HCL BigFix Service Management

AI-powered Service Management

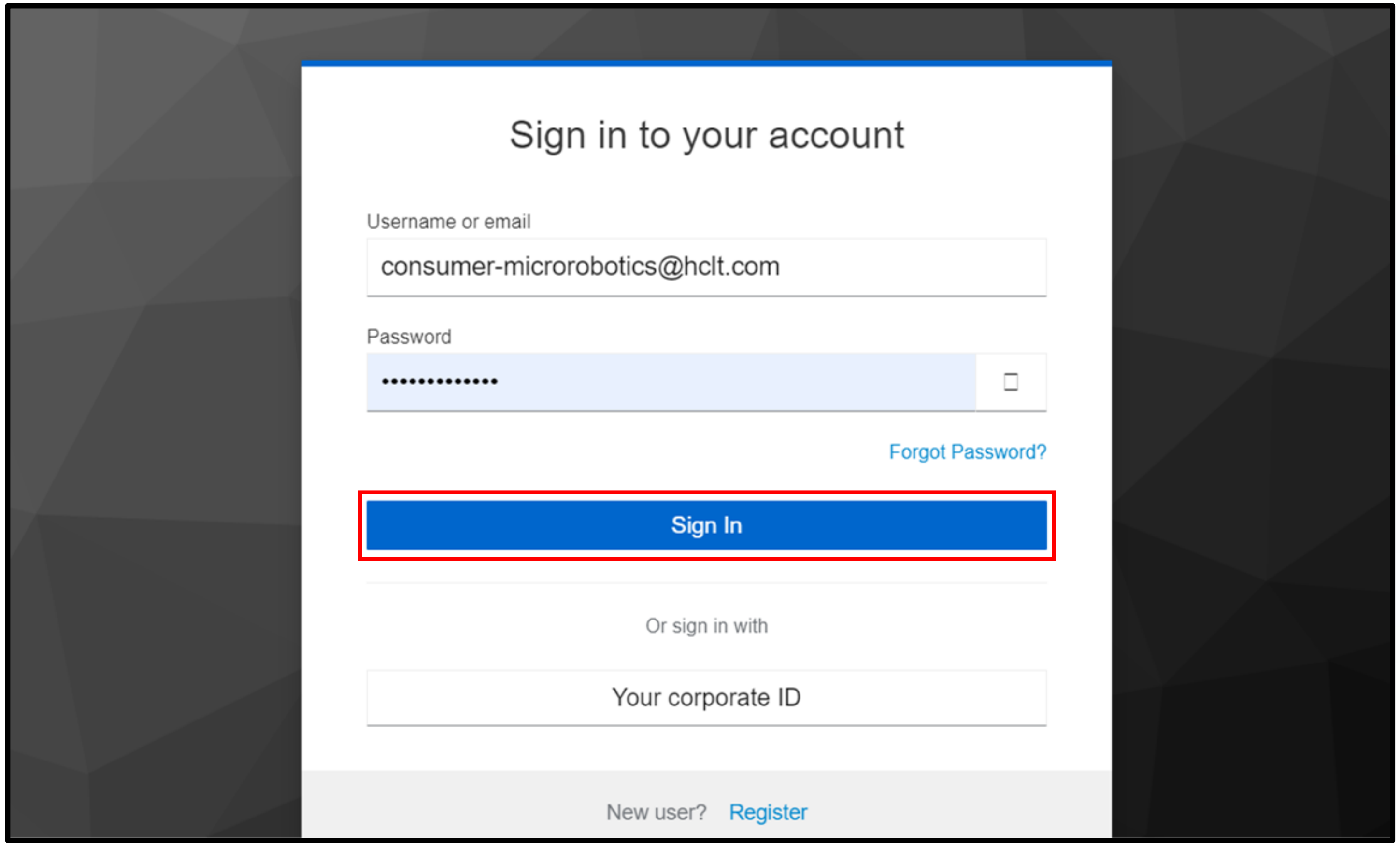
Trial Guide

Login information

- The instance URL to be used for the HCL BigFix Service Management trial is: https://support.dryice.ai
- You must have been provided with four sets of login credentials, one each for the following roles:
    - Consumer
    - Approver
    - Fulfiller/Support User
    - Manager
- If at any time during your trial, you require assistance, please reach out to us at bigfixsm.trial@hcl-software.com

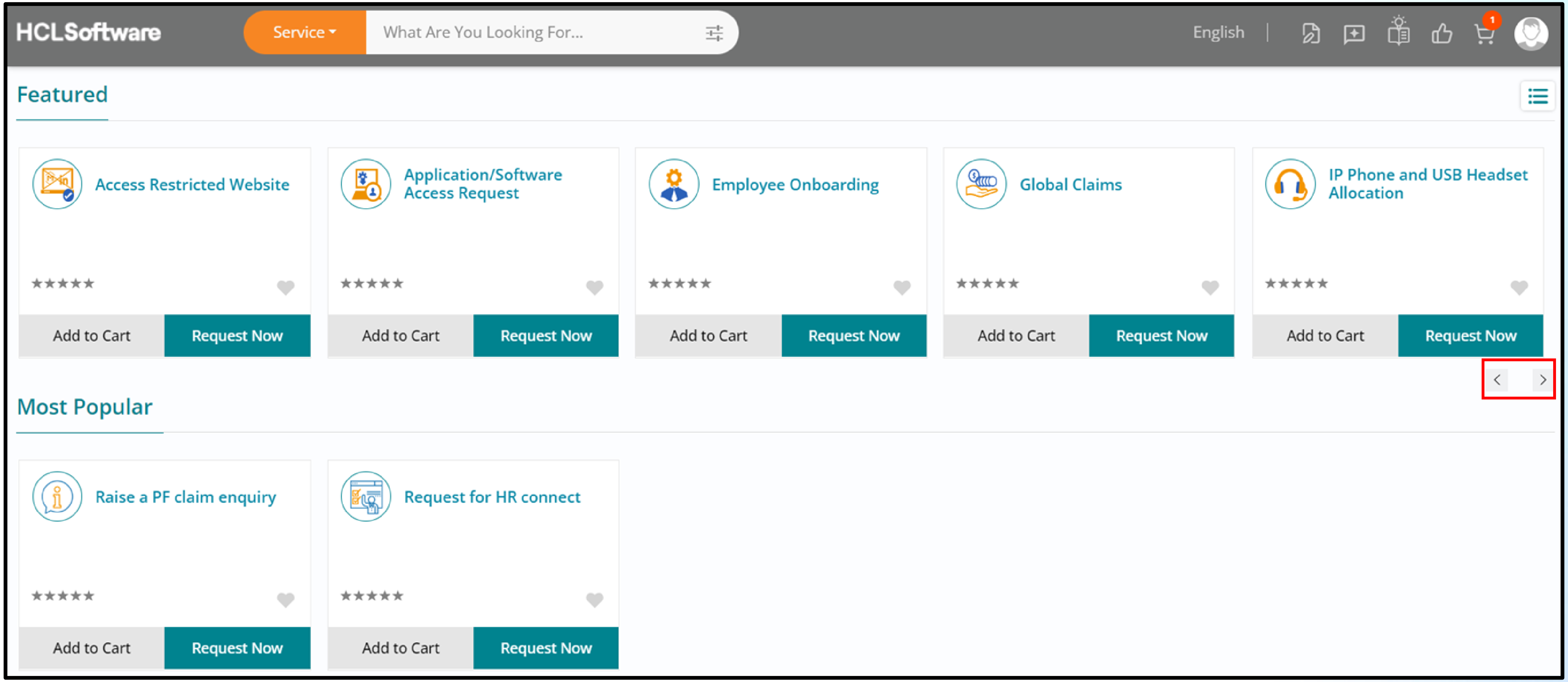
Log into the HCL BigFix Service Management instance

- Click on the URL https://support.dryice.ai and use the consumer role credentials to log into the instance.
- Click on Sign In upon entering the credentials.



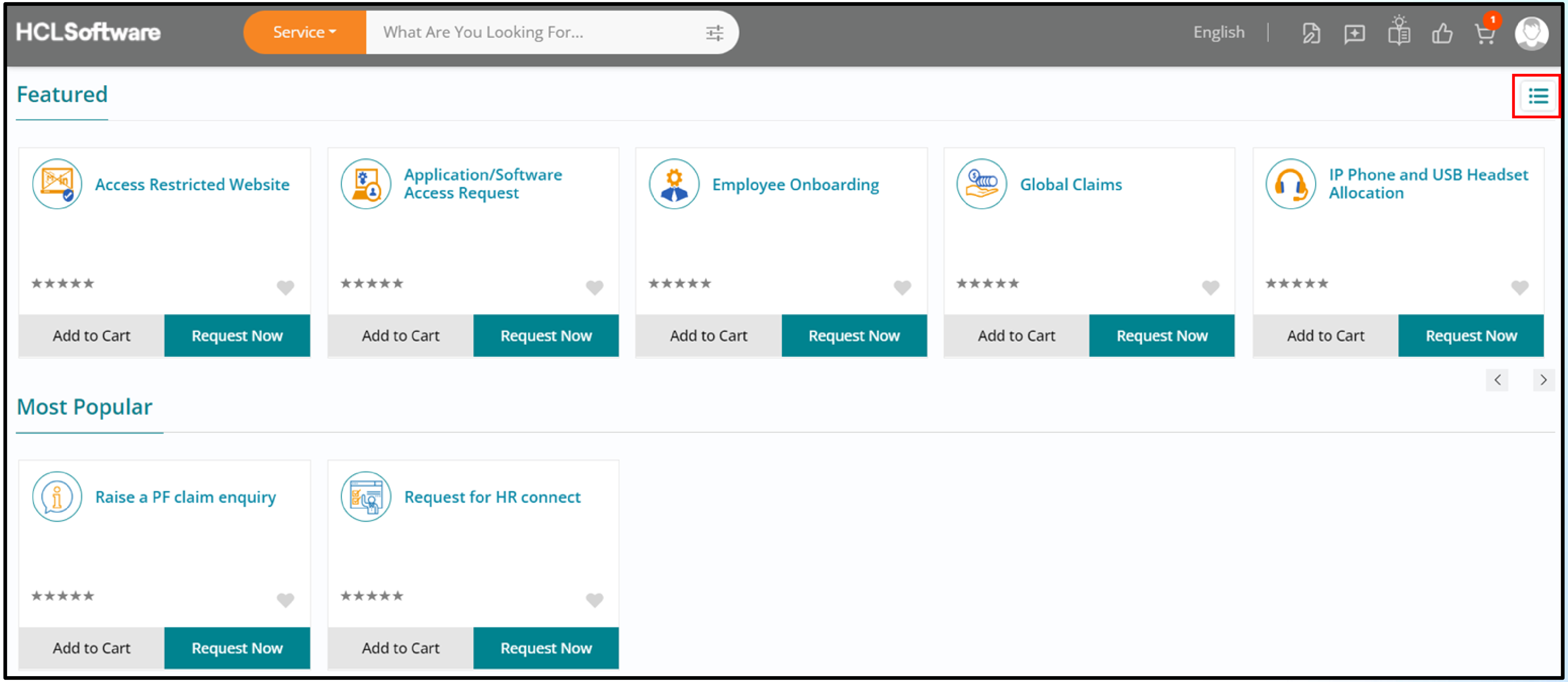
Landing Page

- Upon logging in, you will see the consumer homepage of HCL BigFix Service Management.
- You can make use of the navigation arrows in the featured section to browse through the service offerings.



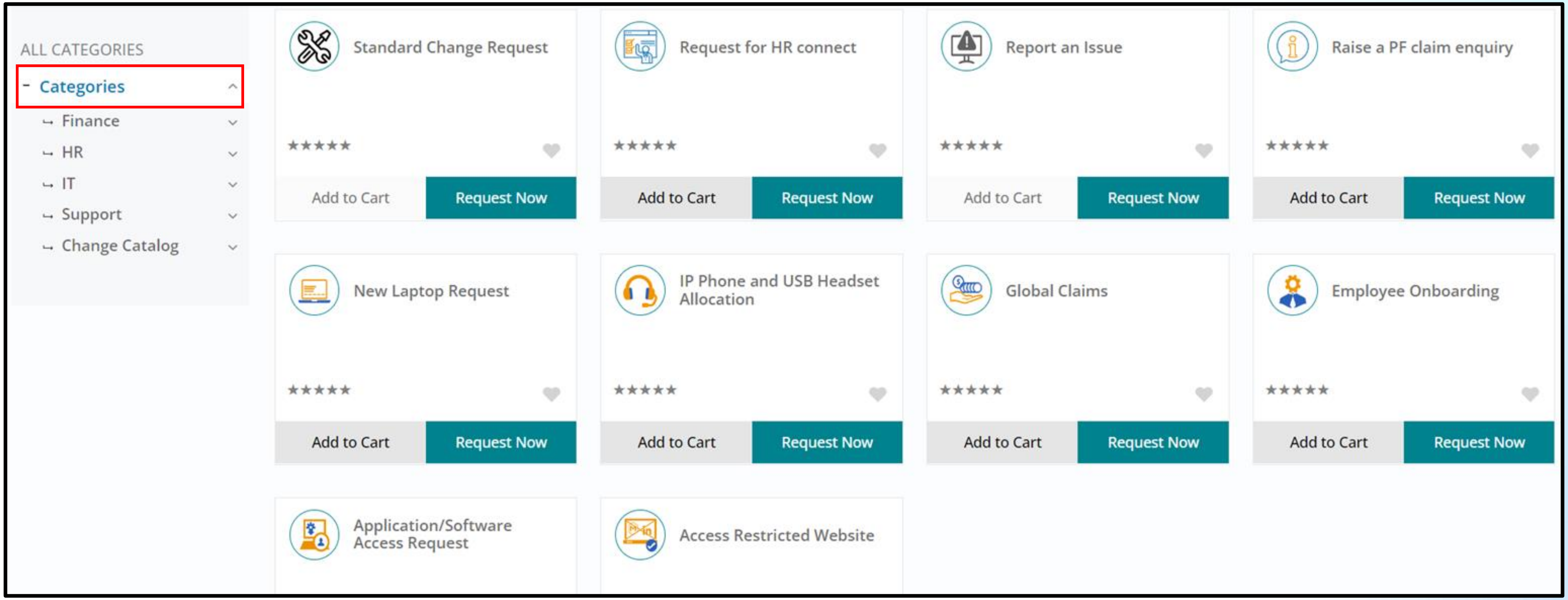
Browse through the offerings

- To view the service offerings segregated by business functions specific categories, click on List View button towards the top right of your screen.



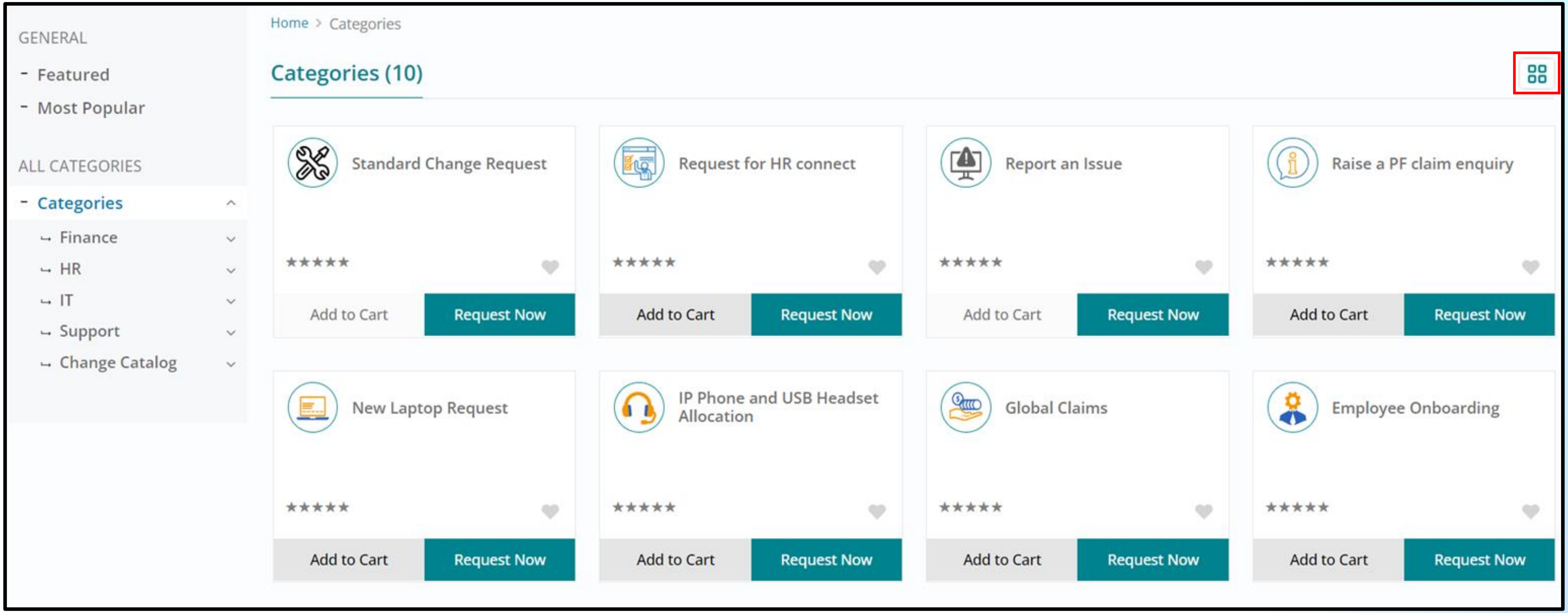
Browse through the offerings

- The business function specific category view is visible towards the left.
- Click on Categories to expand the section. You may choose to expand each category to view the service offerings available to place an order / request.



Browse through the offerings

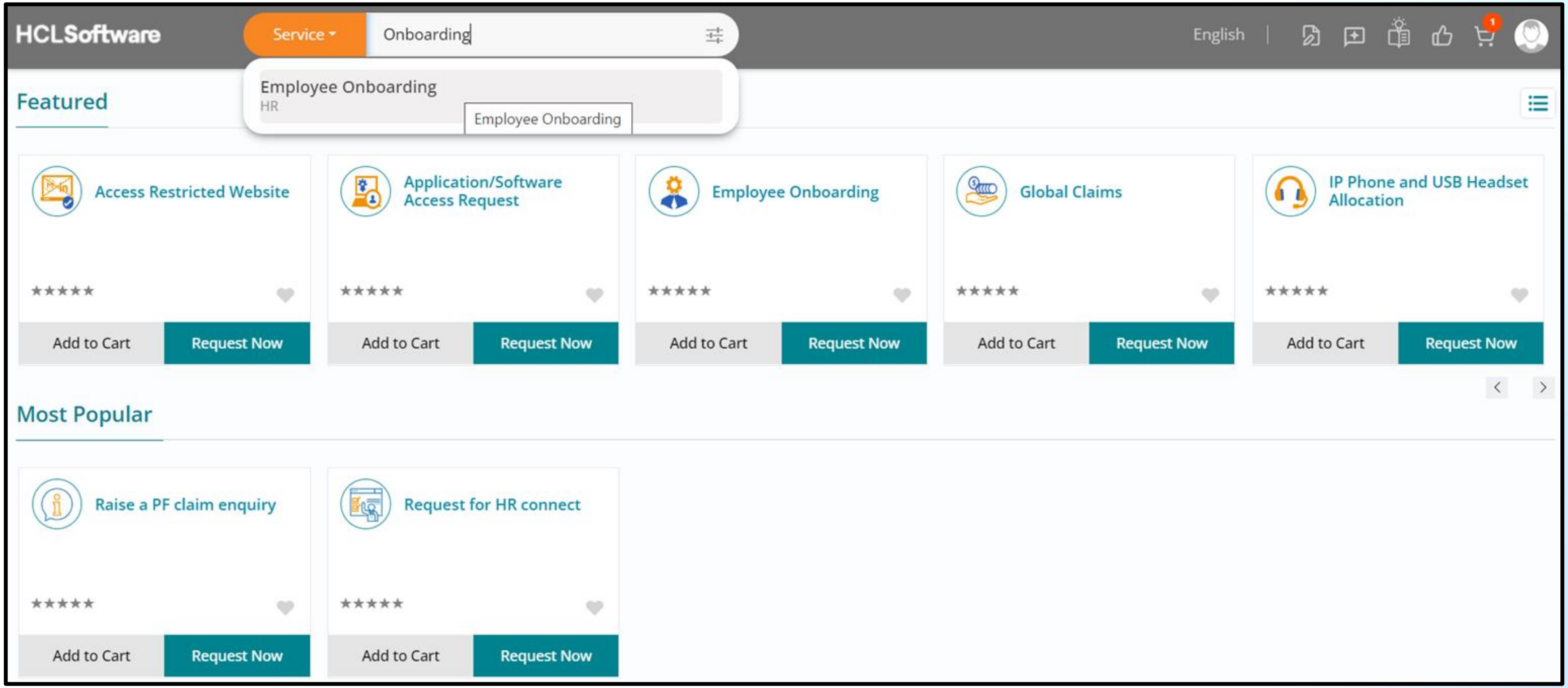
- Once you have browsed through the categories, to go back to the previous view, click on the card view button on the top right of your screen.



Global Search

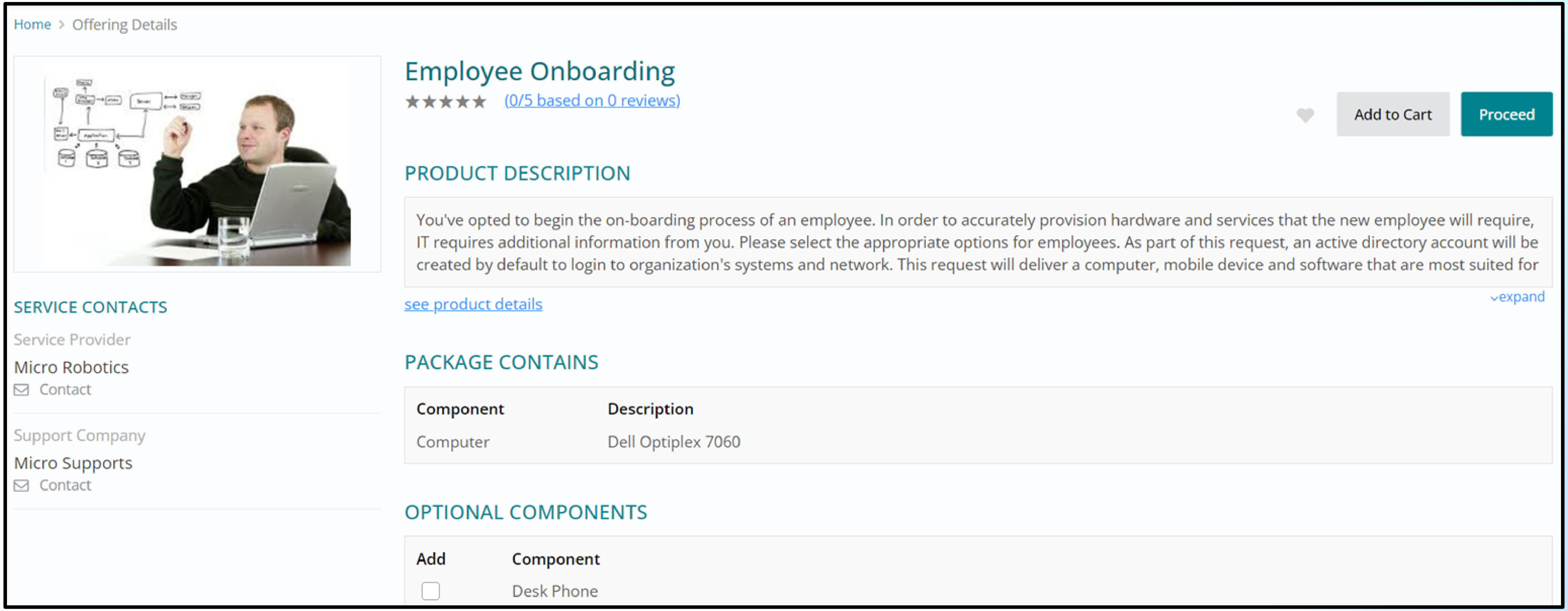
- Type in ‘Onboarding’ on the Global Search section of the consumer homepage and basis the keyword typed in; the related service offerings will appear for selection.

- Click on Employee Onboarding offering.



