

# blueprism<sup>®</sup>

Robotic Process Automation Software

# Blue Prism

## LOGICAL ACCESS MODEL (LAM) GUIDE

Version: 1.4

For more information please contact:

info@blueprism.com | UK: +44 (0) 870 879 3000 | US: +1 888 7577476

[www.blueprism.com](http://www.blueprism.com)

## Revision History

Date	Revision	Author	Description
<a href="#">28/08/2018</a>	1.0	GB	Initial Draft
<a href="#">31/08/2018</a>	1.1	JT	Multi-Team Environments added
<a href="#">13/09/2018</a>	1.2	GB	Realigned with version 6.3
<a href="#">14/09/2018</a>	1.3	JT	Minor grammatical changes
<a href="#">24/06/2019</a>	1.4	BA	Hypercare Group section added

## Contents

1. Introduction .....	4
2. Logical Access Model Benefits.....	5
3. Creating/Updating the Logical Access Model (LAM) Process .....	6
3.1. Download the Logical Access Model (LAM) Template.....	6
3.2. Creating or Updating the LAM .....	7
3.3. Approving the LAM.....	11
3.4. Implementing the LAM.....	11
3.5. Testing the LAM.....	11
3.6. Publishing the LAM.....	11

The information contained in this document is the proprietary and confidential information of Blue Prism Limited and should not be disclosed to a third party without the written consent of an authorised Blue Prism representative. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying without the written permission of Blue Prism Limited

© Blue Prism Limited, 2001 - 2018

All trademarks are hereby acknowledged and are used to the benefit of their respective owners.  
Blue Prism is not responsible for the content of external websites referenced by this document.

Blue Prism Limited, Centrix House, Crow Lane East, Newton-le-Willows, WA12 9UY, United Kingdom  
Registered in England: Reg. No. 4260035. Tel: +44 870 879 3000. Web: [www.blueprism.com](http://www.blueprism.com)

## 1. Introduction

This document outlines the usage of the Blue Prism Logical Access Model (LAM) template.

Any organisation wishing to utilise the Blue Prism application should use this guide to create their own Logical Access Model (LAM).

Based on the Robotic Operating Model (ROM) roles defined, Blue Prism has developed LAM recommendations to be used as a starting point. These are documented in LAM templates, detailed in the following chapters.

## 2. Logical Access Model Benefits

The creation and maintenance of a Logical Access Model for Blue Prism access in an organisation is imperative due to the following reasons:

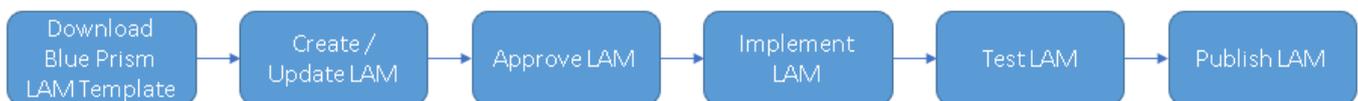
- Promotes the segregation of duties and prevents an “everybody admin” scenario, while defining clear responsibilities within Blue Prism across all environments
- The LAM is a documented record of the users or teams that have access to Blue Prism functionality
- The LAM can be used to check that the permissions or access rights applied within Blue Prism match what is defined in the LAM
- The LAM is a documented record of user or team access in Blue Prism that can be reviewed by the RPA Governance Board
- Provides an offline overview of the permissions or access rights to Blue Prism, without the need to manually access each Blue Prism environments one by one
- Offers the opportunity to align the LAM for Blue Prism to the security policies and standards in your organisation and to enforce the security requirements
- Results in a documented reference useful for audit purposes and incident management

### 3. Creating/Updating the Logical Access Model (LAM) Process

Blue Prism recommends each organisation creates and implements their own Logical Access Model immediately after a Blue Prism environment is created. This should be included as part of any Blue Prism environment set-up.

The default user roles defined within the product should be replaced with user roles defined by the organisation's own Logical Access Model (LAM), derived from the Robotic Operating Model (ROM). This action should be carried out for each Blue Prism environment, with the differences in permission requirements i.e. Development, UAT and Production, being considered. Note that the Runtime Resource and System Administrator user roles cannot be changed.

The process of creating or updating the LAM should involve all stakeholders including the Head of RPA, the RPA Governance Board and IT team, while considering the segregation of duties in the organisation. This process at a high level will look something like this:



Your Blue Prism LAM should be approved by the RPA Governance Board and should comply to the organisation's security and standards.

