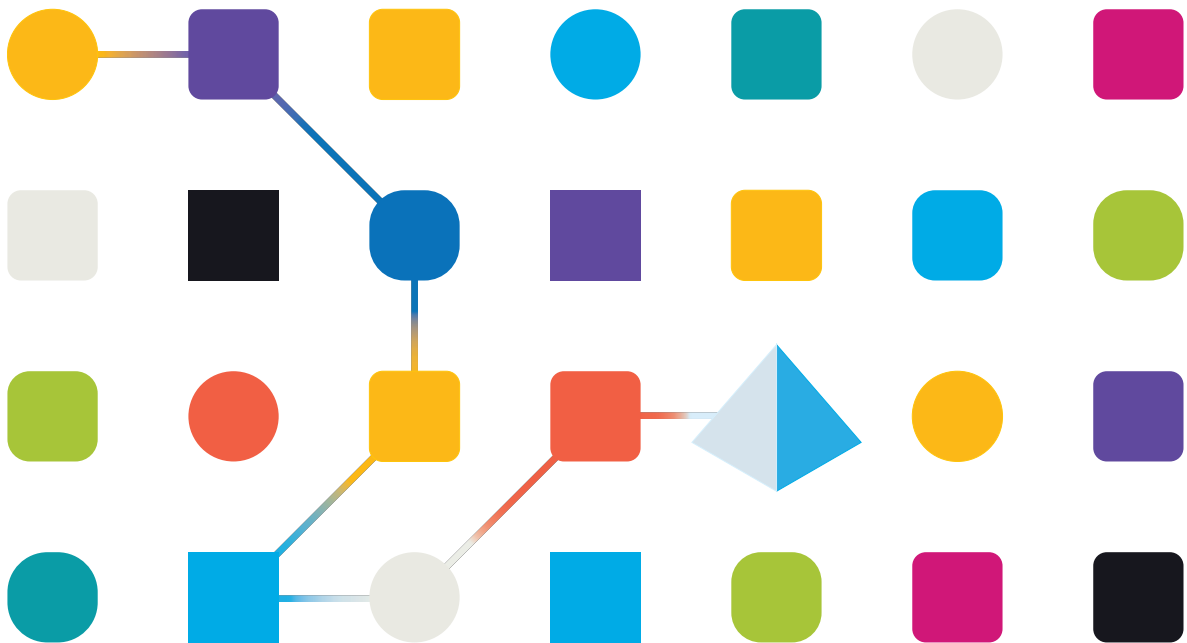




Blue Prism Desktop 1.1

Administrator Guide

Document Revision: 1.0



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Desktop administration

The following information relates to system administration that is specific to the use of the SS&C | Blue Prism® Desktop product.