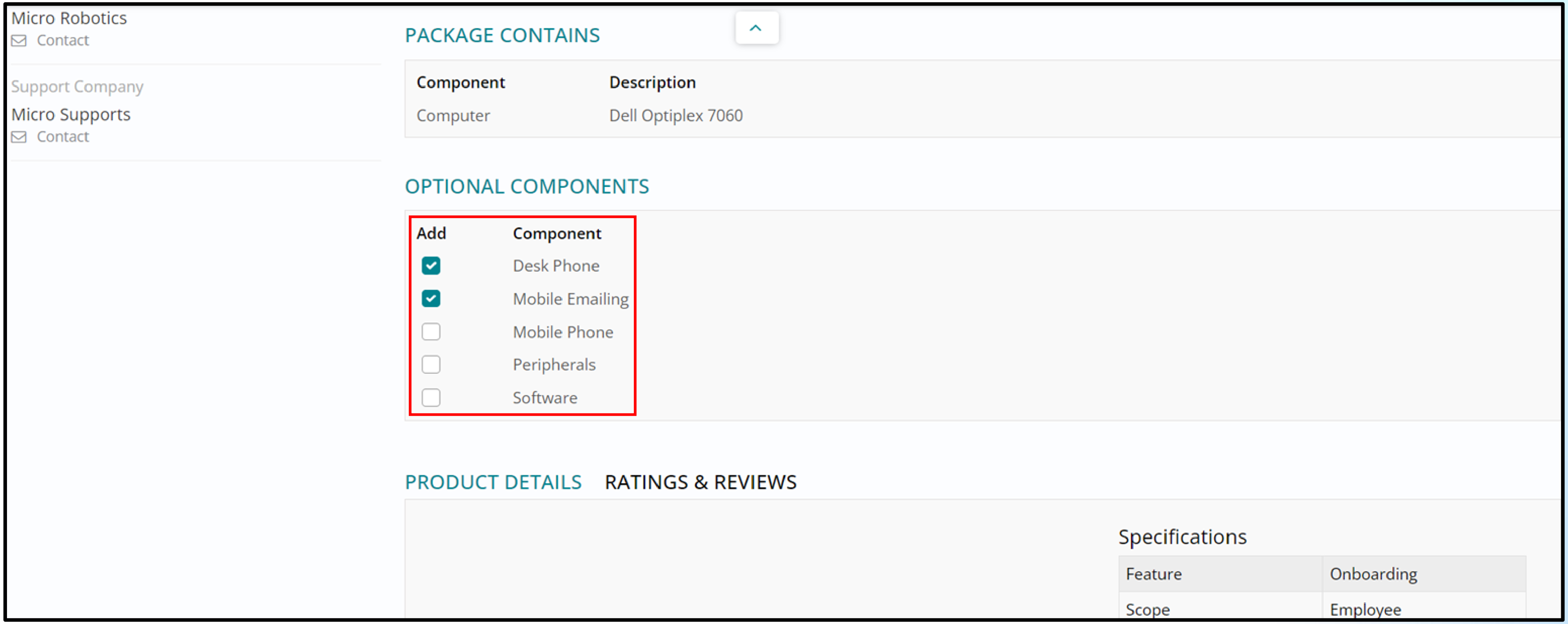
Offering Details

- You can view the offering details such as its description, optional components, contacts, specifications, reviews and ratings.
- Scroll down to view the complete offering details.



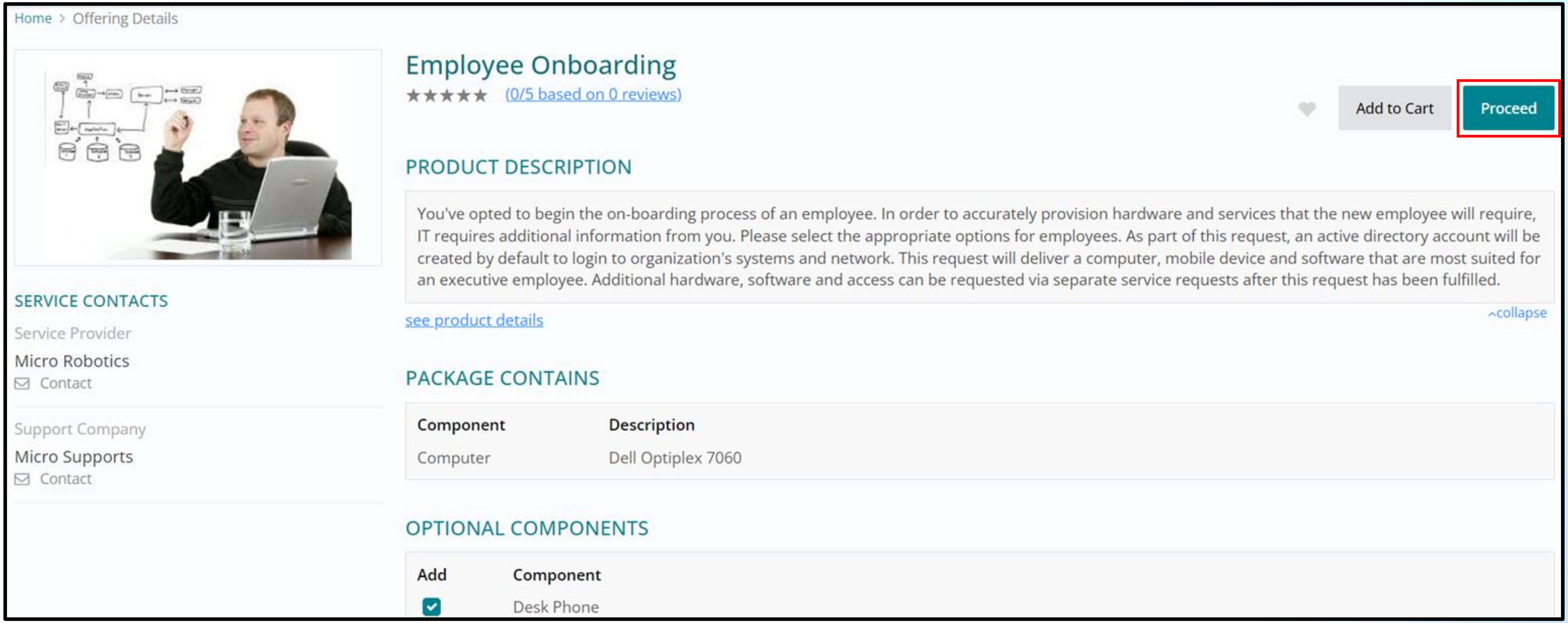
Components Selection

- A service offering can have multiple components, which includes the core component and the optional components.
- The core component is selected by default whereas you can click and select from the list of available optional components.



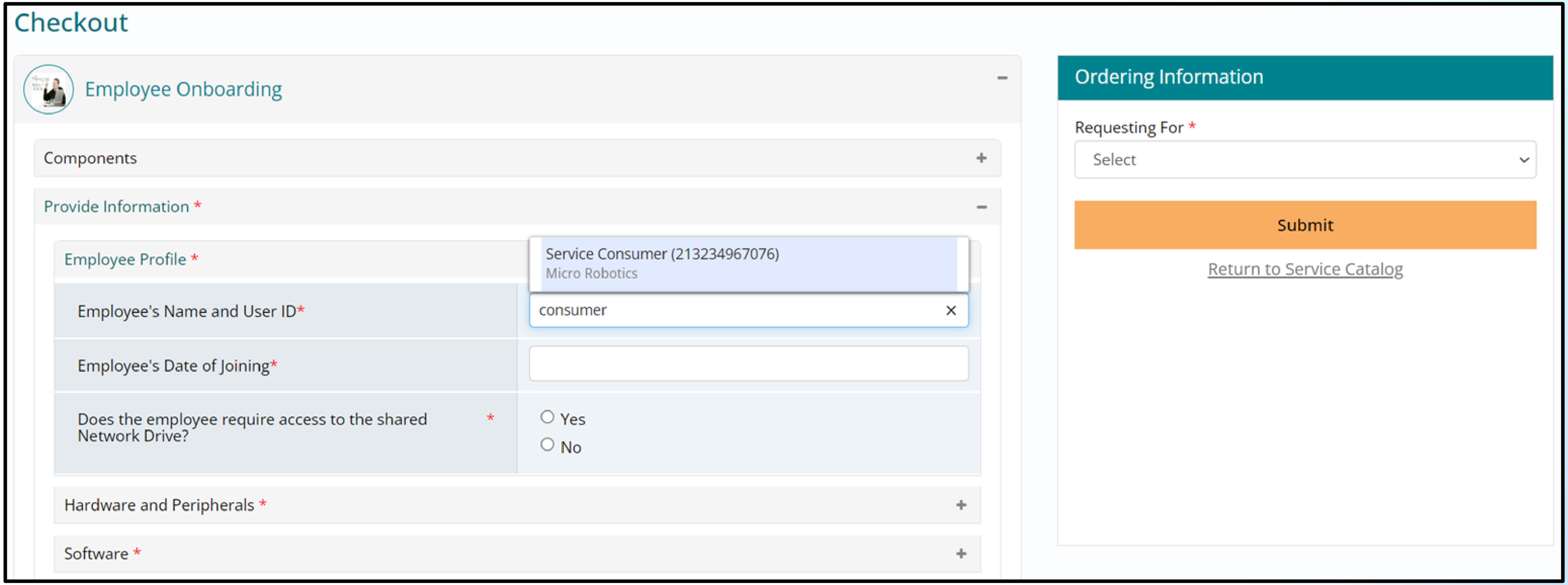
Proceed to Checkout section

- Click on Proceed , to move to the next section and provide information against the selected service offering.
- Alternatively, Add to Cart provides you the option to place the order at a later point in time or order multiple offerings together.



Checkout - Provide Information

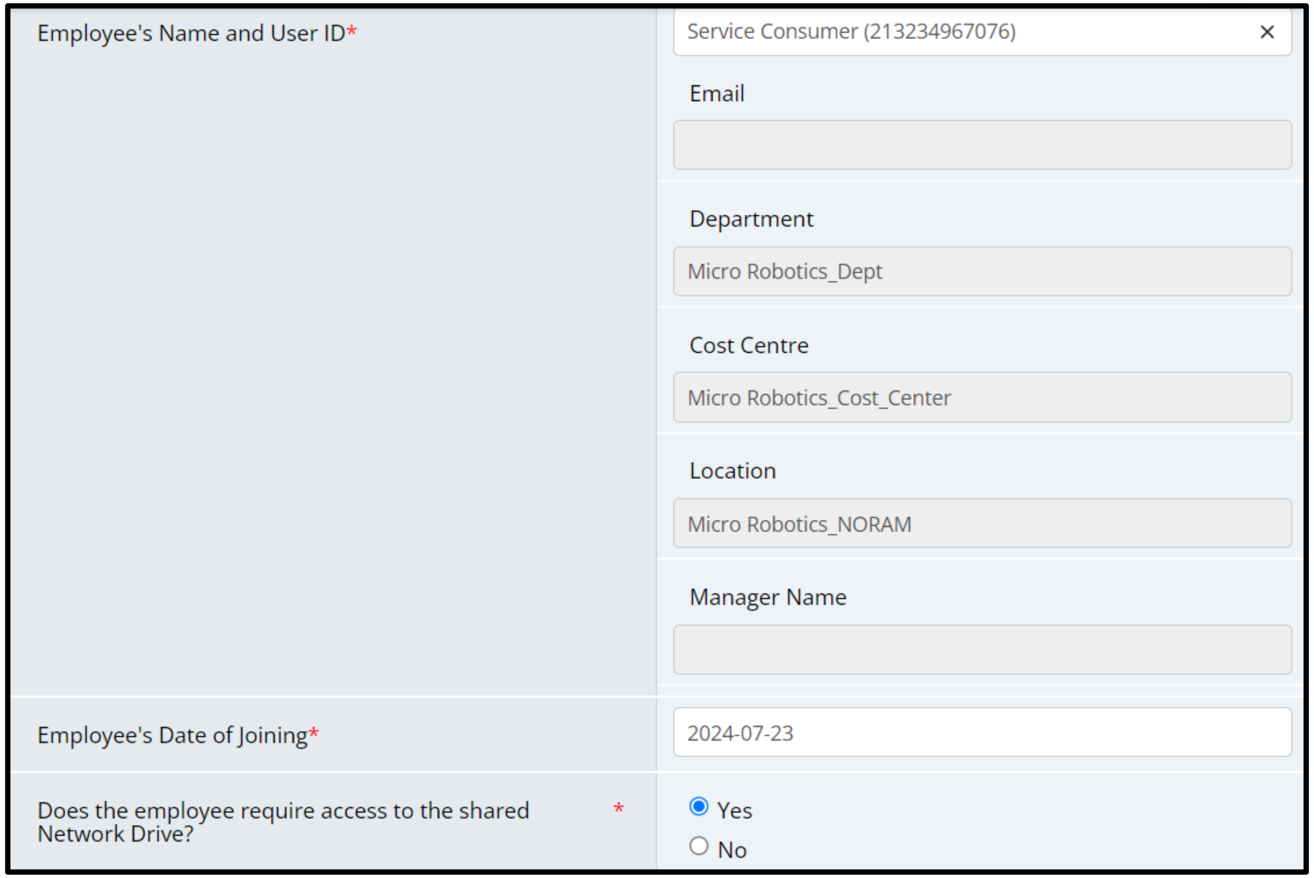
- Expand the provide information section and type in ‘consumer’ followed by selecting Service Consumer.
- Service Consumer is the user which you are logged in with; in case you are using a different user, select that one instead.



Checkout - Provide Information

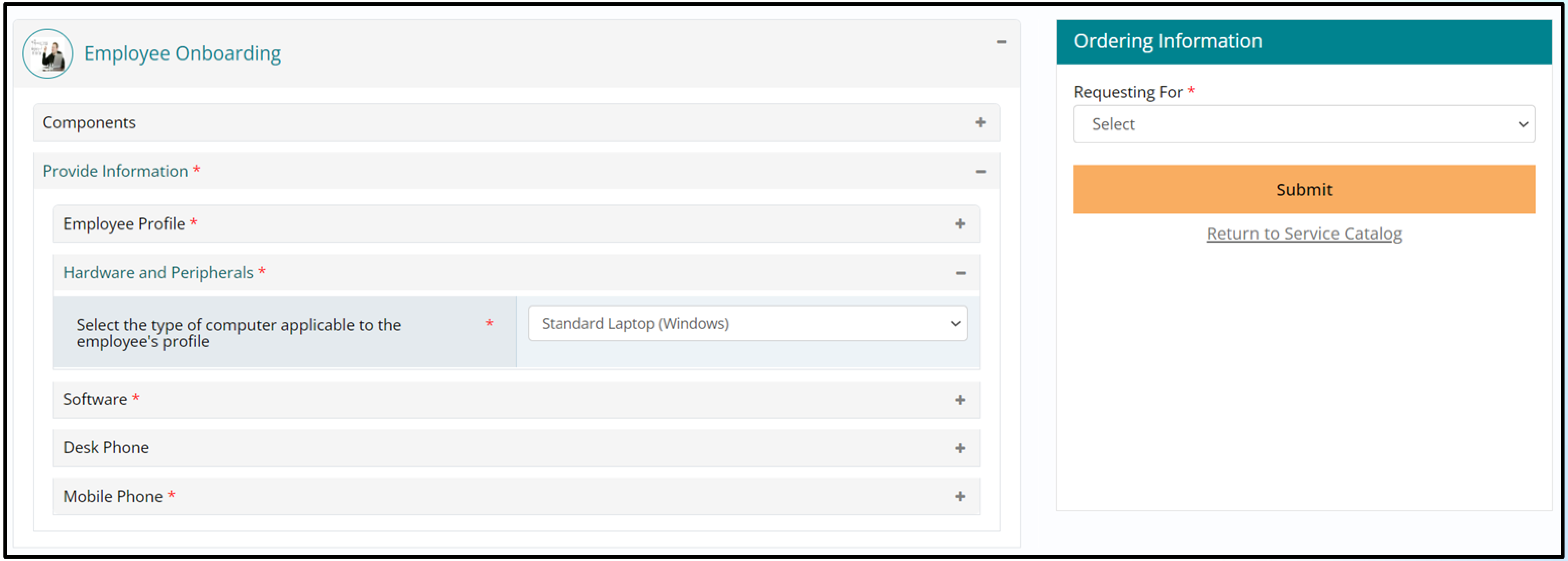
- Upon selecting Service Consumer as the response to the Employee's Name and User ID question, you will see that the consumer's department, cost centre, location details are populated automatically from the foundation data.

- Further, provide responses to the questions that follow. The asterisk symbol indicates that a response is mandatory.



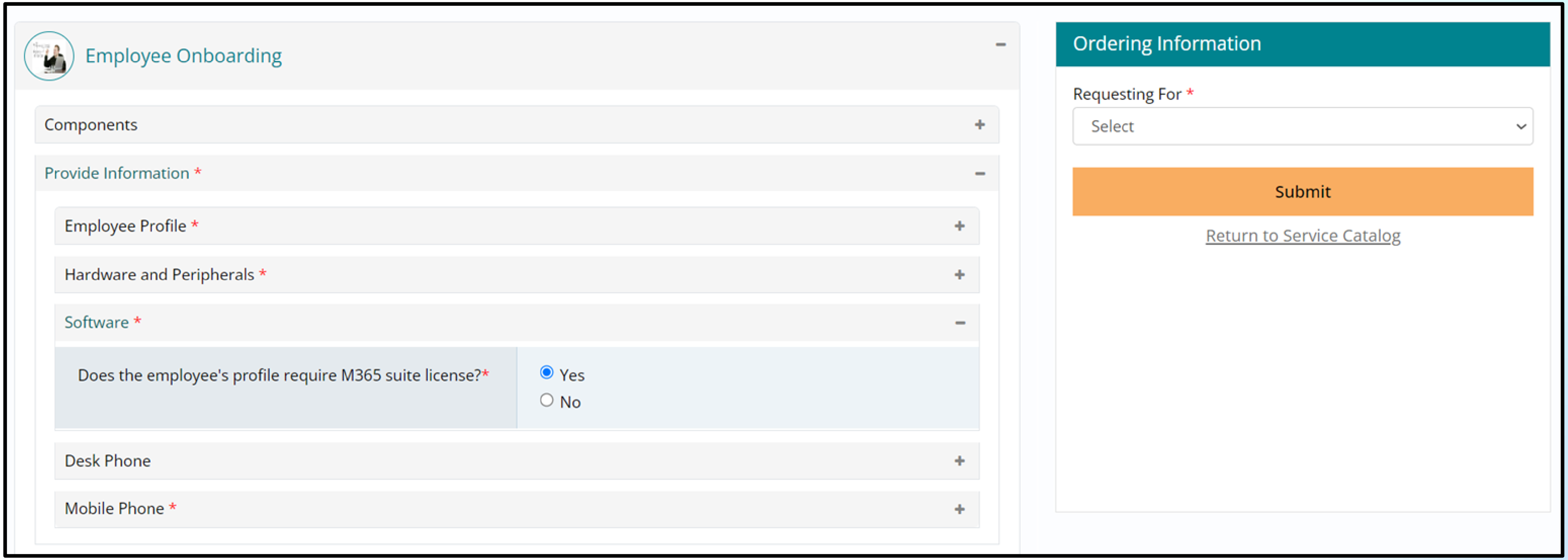
Checkout - Provide Information

- Expand the next section to which response is mandatory and provide the details, in this case Hardware and Peripherals.



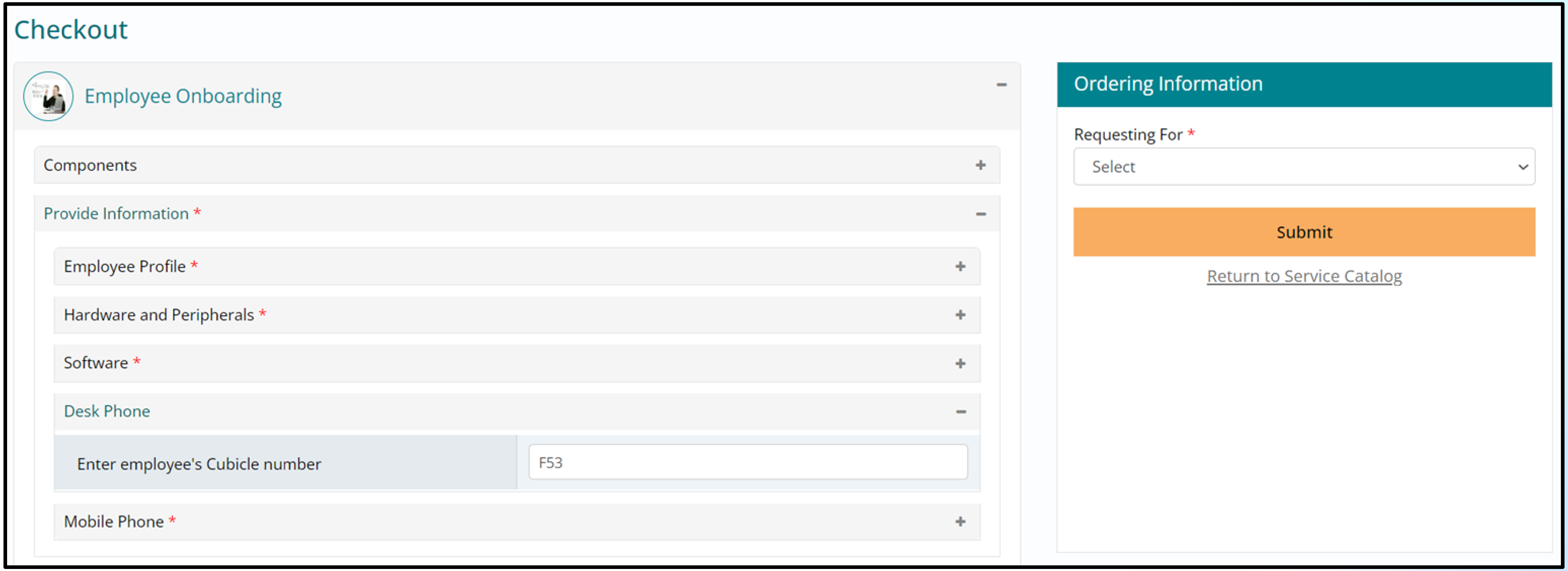
Checkout - Provide Information

- Repeat the same by providing a response for the Software section.



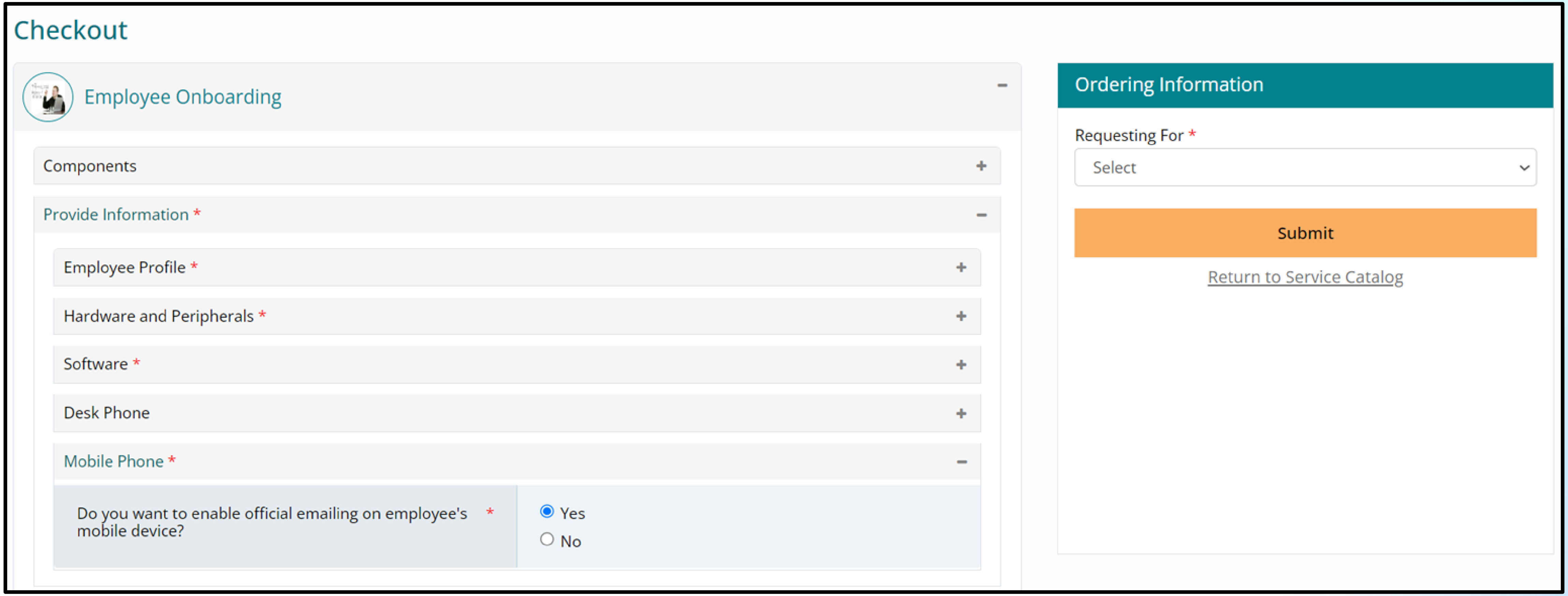
Checkout - Provide Information

- In this case, the Desk Phone section is not mandatory, but you may choose to type in the cubicle number for desk phone delivery.



