

## Blue Prism Interact

Facilitating closer  
teamwork between  
human and  
digital workers



---

## INTERACT- FACILITATING CLOSER TEAMWORK BETWEEN HUMAN AND DIGITAL WORKERS

**Interact is a web interface for creating and managing customizable forms that support attended, human-in-the-loop and RDA capabilities for automation workflows, making it easier for humans and digital workers to collaborate.**

Interact forms can be used to initiate a process or to interact with humans as part of a human-in-the-loop process. It's fully customisable to personalise to the needs of the company, the user and the process.

### WHO USES INTERACT?

**Automation Center of Excellence** – Administration access sits within the CoE, enabling full visibility and if needed, full control over the forms available to each process, the data collected by the forms and internal user profiles and permissions.

**Process owners** – Business users can interact with digital workers using web forms at any point in an automated process, enabling human-in-the-loop automation.

**Process designers** – create forms for any process in the Interact interface or on the fly when designing a process in Blue Prism.

**End users**– clients, customers, patients: any external user with a reason to submit data to your organization can use an Interact form to do so. Forms can be branded for a seamless customer experience and can collect documentation.

**“OUR CUSTOMER FACING STAFF ARE STRUGGLING TO FULFIL ALL CUSTOMER REQUESTS AND TRANSACTIONS AND DATA COLLECTION IS DISTRIBUTED ACROSS MULTIPLE CHANNELS. THIS CREATES A POOR CUSTOMER EXPERIENCE.”**

**Common customer pain point**

---

## INTERACT FORMS - FUNCTIONALITY

- Drag-and-Drop form designer allows business users to design interfaces easily and collaboratively.
- Forms can dynamically adapt based on key fields inputs in order to provide flexible self-service for customers and suppliers
- Customize forms to trigger an automated process by simply selecting the relevant pre-set actions for digital workers to execute.
- Form builder enables icons, dropdown menus and dynamic web forms that are used to gather, or present, the information needed to drive a selected automation.
- Forms can be used to collect documents
- Forms can be embedded into other applications as needed
- Forms can be branded to match the company systems for seamless experience.
- Manage form branding and customization
- Manage integration with Active Directory to partially autocomplete forms
- 8 languages supported (English, Spanish, Japanese, Simplified Chinese, Russian, Portuguese, German, French)
- Auditability as all user actions are logged
- Cloud-hosted forms allow for customer interaction 24/7/365
- 24/7 operations support

---

## COMMON BARRIERS TO IMPLEMENTING HUMAN-IN-THE-LOOP PROCESSES AND HOW TO OVERCOME THEM

Organizations often find that their RPA solution isn't suitable for creating natural workflows across front, middle and back office functions. This means there is a natural limit on the number of processes that can be automated and the amount of value that RPA gives back to the business.

### OUR CUSTOMER FACING STAFF ARE STRUGGLING TO FULFIL ALL CUSTOMER REQUESTS AND TRANSACTIONS AND DATA COLLECTION IS DISTRIBUTED ACROSS MULTIPLE CHANNELS. THIS CREATES A POOR CUSTOMER EXPERIENCE.

Organizations can use Interact web-forms in customer facing portals or websites to initiate transactions, collect data and process requests and enquiries. This can replace other unstructured communication channels such as email to create a more efficient, real-time process. It also removes the need for re-keying similar information collected on paper forms.

An interact form could be the first point of contact for a variety of tasks such as mortgage applications, new

business switching, insurance quote requests or mid-term adjustments, account cancellation, change of address requests, and engineer call-out appointment bookings. All these have processes behind them, some of which are straightforward requests that can be executed in full immediately by a digital workers and others that need human input. In these cases, Interact forms can also be used to provide validation and approval by employees at specific stages of a longer, multi-step process.

Companies which run busy customer centers handle a variety of enquiries and customer needs through many channels. Rather than depend on the call center agent to update multiple screens while speaking with a customer, they can instead input key data onto a form so that the digital worker can carry out the subsequent steps leaving them free to continue the conversation. In some instances, such as an amendment to a policy, the digital worker can access systems that validate complex compliance rules and relay information back to the agents, empowering them to then take the customer through the next step of the request. A range of Interact forms can be deployed in this environment to standardize the collection of

customer data and produce faster, more satisfactory outcomes for customers. Such processes include onboarding of new customers, processing customer transactions, requests for appointments, changes to contact details or billing enquiries.

By using Interact forms to trigger automated processes, customer transactions of all kinds can be sped up and fulfilled accurately every time, meaning more satisfied customers and reduced call times for contact center agents.

---

## WE HAVE MANY PROCESSES THAT REQUIRE HUMAN INPUT AND DECISION POINTS AND CANNOT AUTOMATE THESE USING RPA ALONE.

We often hear from customers that many of their processes can't be automated because they involve approvals from one or more people or require decisions to be made that are too complex to be automated.

The great thing about Interact forms is that they can be used at any point in a process to collect information and sign-off from internal users. The form simply needs to be created with the necessary fields and inserted into the process design. Notifications can be sent to single users or groups of users who are responsible for those tasks. Then, if there is a further automated portion of the process, the form submission will trigger the digital worker to start work on the next stage.

