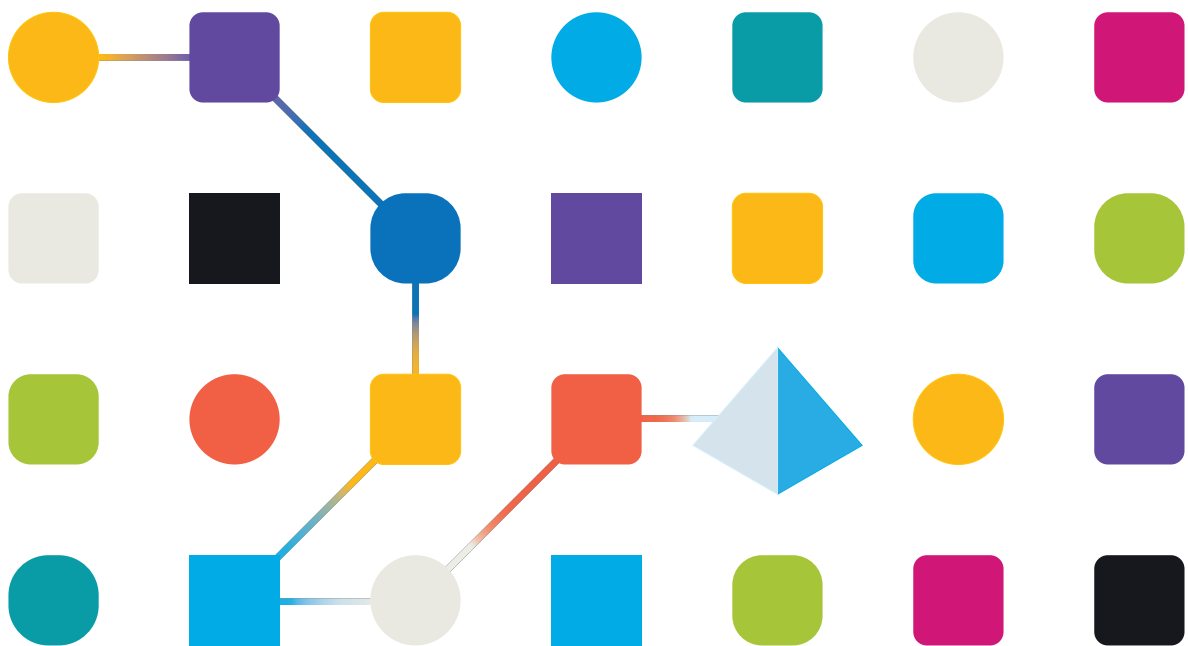# Blue Prism Desktop 1.1

User Guide

Document Revision: 1.0

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Contents

About Desktop

SS&C | 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 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 Desktop, and will tell you what to do next if something doesn't work as expected. If you need more help with Desktop, please contact your system administrator.

About this user guide

Find out how to use Desktop:

- Getting started with Desktop on page 6 – Connect and log into Desktop.
- Run a process on page 15 – Use Desktop to run an automated process.
- Recent activity on page 25 – View and run your recent processes.
- Process library on page 26 – View and run the processes that have been made available to you.
- Session history on page 27 – View details of all the processes you have run, including those that generated an error message.
- Settings on page 35 – Configure your credentials, connections, and Desktop user interface settings.

Desktop tour

Watch the Desktop application overview.

> To watch the Desktop tour, see our Blue Prism Desktop tour video.

Glossary of terms

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

Term	Description
Connection	The set of values that point to the required components for 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 Desktop connection has a unique name.
Credential	The security information that allows a Desktop process to automate another software application on your computer to complete a task. Credentials consist 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 Desktop part-way through a process. The process will pause temporarily to enable you to enter the information.

Term	Description
Process	Pre-defined steps automated by Blue Prism that carry out a task on your computer. Some 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 Desktop at the start of a process, before it starts to run.

Getting started with Desktop

This section tells you how to:

- Launch SS&C | 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 or that have been shared with you during installation. This depends on the policy within your organization.
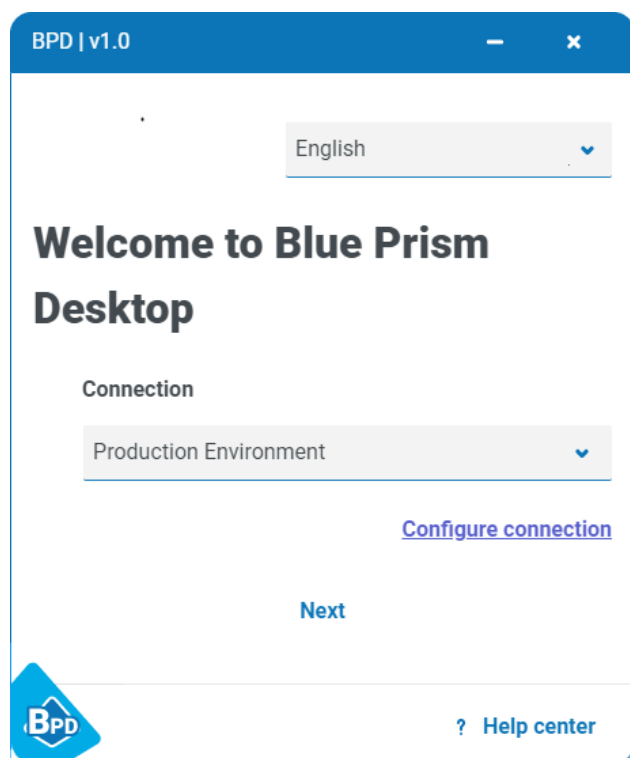
> If, after following these instructions, you cannot log into Desktop, please contact your system administrator for assistance.

Launch Desktop

To launch Desktop:

- Click the Blue Prism Desktop shortcut on your computer desktop, or

- Search for SS&C | 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 or your administrator (depending on the policy of your organization) will need to import or create a connection before you can proceed, see Import a connection on page 11 and Create a new connection on page 11.

Change the language

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

If required, you can manually change the language using the drop-down list on the Welcome screen:
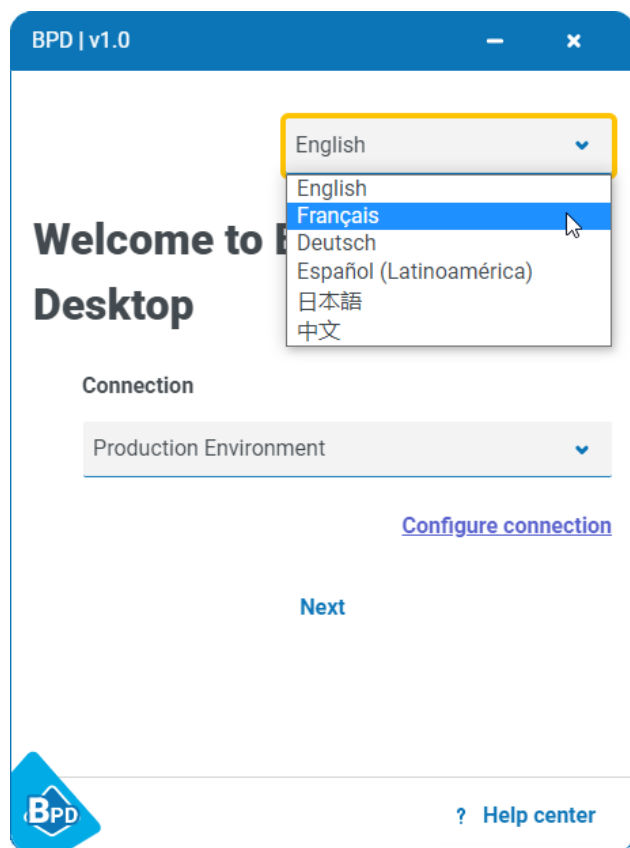
💡 You can also change the language after login, using **Settings** > **Language**, see Change Desktop language settings on page 47.

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 Desktop username and password, if single sign-on is not used for 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 may be able to import or create a connection, depending on the policy of your organization. See Configure connections (before login) on page 10 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.
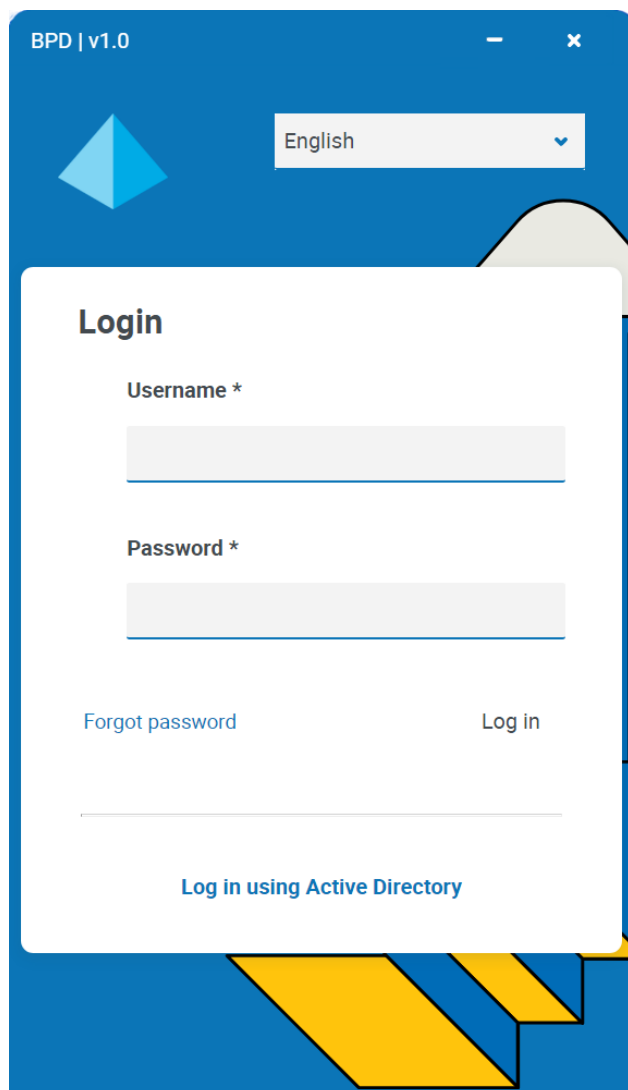
✎ The language drop-down on the Login screen only applies to the Login screen itself. To change the language of the Desktop interface, you must use the language drop-down on the Welcome screen, or on **Settings** > **Language** (after logging in), see Change the language on the previous page.

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.