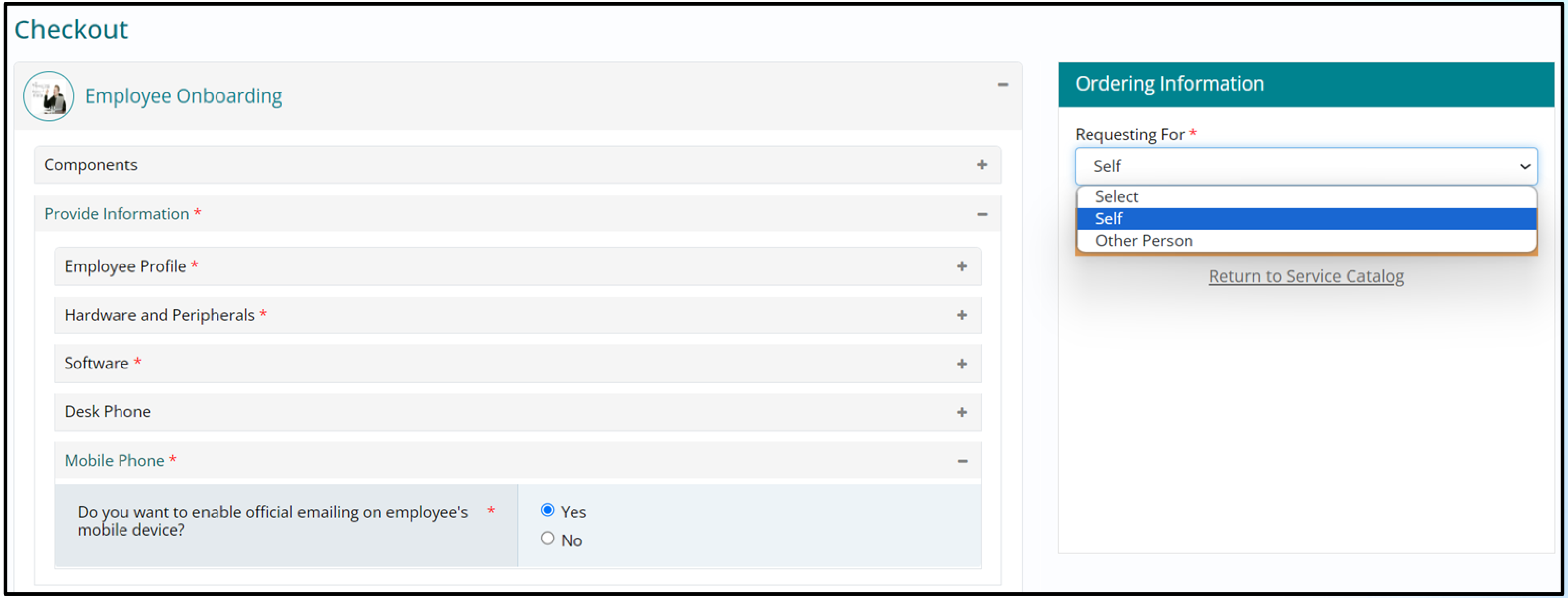
Checkout - Provide Information

- The Mobile Phone section is the last one to be filled; select from the available options to record the responses.
- You can choose to expand each section to check the responses provided as well.



Ordering Information - Self / On Behalf

- Under the Ordering Information section towards the right of your screen, select Self to place the order for yourself.
- Selecting Other Person will prompt you to provide the user information for whom you would like to place the order.
- Click on Self and then on Submit button to complete placing the order.



My Requests

- Upon placing the order / request, you will automatically be navigated to the My Requests section wherein you can view the latest request on top of the list view.
- If you had placed the request on behalf of someone else, you would see the request under Others section.

Home > My View

My Requests | My Assets/CIs | My Notifications

Self | Others | Watching

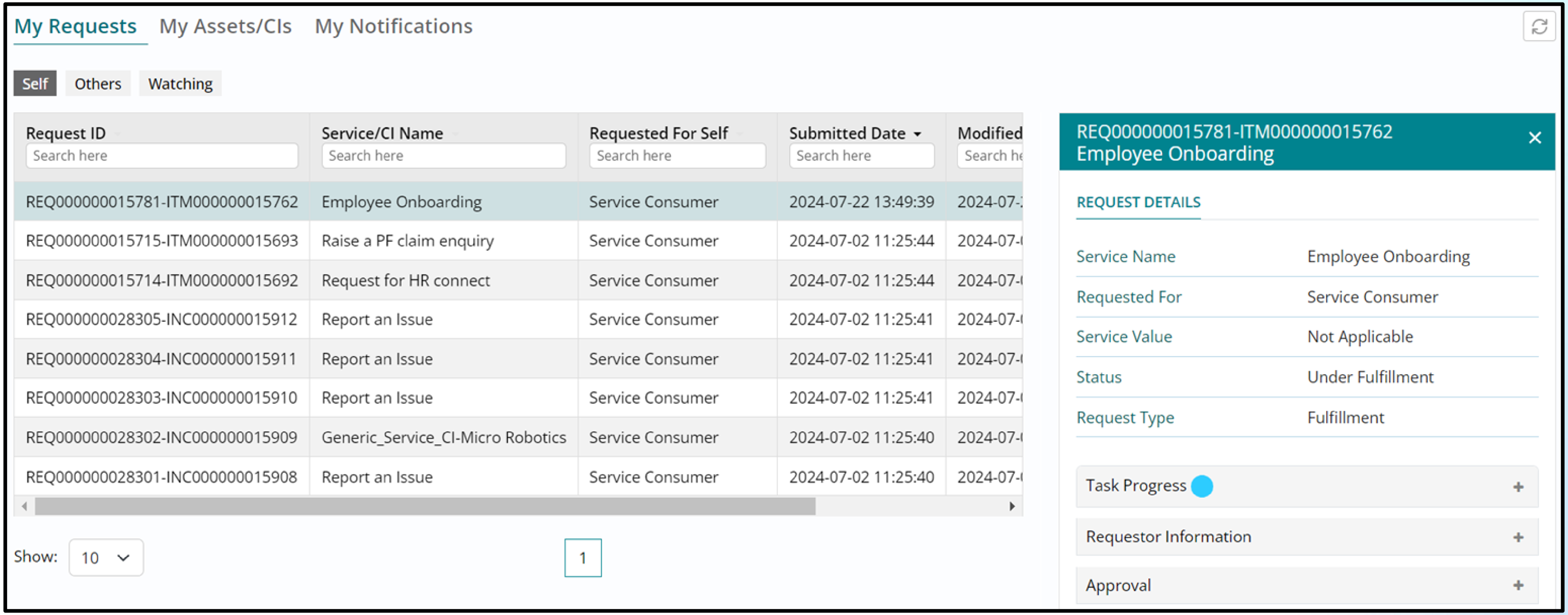
Request ID	Service/CI Name	Requested For Self	Submitted Date	Modified Date	Status
Search here	Search here	Search here	Search here	Search here	8 selected
REQ000000015781-ITM000000015762	Employee Onboarding	Service Consumer	2024-07-22 13:49:39	2024-07-22 13:49:39	Under Fulfillment
REQ000000015715-ITM000000015693	Raise a PF claim enquiry	Service Consumer	2024-07-02 11:25:44	2024-07-02 11:25:44	Under Fulfillment
REQ000000015714-ITM000000015692	Request for HR connect	Service Consumer	2024-07-02 11:25:44	2024-07-02 11:25:44	Under Fulfillment
REQ000000028305-INC000000015912	Report an Issue	Service Consumer	2024-07-02 11:25:41	2024-07-09 10:45:19	Submitted
REQ000000028304-INC000000015911	Report an Issue	Service Consumer	2024-07-02 11:25:41	2024-07-02 11:25:41	Submitted
REQ000000028303-INC000000015910	Report an Issue	Service Consumer	2024-07-02 11:25:41	2024-07-02 11:25:41	Submitted
REQ000000028302-INC000000015909	Generic_Service_CI-Micro Robotics	Service Consumer	2024-07-02 11:25:40	2024-07-02 11:25:40	Submitted
REQ000000028301-INC000000015908	Report an Issue	Service Consumer	2024-07-02 11:25:40	2024-07-02 11:25:40	Submitted

Show: 10

1

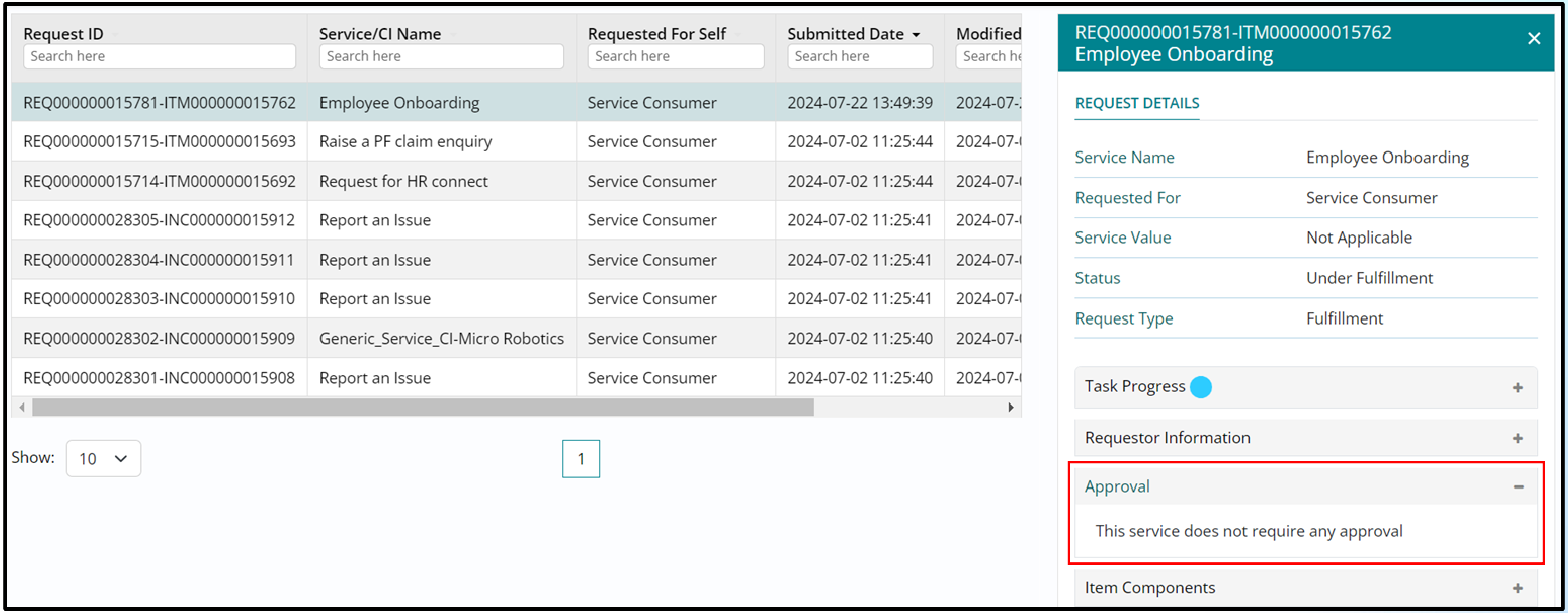
My Requests

- Click on the request placed and you will see the request details open on the right of your screen.
- You can scroll down and expand each section of the selected request to browse through its details.



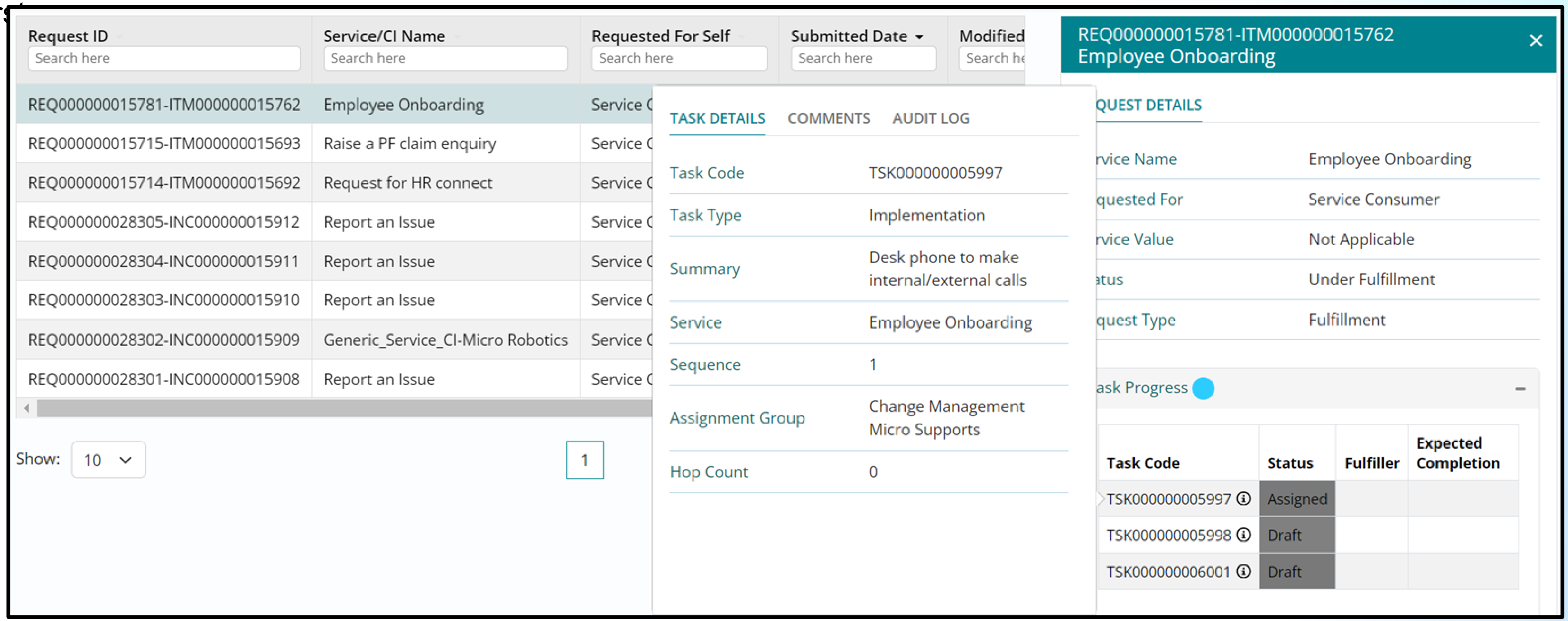
My Requests

- The status of the request reads Under Fulfillment instead of Pending Approval, meaning that this service offering does not require any approval.
- Expand the Approval section to confirm the same and you can view the approval not required message.



My Requests - Task Progress

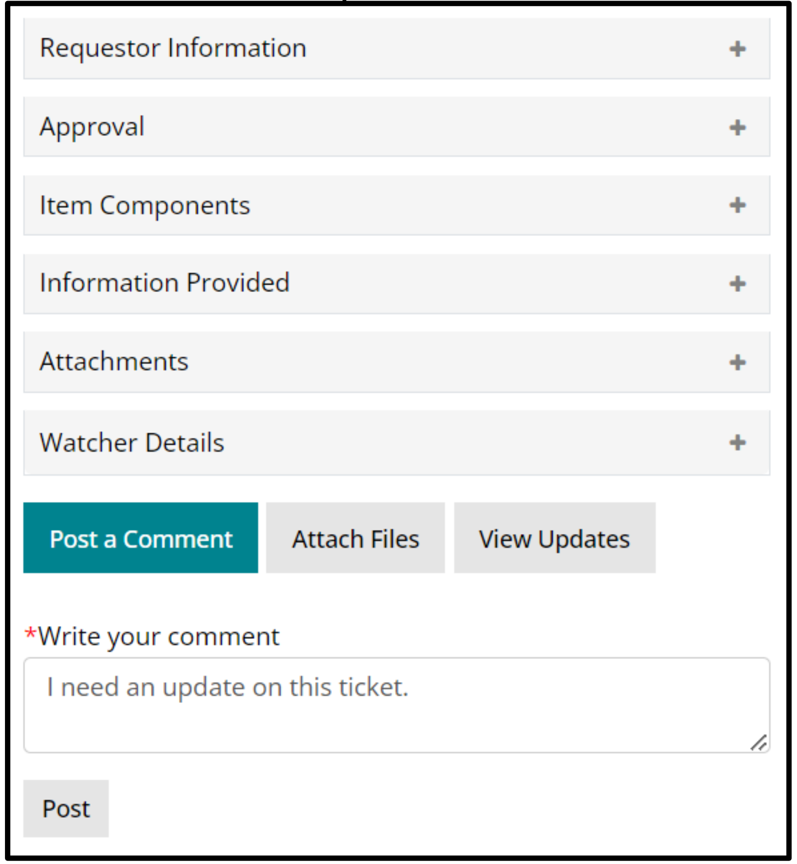
- Scroll upwards and expand the Task Progress section to view the pre-configured fulfillment tasks that are a part of this request.
- Clicking on the information symbol beside the Task Code will show a glimpse of the task details.
- The first task is in Assigned status and the other two are in Draft implying that they will change status upon completion of the fir

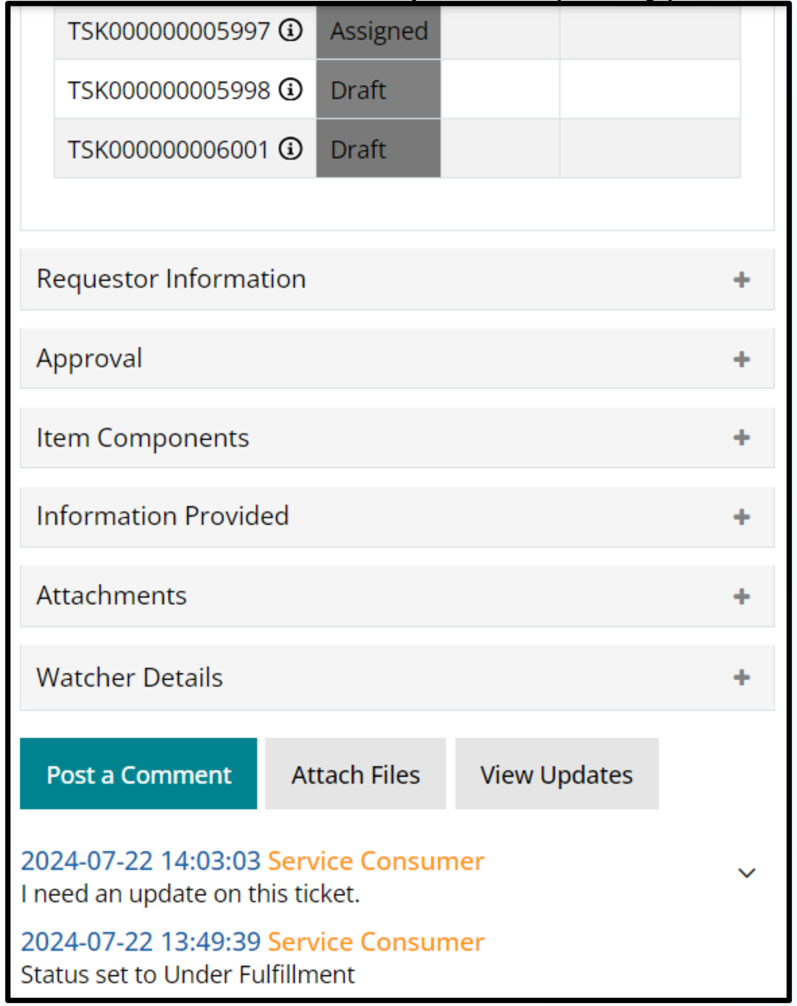


HCLSoftware

My Requests - Comment and Updates

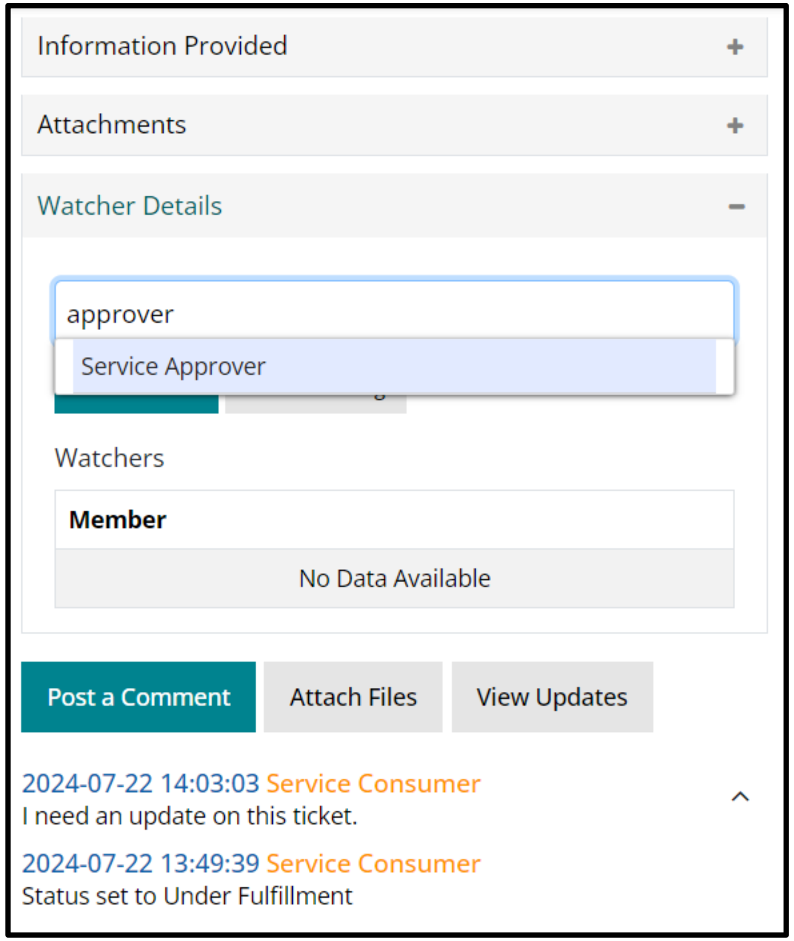
- Left image - Scroll to the bottom of the page and click on Post a Comment followed by typing a comment and clicking on Post.
- Right image - Click on View Updates to view the comment posted and other status updates (if any) on the request.

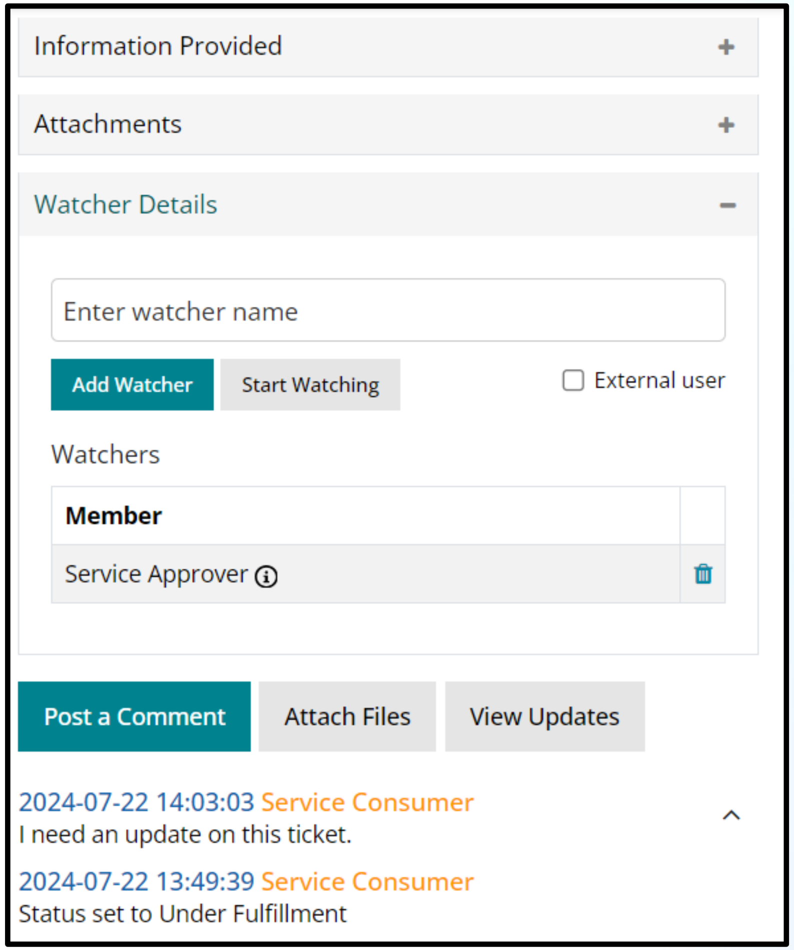




My Requests - Watcher Details

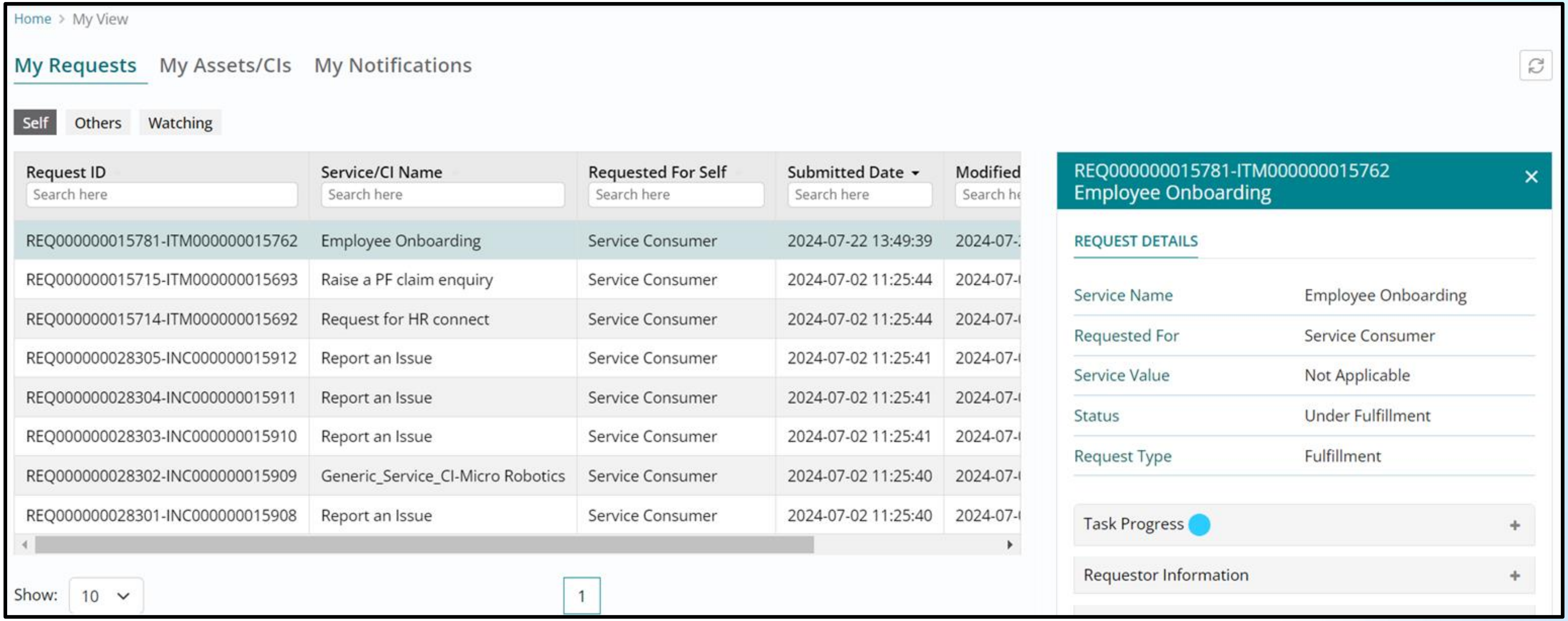
- Left image - Expand Watcher Details section and type in ‘approver’ followed by selecting Service Approver and clicking on Add Watcher. This will ensure that the added watcher will receive all the request updates via notifications.
- Right image - The watcher is added, and the details are visible under Watcher Details section of this request.