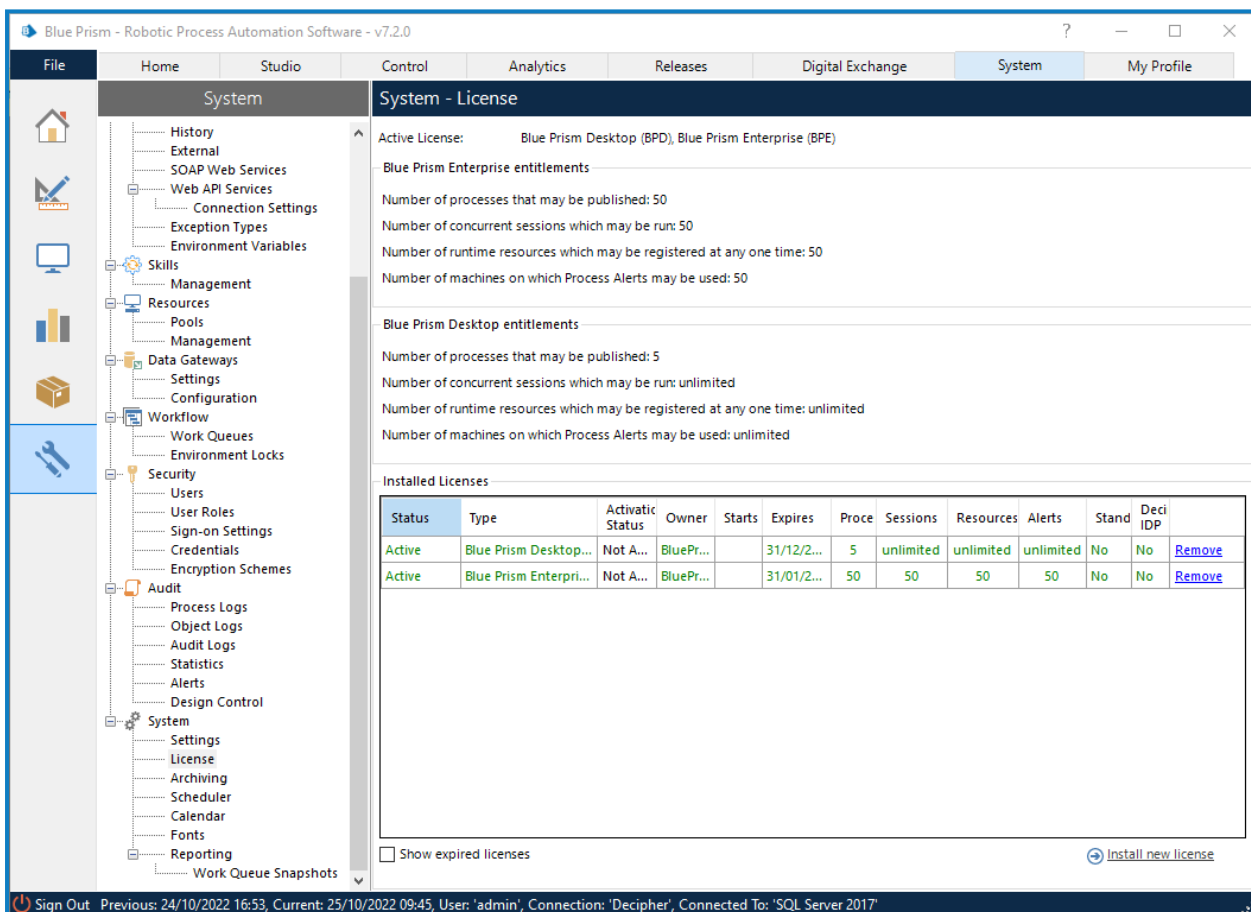
Desktop licenses

A Desktop license can be imported alongside an Enterprise, NHS, Trial, or Learning license. A separate environment is not required for this version of Desktop (separate environments were required for an earlier version). An environment with a Desktop and a Blue Prism Enterprise license applied to the same database is referred to as a *dual license Blue Prism environment*.

Unlike Blue Prism Enterprise licenses, whose use is determined by the number of concurrent sessions, Desktop licenses are associated with the number of registered Desktop runtime resources.

When a user logs into the Desktop client for the first time, their machine is registered as a Desktop runtime resource and a Desktop license is associated with that machine. If another user logs onto that machine, they will share the same Desktop license.


To remove a license from a machine and make it available for another machine, the Desktop system administrator will need to retire the Desktop runtime resource, see [Resource management](#) for details. Subsequent login attempts on that machine will fail until the resource is unretired.



Audit trail for Desktop

Desktop uses the same auditing functionality as Blue Prism Enterprise, therefore the audit trail for Desktop matches that of Blue Prism Enterprise. Session logs are stored locally and synchronized with the Blue Prism application server and can be viewed in Blue Prism Enterprise by a Blue Prism administrator.

In the Desktop client, users can view information about all the sessions they have run, however, audit logs are only visible in the Blue Prism interactive client.

 If the Desktop client is closed before all session logs have been uploaded to the server via the API, they will remain on the user's machine until the client is re-opened.

Desktop audit logs

For details on Blue Prism audit logs, see [Audit logs](#). You can use the Session Source column to filter the audit logs by session type (this indicates whether the process was run in Desktop, or in Blue Prism Enterprise).

Desktop session logs

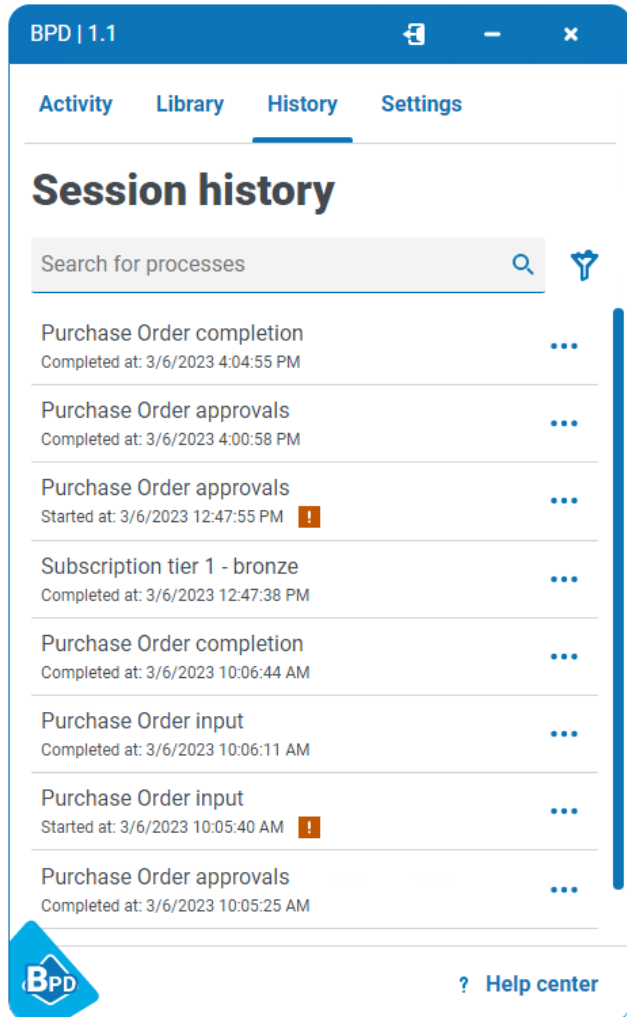
The session logs for processes that have run in Desktop can be viewed in the session log viewer in Control Room. There are no differences between the session logs from the same process being run in Blue Prism Enterprise, or in Desktop. For details on Blue Prism session logs, see [Session Log Viewer](#).