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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).
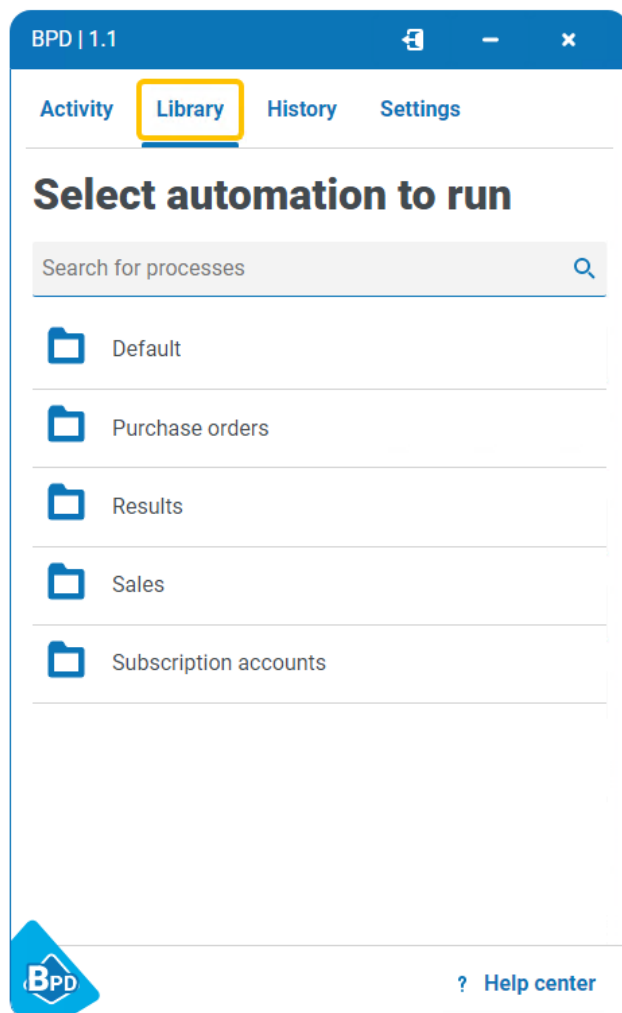
Configure connections (before login)

> ✎ The actions you are permitted to perform on connections will depend on your organization's policy. If your organization does not allow you to configure connections then you won't see the Configure connection link on the Welcome screen.

If permitted by your organization you can add a new connection, or multiple connections, by importing a connection configuration file from the Welcome screen. You can also configure connections from the Settings tab after logging in.

Alternatively, you may be permitted to create a new connection yourself using the details of a Desktop environment, if known, and to edit and delete connections (you cannot edit or delete shared connections). If you require assistance, please contact your system administrator.

To configure a connection, click **Configure connection**. The Saved connections screen displays.
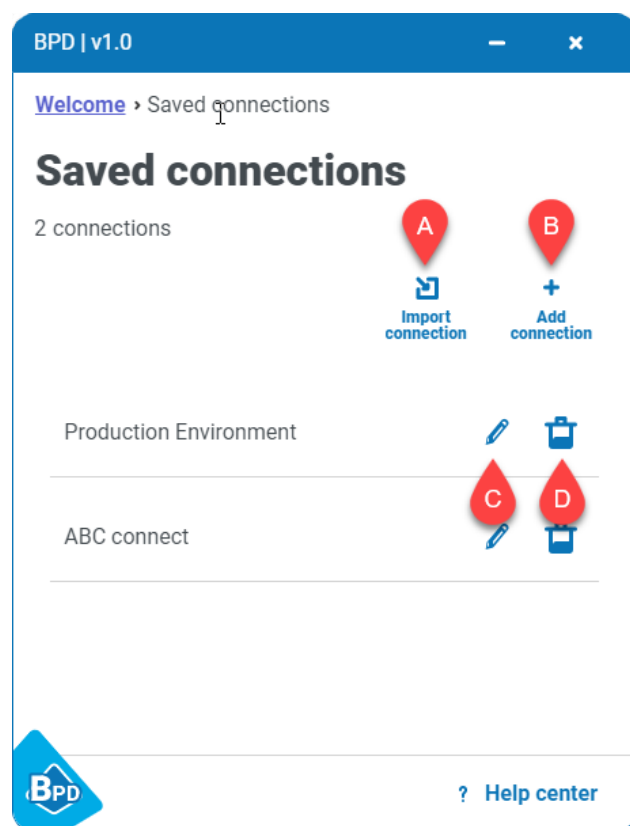
The following options are available:

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 on the next page.

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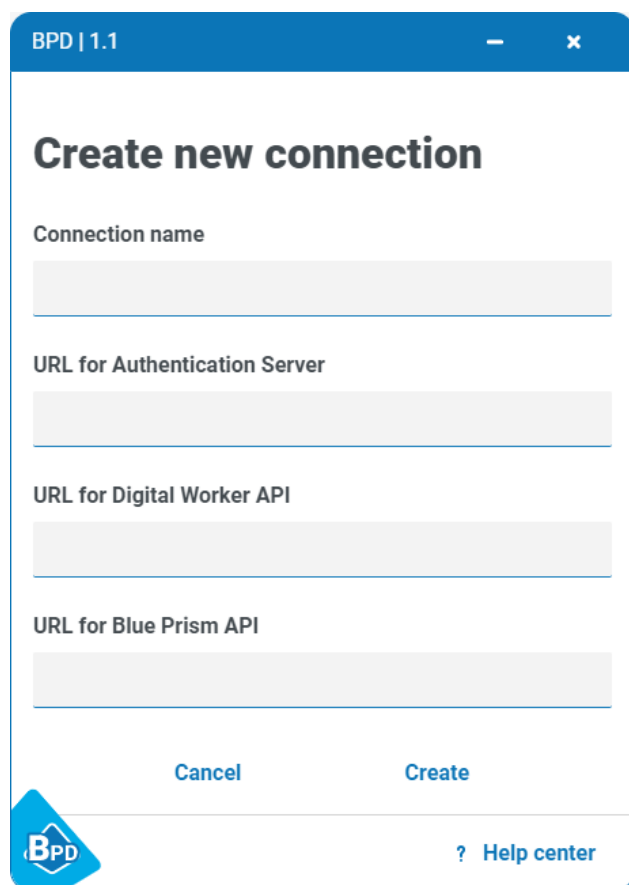
   The connection configuration file is uploaded. The connections configured in the file (there can be more than one per file) are added to your list of saved connections. You can now select the required connection from the Welcome screen and log in.

Create a new connection

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

1. On the Welcome screen, click **Configure connection**. The available connections and options can vary depending on your installation of Desktop.

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.
	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.
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

ABC connect2

URL for Authentication Server

ims-connect.name.co.uk

URL for Digital Worker API

https://bpapi-dw-name.name.co.uk:12345/

URL for Blue Prism API

https://bpapi-name.name.co.uk:67891/

Cancel   Create
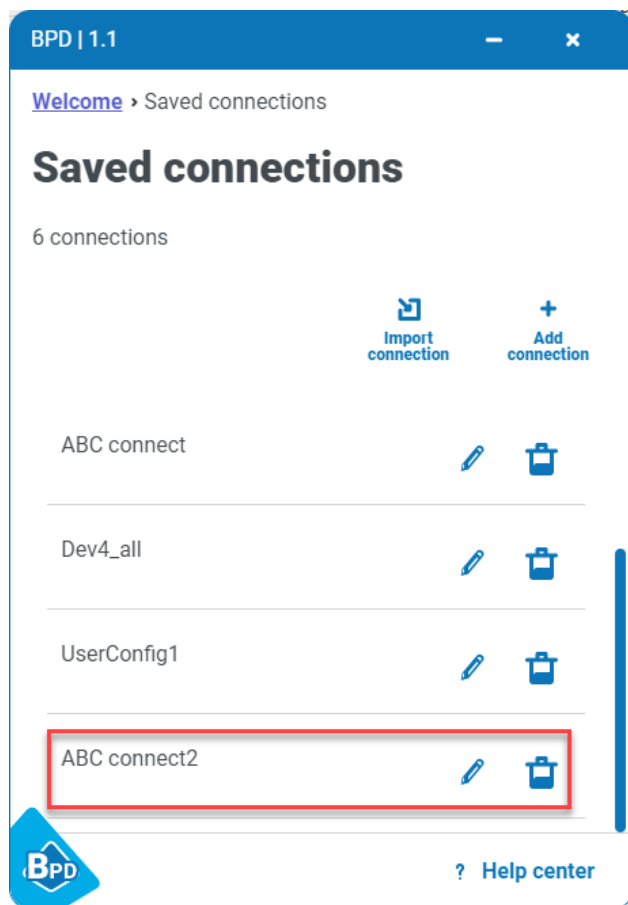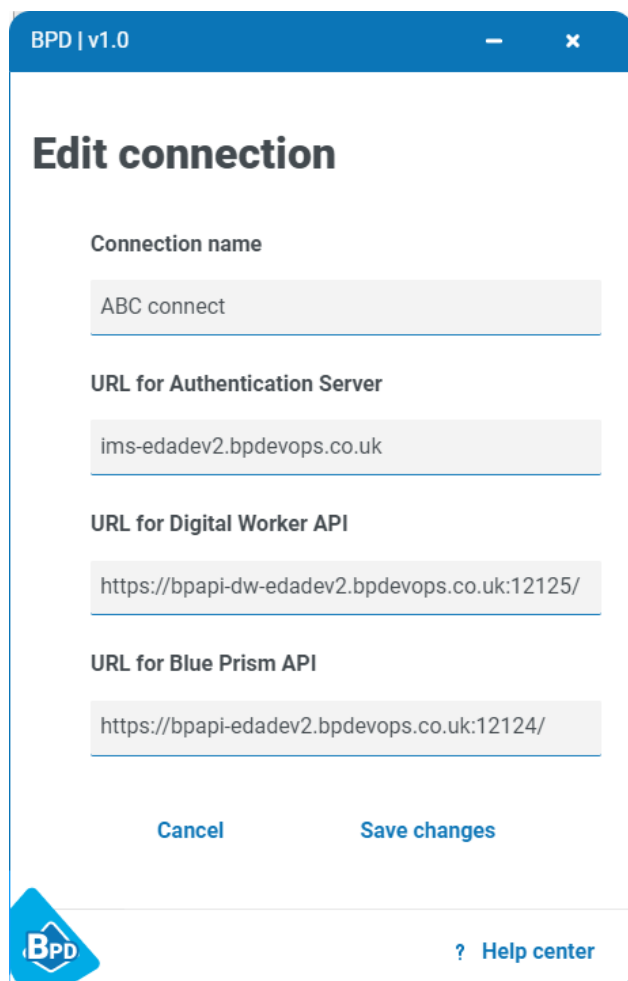
? Help center