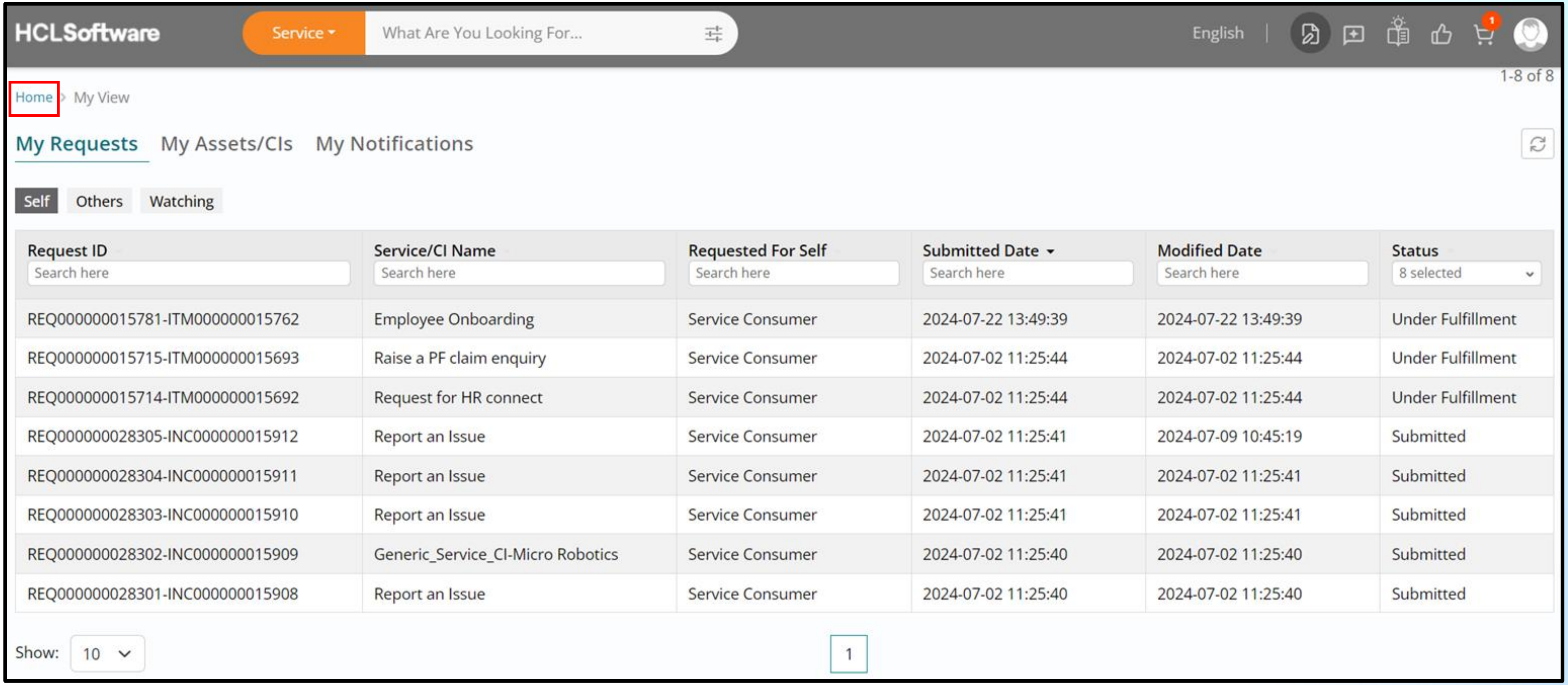
My Requests

- Once you have browsed through details of the request, scroll up the screen and click on cross button to close the request details visible towards the right.
- This will show the complete list view and you can choose to view the details of other requests as well.



Navigation to Homepage

- Click on Home hyperlink on the top left of your screen to navigate back to the consumer homepage / initial landing page.



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REQ000000028304-INC000000015911	Report an Issue	Service Consumer	2024-07-02 11:25:41	2024-07-02 11:25:41	Submitted
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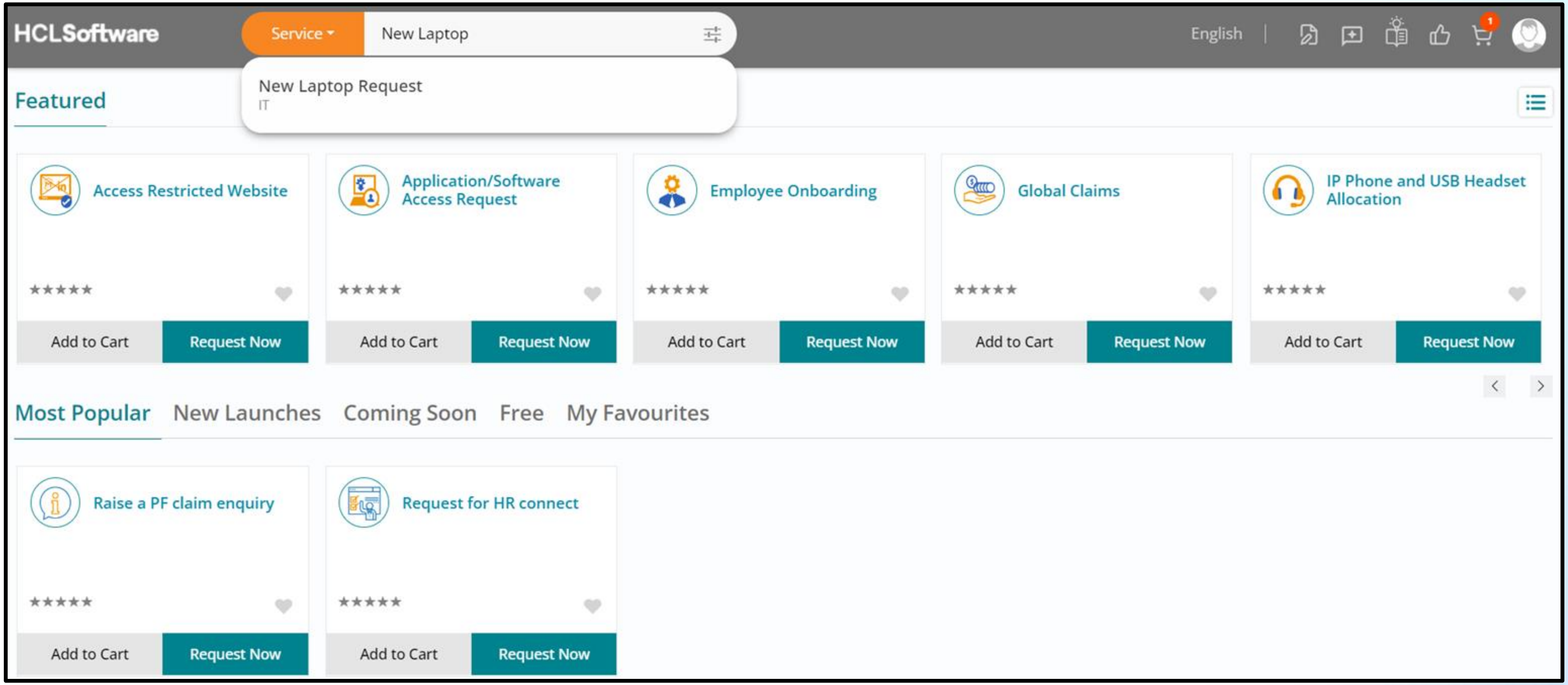
REQ000000028302-INC000000015909	Generic_Service_CI-Micro Robotics	Service Consumer	2024-07-02 11:25:40	2024-07-02 11:25:40	Submitted
REQ000000028301-INC000000015908	Report an Issue	Service Consumer	2024-07-02 11:25:40	2024-07-02 11:25:40	Submitted

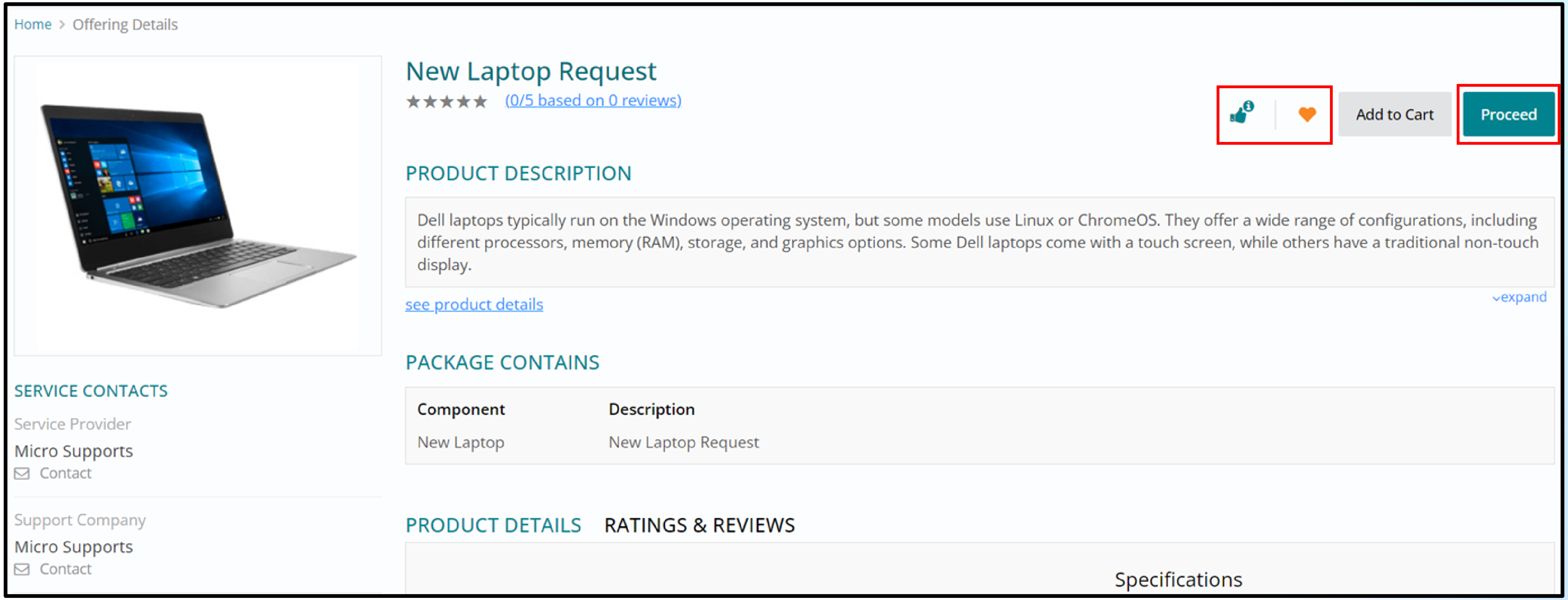
Global Search

- Since we placed an order without an approval the last time around, lets try doing that for another request which has an approval configured against it this time.
- Use the global search and type new laptop followed by selecting the New Laptop Request offering.



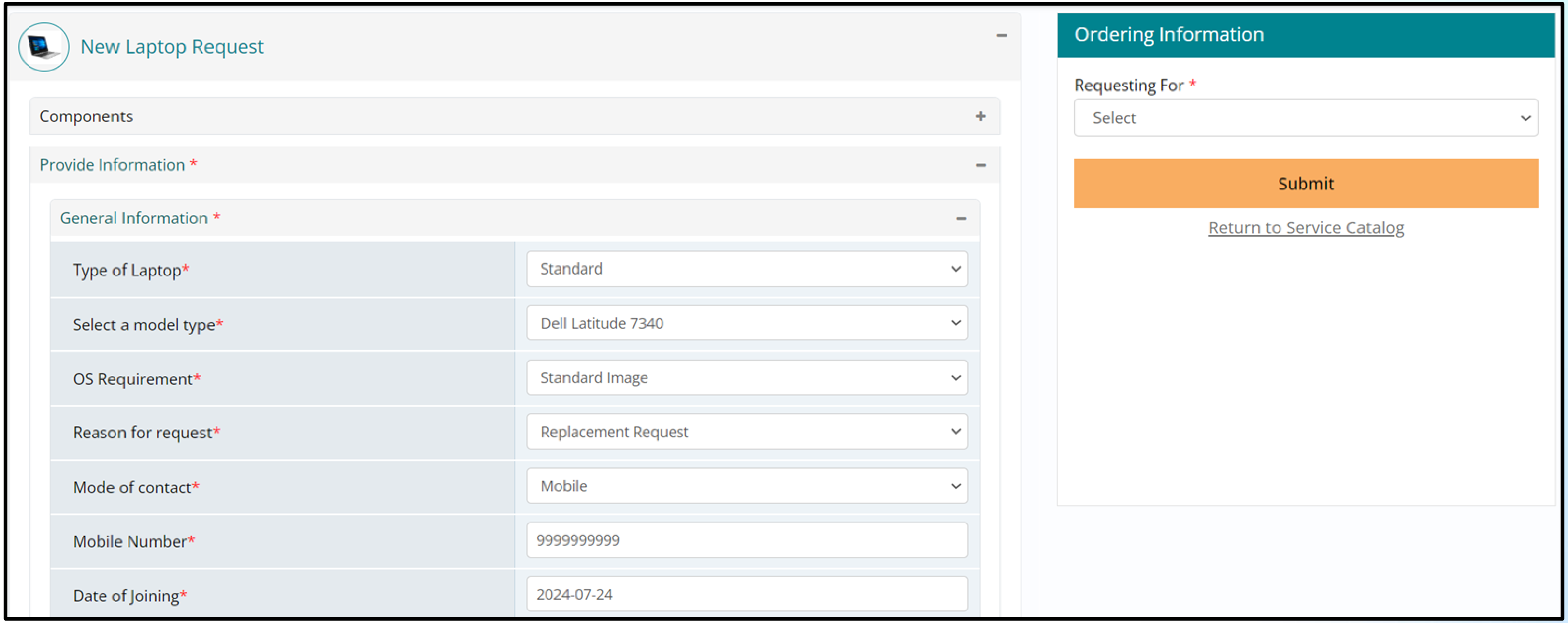
Offering Details - Approval Required and Add to Favourites

- You can view the offering details. The two options to the left of the Add to Cart and Proceed buttons indicate Approval Required (thumb with the information icon) and Add to Favourites (heart icon).
- Upon clicking on the heart icon, the offering is added to My Favourites section on your homepage.
- Click on Proceed.



Provide Information - General Information

- Expand the General Information section and provide responses against each of the mandatory questions.

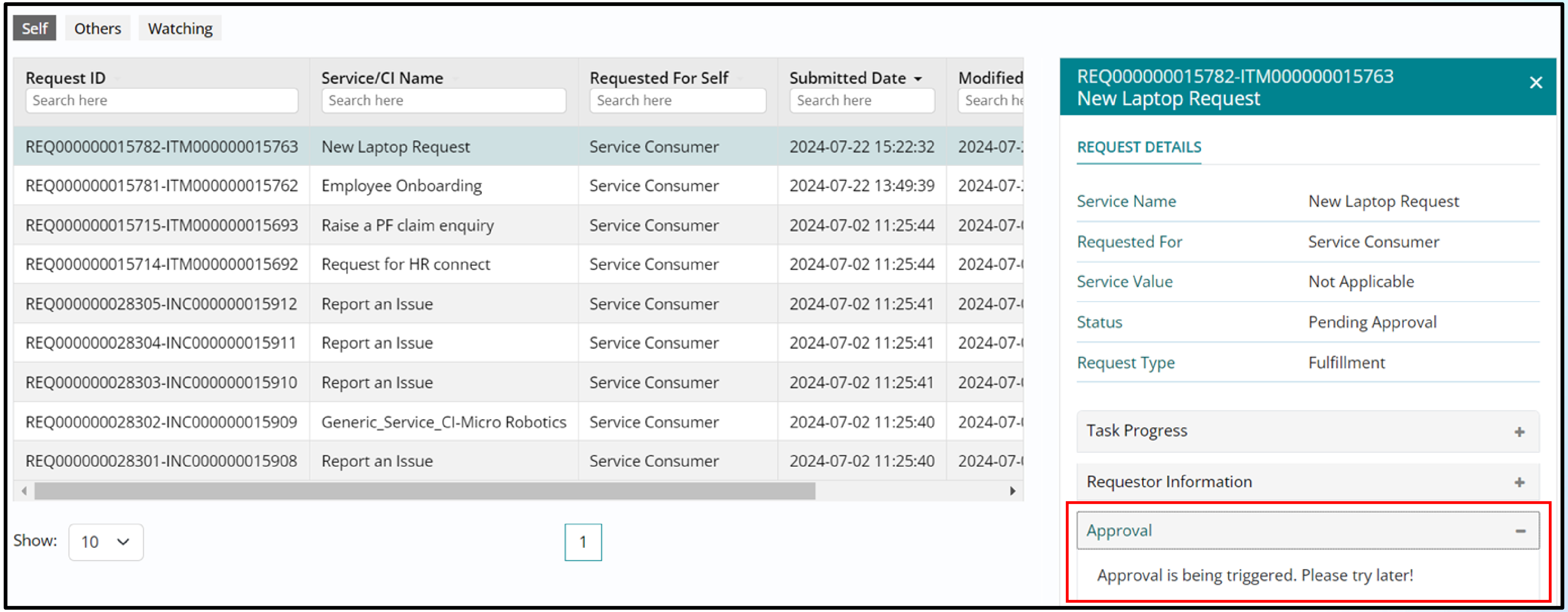


Ordering Information

- Expand the Delivery section and type the shipping address to which the package needs to be delivered.
- Once done, under Ordering Information on the right of your screen, select Self in Requesting For followed by clicking on Submit to place the order / request.

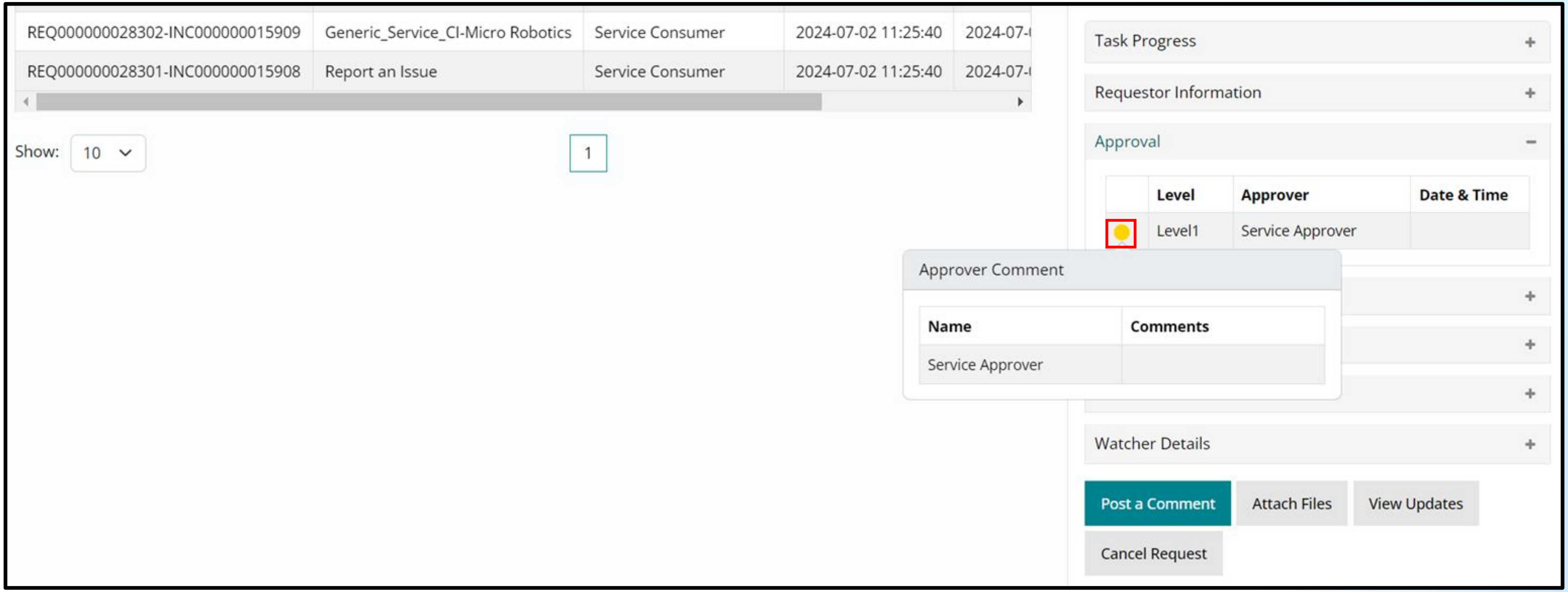
My Requests - Approval Trigger

- Upon placing the order / request, you will be automatically navigated to the My Requests section wherein you can view the latest request on top of the list view.
- Click on the request to open its details on the right followed by expanding the approval section. This offering had an approval configured which can be seen here since it is in process of being triggered by the system.



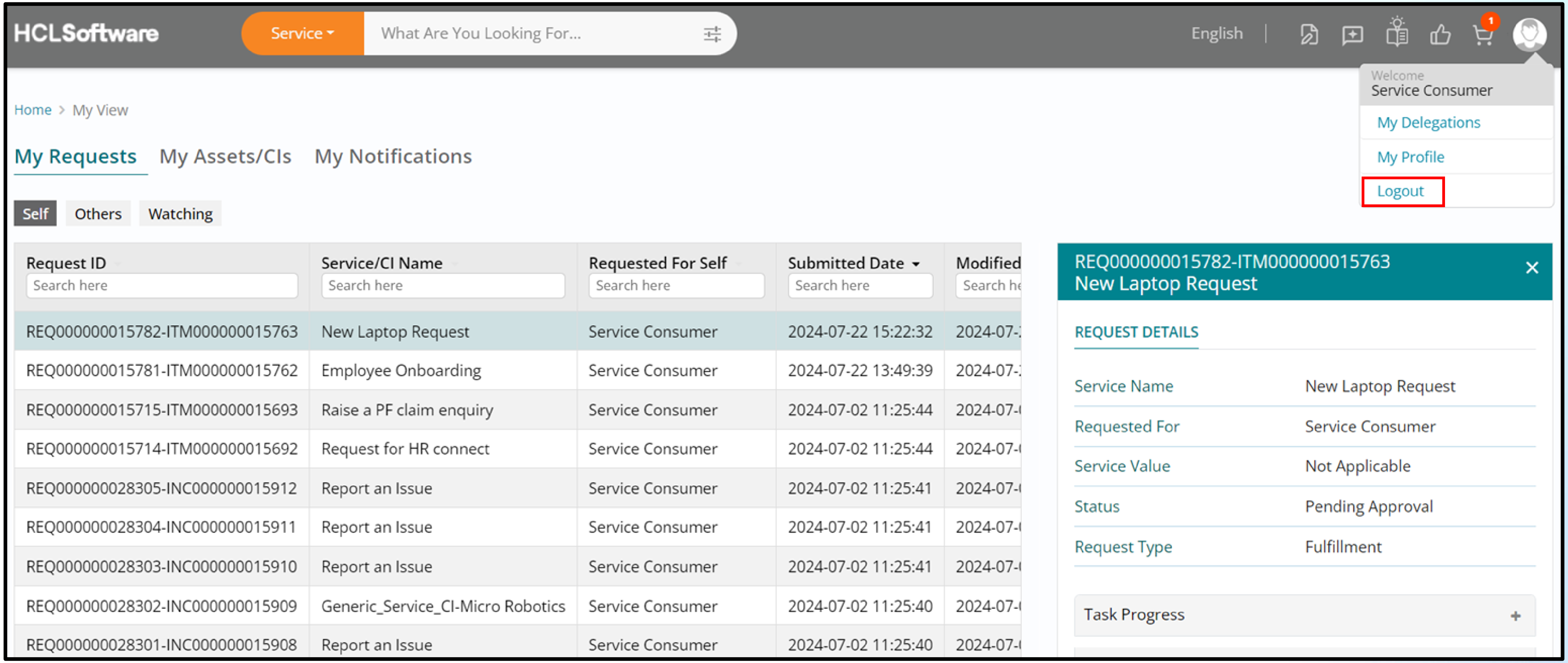
My Requests - Approval Details

- Wait for a couple of minutes and refresh the page, post which you can scroll down the request details and expand the Approval section.
- Click on the amber indicator to view the name of the approval group / individual with whom the approval is pending; in this case it is Service Approver i.e., the approval user (one of the four role-wise login credentials passed onto you for this trial).