In the Session Log Viewer for a selected process, you can also view the input parameters for all Input stages included in the process, and the output parameters for all Output stages included in the process. See [Log Parameter Viewer](#) for details.

Session history for Desktop client users

Desktop client users can select the **History** tab to see information about all the sessions they have run. A list of historical sessions displays in date/time order, starting with the most recent. Each session in the list represents a single run of a process.

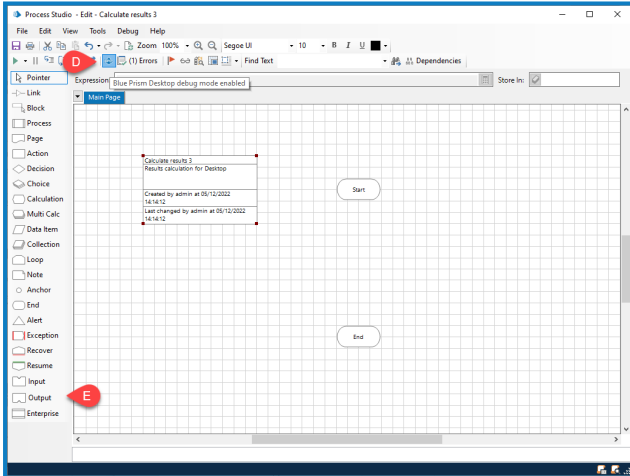
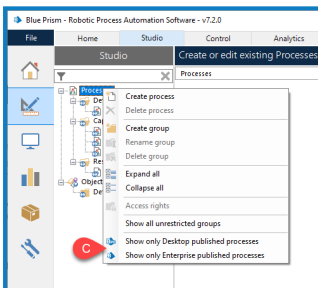
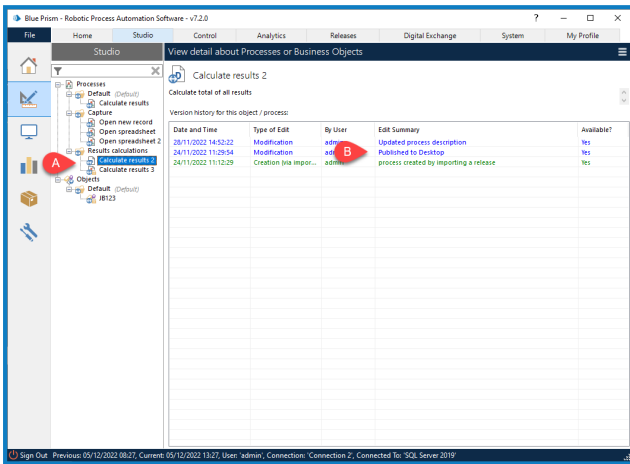
Users can also choose to group the sessions on the History tab in folders by process name. This is controlled from the Settings > History screen.



If a process has not successfully completed, a **View issues** link is available via the ellipsis (...) for that process, which opens a new screen that displays more information about why the process failed to run correctly. See [Session history](#) for details.

Process and Object Studio with a Desktop license applied

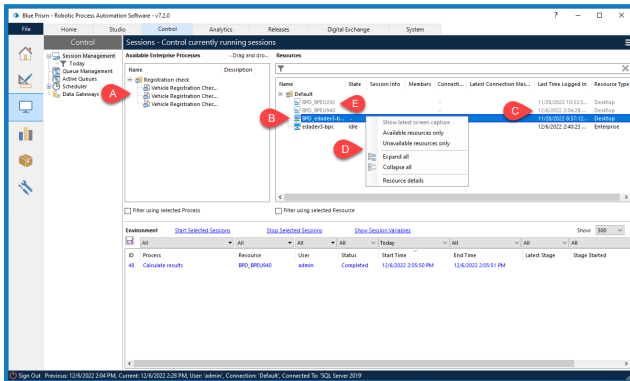
The Blue Prism Process and Object Studio has the following features with a Desktop license applied:



- A. Desktop-specific icons are used for processes published for use in Desktop, both in the tree view and in the right-hand panel.
- B. The description in the Edit Summary column in the process version history indicates when a process has been published for Desktop.
- C. In dual license environments (environments where both Desktop and Enterprise licenses are applied), process filters on the right-click context menu enable users to view all processes (the default), only processes published for Desktop, or only Enterprise processes published to Control Room.
- D. The Desktop debug mode button is available, enabling you to switch between building processes for Desktop or Blue Prism Enterprise in a dual license environment. If only a Desktop license is applied, the Desktop debug mode is always enabled.
- E. The Desktop-only functions (such as the Input, Output, and Enterprise Session stage types) become available when the Desktop debug mode is enabled.