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.
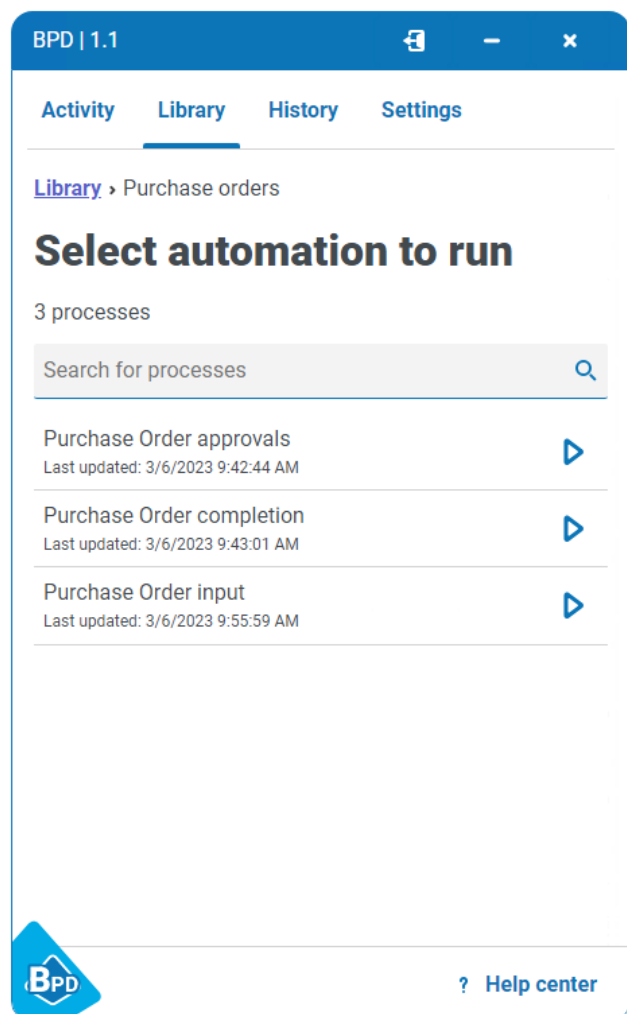
Run a process

When you have successfully logged into SS&C | Blue Prism® Desktop, the **Activity** tab displays by default. This default setting and the number of processes displayed can be changed if required, see Manage recent activity settings on page 46 for details.
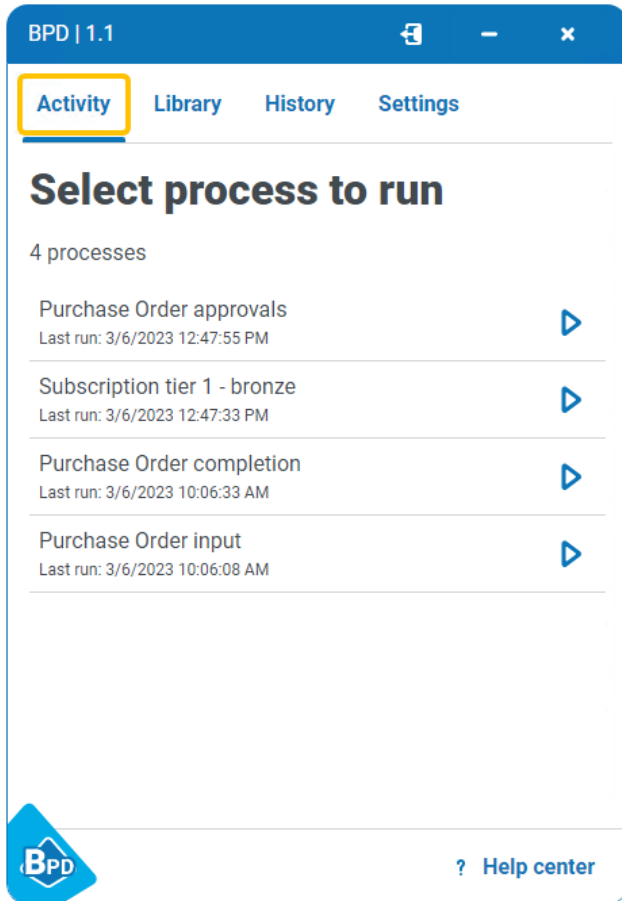
If no processes are displayed or the process you want to run is not displayed in the Activity tab, click the **Library** tab.
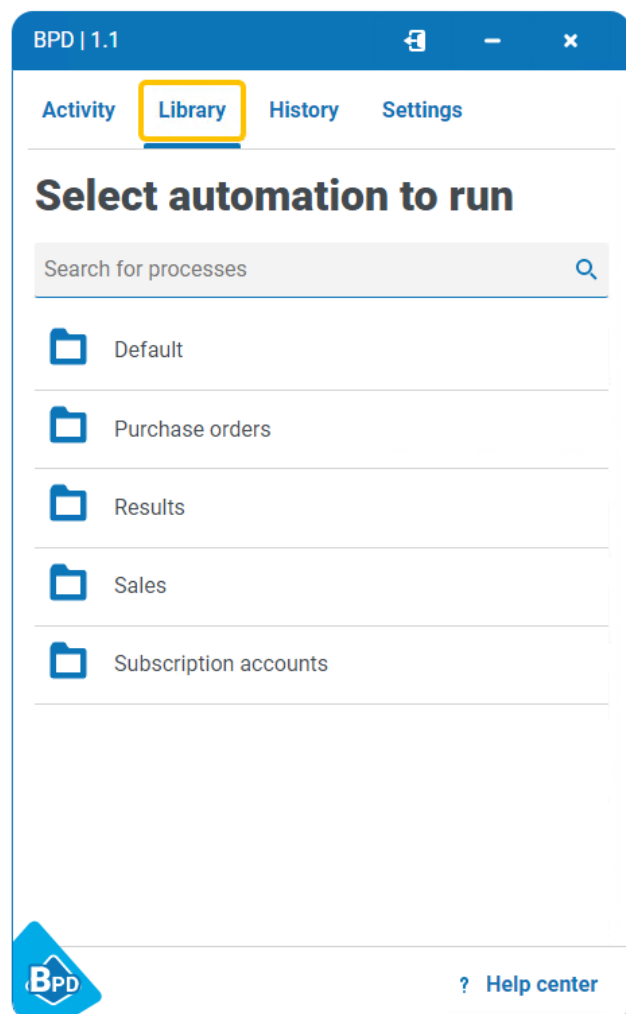
In the Library tab, click a folder to expand it and display a list of processes.

Running a process is the same, regardless of whether you are on the Recent or the Library tab. Click the ▷ (Run) icon.
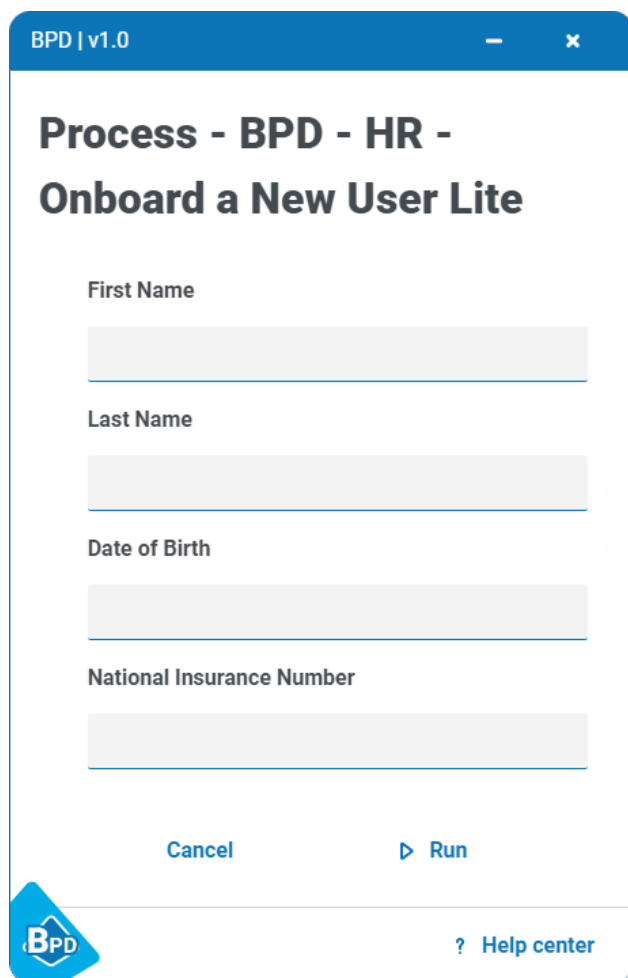
Some processes will require you to enter additional information, either before the process can run, or part-way through the process, see Enter additional information on page 23.

- If the process does not require you to enter any additional information, a message displays to inform you that the process is running.
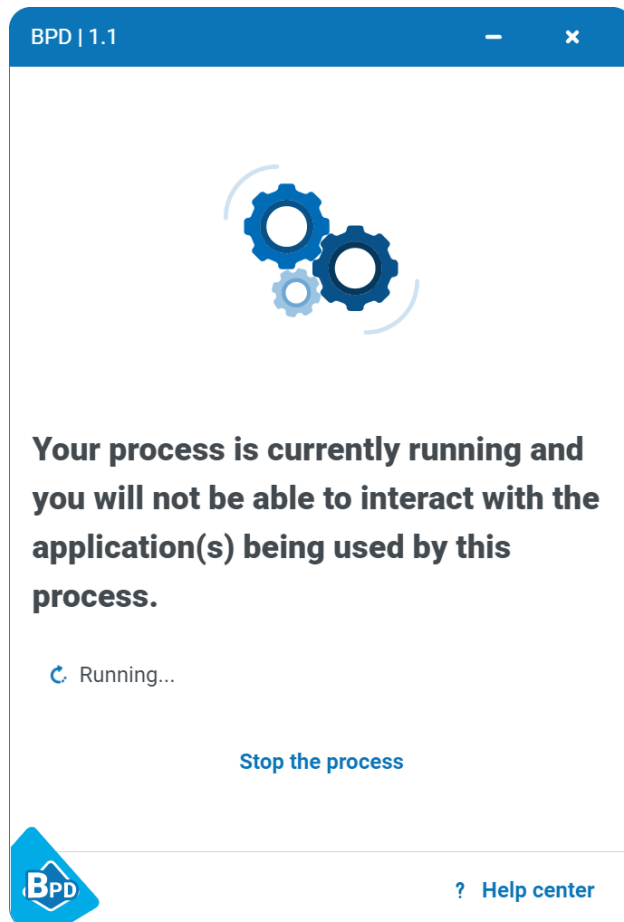
If necessary you can click **Stop the process** to abandon the process and return to the process library. If you do this, any updates that the process has already made will still be applied.