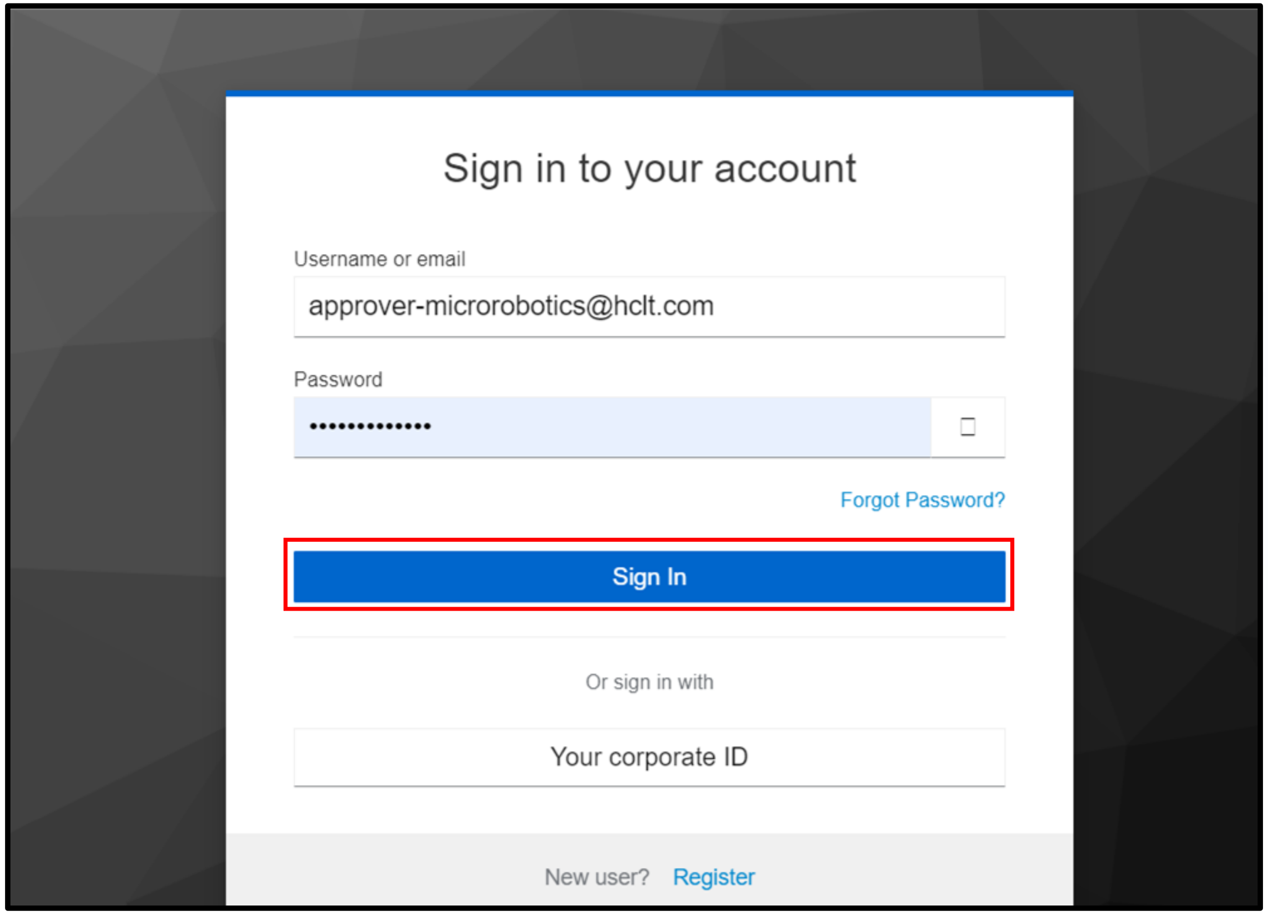
Logout of Consumer Role

- Scroll up and click on the My Account button (User icon) on the top right of your screen followed by clicking on Logout.
- This will log you out of the Service Consumer role, you are currently logged in with.



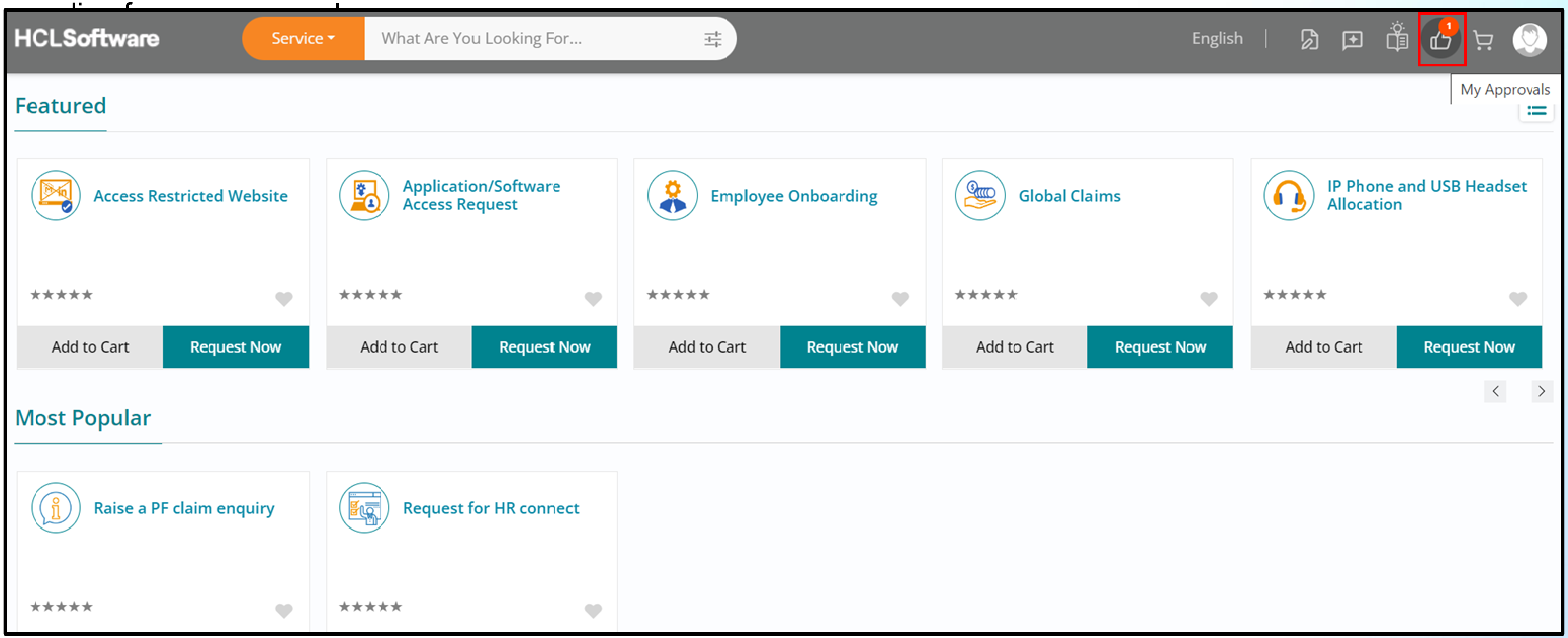
Login using Approver Role

- Use the approver role credentials to log into the instance.
- Click on Sign In upon entering the credentials.



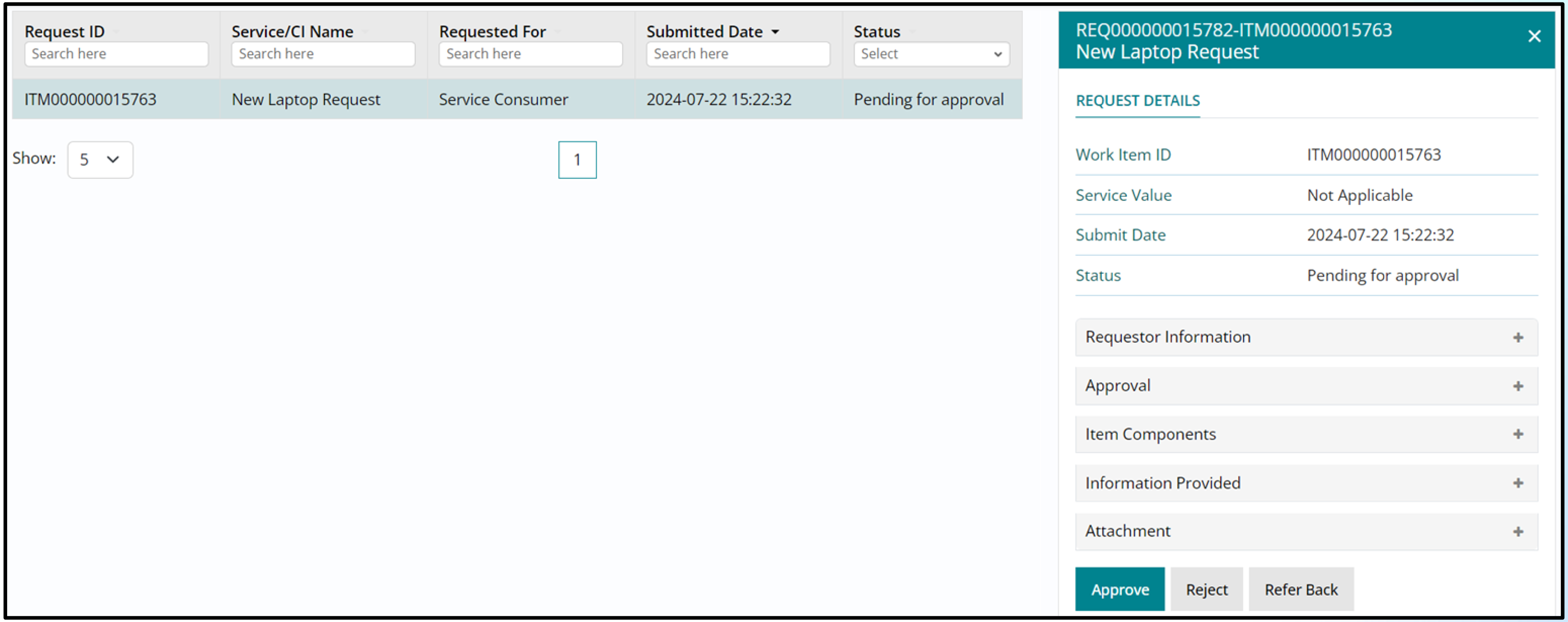
Landing Page

- Upon logging into the HCL BigFix Service Management consumer homepage, you will see all the service offerings available for consumption.
- Navigate to the top right of the BigFix Service Management page and click on My Approvals button to view the requests



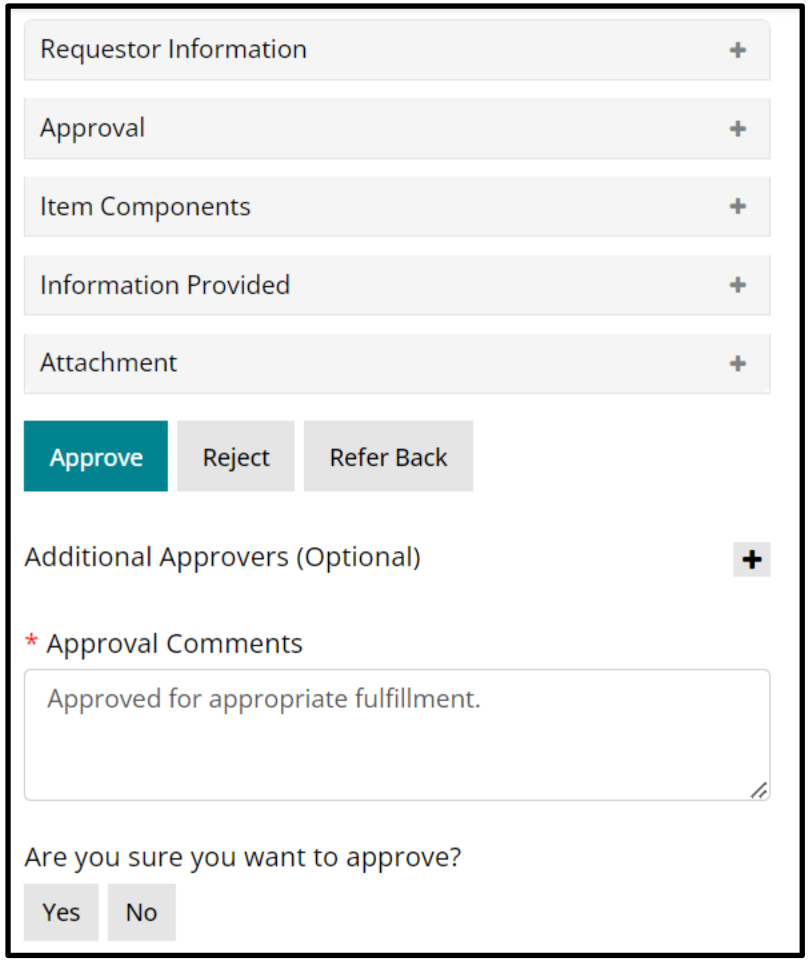
My Approvals

- Click on the request pending for approval from the list view.
- You may choose to expand each section under the Request Details section to browse through all the information.



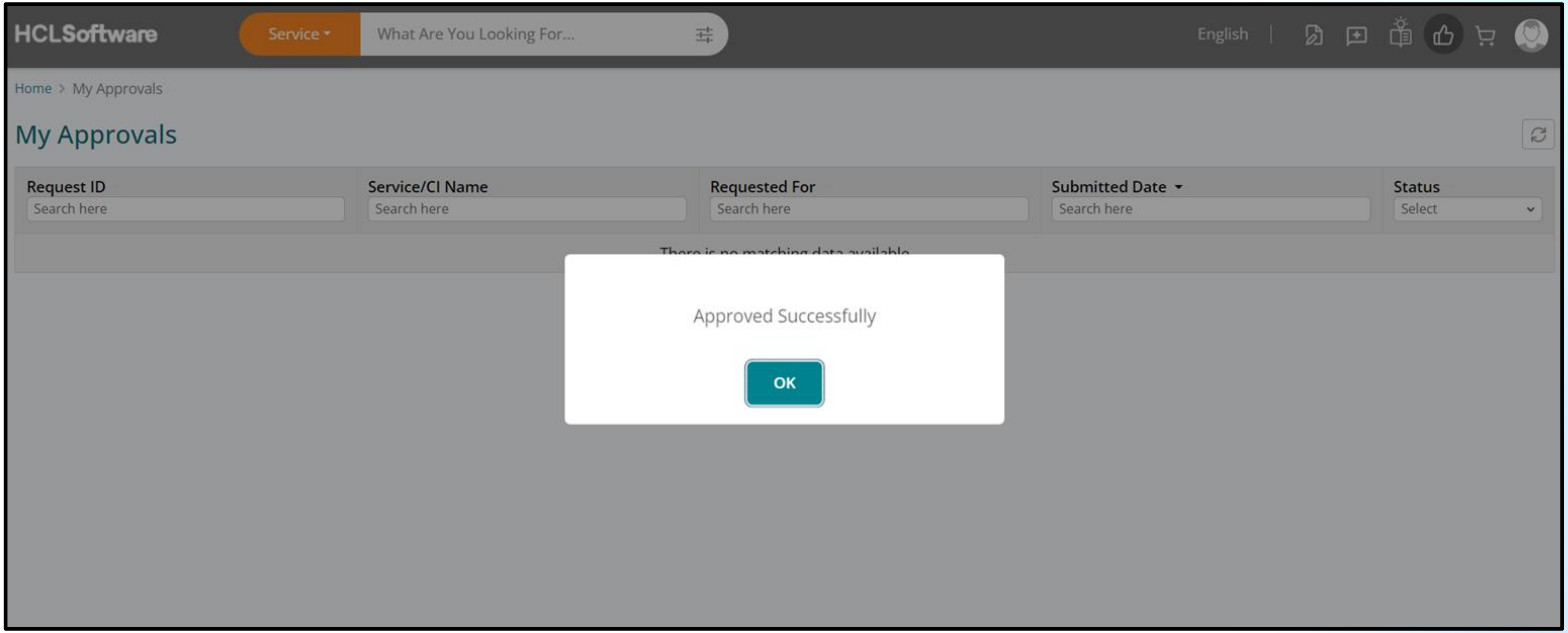
My Approvals

- There are one of three actions that you can take on a request pending approval, namely Approve, Reject and Refer Back.
- Click on Approve and type in your approval comments before clicking on Yes to provide approval on the request.



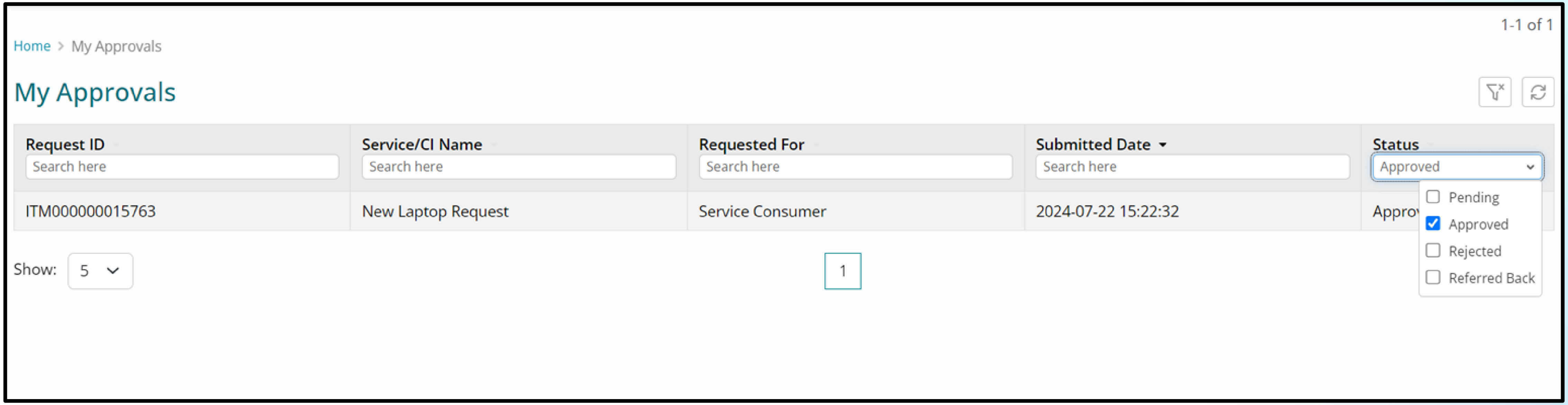
Approved Successfully

- Upon providing your approval, you will see a confirmation message stating that the request was approved successfully.
- Click on OK and you will navigate back to the My Approvals list view.



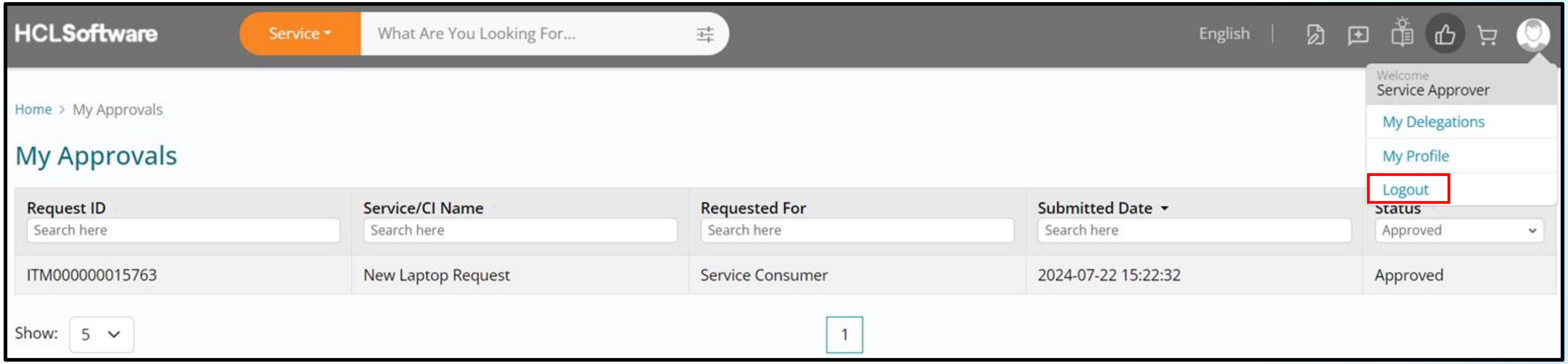
Approved Requests

- The filters on My Approvals list view show the requests pending approval by default.
- You can filter the Status column and choose to view the request you just approved.



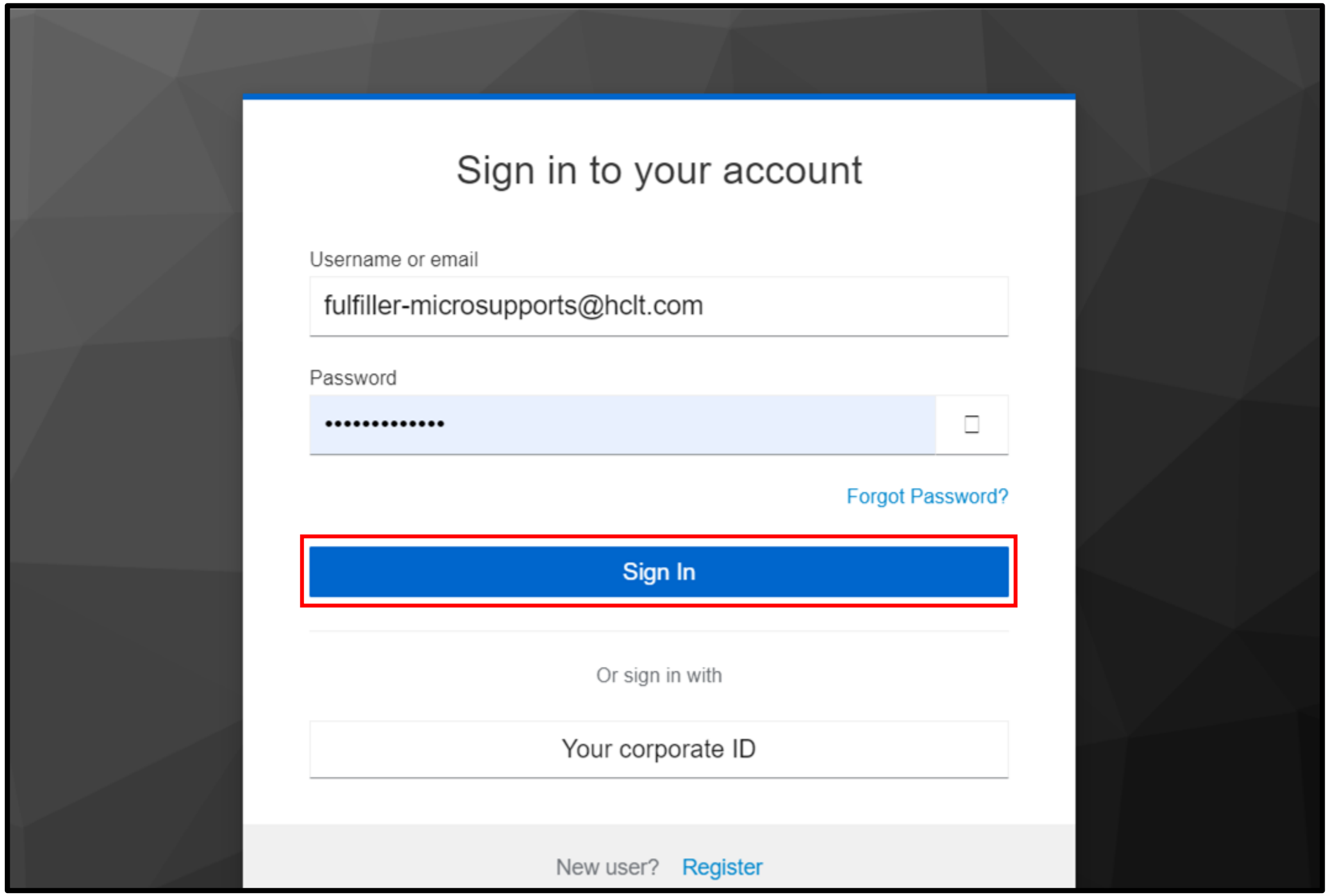
Logout of Approver Role

- Click on the My Account button (User icon) on the top right of your screen followed by clicking on Logout.
- This will log you out of the Service Approver role you are currently logged in with.
- We can proceed to using the fulfiller role next for request fulfillment.



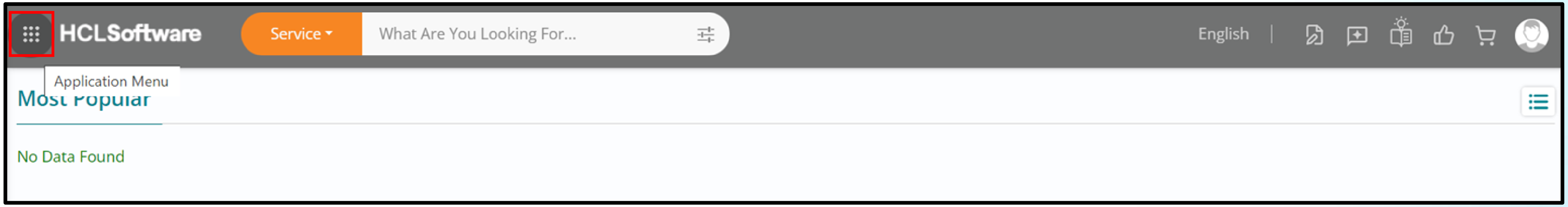
Login using Fulfiller Role

- Use the fulfiller role credentials to log into the instance.
- Click on Sign In upon entering the credentials.