Control Room with a Desktop license applied

The Blue Prism Control Room has the following features with a Desktop license applied:

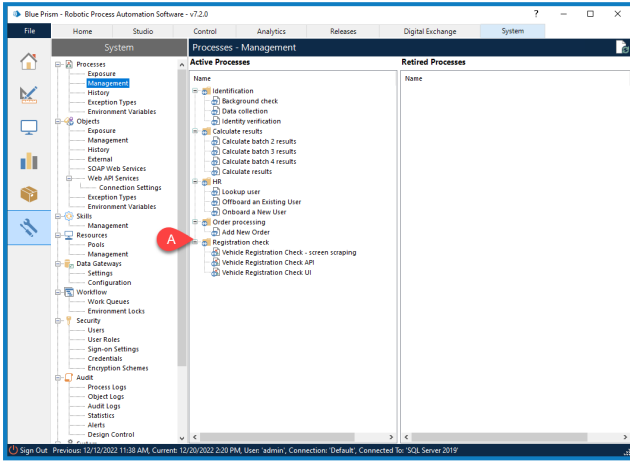


- A. The Available Processes panel is labeled Available Enterprise Processes. In dual license environments (environments where both Desktop and Enterprise licenses are applied), the panel only lists Enterprise processes published to Control Room. Processes published to Desktop are not included.
- B. Runtime resources have different icons for Desktop and Enterprise resources.
- C. If only a Desktop license is applied, only the resource name and the last time a user logged in with that resource are displayed in the Resources panel. In dual license environments all columns are displayed in the Resources panel, and all resources are listed by default. The Resource Type column allows you to filter the list to display only Desktop or only Enterprise resources.
- D. If only a Desktop license is applied, the shortcut menu options for runtime resources are reduced, so only the **Expand all**, **Collapse all**, and **Resource details** options are available. In dual license environments, all options are available.
- E. The drag and drop functionality to run a process is disabled for Desktop resources, these are grayed-out and cannot be used to create a session (you cannot drag a process onto a Desktop resource or vice versa).

System Management with a Desktop license applied

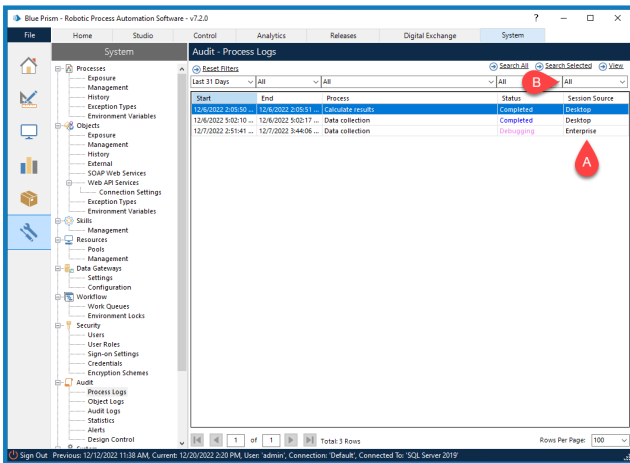
Blue Prism System Management has the following features with a Desktop license applied:

Processes – Management



- A. Icons for processes published for use in Desktop are different to those for Enterprise processes published to Control Room.

Audit – Process Logs



- A. A Session Source column shows whether processes were run in Desktop or Enterprise. The column is only available in dual license environments (where both a Desktop and an Enterprise license are applied).
- B. A filter enables you to filter sessions by session type. The filter is only available in dual license environments.

Desktop user roles and permissions

Desktop user role

To simplify the task of setting the permissions for Desktop client users, a Desktop-specific user role, **Desktop Users**, can be applied from the Blue Prism interactive client. This permission is also enabled for users with the **System Administrators** role applied.

Desktop permissions

The **View Desktop Resource** and **Control Desktop Resource** permissions, included in the **Resources** group in System > Security – User Roles, are available in a dual license Blue Prism environment (a Desktop and a Blue Prism Enterprise license applied to the same database) to control access to Desktop runtime resources.

These permissions are enabled by default for the following roles:

- Desktop Users
- Process Administrators
- Runtime Resources
- System Administrators
- Testers

The **View Desktop Resource** permission controls the visibility of Desktop resources in the following areas of Blue Prism Enterprise:

- Control Room – Resources pane.
- Control Room – Resources filter in the Environment pane.
- System > Resources – Management screen.

The **Control Desktop Resource** permission enables administrators to create, start, stop, and delete sessions on a Desktop user's machine remotely. Once a session is running, users with this permission can interact with it remotely to perform tasks such as sending terminate or stop requests.

Users with this permission are implicitly granted the View Desktop Resource permission.

For information on how to apply roles to users, see [Blue Prism roles](#).

Configure environment connections for Desktop

Desktop environment connections enable the Desktop application to connect to specific Blue Prism environments using a Desktop license.

When installing the Desktop client, users can choose to connect to a shared Desktop.User.config file, a locally stored config file, or both.

Configure a shared connection

If the **Allow local connections to be configured** option is selected when installing the Desktop client, a Desktop.User.config connection file is created locally. You can then copy and edit this to create a connection file that can then be made available to Desktop users from a shared location. See [Edit the Desktop.User.config file on page 19](#) for details of how to edit a Desktop.User.config connection file.