- 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. An additional message displays when you run the process to inform you that you may be asked for more information, and that the time available for you to do this might be limited, see Enter additional information on page 23.

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 24.
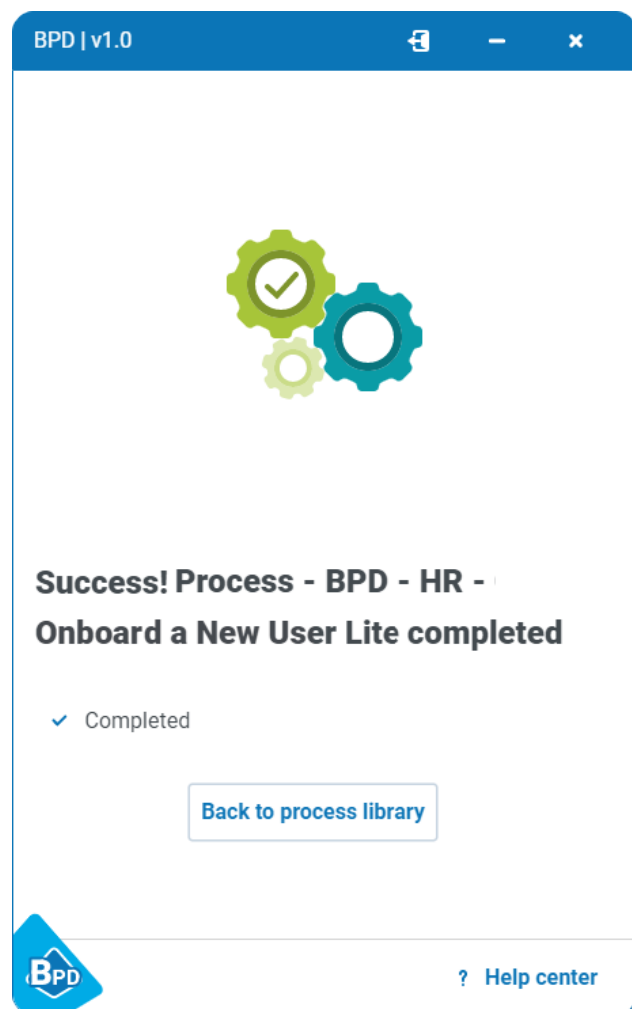
- If the process has been designed to include a summary of some or all of the entered information (known as output parameters), this will be displayed at the appropriate point. If this includes any image files, you can download and save the images from this screen. Click **OK** to continue.

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 27.
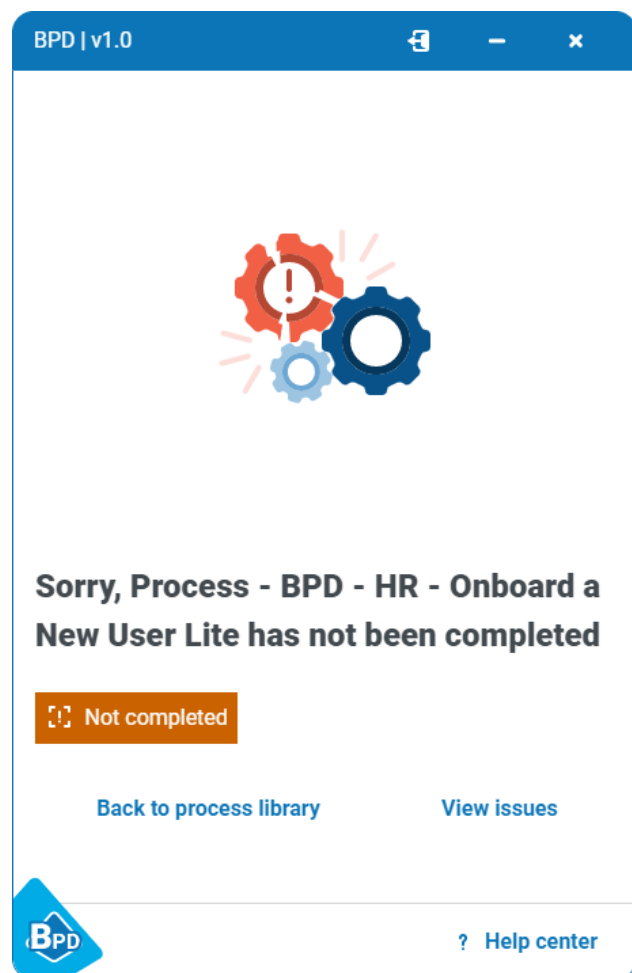
To find out more about the failure reason, click **View issues**.

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.
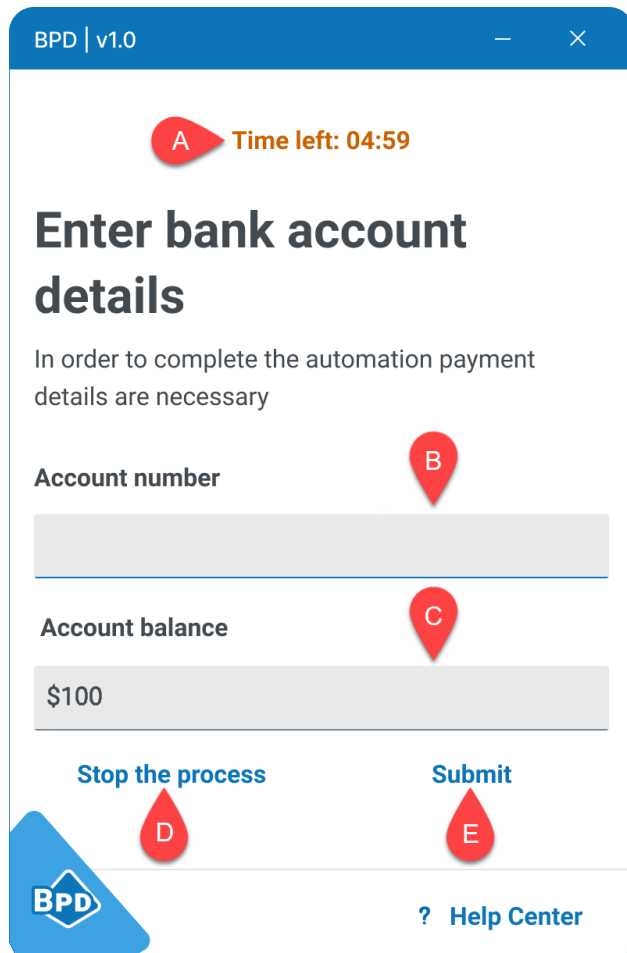
After you have run a process from the Recent or Library tab you will return to the same position on the tab from which it was run. This happens whether the process was successfully run or not, or was canceled or stopped.

All the processes you have run are listed on the History tab, see Session history on page 27.

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. Editable fields display with a blue underline and a shaded background, non-editable fields display with a white or black background, depending on your selected theme.

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, so you can view them from the History tab if needed, see , and can be viewed in the session log by your system administrator if needed.

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 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.

Recent activity

By default, the **Activity** tab displays when you log into SS&C | Blue Prism® Desktop. The display of the Recent tab and the number of processes listed is controlled by the **Library** option in the Settings tab.
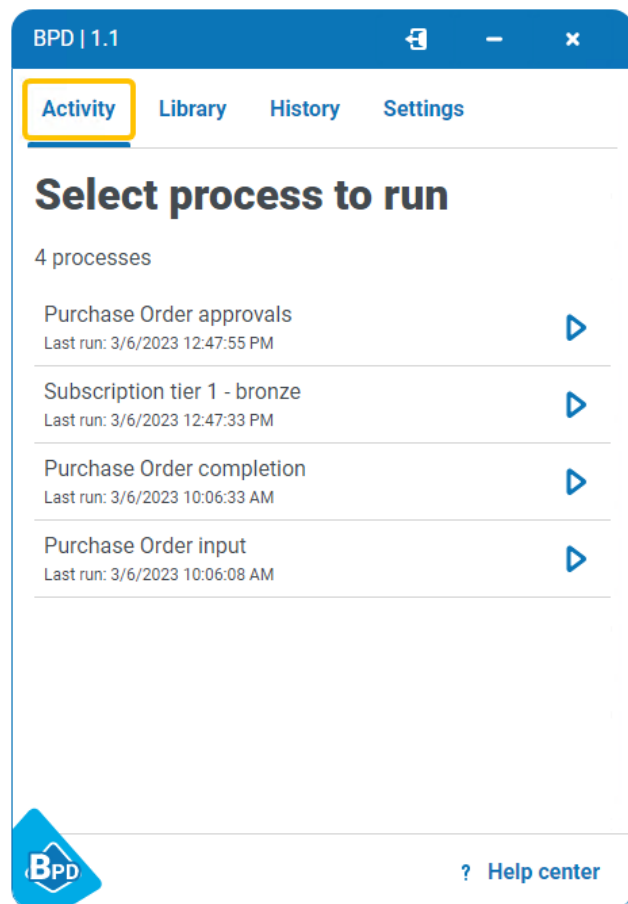

You can run a process from this screen in the same way as from the process library. For more information, see Run a process on page 15.

If there are no processes displayed, or the process you want to run is not displayed in the Activity tab, see Process library on the next page for details of how to access processes that you can run.

If you have previously run any processes that are no longer available to you, they will still be listed here, but you won't be able to re-run them.