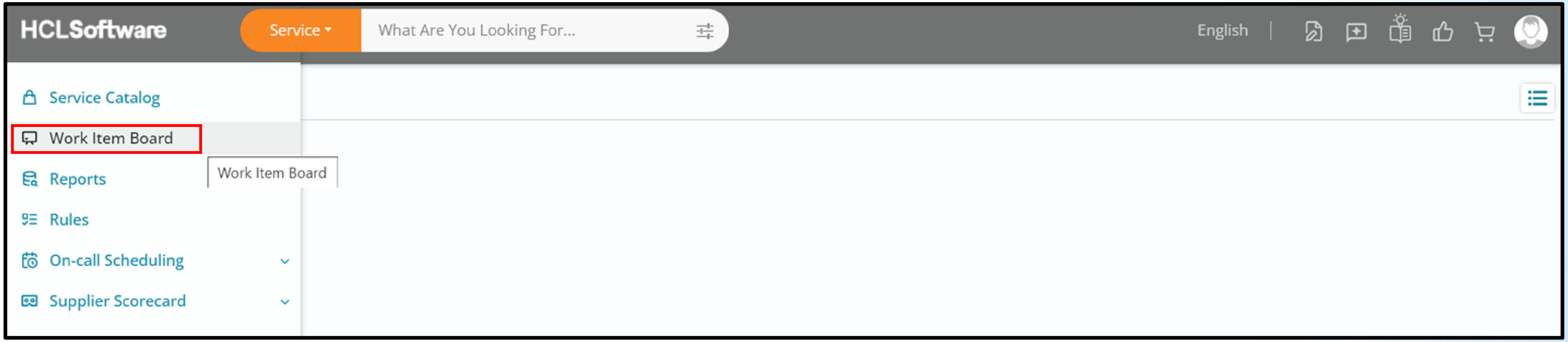


Landing Page - Left Navigation Pane

- Upon landing on the homepage, navigate to the left top of your screen and click on Application Menu.
- The reason you see No Data Found on the homepage is because, for the purpose of this trial, there are no offerings available for consumption by the fulfiller role.



- Click on Work Item Board from the left navigation pane.



Work Item Board - List View

- The work item board of HCL BigFix Service Management provides a fulfiller with the list view of different types of tickets.
- In this case, by default, you will land on Assigned to me sub-section under Task section.
- You can view all the tasks - be it fulfillment tasks, incident tasks, problem tasks and change tasks in this list view.

Home > Work Item Board

1-4 of 4

Task(4) Fulfillment Incident Problem Change Appointment Action

Assigned to me | Assigned to my groups | All

Last 30 days

	Task ID	Work Item ID	SLA Status	Service Name	CI Name	Company	Summary	Status	Work Item	Reported On
	Search here	Search here		Search here	Search here	Search here	Search here	3 selected	Select	Search here
	TSK000000005895	INC000000015912		Report an Issue	Generic_Service_CI-Micro Robot...	Micro Robotics	Reproduce the issue	Assigned	Incident	2024-07-02 11:25:45
	TSK000000005894	PRB000000010379			Generic_Service_CI-Micro Robot...	Micro Robotics	Validate the permanent fix	Assigned	Problem	2024-07-02 11:25:45
	TSK000000005893	PRB000000010379			Generic_Service_CI-Micro Robot...	Micro Robotics	Identify the root cause	Assigned	Problem	2024-07-02 11:25:44
	TSK000000005892	PRB000000010379			Generic_Service_CI-Micro Robot...	Micro Robotics	Investigate the issue	Assigned	Problem	2024-07-02 11:25:44

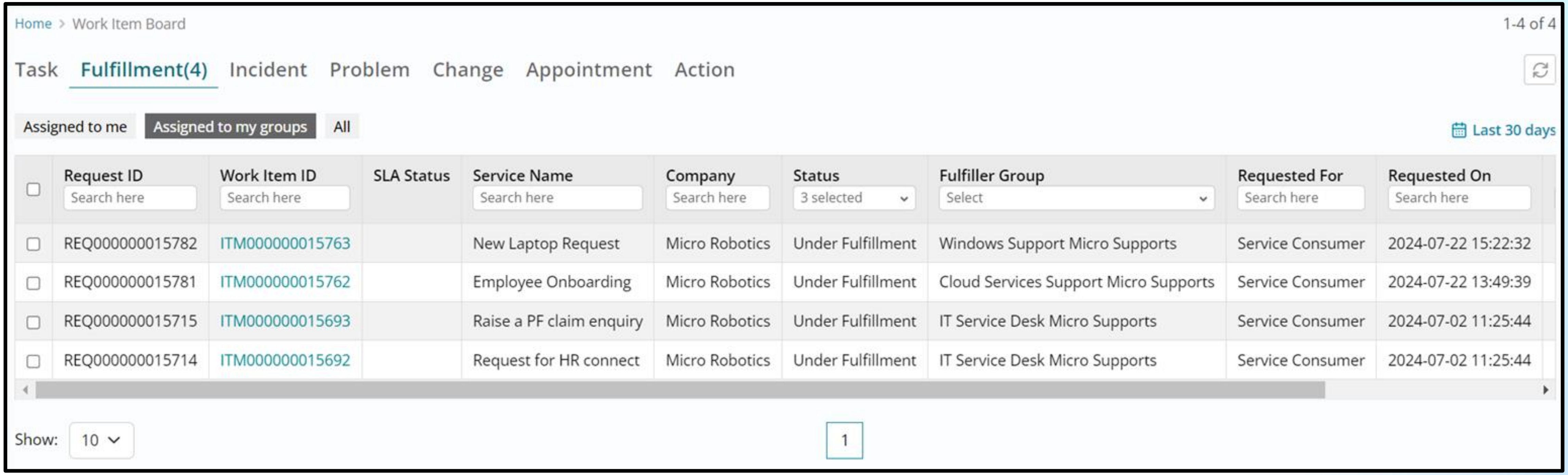
Show: 10

1

Work Item Board - List View

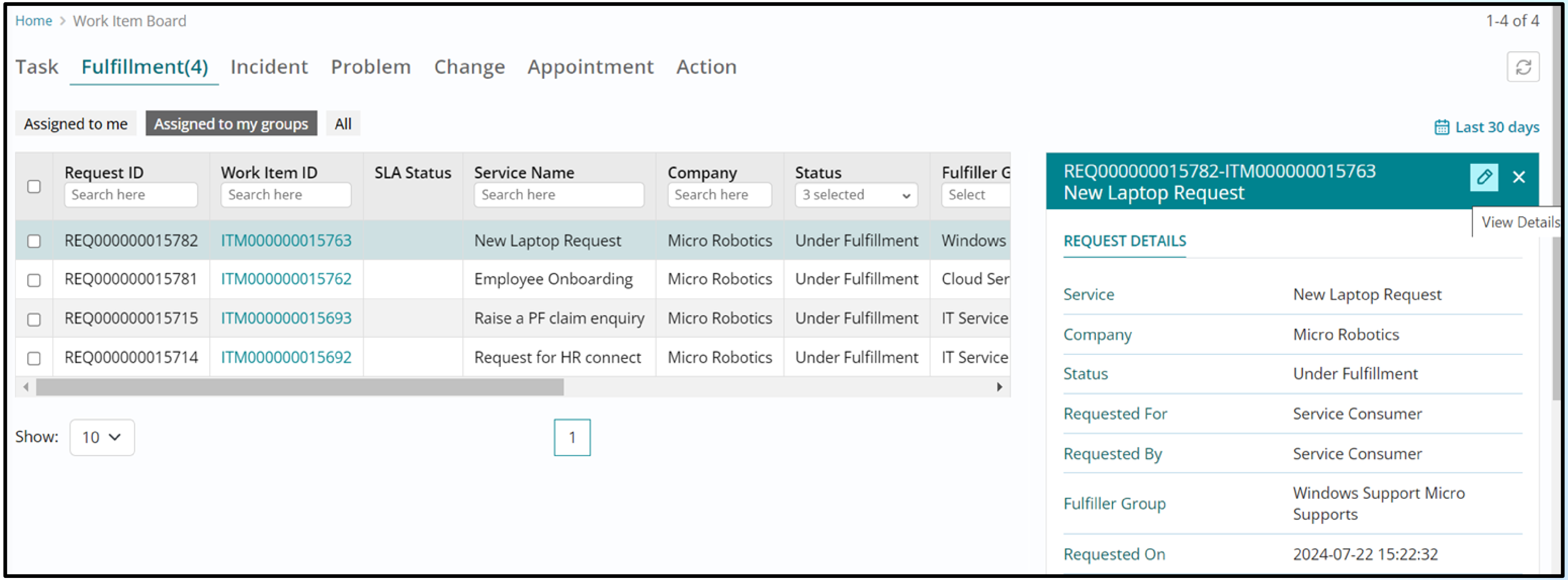
- Since we are looking to fulfill a request here, click on Fulfillment section followed by Assigned to my groups sub-section to view all the fulfillment tickets that are assigned to your group.

- The filters are set to show tickets generated in the last 30 days and for certain status values by default, with the option to apply filters as required.



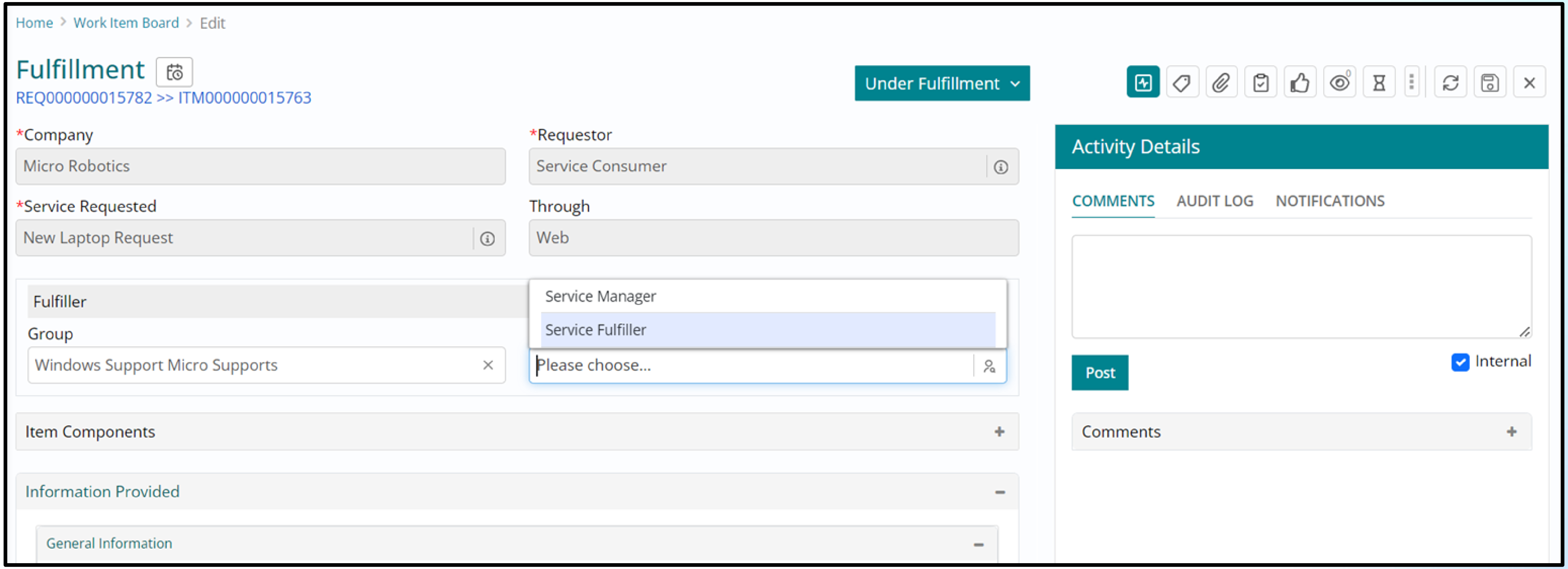
Work Item Board - List View

- Click on the ticket you approved and is pending fulfillment, and the request details section will open towards the right.
- Click on the View Details button available towards the right to open the fulfillment ticket form and view its details.



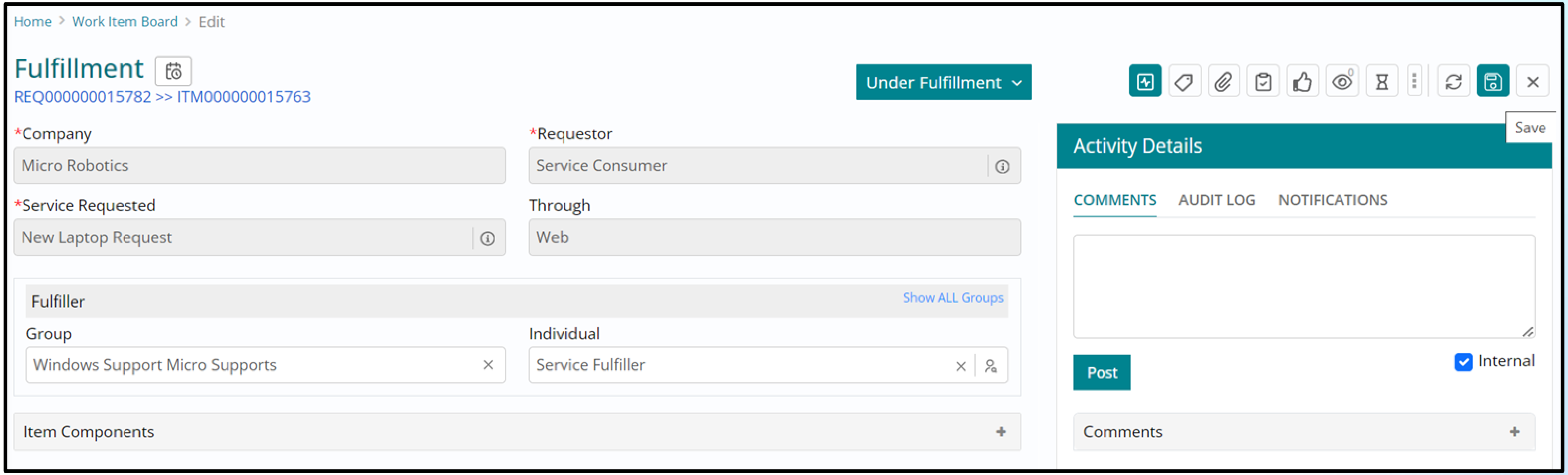
Fulfillment - Individual Assignment

- This is the fulfillment ticket form. You can browse through its details to begin with.
- Next, click on the Individual button and select Service Fulfiller (the role you are logged in with) to assign the ticket to yourself.



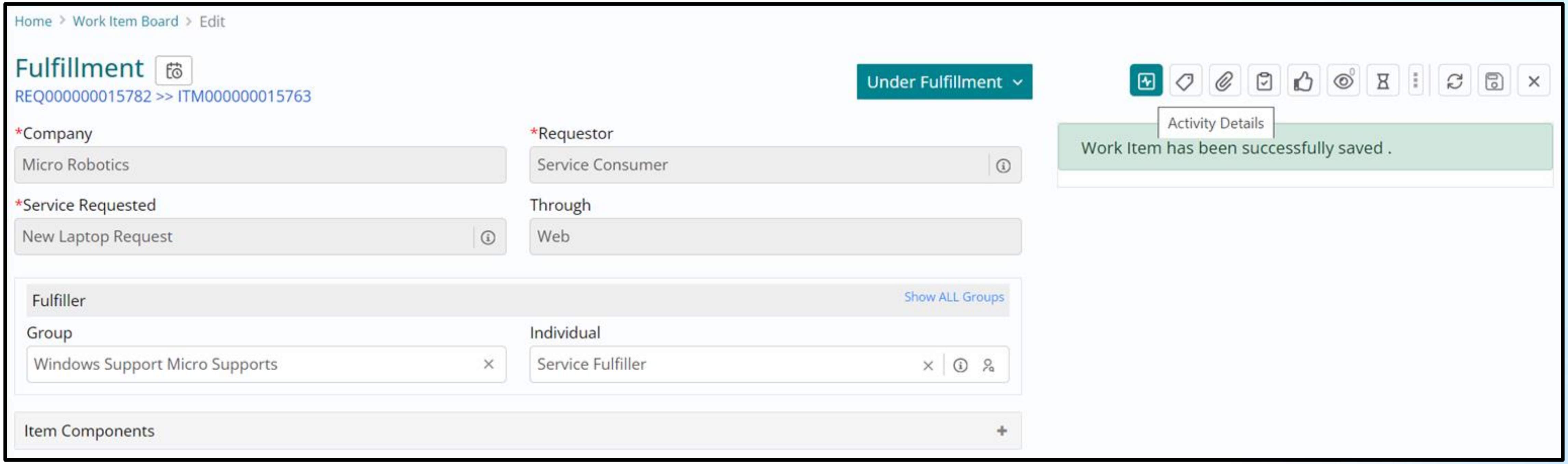
Fulfillment - Save Form

- Click on Save button available towards the top right of the fulfillment ticket form to save the individual details you just selected.
- This will ensure that you are able to make changes to this ticket, since it is now assigned to your name.
- Save button ensures that all the changes made on the form are saved.



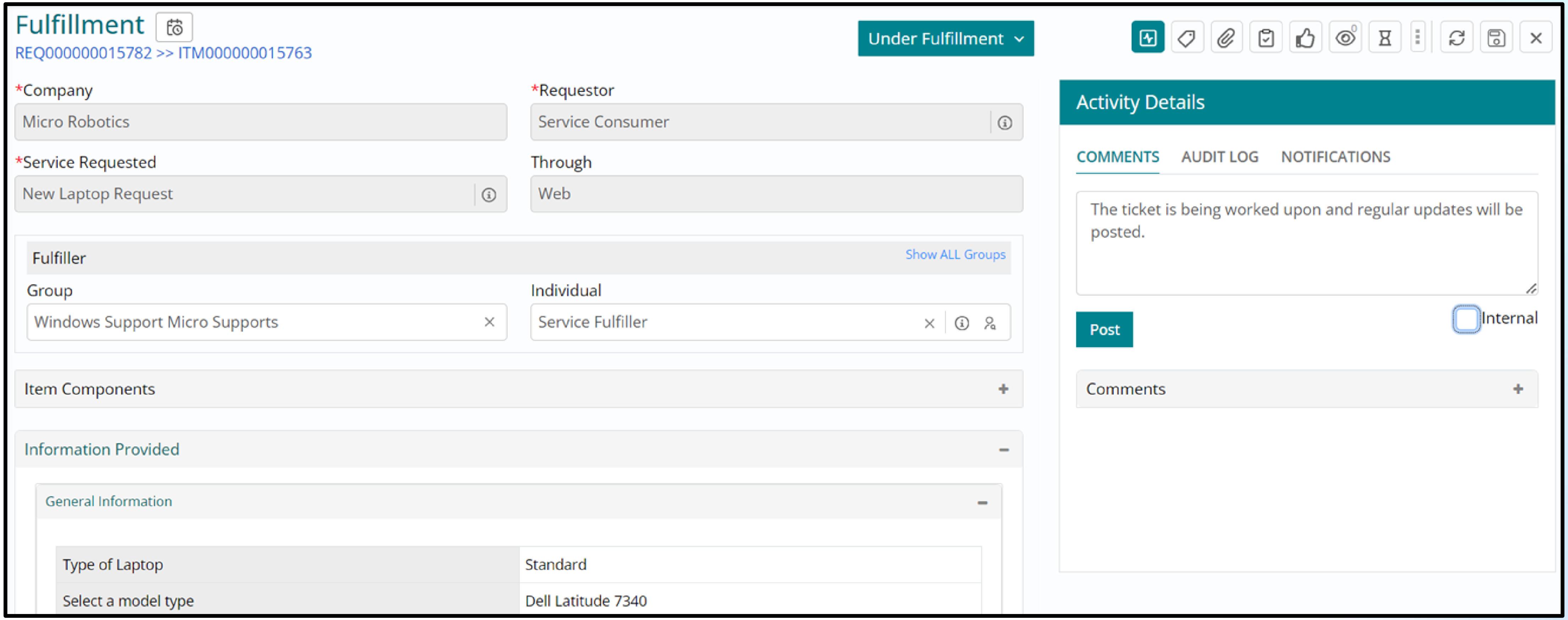
Fulfillment - Activity Details

- You will receive a success message stating that the work item has been successfully saved.
- Work item in this case refers to the fulfillment ticket being worked upon.
- Click on Activity Details button to navigate and update / view the comments and activity log of this ticket.



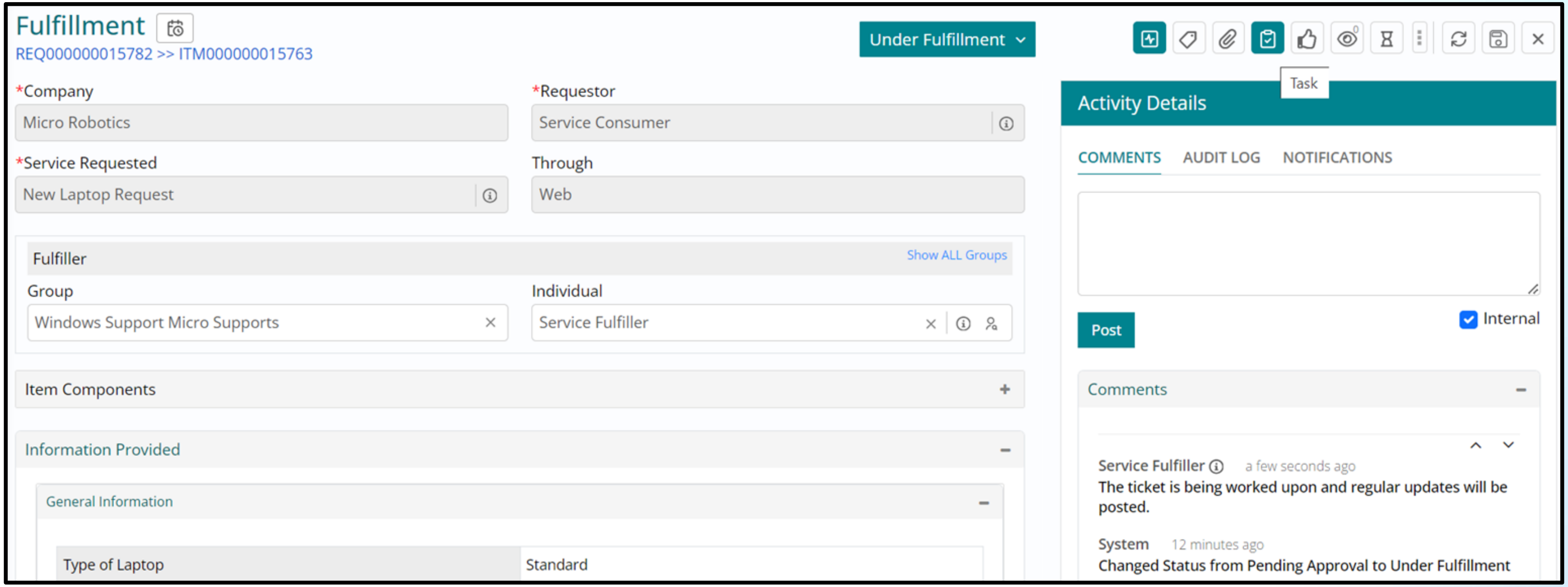
Fulfillment - Comments

- Type in a comment stating that the ticket is being worked upon and ensure that you have unchecked the Internal button before clicking on Post.
- Internal button is checked by default to avoid information overload for the requestors. In case, you would like the requestor to view the comment you have posted, uncheck the Internal button and then post the comment.



Fulfillment - Task

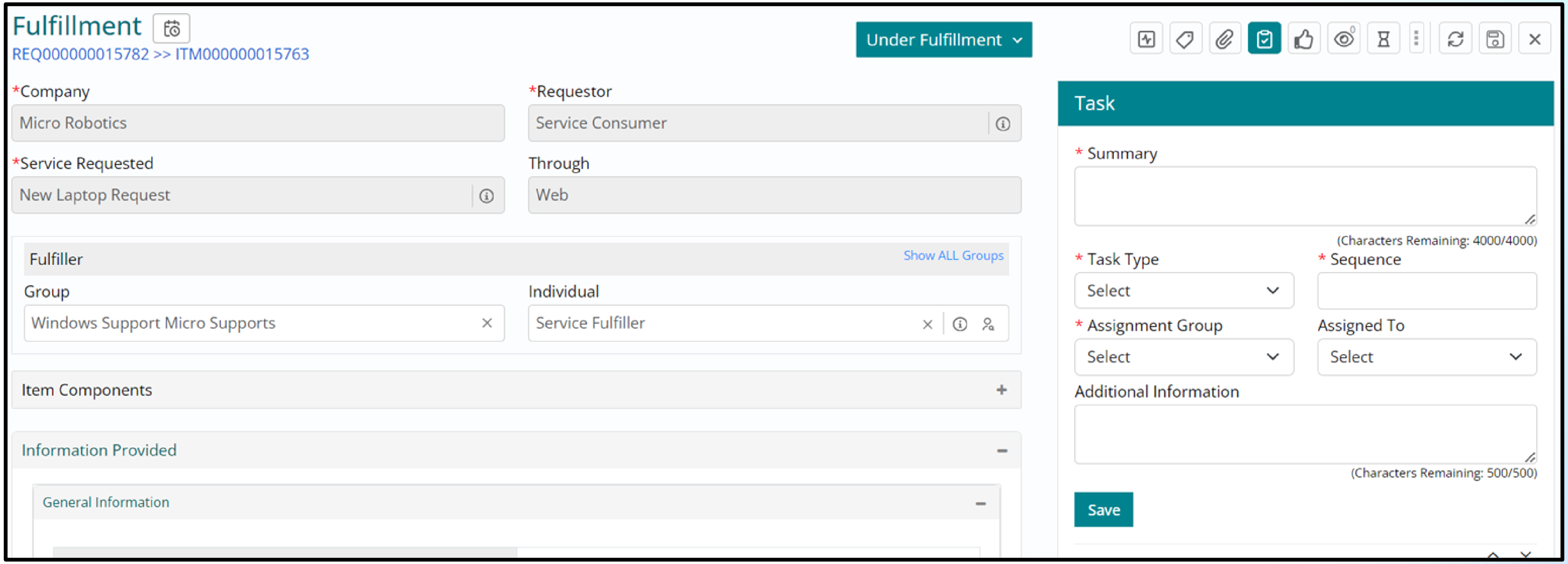
- A fulfillment request might require multiple tasks to be performed by different teams prior to fulfillment.
- Click on Task button to navigate and view / create task(s) against this fulfillment ticket.