This means that an organization can vastly expand the processes it can automate, generating additional value and giving more time back to employees.

In the financial services industry for example, companies must meet stringent regulations or face large fines. Interact forms can be crucial to ensuring that the data being processed is fully accurate as well as the appropriate exceptions actioned or approvals made in a timely fashion. Such processes can include Know your Customer (KYC), Anti-money laundering (AML), fraud detection or background checks. Interact provides a full audit trail across users and processes.

---

## IMPLEMENTING AND SUSTAINING ATTENDED AUTOMATION IS PROBLEMATIC WITH OUR AVAILABLE RESOURCES

Many CoEs struggle to support the demand for creating attended automation forms across the business. Creating automations for processes means coding complex data capture forms and limiting access for security purposes.

Interact can remove bottlenecks and the obstacles that prevent an organization from fully realising the potential of attended automation. Firstly, it is simple for anyone to create a form, so the subject matter experts and process owners can take responsibility for designing their own automations rather than requiring time and resources from the CoE. They can choose from a menu of actions that have been aligned to a specific function. For example, options to access SAP

for steps involved in processing an invoice can be restricted only to staff working in the finance function. Interact forms easily slot into process designs in Blue Prism design studio.

Secondly, the CoE maintains complete control over roles and responsibilities using the Interact administration interface. The CoE controls who is able to design and implement a form, who can view the submissions and who receives the forms for actions needed within a process. As a result, organisations can maintain a complete audit trail of use to ensure full compliance.

**“WE HAVE BOTS IN DIFFERENT DEPARTMENTS DELIVERING A RANGE OF PROCESSES, BUT SOME ARE JUST RUNNING ONE PROCESS WHICH IS INEFFICIENT. WE SEEM TO HAVE A LARGE RPA WORKFORCE THAT SHOULD BE PROVIDING MORE VALUE BACK TO THE BUSINESS.”**

**Common customer pain point**



## **WE HAVE TROUBLE CONVINCING OUR STAFF THAT RPA WILL HELP THEM DO THEIR JOBS MORE EFFECTIVELY. GETTING BUY-IN IS CHALLENGING**

One of the reasons why employees find it difficult to come to terms with process automation is that they feel it is taking away responsibility and control over work they are used to doing. They may also feel concerned that processes won't be completed properly without their input and approval.

Interact is a great tool to help boost morale and get buy-in – particularly for front office staff who are under pressure to reduce call times and fulfil transactions more quickly to hit targets.

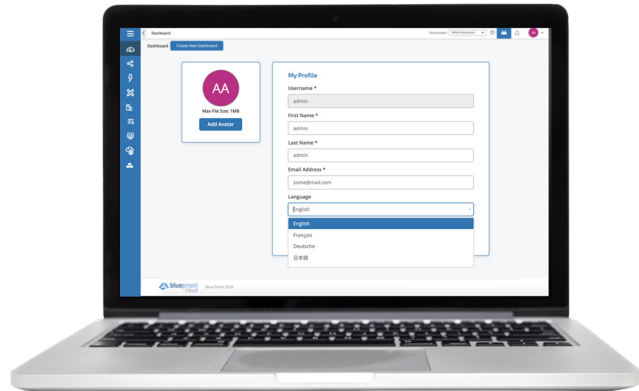
This is in part because it allows them to play an important part in automating their processes. They can help to design the forms and keep an eye on submissions. They can still be the human in the loop for validations and approvals. And once they are comfortable with the technology, they will see how much faster certain processes can be completed that actively help them do their work more efficiently and meet their targets.



## FEATURES AND CAPABILITIES

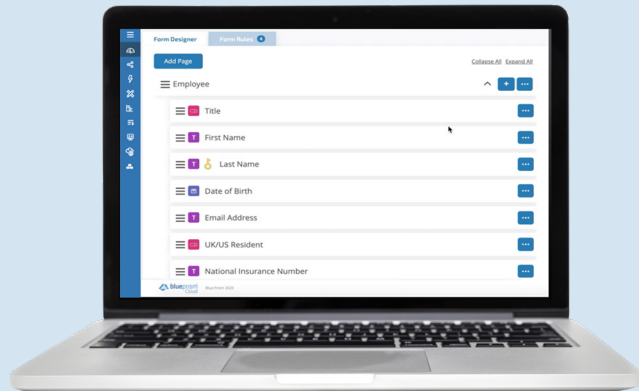
### FULLY CONFIGURABLE USER ROLES

- Fully configurable user roles and access levels in addition to auditable usage ensures security.
- An administration login ensures that access to forms, data submissions and exceptions is centrally controlled.



### COLLABORATE AND MANAGE DATA

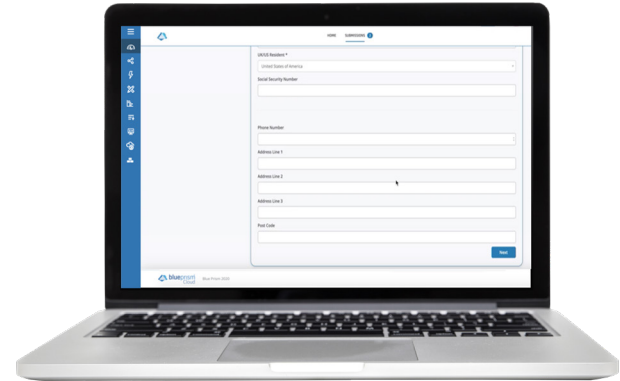
- Business owners can work collaboratively on form creation with the CoE.
- Optional “Purge upon Submission” field to delete classified, personal or sensitive data.