Once created and accessible, the shared connection file can be made available to Desktop users in the following ways:

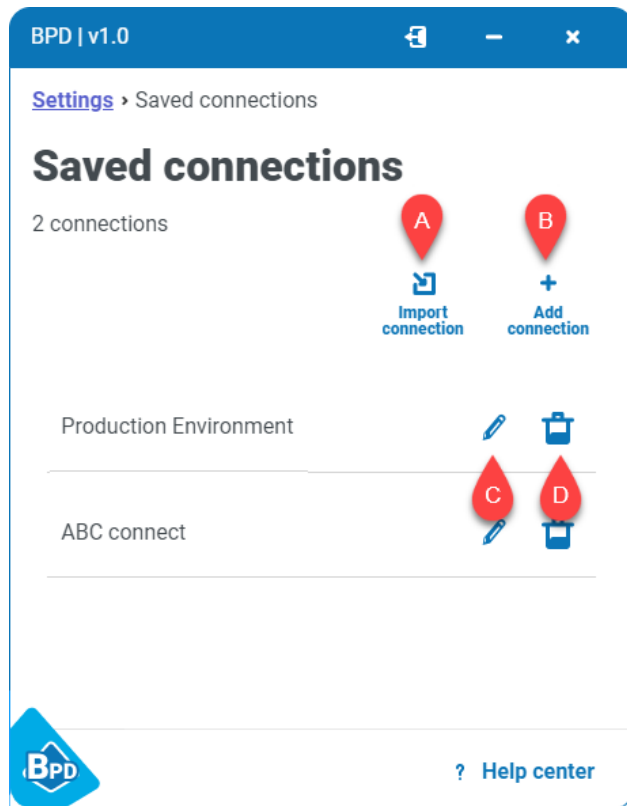
- During installation of the Desktop client. On the Remote connection configuration screen, specify the location and name of the shared connection file. See [Install and connect the Blue Prism Desktop client](#) for details.
- By editing the connection settings for a user's machine, see [Edit connection settings for a user's machine on page 20](#) for details.

Desktop.User.config backup file

When a Desktop user has successfully connected to a Desktop environment using a shared connection file, a .desktop.shared.config.bak file is automatically generated and stored locally in C:\Users\\AppData\Roaming\Blue Prism Limited\Desktop. This connection file is then used to establish a connection with the Desktop environment, removing the need to connect to the shared file each time the user accesses Desktop.

Configure a local connection

To configure a connection in the Desktop application, click **Saved connections**. The Saved connections screen displays.



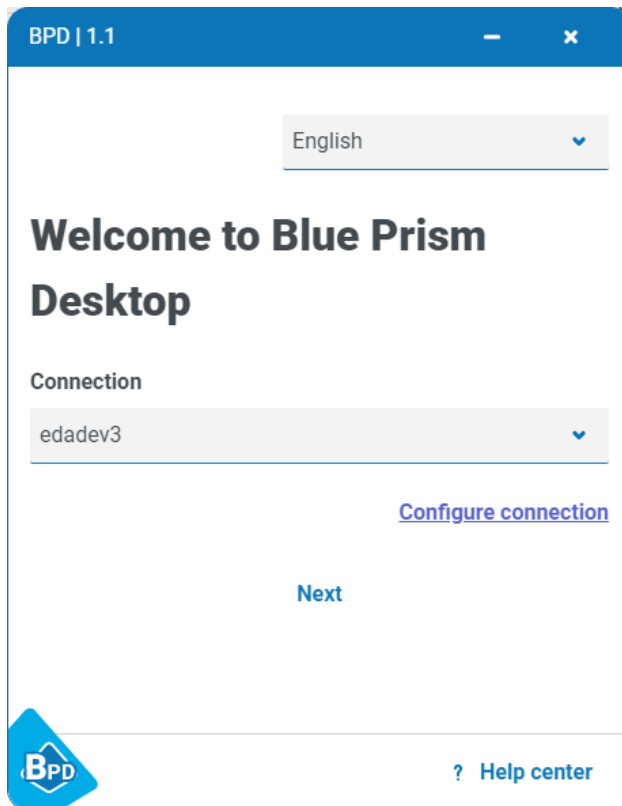
The following options are available:

- A. **Import Connection** – Add one or more new connections by importing a connection configuration file, see [Import a connection using Desktop on page 19](#).
- B. **Add connection** – Add a completely new connection, see [Create a new local connection using Desktop on the next page](#).
- C. **Edit connection** – Edit the configuration details of this connection, see [Edit a local connection using Desktop on page 18](#).
- D. **Delete connection** – Delete this connection, see [Delete a connection using Desktop on page 20](#).