As the RPA organisation grows, the LAM will need to be reviewed and updated before applying any access changes to the environments, by using either the suggested process or by using the chosen internal standard change management methodology, thus ensuring the LAM definition reflects the environments setup.

In the case of Blue Prism upgrade from a previous version, an appropriate review and update of the LAM is also recommended as part of the upgrade project, due to the potential impact of permission/access right changes in newer versions of Blue Prism.

Your Logical Access Model (LAM) should document all user accounts and roles defined across all environments.

The following chapters describe the suggested process steps in more detail.

#### 3.1. Download the Logical Access Model (LAM) Template

The Blue Prism Logical Access Model (LAM) template can be downloaded from the Blue Prism Portal. It can be found in Documents area by searching for "Logical Access Model (LAM)" You will need to ensure you use the template for the version of Blue Prism you are using.

Before starting work on your own Logical Access Model (LAM), read the Instructions sheet of the downloaded template and familiarise yourself with the template itself, the Blue Prism user roles and permissions. If you are using V6.3 or later of Blue Prism, you should also familiarise yourself with the access rights that can be applied to groups.



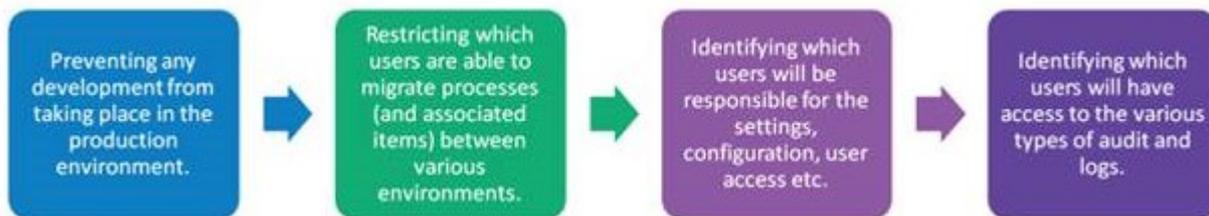
## 3.2.2 Logical Access Permissions

Blue Prism supports using a mixture of bespoke and out-of-the-box security roles to allow each user to be granted the appropriate access in each environment.



It is necessary to establish any logical access restrictions that will be implemented to provide an appropriate level of control and governance across the various environments.

These may include:



Further guidance on establishing appropriate logical access permissions is provided as part of the Blue Prism Robotic Operating Model documentation available on the Portal.

The Role Permissions spreadsheet in Blue Prism’s Logical Access Model (LAM) template defines the permissions of each user role within Blue Prism, across each environment.

The provided template LAM is a “standard” and recommended set of user roles and Blue Prism permissions associated across each environment. Additional roles and changes to your LAM can be applied, ensuring your LAM reflects your organisation roles and complies to your internal security policies and standards.

When defining the user roles’s permissions, reflection on the segregation of duties is strongly recommended.