Fulfillment - Task

- The task form that you see towards the right of your screen can be used to create an ad-hoc task to seek involvement of a team to perform a specific task. You can try this out for a different request at a later point during your trial.

- For now, you can ignore this and scroll down using the right scroll bar, to view some pre-defined fulfillment tasks.



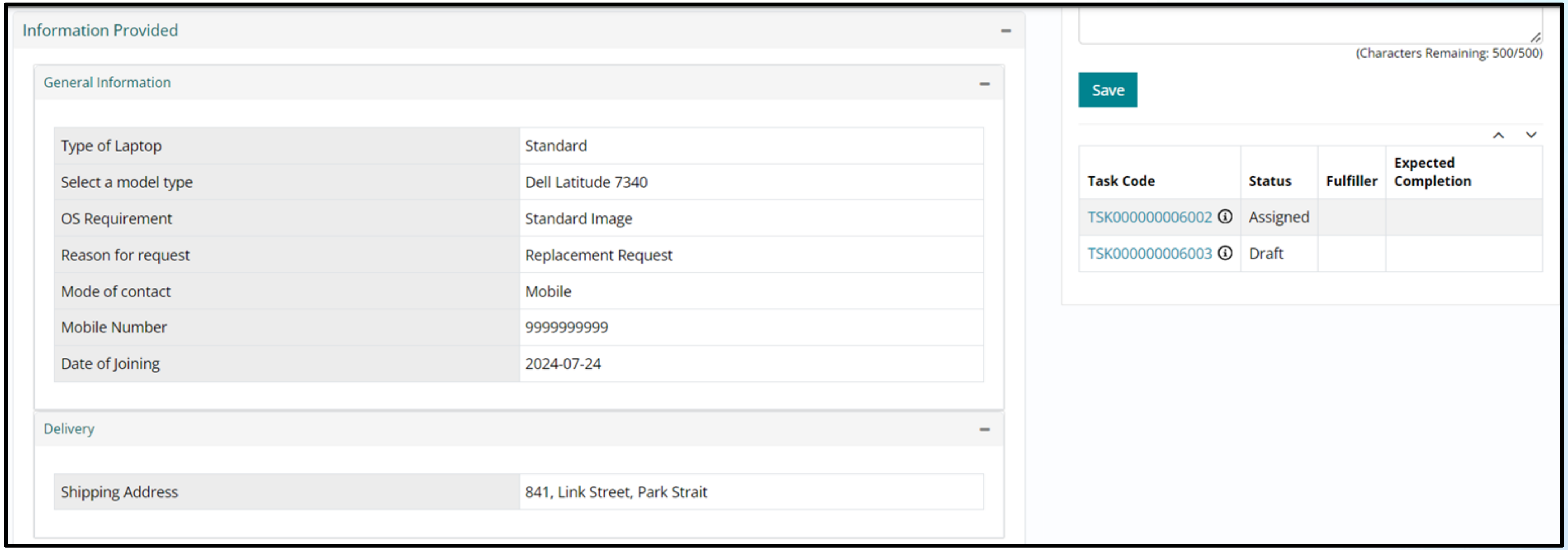
HCLSoftware

Fulfillment - Task

- Upon scrolling down, you will see that there are two tasks that were configured by the catalog manager for this specific offering and therefore they need to be completed / cancelled as a part of fulfilling this request.

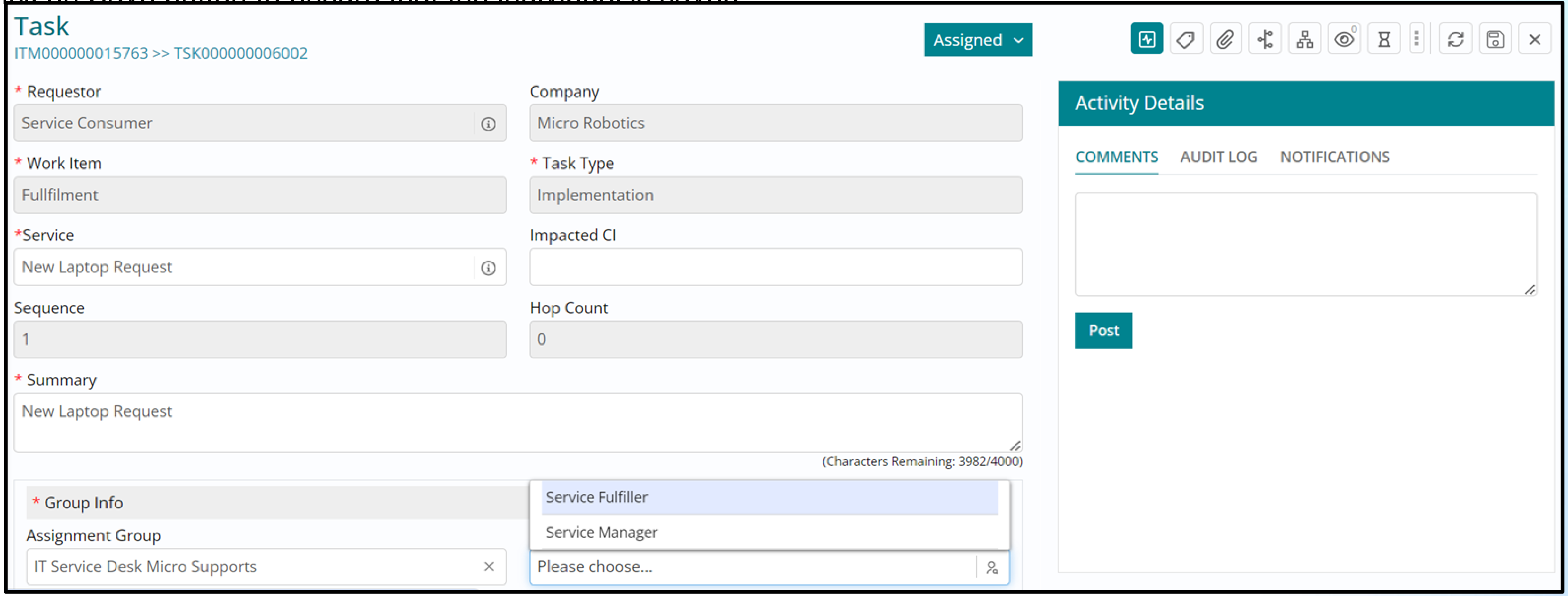
- The first task you see is in Assigned status whereas the second one below it is in Draft status indicating that they are sequential tasks, and the second one will be triggered upon completion of the first one. If these tasks were configured to run in parallel, both would have appeared to be in Assigned status upfront.

- Click on the first Task Code to open and view the task form.



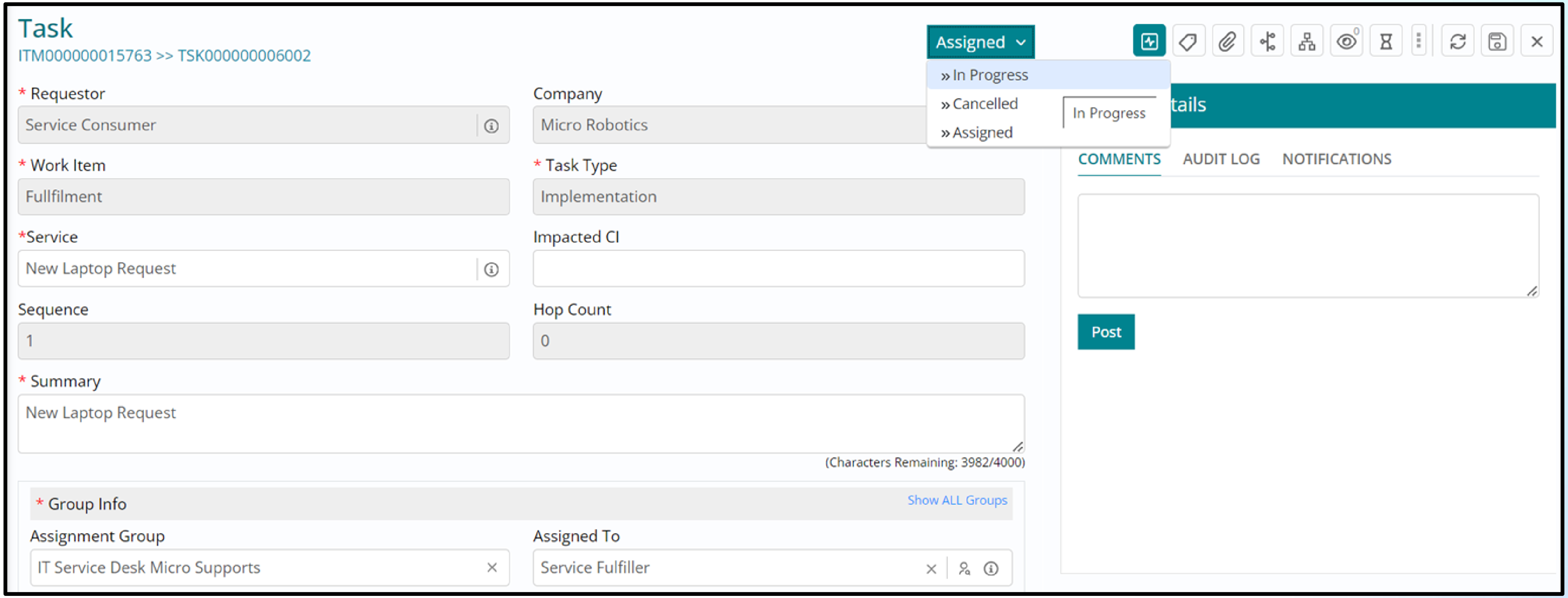
Task - Individual Assignment

- This is the task form. You can browse through its details to begin with.
- Next, click on the Individual button and select Service Fulfiller (the role you are logged in with) to assign the ticket to yourself.
- Click on Save button to ensure that the individual is saved



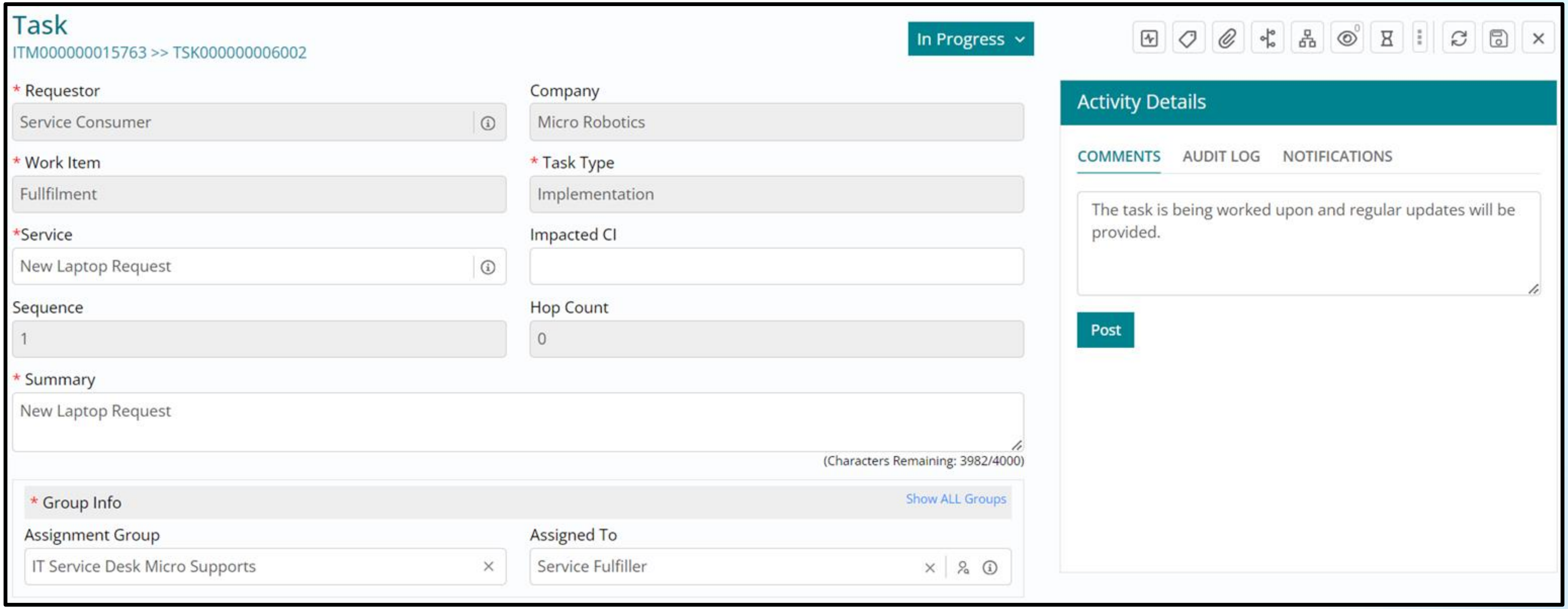
Task - In Progress Status Change

- Click on the status drop down and change the status of the task to In Progress, indicating that you are working on the ticket.
- Click on the Save button to record the status change.



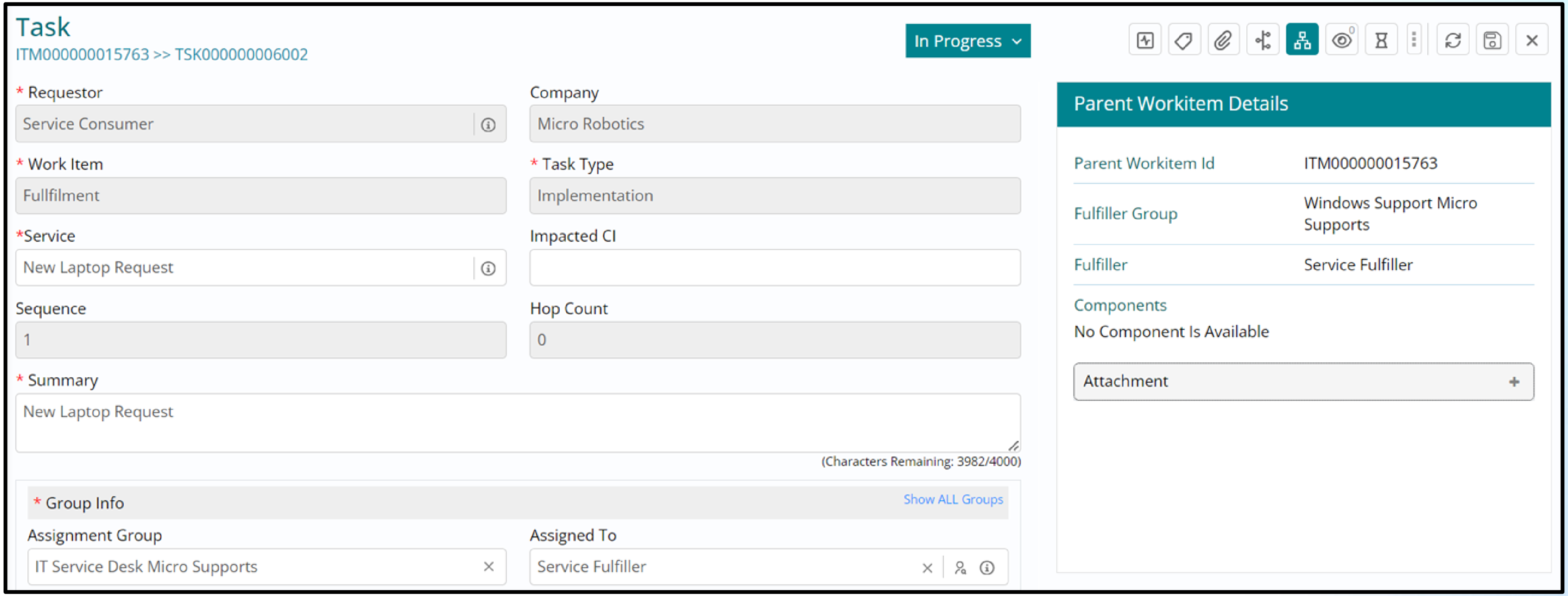
Task - Comments

- Type in a comment stating that the ticket is being worked upon followed by clicking on Post to keep the requestor informed.



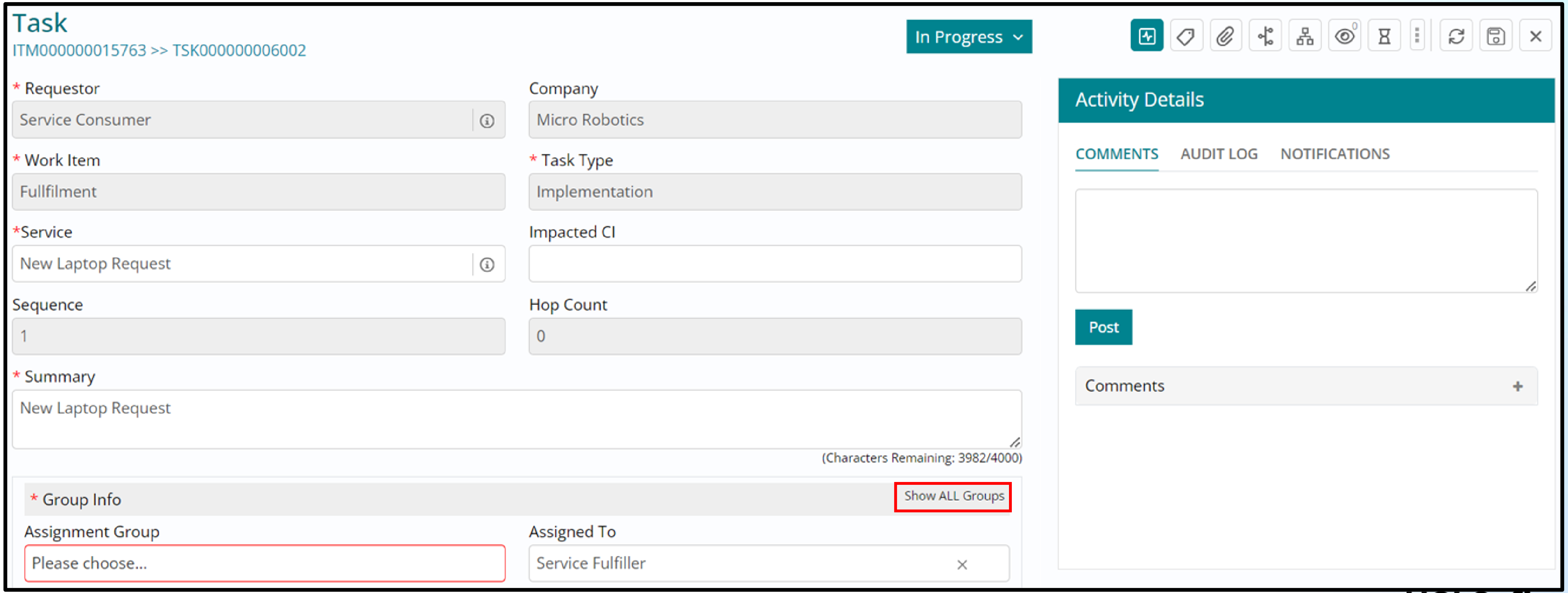
Task - Parent Workitem Details

- If at any point in time, you would like to view or get a glimpse of the parent ticket (in this case fulfillment workitem) details, you can click on the parent workitem details button available towards the right of your screen.
- Alternatively, in case you have the access to view the parent ticket form, then the hyperlink towards the top left of the task form with the ITM ID can be used to navigate to the parent ticket form.



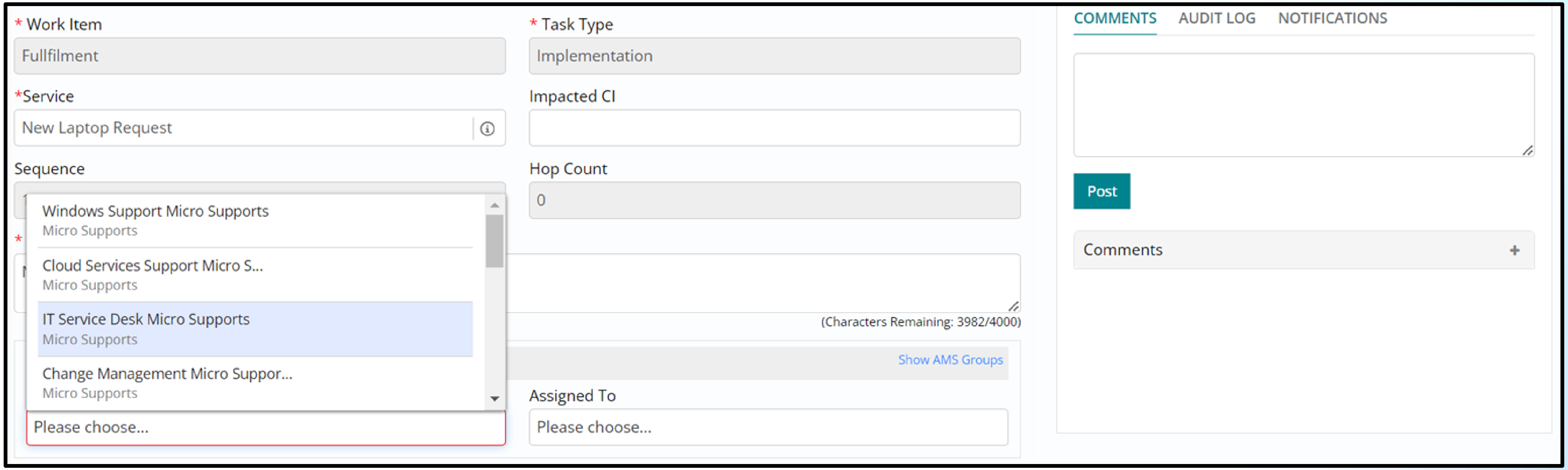
Task - Reassignment

- In case you chose to navigate to the fulfillment ticket form, navigate back to the task form to try your hands on reassigning a ticket from one assignment group to another.
- Click on the cross button against the Assignment Group field under Group Info section of the task form, to clear the current assignment group selected.
- Click on Show ALL Groups in the same section to ensure that the Assignment Group section shows all groups available.



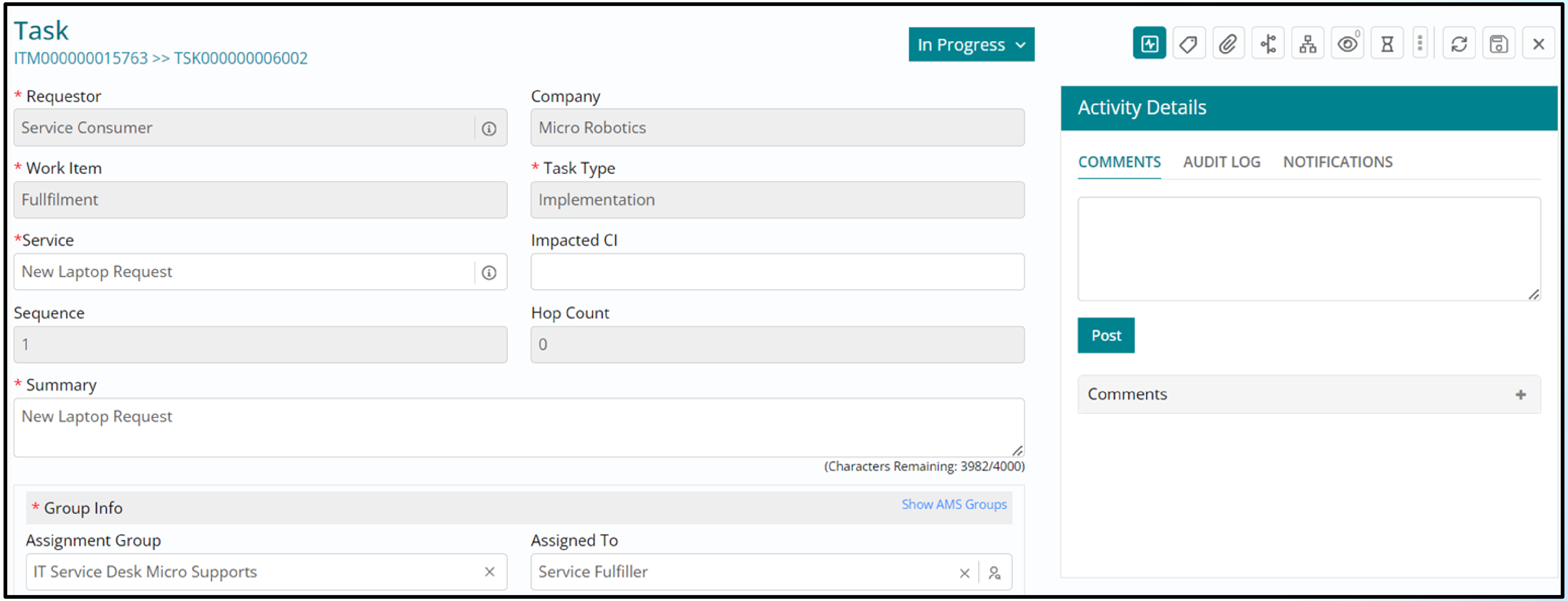
Task - Reassignment

- Click on the Assignment Group field and from the list of groups available, reassign the ticket to IT Service Desk group by selecting that group.
- Click on Save button to ensure that the reassignment change has been recorded.