Create a new local connection using Desktop

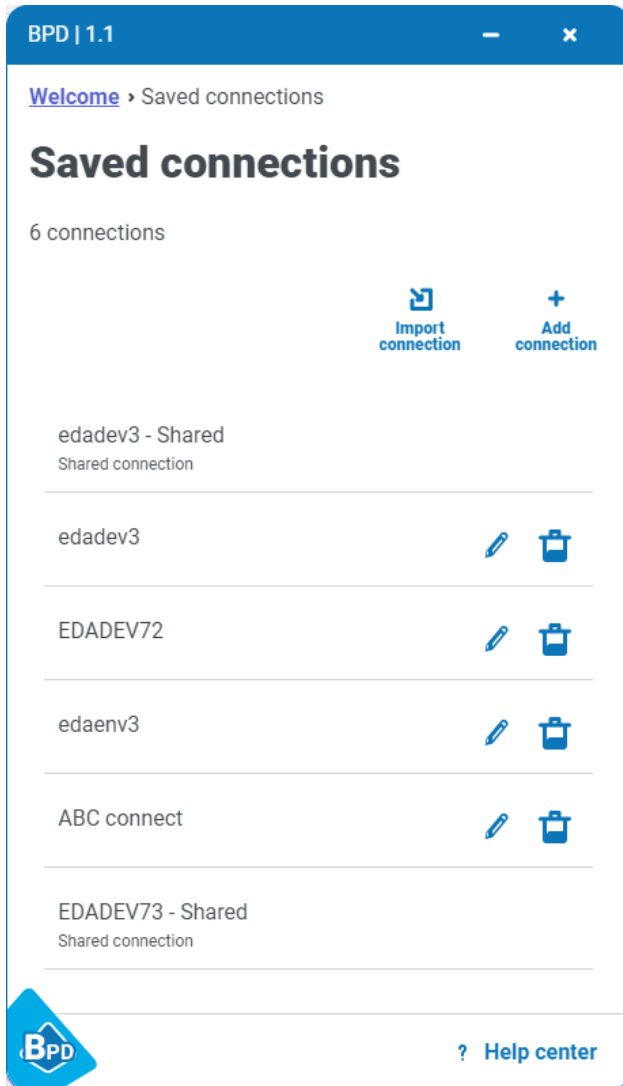
1. Open the Desktop application.


The Welcome to Desktop screen displays.



2. Click **Configure connection**.

The Saved connections screen displays.



 The available connections and options on this screen are dependent on each user's installation of the Desktop client.

3. Click **Add connection**.



The Create new connection screen displays:

The screenshot shows a window titled "BPD | 1.1" with a close button. The main heading is "Create new connection". Below the heading are four text input fields:

- Connection name
- URL for Authentication Server
- URL for Digital Worker API
- URL for Blue Prism API

At the bottom of the form are two buttons: "Cancel" and "Create". In the bottom left corner, there is a blue diamond logo with "BPD" inside. In the bottom right corner, there is a link that says "? Help center".

4. 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. <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;">  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. </div>
URL for Authentication Server	Enter the Authentication Server URL. <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;">  To ensure a secure connection is used, all Authentication Server URLs must include https://. If you do not include https:// in the URL, it will be added automatically. </div>
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.

BPD | 1.1
— ×

Create new connection


Connection name

URL for Authentication Server

URL for Digital Worker API

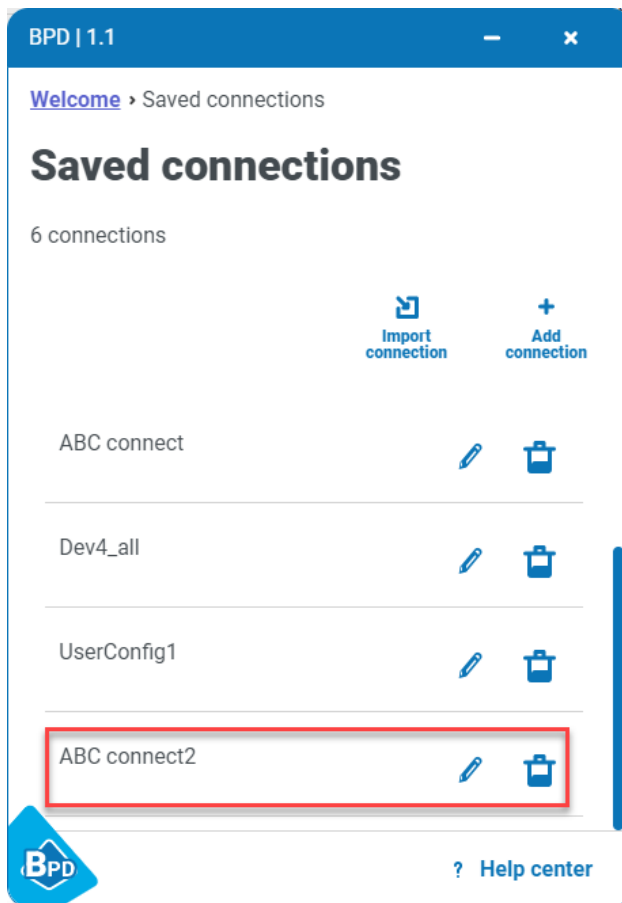
URL for Blue Prism API

Cancel
Create


? [Help center](#)