## FEATURES AND CAPABILITIES

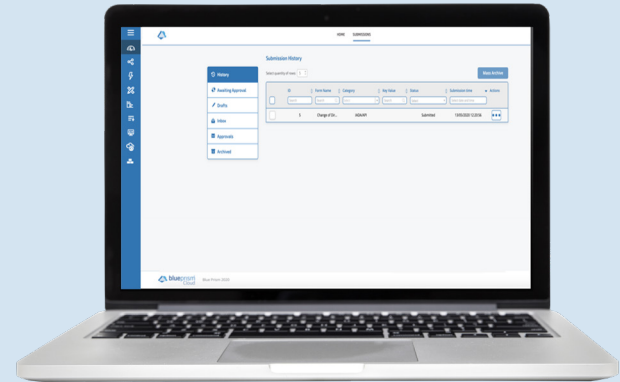
### CREATE A BETTER CUSTOMER EXPERIENCE

- External facing web-forms can collect customer data in a structured way to trigger processes, cutting down on calls.
- An agent can use a Digital Worker to gather required customer information from internal systems while they help the customer.



### AROUND THE CLOCK PROCESSING

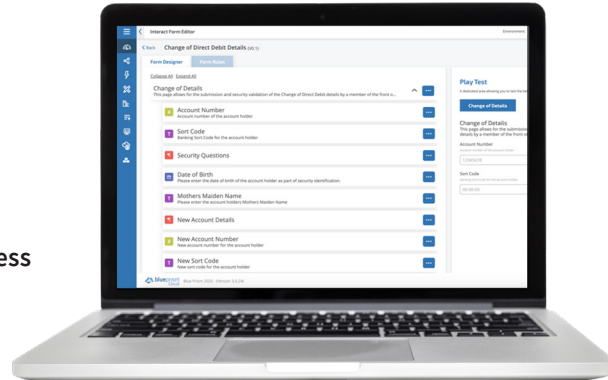
- Non-real time actions can be processed outside of contact centers at any time of day.
- Real-time processes can be supported and time to process reduced.



## FEATURES AND CAPABILITIES

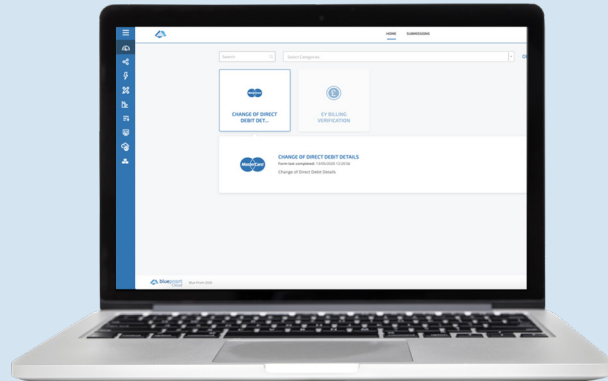
### CREATE WEBFORMS AND TRIGGER PROCESSES

- Create web forms that can be accessed anywhere, anytime by team members who need to provide validation and approvals.
- Completion of a validation or approval form triggers the next automated state of the process



### CUSTOMIZE FOR PROCESS AND DATA ACCESS

- Customize the form to the requirements of the process
- Manage access by user or user group to ensure that the right people can access the forms and the associated data.



---

## Customer Examples

### ENERGY PROVIDER

The Energy Provider deploys interact to trigger two activities for Digital Workers supporting Call Centre agents.

The first process is used to assist call centre staff with manual tasks as they speak to customers such as updates to their Debit Card information. In this use case, the agent collects information into a screen from the customer and then despatches the digital worker to execute all the required updates to the billing and CRM systems in-line with business SLAs.

The second use case consists of the Digital Worker collecting information in real-time to support the Call Centre agent. For example, if someone calls to shut down an account, checks have to be made to ensure there is no bad debt on the account or any pending injunctions. As soon as the agent receives the confirmation required, they can then step through the relevant steps to close the account or continue with further discussions. By deploying Digital Workers to support agents

in this way, requests are resolved quickly and agents can give their undivided attention to the speaking with customers instead of having to navigate through multiple screens at the same time.

### MOUNT SINAI HEALTHCARE

US Healthcare provider, Mount Sinai has implemented Interact forms as part of a public patient interface which allows patients to input their data and documentation before arriving for an appointment. The form automatically pre-populates data into various hospital systems so that it's collected together and ready for use by physicians and consultants when the patient arrives.

The use of the forms has eliminated time spent filling paper forms on arrival, and as a result increased the number of patients that consultants can see in a day. This self-registration approach also avoids the errors that creep in through manual data entry and so ensures that hospital systems are accurately updated.