## LOGICAL ACCESS MODEL

Area	Permission	Description	* Cannot be changed																														
			Environment 1 - DEV				Environment 2 - UAT				Environment 3 - PROD																						
			Developer	Lead Developer	Solution Designer	Release Manager	System Manager	Process Controller	Support Analyst	Runtime Resource *	System Administrator *	Developer	Lead Developer	Solution Designer	Release Manager	System Manager	Process Controller	Support Analyst	Runtime Resource *	System Administrator *	Developer	Lead Developer	Solution Designer	Release Manager	System Manager	Process Controller	Support Analyst	Runtime Resource *	System Administrator *				
Analytics	Create/Edit/Delete Tiles	- The user can create/edit/delete tiles within a Dashboard in the environment	Yes	Yes	No	No	No	No	No	No	Yes	No	No	No	No	Yes	Yes	No	Yes	No	Yes	No	No	No	No	No	Yes	Yes	No	Yes	No	Yes	
	Design Global Dashboards	- User can design and build a new Global Dashboard that is available to all other users	Yes	Yes	No	No	No	No	No	No	Yes	No	No	No	No	Yes	Yes	No	Yes	No	Yes	No	No	No	No	No	Yes	Yes	No	Yes	No	Yes	
	Design Personal Dashboards	- User can build a personal Dashboard for their own use	Yes	Yes	No	No	No	No	No	No	Yes	No	No	No	No	Yes	Yes	No	Yes	No	Yes	No	No	No	No	No	Yes	Yes	No	Yes	No	Yes	
	Design Published Dashboards	- User can build a published Dashboard	Yes	Yes	No	No	No	No	No	No	Yes	No	No	No	No	Yes	Yes	No	Yes	No	Yes	No	No	No	No	No	Yes	Yes	No	Yes	No	Yes	
	Import Global Dashboard	- Importing of global Dashboard into the database	Yes	Yes	No	No	No	No	No	No	Yes	No	No	No	No	Yes	Yes	No	Yes	No	Yes	No	No	No	No	No	Yes	Yes	No	Yes	No	Yes	
	Import Published Dashboard	- Importing of published Dashboard into the database	Yes	Yes	No	No	No	No	No	No	Yes	No	No	No	No	Yes	Yes	No	Yes	No	Yes	No	No	No	No	No	Yes	Yes	No	Yes	No	Yes	
	Import Title	- Importing a configured tile into the database	Yes	Yes	No	No	No	No	No	No	Yes	No	No	No	No	Yes	Yes	No	Yes	No	Yes	No	No	No	No	No	Yes	Yes	No	Yes	No	Yes	
	View Dashboards	- Ability to view the available Dashboards configured	Yes	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No	Yes	
Control Room	Full Access to Queue Management	- View Queues - Force Retries of failed items - Manually mark pending items as exceptions - Change Status of Queue items - Change Defer To time of pending items	Yes	Yes	Yes	No	No	No	No	No	Yes	Yes	Yes	No	No	No	Yes	No	Yes	No	Yes	No	No	No	No	No	Yes	No	Yes	No	Yes	No	Yes
	Full Access to Session Management	- Start Sessions - Stop Sessions - Delete Pending Sessions - Amend Session Variables - Set Start Up Parameters	Yes	Yes	No	No	No	No	No	No	Yes	Yes	Yes	No	No	No	Yes	No	Yes	No	Yes	No	No	No	No	No	Yes	No	Yes	No	Yes	No	Yes
	Read Access to Queue Management	- View Queue - Change Status of Queue Items - Change Defer To time of pending items	Yes	Yes	Yes	No	No	No	No	No	Yes	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	No	No	No	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Read Access to Session	- View Session Manager	Yes	Yes	Yes	No	No	No	No	No	Yes	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	No	No	No	No	No	Yes	Yes	Yes	No	Yes	No	Yes
	View resource screen	- View resource captured screenshots	Yes	Yes	No	No	No	No	No	No	Yes	Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	No	No	No	No	No	Yes	Yes	Yes	No	Yes	No	Yes

You should update the Roles Permissions spreadsheet in your own LAM to reflect the intended roles and roles permissions in your organisation.

Along with your defined roles, your LAM should also include the Runtime Resource and System Administrator roles. This ensures your Blue Prism environments and LAM are synchronised, and is useful for audit purposes. These roles should be only assigned to the appropriate user accounts.

For information on how to create user roles and select permissions, please review the Blue Prism help.

### 3.2.3 Multi-Team Environments

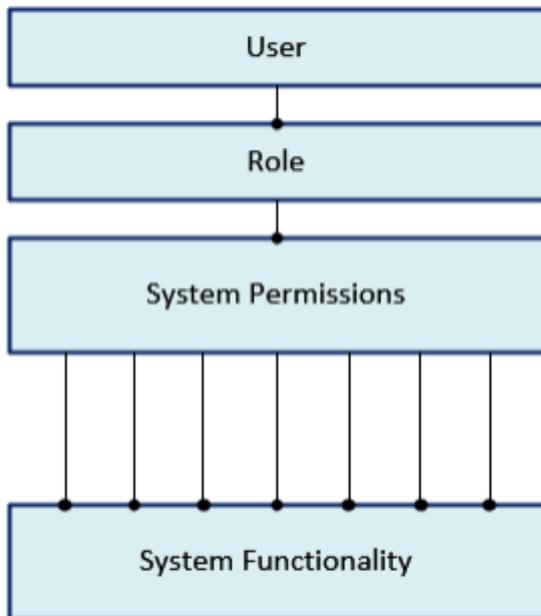
If you are using version 6.3 or later of Blue Prism you have the option of using the Multi-Team Environments feature.

The Multi-Team Environment concept of Blue Prism version 6.3 brings a greater level of access control, allowing defining Access Rights in addition to roles permissions.