Process library

The **Library** tab displays all the processes that you can run in SS&C | Blue Prism® Desktop, organized into folders.
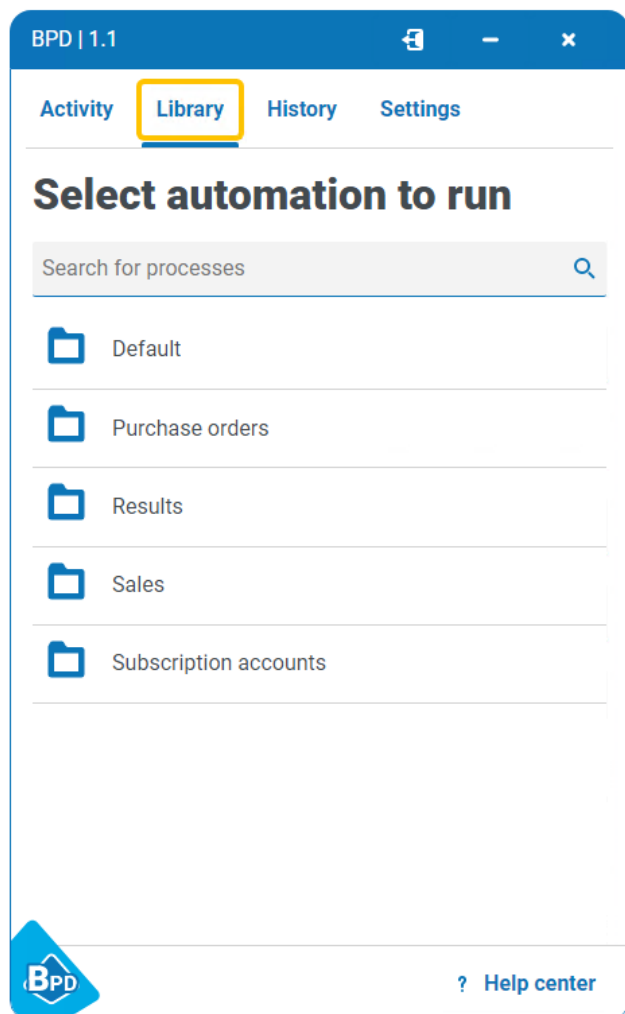
Click a folder to open it and display the list of processes in the folder. The number of processes in the selected folder is indicated above the list, and a scroll bar displays if there are processes that don't fit on the screen. You can use the breadcrumbs at the top of the tab to navigate back through the folder structure. To search for processes by name, type the process name in the **Search for processes** field. The list is filtered to only include folders and/or processes that start with the entered characters. Initially ten folders or processes are listed, and more are loaded as you scroll down.

> ✎ 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 .

Session history

Select the **History** tab to see information about the processes you have run in Desktop. The amount of history available to you depends on the data retention policies in place for 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.

If you have previously run any processes that are no longer available to you, they will still be listed here, but you won't be able to re-run them.

By default, the 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 (see List view below). However, you can choose to group the sessions into folders by process name (Folder view on the next page) by using the **Show folders in the session history** option on the Settings > History screen. See Manage history settings for more information. Initially, your ten most recently run processes are listed, and more are loaded as you scroll down.

List view

Each session of each process you have run is listed, with information about the session. This is the default view.
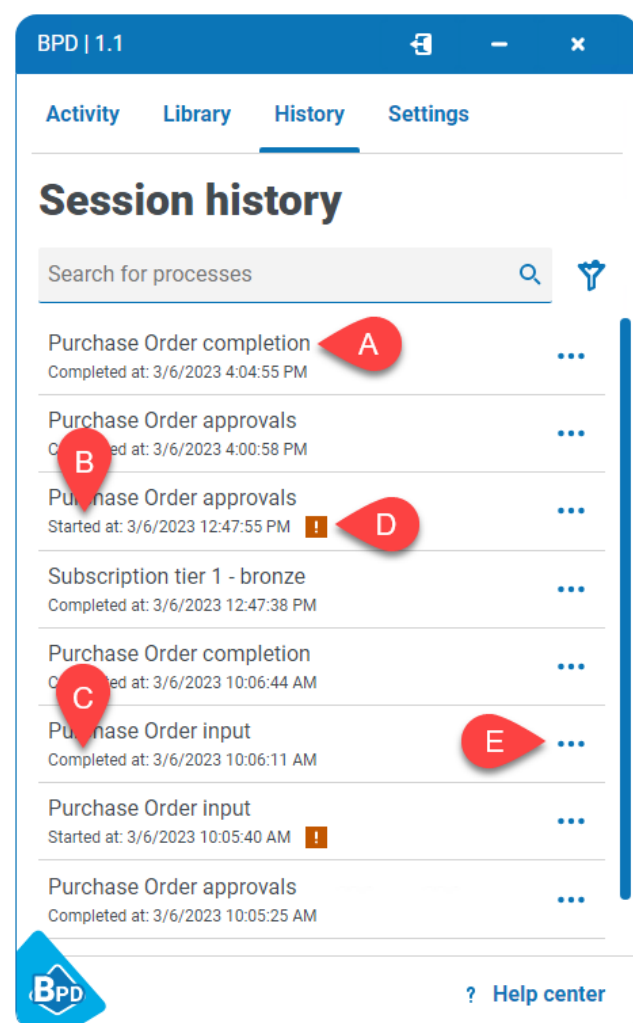
A. **Title** – The name of the process run in the session.

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

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

D. **Exclamation mark** – Indicates that this process failed to complete successfully. There are several reasons why this might happen, for example, if the process was manually stopped, or invalid data was entered.

E. **ellipsis (...)** – Click to view any issues for failed processes (for example, why the process failed to complete), or to view the details of completed processes (for example, radio button options, and any startup and/or mid-process parameters you entered for the process), or to run the process again.

Folder view

A folder displays for each process you have run. When you open a folder, the name of the process displays at the top of the screen, followed by a list of the sessions in which it was run.
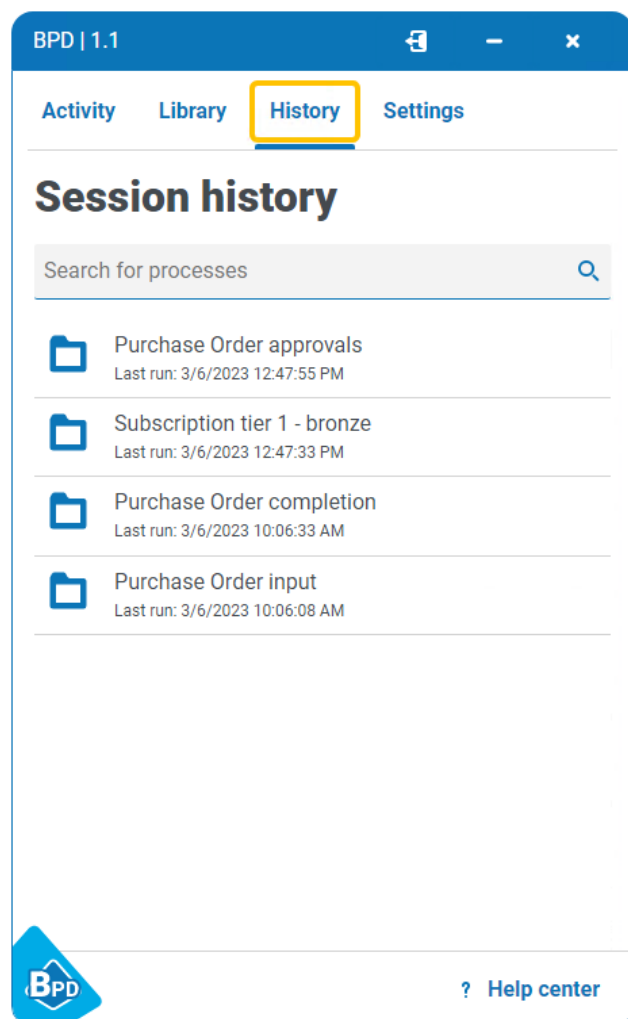
Search and filter

The **Search for processes** field enables you to search for sessions by name, and additional filters enable you to filter the sessions by process status or date range, and to change the date/time sort order of the sessions.

> Filtering and changing the sorting order of the results are only available on the list view, they are not available on the folder view. The search is available on the list view and the folder view.

- To search for processes by name, type the process name in the **Search for processes** field. The list is filtered to only include folders and/or processes that start with the entered characters.

- To change the sorting order (available on the list view only):

    1. Click the filter icon 🔻.

       The filters page opens.

    2. On the Filters page, choose the sorting order you require.

- To filter by status or date range (available on default view only):

  1. Click the filter icon ▽ .

     The filters page opens.

  2. On the Filters page, update the filter settings.

See for more information.

View issues

If a process does not successfully complete, you can see more information about why it failed by clicking the ellipsis (**...**), then **View issues**. This displays the name of the process, its start time, and 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**.
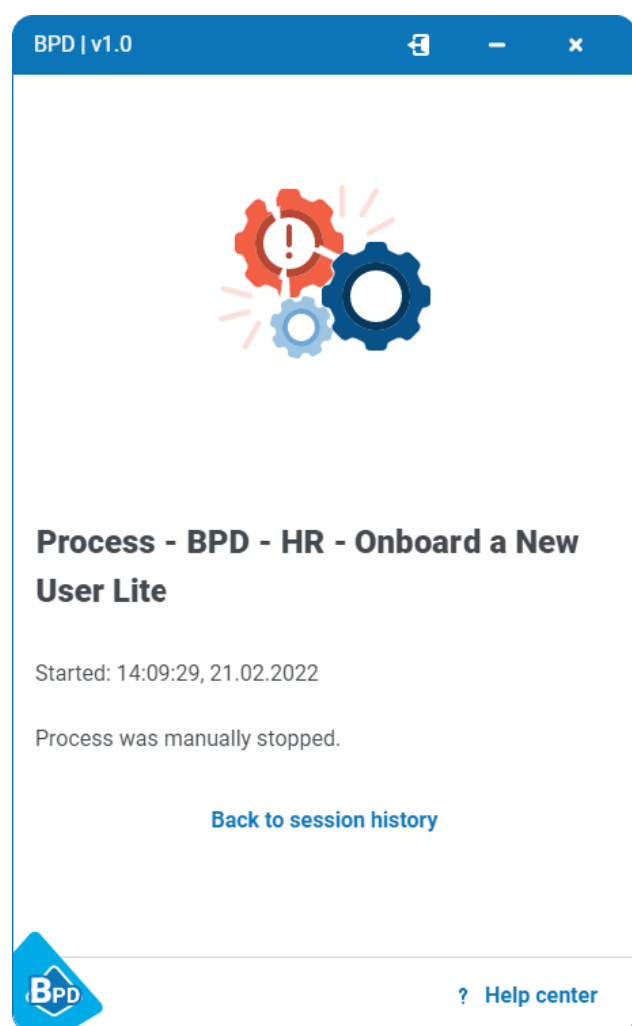
If you need help to fix the problem, you should give this information to your system administrator. They are able to view a complete session log with more detailed information about all the processes that you have run, any additional information you entered, and details of why a process failed.

View details

Click the ellipsis (**...**), then **View details** to display the startup and/or mid-process parameters you entered for the session, including the name and path of any image or binary files used as process startup parameters. If you entered parameters at more than one stage in a process, the parameters are listed on multiple tabs.