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

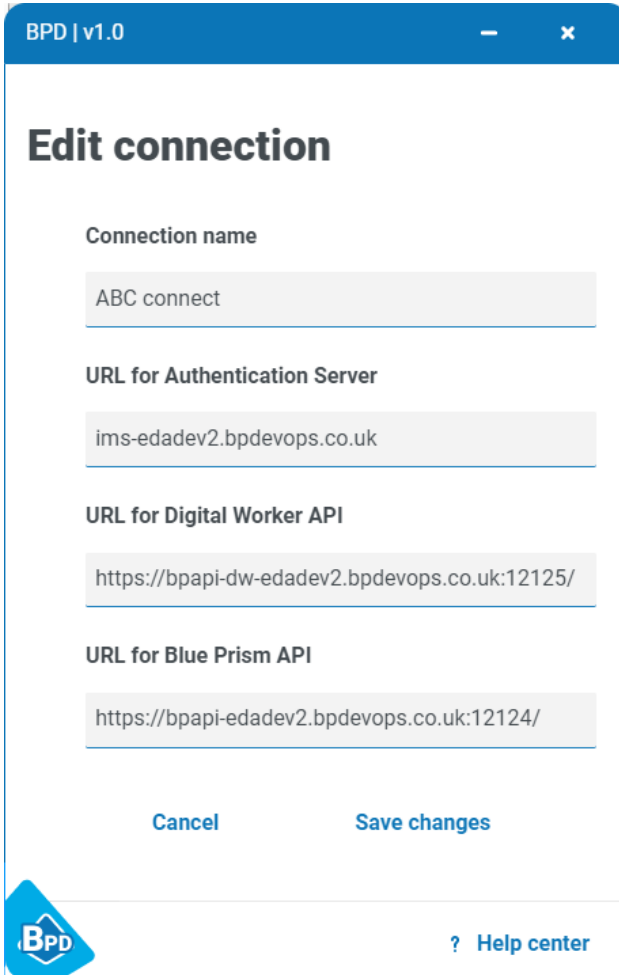
The connection is created and displays on the Saved connections screen.



The configuration is updated in the Desktop.User.config file, which is located in C:\Users\\AppData\Roaming\Blue Prism Limited\Desktop. The configuration file can then be imported by clicking **Import connection** on the Saved connections screen on each Desktop user's computer. See [Import a connection using Desktop on page 19](#) for details.



Edit a local connection using Desktop

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.

 You cannot edit the currently used connection from the Settings screen once logged into Desktop. If you need to do this, you will first need to log out of the Desktop application. You can then edit the original connection. The Edit connection icon  does not display for the current connection.

Import a connection using Desktop

Although the functionality is available to do so, it is not expected that Desktop users will create, edit, or delete their own connections. It is expected that this information will be provided to them by system administrators. However, because the connection configuration information is stored in their user settings, they will need to import the configuration file themselves. When rolling out Desktop to end users, it is recommended that system administrators create and distribute a centrally-controlled Desktop.User.config file to be imported by Desktop users.

⚠ 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 the current user's list of saved connections. They can now select the required connection from the Welcome screen and log in.


Edit the Desktop.User.config file

In addition to being automatically generated and accessible through the Desktop client, you can create and modify the Desktop.User.config file using a text editor, whether it is stored locally, or in a shared location.

The following example shows a typical Desktop.User.config file:

```
{
  "Environments": {
    "edadev2": {
      "ConfigurationName": "edadev2",
      "ApiUrl": "https://xxapi-edadev2.site.co.uk:12121",
      "DigitalWorkerApiUrl": "https://ttapi-dw-edadev2.site.co.uk:54441",
      "AuthenticationServerDomain": "ims-edadev2.bpdevops.co.uk",
      "ClientName": "bpd"
    },
    "ABC connect": {
      "ConfigurationName": "ABC connect",
      "ApiUrl": "https://xxapi-edadev2.site.co.uk:12634",
      "DigitalWorkerApiUrl": "https://uuapi-dw-edadev2.site.co.uk:54455",
      "AuthenticationServerDomain": "ims-edadev2.site.co.uk",
      "ClientName": "bpd"
    }
  },
  "Selected": "edadev2"
}
```

The connection name used in a Desktop connection configuration file must match the "ConfigurationName", as highlighted in the above example. If you create the connection using the Desktop application, these values will automatically match, however, this must be considered if editing the Desktop.User.config file directly.

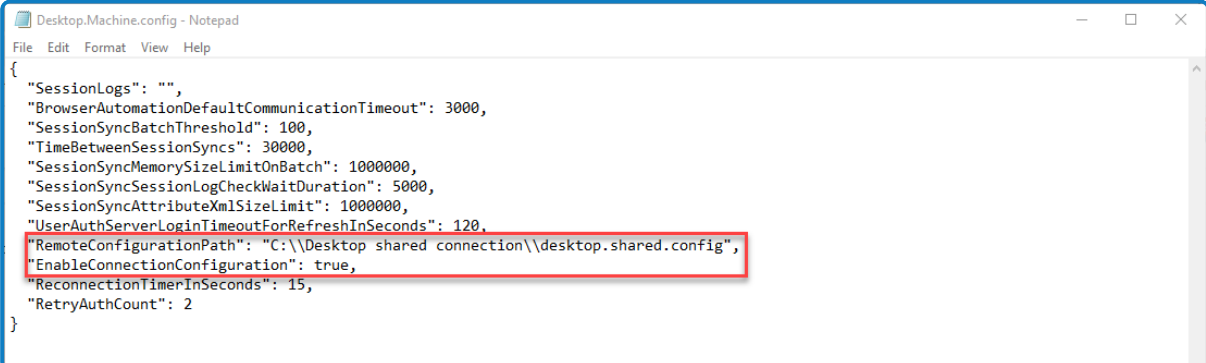
 To import a Desktop.User.config file that has been saved with a .txt extension, you will need to change the file type from **Custom Files** to **All Files** in order make the text file available for import.