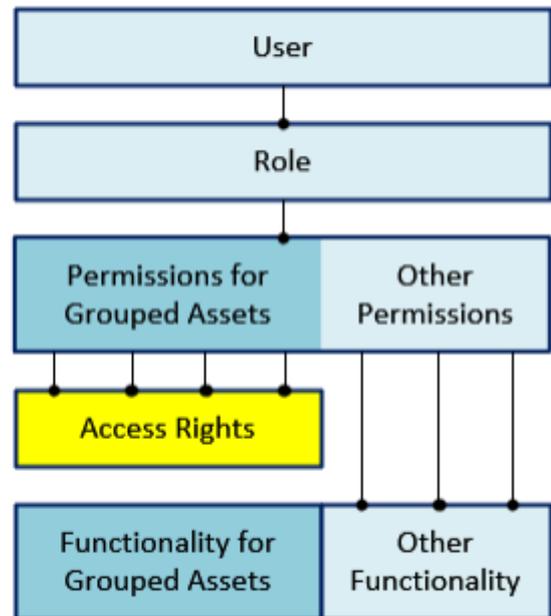
In previous versions, roles defined system-wide permissions for users, whereas in version 6.3, all Processes, Objects and Resources reside in groups, and the access rights can refine permissions for groups. For other functionality unrelated to groups, role permissions continue to fully define access.

Please note, the roles permissions in the Blue Prism product were adjusted from version 6.3 onwards, therefore a review and update of your own LAM should be part of your upgrade to version 6.3 project, even if you decide not to use the new Multi Team feature.

## **V6.2 Role-based permissions**



## **V6.3 Access Rights to Grouped Assets**



For more information on multi-team environments and on how to make use of the feature, the following documentation available on the customer portal should be reviewed:

- V6.3 User Guide – Multi-Team Environments
- Multi-team environment – Implementation Overview

Note, a new Web Service Consumer role is pre-defined in version 6,3 with access to only the Execute Process as Web Service and Execute Business Object as Web Service permissions. This role has been created to simplify the ability to apply the correct permissions to user accounts that will be used to consume Blue Prism Processes and Objects exposed as Web Services. This role grants the necessary execute permissions without providing access to areas of the interface, such as Control Room. The role can be used in conjunction with the capabilities of Multi-Team Environments to restrict which exposed Objects and Processes can be accessed by user accounts assigned to this role.

If bespoke user roles are needed for technical purposes such as this, remember to document them in your LAM following review by the RPA Governance Board.

A separate LAM template exists for version 6.3 or later and is available on the portal. It contains Instructions, Role Permissions and Users sheets but also sheets outlining what a multi-team setup might look like for each environment; development, UAT and production. The Instructions sheet of this template explains the multi-team sheets in more detail.

If you choose to use Multi-Team Environments, the users sheet should reflect which team(s) each user is a member of.

The Implement LAM chapter of this guide details how the permissions and access rights will be applied for each environment as defined in your own LAM.

### 3.2.4 Hypercare Group

Go-lives of complex processes often pose a number of risks that must be recognised and minimised. Intensive support and supervision in the production environment during the stabilisation phase is crucial for the success of the go-live. This is precisely where it is often agreed to establish Hypercare support. The Hypercare phase is typically a short-term provision of professional support resources.

The Hypercare group should only be created to place processes or business objects that need emergency fixes applied to them. This group should offer a set of recommended permissions to deliver efficient support with minimal run-in time during and after the go-live.

The Hypercare group should be used as it strengthens the audit trail, and approval should be given before moving something in/out of the group. Items are only in this group temporarily until stable running is confirmed before being placed back into its appropriate location. Developers can't edit anything in production except for the items in this group – maintaining security but providing flexibility.

### 3.3. Approving the LAM

After your own Logical Access Model (LAM) document is created or updated, it should be approved by your RPA Governance Board and should comply to your organisation's security and standards.

### 3.4. Implementing the LAM

After defining your LAM and having the approval of the RPA Governance Board, the user roles within Blue Prism should be updated accordingly. Please reference the Blue Prism help for more details, by searching for "User Permissions", "User Roles" or "User Settings".

In the first step, the user roles and their permissions will be updated in System/Security/User Roles section of the product, to reflect the Role Permissions sheet within your LAM. This needs to take place for each Blue Prism environment.

As the second step, the user accounts and their assignment to user roles will be defined in System/Security/Users section of the product, according to the Users sheet of your LAM, across all environments.

If you are using Blue Prism version 6.3 or later and are using the Multi-Team Environments feature, the defined access rights in your LAM will need to be applied to the respective environments.

### 3.5. Testing the LAM

After your LAM is implemented in all environments, the defined user accounts and user roles should be tested across all environments. You should ensure each user role has enough permissions to perform their role effectively. It is recommended to test at least one user account for each user role across all environments.

### 3.6. Publishing the LAM

When the Logical Access Model implementation is successful tested, the LAM document must be communicated and published appropriately in your organisation.

Any planned changes to the LAM should follow the described process and be reviewed before implementation by the RPA Governance Board, while adhering to your internal change management methodology.