Run a process again

Click the ellipsis (**...**) then **Retry** to run a process again. If you entered start-up parameters previously, most of these are pre-populated for the subsequent-run, but you can change them if needed. The following startup parameters are not pre-populated and must be entered or re-entered:

- Fields that have been added to the process since you ran it previously
- Image files
- Binary files
- Passwords

Search and filter processes

The text search enables you to search for a process in Desktop by name on the Process library and Session history tabs. Where filters are also available, you can filter the results by process status and/or start date and time range, and change the date/time sorting order of the results.

Where both the text search and the filters are available, they are cumulative, so you can combine a text search with the sorting order, status, and date/time range filters. If you only wish to use the filters, you must clear any entry in the search field.
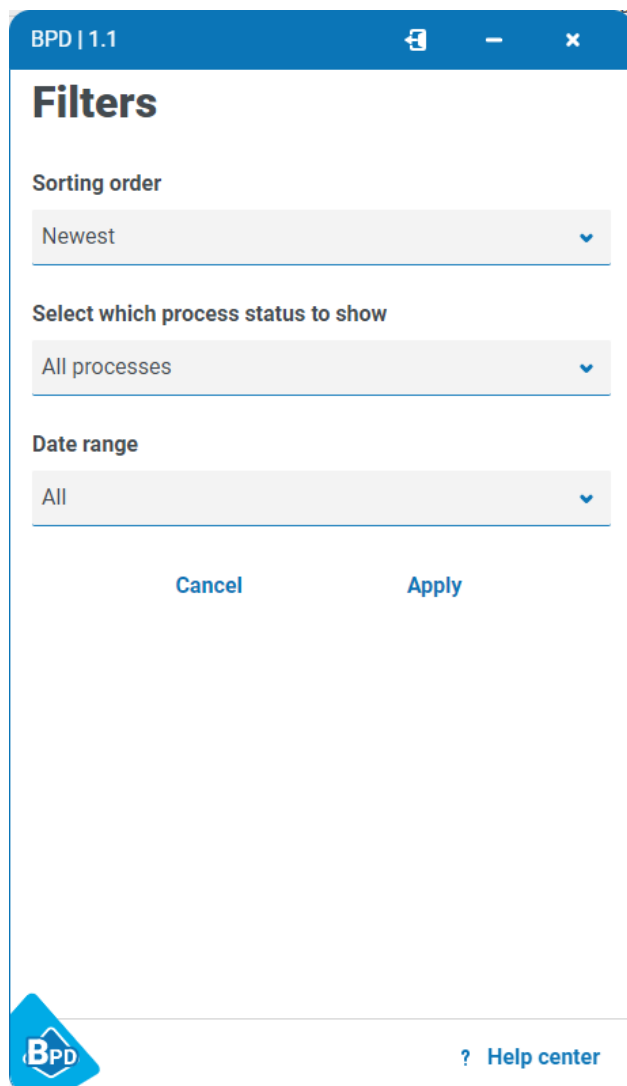
You can apply different settings to each tab, and these are retained when you change tabs.

Text search

To use the text search, type the name of the process your require in the **Search for processes** field. As you type the list is filtered to only display folders and/or processes that start with the entered characters. The search field is available on the list view and the folder view.

Filters

The filters enable you to sort the results on the Session history tab by date, and to search by process status and/or date range. They are only available on the list view, not on the folder view. See Manage history settings on page 45 for more information.

Sorting order

Select from the following drop-down options:

- **Newest** – Sorts the results on the Session history tab from newest to oldest. This is the default.
- **Oldest** – Sorts the results on the Session history tab from oldest to newest.

Process status

1. Select from the following drop-down options:
   - **All processes** – Includes all processes that have been started.
   - **Completed** – Includes only processes that ran successfully to the end.
   - **Not completed** – Includes only processes that failed to run successfully, this includes both **Not completed** and **Stopped** processes.
2. Optionally, select a date range as an additional filter, or click **Apply**.

   The History tab displays, listing all processes that match the filter criteria.

Date and time range

This filter checks the date and time on which the process run was started.

1. Select from the following drop-down options:
   - All
   - Today
   - Last 24 hours
   - Last 7 days
   - Last 31 days
   - Custom range

2. If you selected **Custom range**, you can now define the date range and specific start and end times. You can either type into the date fields, or click the calendar icon to select from a pop-up calendar:

3. If required, use the **Time range** slider to toggle the time fields on and enter a process start time range. If you do not select a time range, the start time will be 00:00:00 for the from date, and 23:59:59 for the to date.

4. Click **Apply**.

   The History tab displays, listing all the processes that match all the filter criteria.

In this example, the History tab will display completed processes that started to run between 09:30:00 on 9th November 2022, and 17:29:00 on 14th November 2022, from newest to oldest.
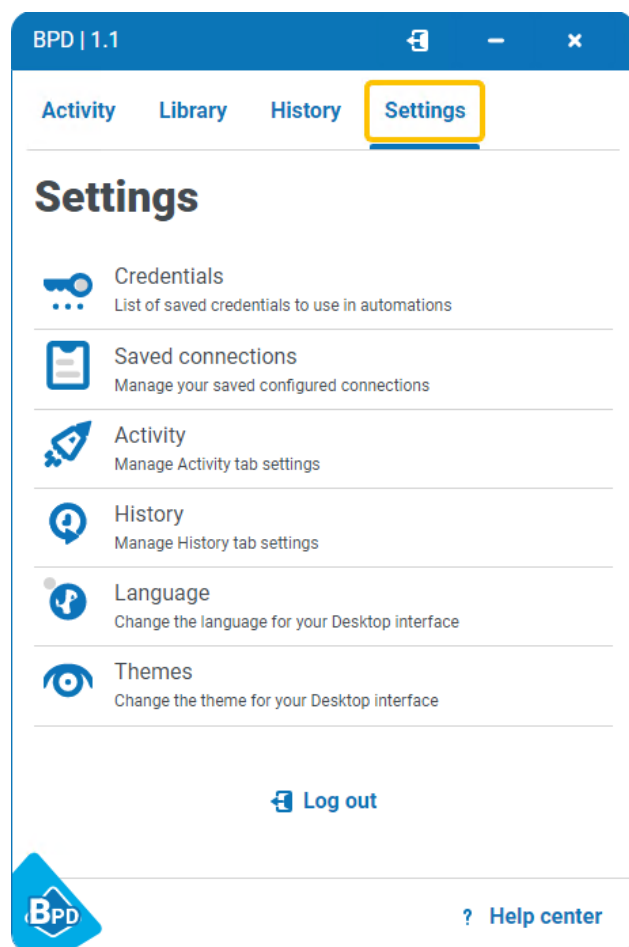
Settings

Select the **Settings** tab to view and configure your SS&C | Blue Prism® Desktop credentials and your connections.

The options on the Settings tab are:

- **Credentials** – Displays a list of credentials stored on your computer. Desktop will use these when it logs into another application on your computer to run a process. See Configure credentials on page 41.

- **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) on the next page.

- **Activity** – Enables you to control the display of the Activity tab, and specify the number of processes listed. See Manage recent activity settings on page 46

- **History** – Allows you to manage how the History tab displays. See Manage history settings on page 45

- **Language** – Allows you to change the language of the Desktop interface. See Change Desktop language settings on page 47.

- **Themes** – Allows you to change the color theme of the Desktop interface. See Change Desktop theme settings on page 48.

Configure connections (after login)

> ✎ The actions you are permitted to perform on connections will depend on your organization's policy. If your organization does not allow you to configure connections then you won't see the Configure connection link on the Welcome screen.

If permitted by your organization 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 10.

Alternatively, you may be permitted to create a new connection yourself using the details of a Desktop environment, if known, and to edit and delete connections (you cannot edit or delete shared connections, or the connection you are currently using). If you require assistance, please contact your system administrator.

To configure a connection, click **Saved connections**. The Saved connections screen displays.
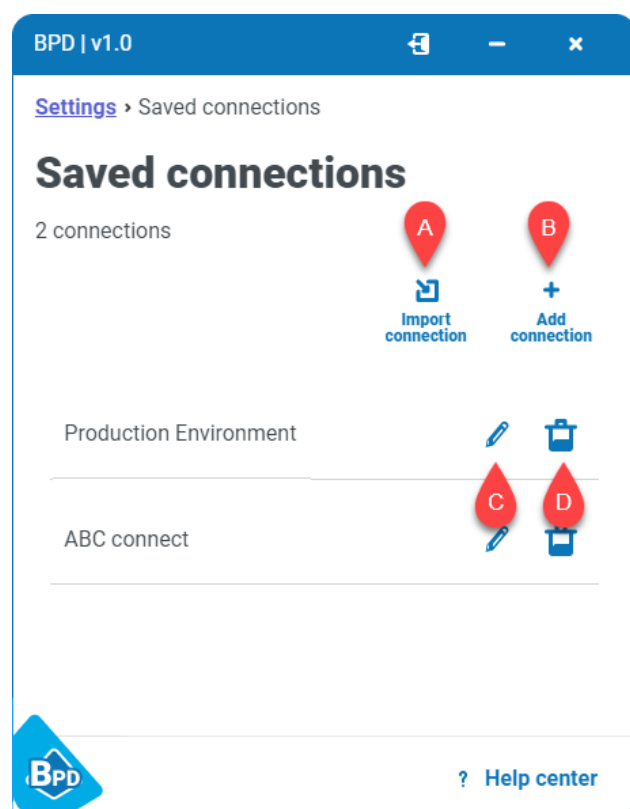
The following options are available:

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 below.

B. **Add connection** – Add a completely new connection (if your organization allows this), 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 40.