Edit connection settings for a user's machine

When the Desktop client is installed on a user's machine, a configuration file called Desktop.Machine.Config is created, which contains the connection settings chosen during installation.


To change the connection settings for a user's machine without having to re-install or update the installation:


1. Using a text editor, open the Desktop.Machine.Config file. The default location is `C:\ProgramData\Blue Prism Limited\Blue Prism`.
2. Modify the following settings, as required:
 - `RemoteConfigurationPath` – Edit the file name and path of the shared connection file.
 - `EnableConnectionConfiguration` – Type `true` to add access, or type `false` to remove a user's access to the configure connections options in the Desktop client.





```
Desktop.Machine.config - Notepad
File Edit Format View Help
{
  "SessionLogs": "",
  "BrowserAutomationDefaultCommunicationTimeout": 3000,
  "SessionSyncBatchThreshold": 100,
  "TimeBetweenSessionSyncs": 30000,
  "SessionSyncMemorySizeLimitOnBatch": 1000000,
  "SessionSyncSessionLogCheckWaitDuration": 5000,
  "SessionSyncAttributeXmlSizeLimit": 1000000,
  "UserAuthServerLoginTimeoutForRefreshInSeconds": 120,
  "RemoteConfigurationPath": "C:\Desktop shared connection\desktop.shared.config",
  "EnableConnectionConfiguration": true,
  "ReconnectionTimerInSeconds": 15,
  "RetryAuthCount": 2
}
```

Delete a connection using Desktop

 This action deletes the connection from the user's 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 the configuration and the Saved connections screen displays.

 You cannot delete the currently used connection from the Settings screen once logged into Desktop. If you need to do this, you will first need to log out and log back in using a different connection. You can then delete the original connection. The Delete connection icon  does not display for the current connection.


Blue Prism Desktop configuration

The following settings can be configured in your Desktop environment or user settings.

Change the limit for the number of items in a folder

The default setting for the maximum number of items that are available in a folder in the Desktop process library is 100. This limit can be amended if required.

1. Using a text editor, open the Web.config file for the Digital Worker API. The default location is C:\Program Files (x86)\Blue Prism Limited\Blue Prism Digital Worker API\Web.config.
2. Find `<add key="MaxItemsPerPageLibrary" value="100" />` and update the value as required.

 The minimum value for this setting is 1 and there is no maximum. However, it is recommended that implementation is taken into account if adjusting this value.



```
1 <?xml version="1.0" encoding="utf-8"?>
2 <!--
3 For more information on how to configure your ASP.NET application, please visit
4 https://go.microsoft.com/fwlink/?LinkId=301879
5 -->
6 <configuration>
7 <appSettings>
8 <clear />
9 <add key="webpages:Version" value="3.0.0.0" />
10 <add key="webpages:Enabled" value="false" />
11 <add key="ClientValidationEnabled" value="true" />
12 <add key="UnobtrusiveJavaScriptEnabled" value="true" />
13 <add key="DocumentProcessing.ResultQueue.Password" value="" />
14 <add key="MaxItemsPerPage" value="1000" />
15 <add key="SessionLogs.MaxResultTextLength" value="100" />
16 <add key="Authorization.Audience" value="bp-api"/>
17 <add key="Swagger.Enable" value="false" />
18 <add key="CreateWorkQueueItems.MaxRequestsInBatch" value="100" />
19 <add key="CreateWorkQueueItems.MaxStatusLength" value="255" />
20 <add key="CreateWorkQueueItems.MaxTagLength" value="255" />
21 <add key="ConnectionName" value="CONNECTION_NAME" />
22 <add key="ServerName" value="SERVER_NAME" />
23 <add key="DatabaseName" value="DATABASE_NAME" />
24 <add key="DatabaseUsername" value="DATABASE_USERNAME" />
25 <add key="DatabasePassword" value="DATABASE_PASSWORD" />
26 <add key="UsesWindowAuth" value="USE_WINDOWS_AUTH" />
27 <add key="BPusername" value="BP_USERNAME" />
28 <add key="BPpassword" value="BP_PASSWORD" />
29 <add key="BPServerConfigName" value="Default"/>
30 <add key="MaxItemsPerPageLibrary" value="100" />
31 </appSettings>
32 <system.web>
33 <compilation debug="false" targetFramework="4.8" />
34 <httpRuntime targetFramework="4.8" />
35 <customErrors mode="RemoteOnly"></customErrors>
```

3. Save the changes to the Web.config file.

Update History tab settings

The Desktop History tab settings are individual to each user, and are retained when users close or log out of Desktop. These settings are held in a configuration file, Desktop.Prefs.config, which is stored in C:\Users\\AppData\Roaming\Blue Prism Limited\Desktop. Manual updates can be made to the configuration file if necessary, and these are reflected in the user interface when users log back into Desktop.