D. **Delete connection** – Delete this connection, see Delete a connection on page 41.

Depending on your organization's 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.
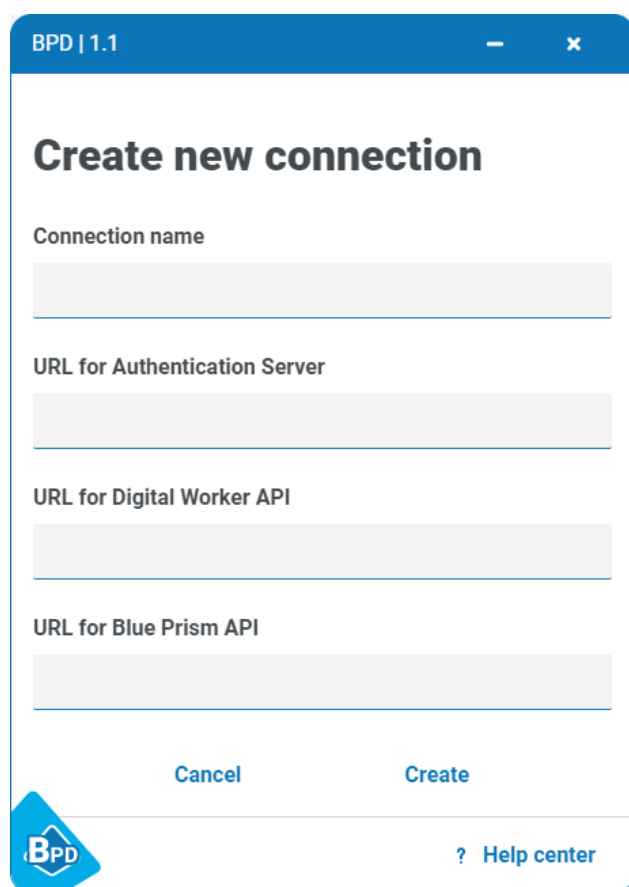
2. Click **Open**.

   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 Settings screen, click **Saved connections**. The available connections and options can vary depending on your installation of Desktop.

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

   The Create new connection screen displays:

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

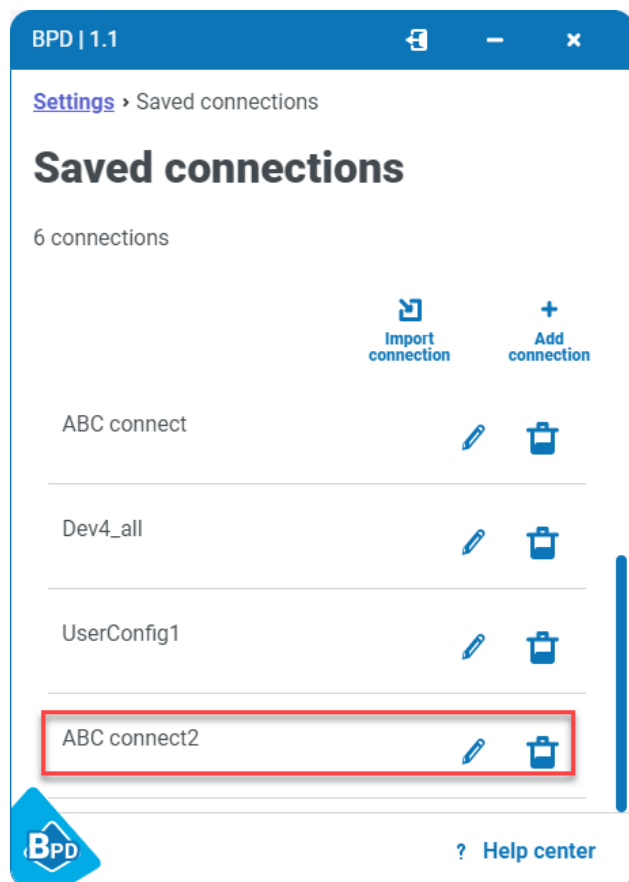| Field name	Information required
Connection name	Enter a name for this connection. Connection names must be unique, and are case-sensitive. If you try to create a new connection with the same name as an existing one, a warning message displays and you cannot save the connection.
URL for Authentication Server	Enter the Authentication Server URL. 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.
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.

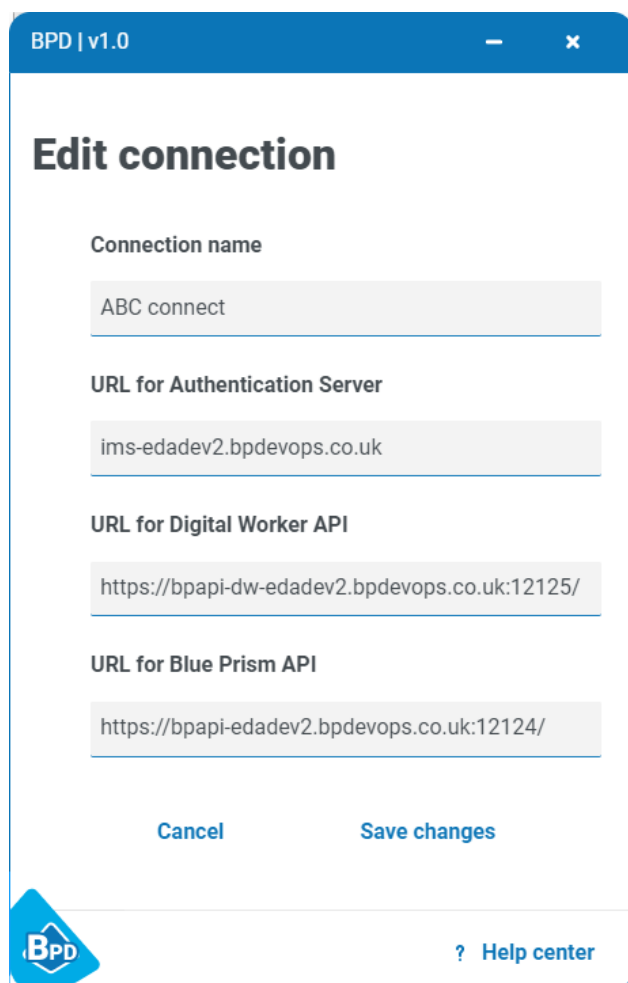The connection is created and displays on the Saved connections screen.

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.

   BPD | v1.0   —   ✕

   ## 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

   BPD   ? 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 Desktop credentials (if your organization allows this), on the Settings tab, click **Credentials**. The Credentials screen displays.
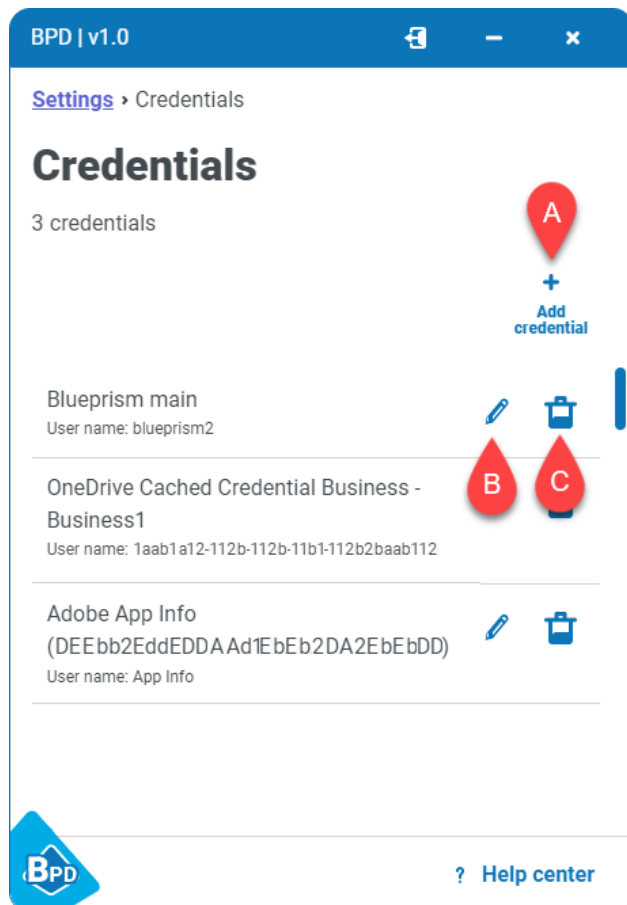
The following options are available:

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

B. Edit a credential, see Edit a credential on page 44.

C. Delete a credential, see Delete a credential on page 44.

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.

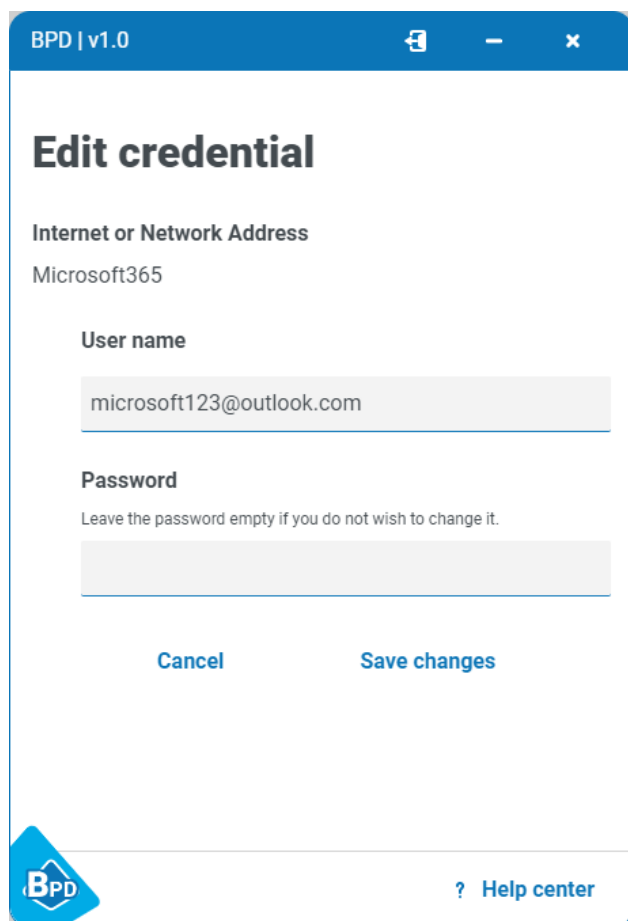| Field name	Information required
Internet or Network Address	An identifier for the credential, for example the internet or network address the credential will connect to.
User name	Enter the user name for the credential.
Password	Enter the password for the credential. For security, the characters are 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.
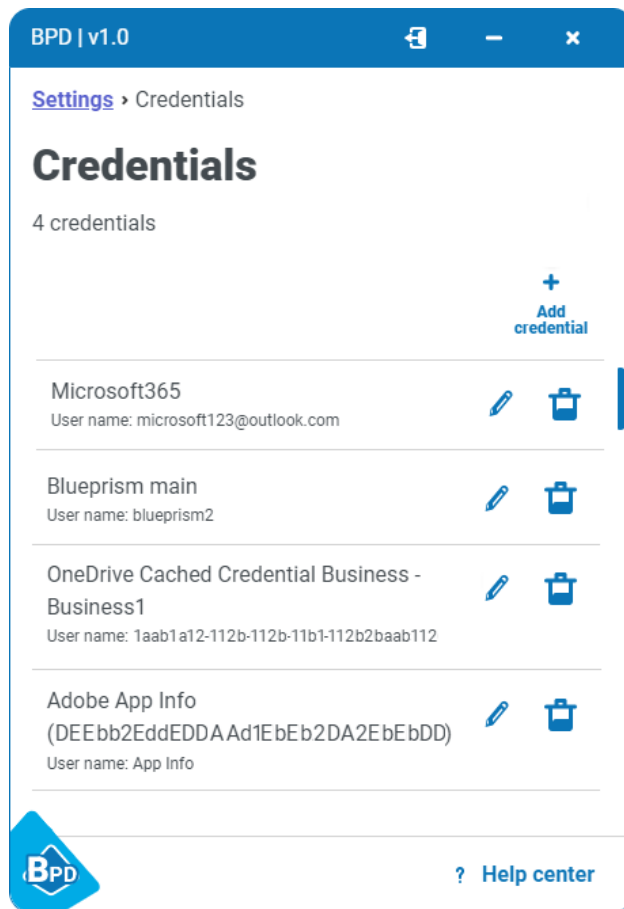
Edit a credential

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.

Manage history settings

The Settings > History screen in Desktop allows you to manage the display of the Session history on page 27 tab. You can view the sessions on the tab as a list, or grouped into folders.
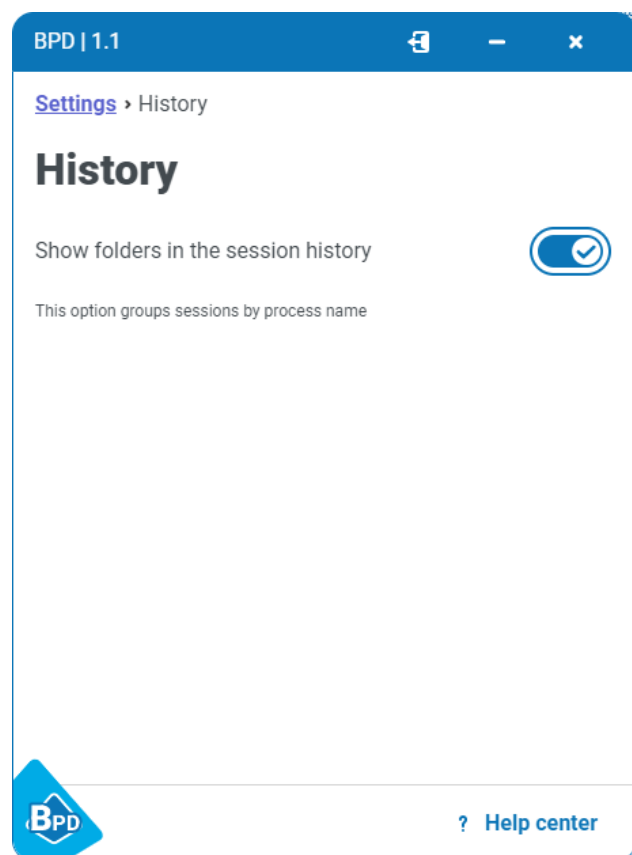

The **Show folders in the session history** option enables you to group the sessions listed on the History tab in folders by process name. Use the toggle to switch folders on and off.

Desktop remembers your settings on the Settings > History screen when you close or log out of the application.

Manage recent activity settings

The Settings > Activity screen in Desktop allows you to manage the display of the Activity tab, see Recent activity on page 25.
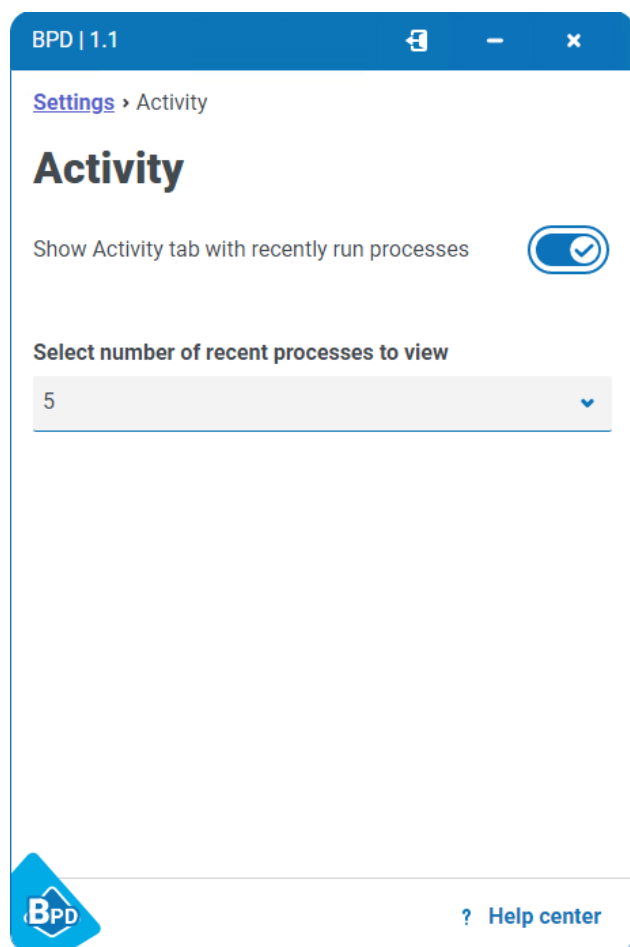

The following options are available:

- **Show Activity tab with recently run processes** – When selected, the Activity tab is visible in the Desktop user interface and is the landing screen when you log into Desktop. This option is selected by default.

- **Select number of recent processes to view** – Select the number (5, 10, 15, or 20) of recently run processes you want to list on the Recent tab. The default setting is 5.

Desktop remembers your settings on the Settings > Activity screen when you close or log out of the application.

Change Desktop language settings

The Settings > Language screen allows you to change the language of the Desktop interface.
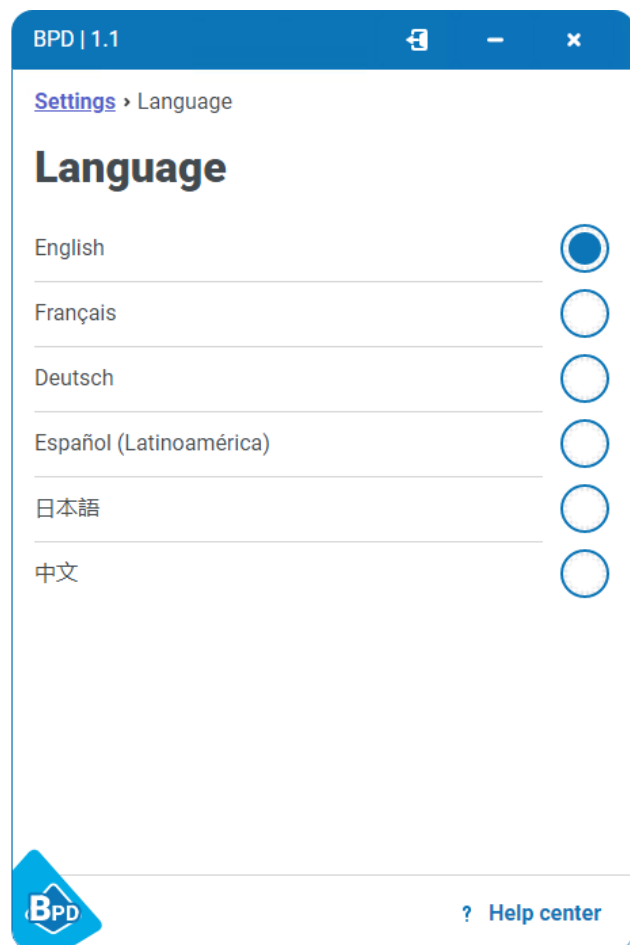
The default language of the Desktop interface is based on your operating system settings. If this language is not supported by Desktop, English (United States) is used as the default.

Use the radio buttons to choose your required language. Desktop remembers your chosen language when you close or log out of the application.

> You can also change the language before you log in, using the drop-down list on the Welcome screen, see Change the language on page 7.

Change Desktop theme settings

The Settings > Themes screen allows you to change the color theme of the Desktop interface. You can use a light (white background) or dark (black background) theme.

By default, Desktop uses the setting you have chosen for your operating system. For Windows, this is set in **Settings** > **Personalization** > **Colors**, where you can choose a light or dark color mode. The options on the Themes screen allow you to use your OS theme, or to override this for Desktop.
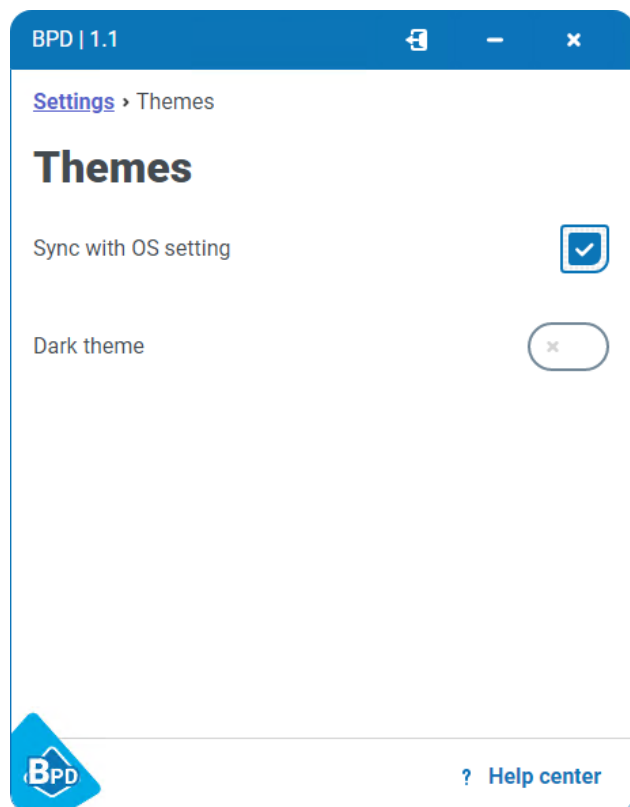
The **Sync with OS setting** checkbox is selected by default. If you change your operating system color mode, this will take effect when you restart Desktop.

- If your OS color mode is set to light, Desktop uses the light theme by default. Removing the tick enables the **Dark theme** switch. Use this to switch the Desktop theme to dark if required.

- If your OS color mode is set to dark, Desktop uses the dark theme by default. Removing the tick immediately sets the Desktop theme to light and enables the **Dark theme** switch. Use this to switch the Desktop theme back to dark if required.

Desktop remembers your theme settings when you close or log out of the application.