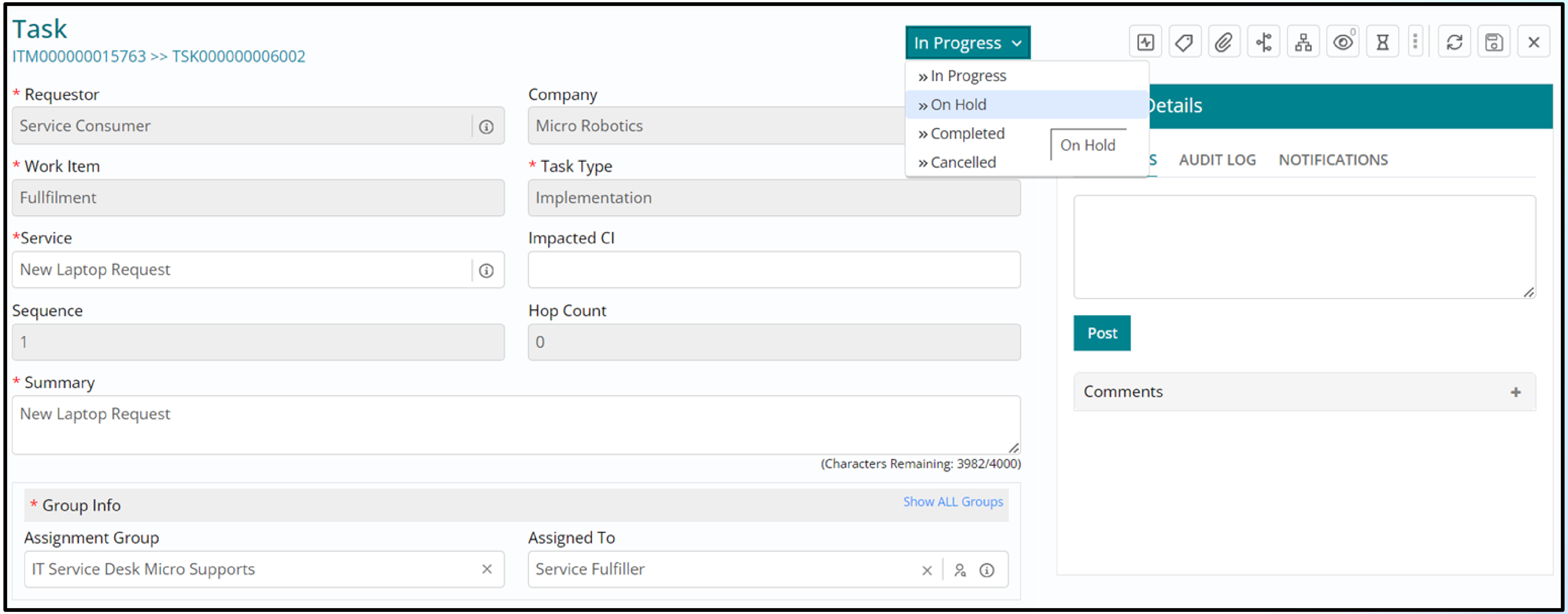
Task - Individual Assignment

- Click on the Individual button and select Service Fulfiller (the role you are logged in with) to assign the ticket to yourself.
- Click on Save button to ensure that the individual is saved.



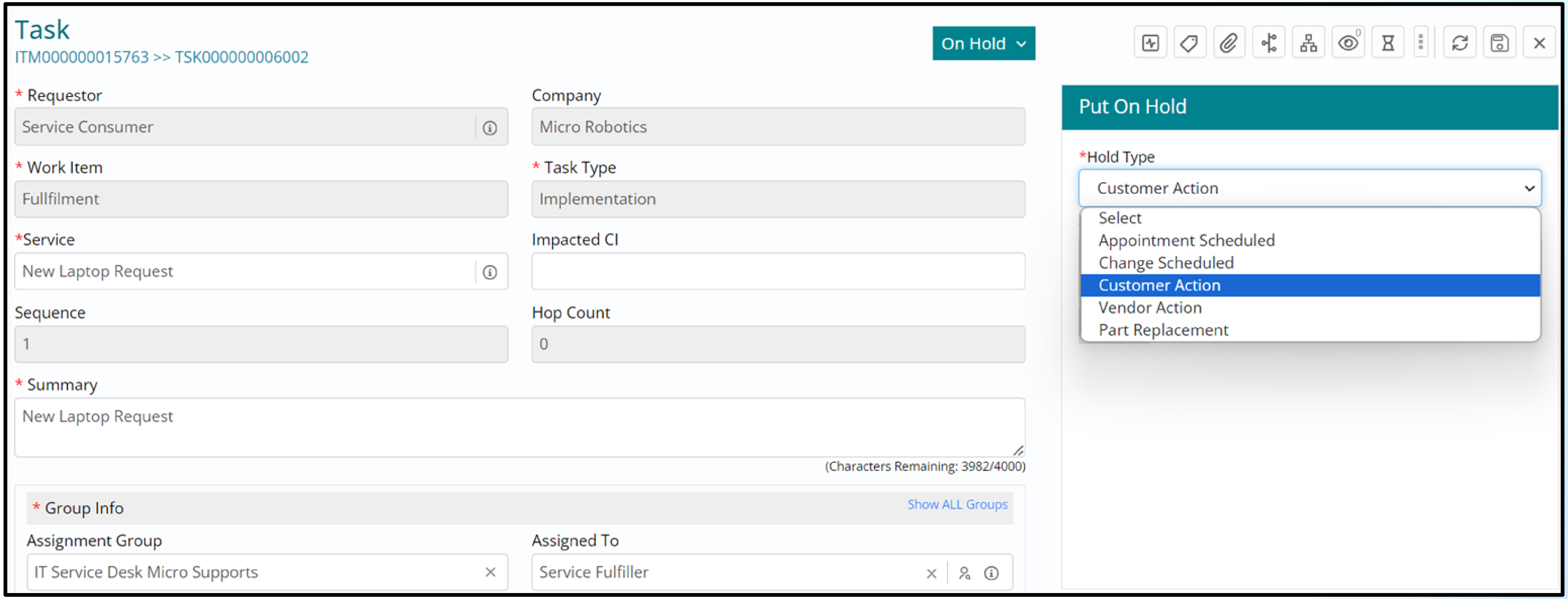
Task - On Hold Status Change

- Click on the status drop down and change the status of the task to On Hold indicating that you are awaiting details or action from someone else to continue working on this task.
- If there is any service level configured against this task in the system, then this will ensure that its measurement is paused.



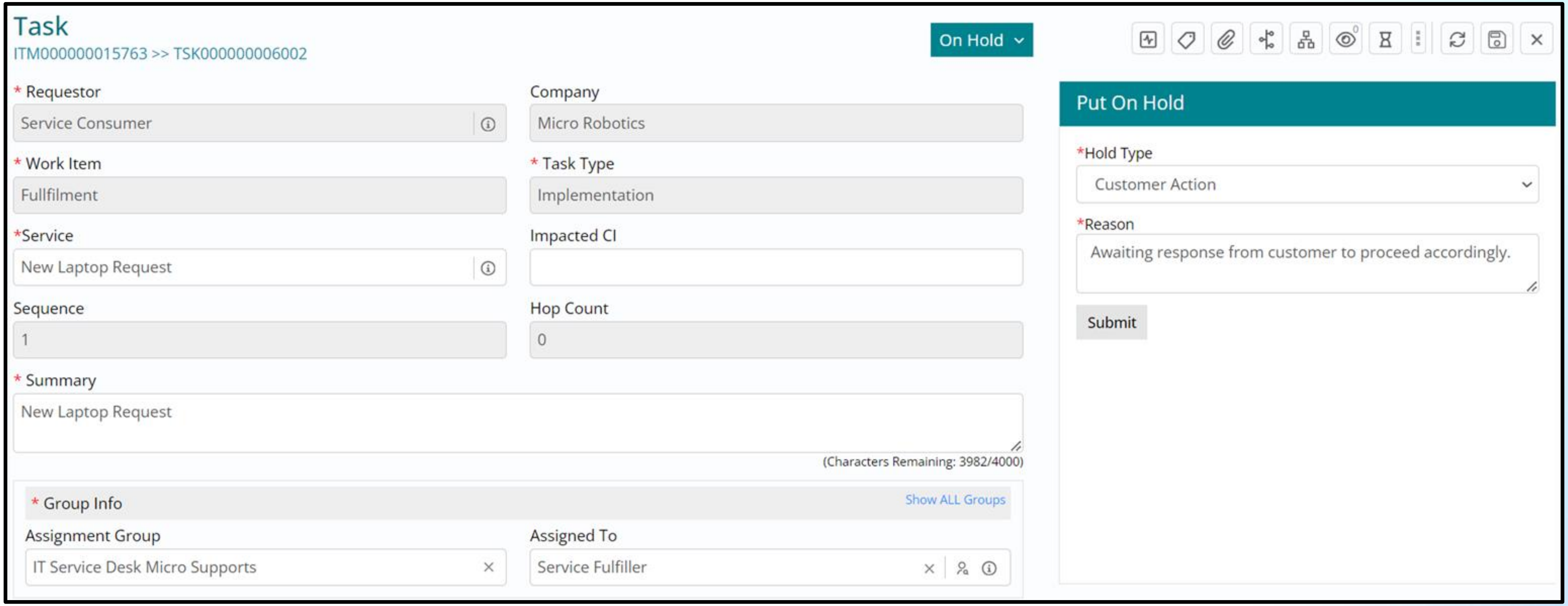
Task - On Hold Reason

- Click on the Hold Type dropdown field and select one amongst the available options.
- In this case, we are selecting Customer Action indicating that you require some details from the customer / requestor to continue working on this task.



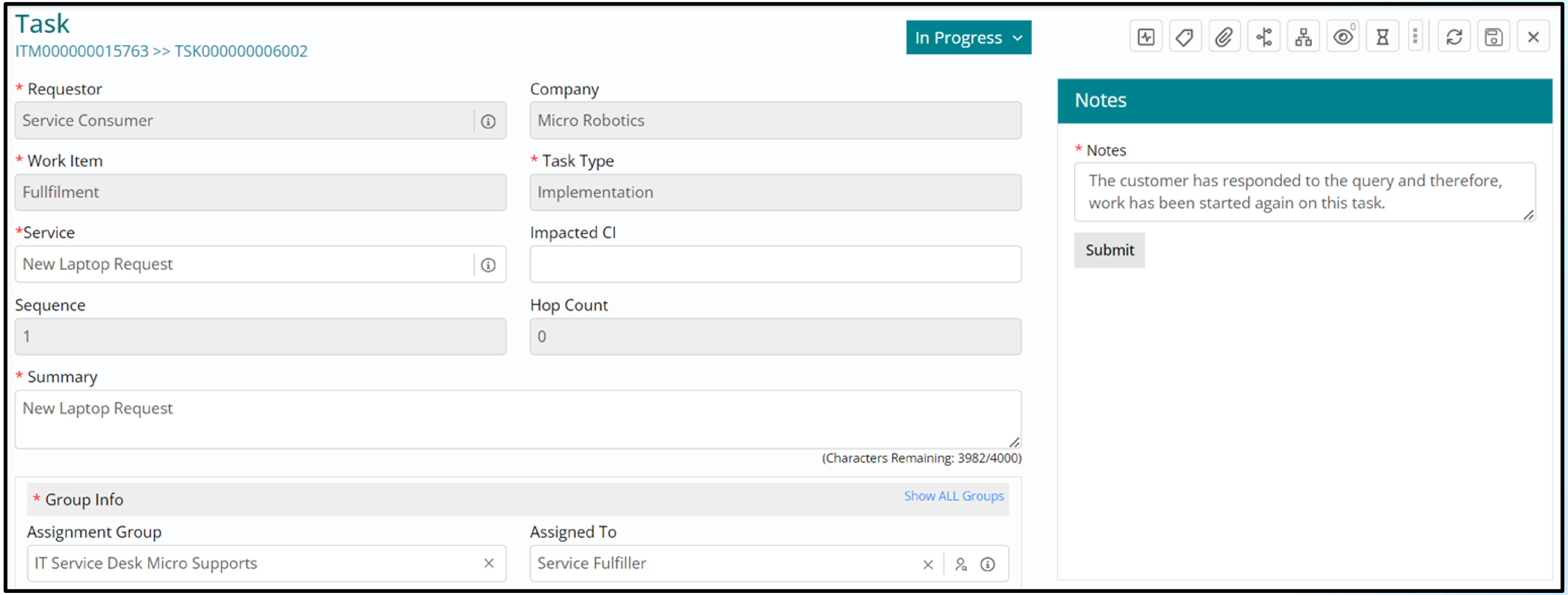
Task - On Hold Reason

- Type in the reason for placing the ticket on hold as a comment followed by clicking on Submit.
- The requestor will automatically be notified that the task has been placed on hold since there is customer action awaited.



Task - In Progress Status Change

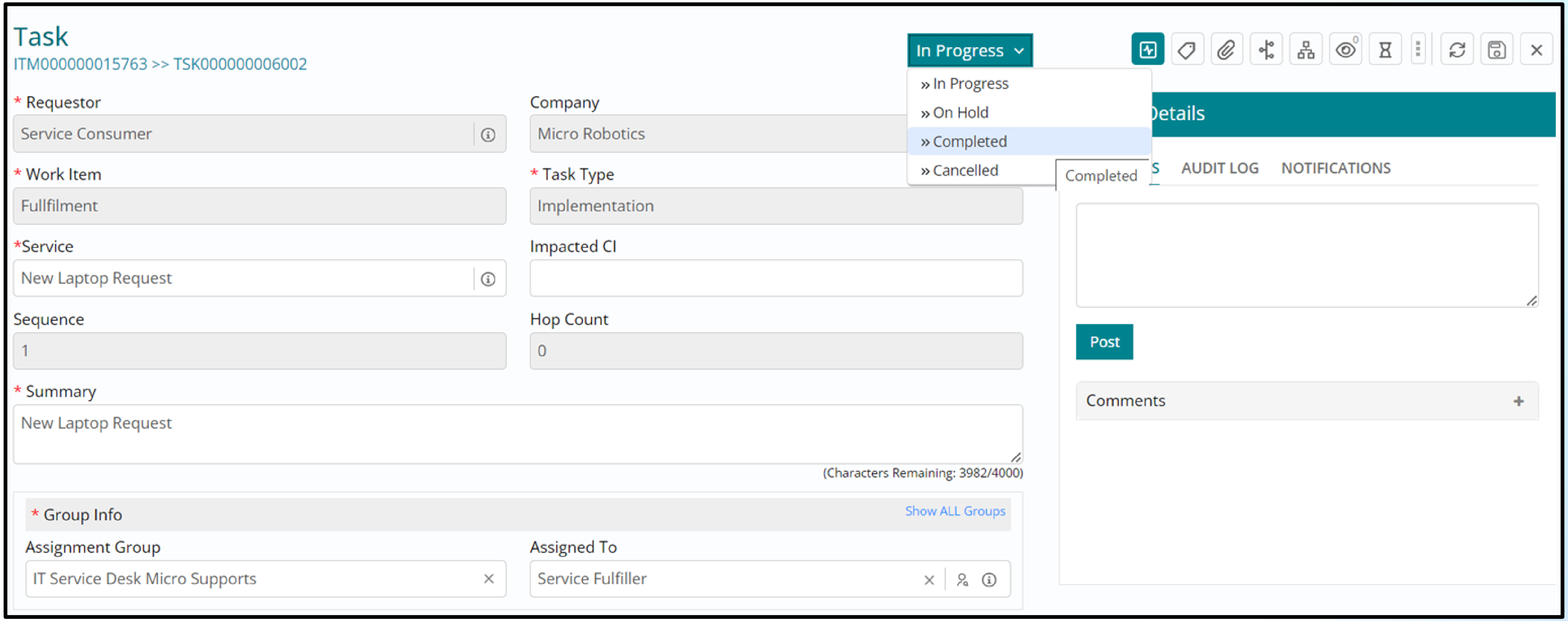
- Click on the status drop down and change the status of the task to In Progress indicating that you are working on the ticket.
- Type in comments in the Notes field followed by clicking on Submit, to record the status change and the comments entered.



HCLSoftware

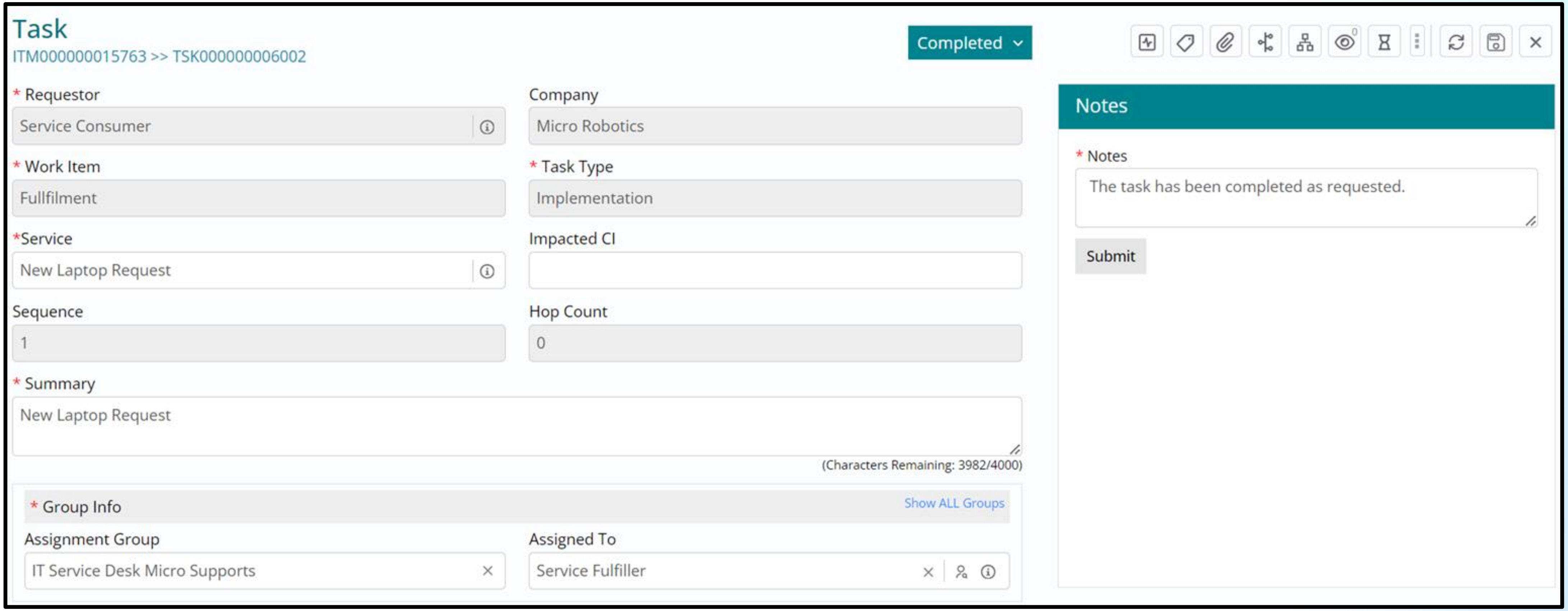
Task - Task Completion

- Click on the status drop down and change the status of the task to Completed, indicating that you have completed working on the ticket.



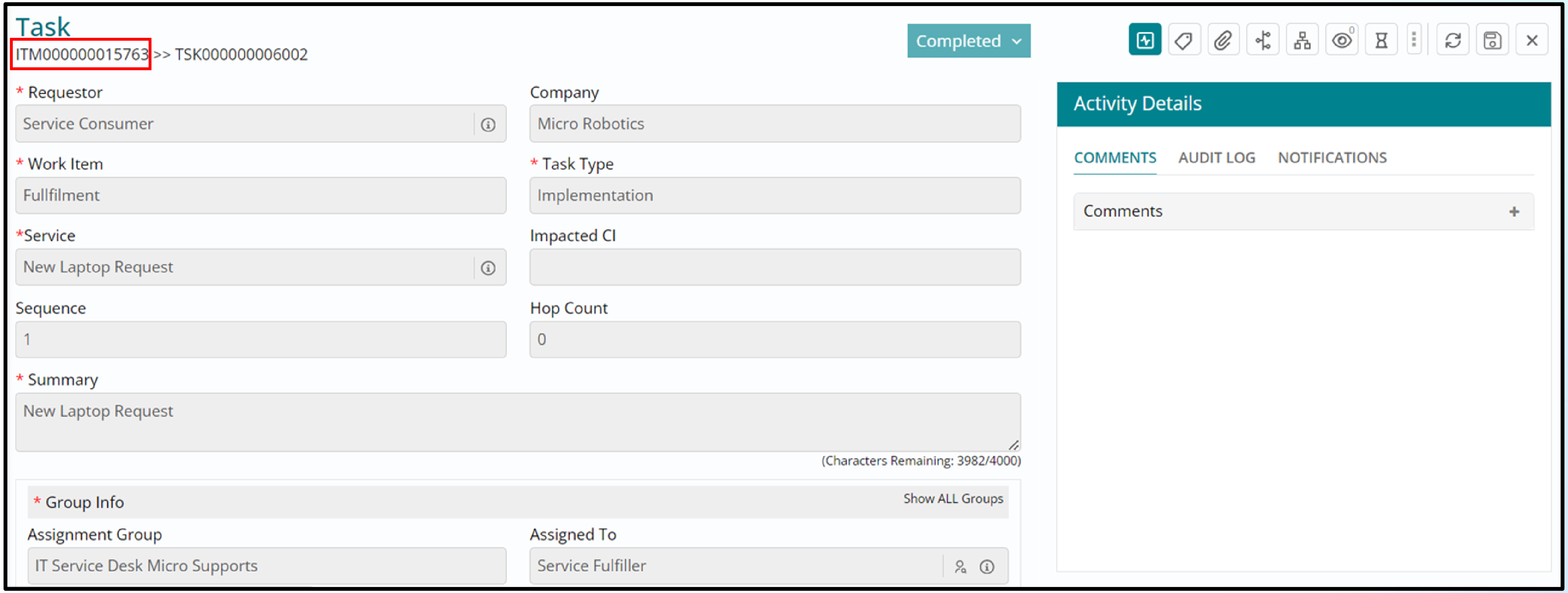
Task - Task Completion Notes

- Type in comments in the Notes field followed by clicking on Submit, to record the status change and the comments entered.



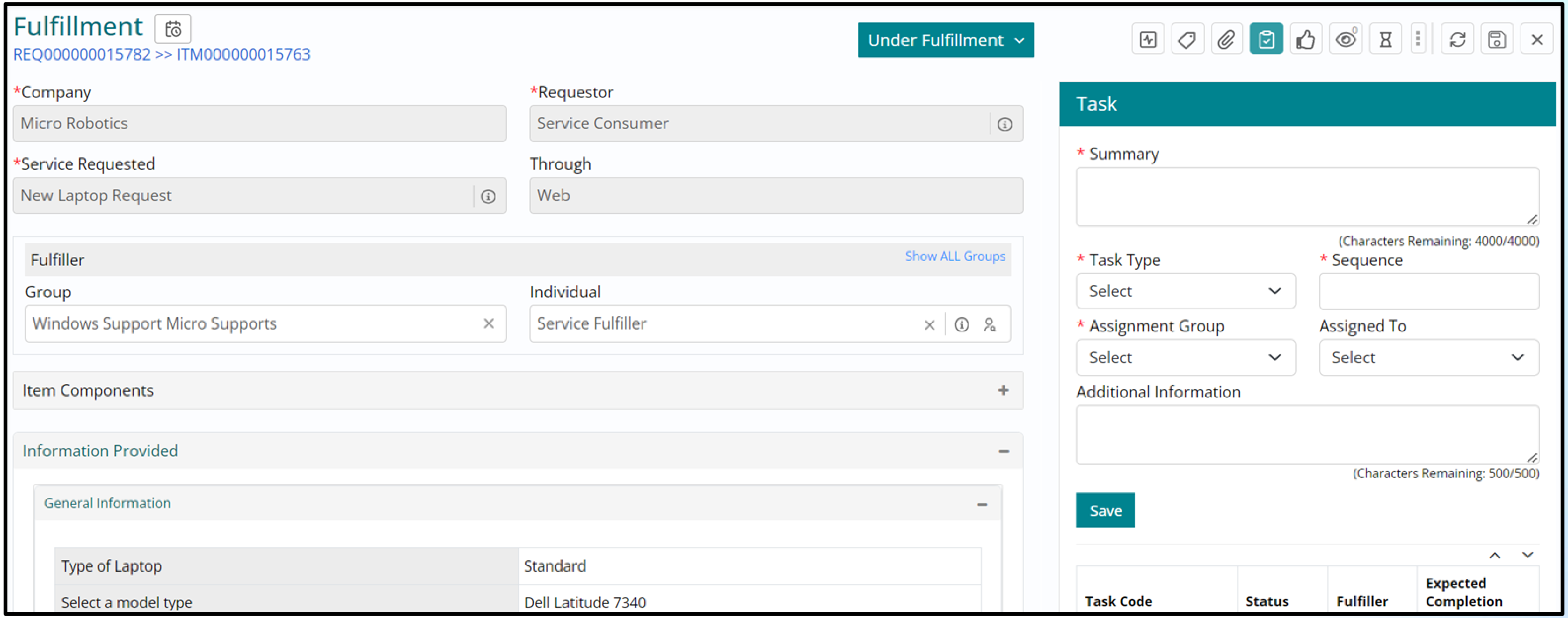
Navigation to Parent Workitem

- This task is now completed, and you can notice this from the fading out of the Status button.
- Next, since you have access to view the parent ticket form, click on the hyperlink towards the top left of the task form with the ITM number, to navigate to the parent ticket form.



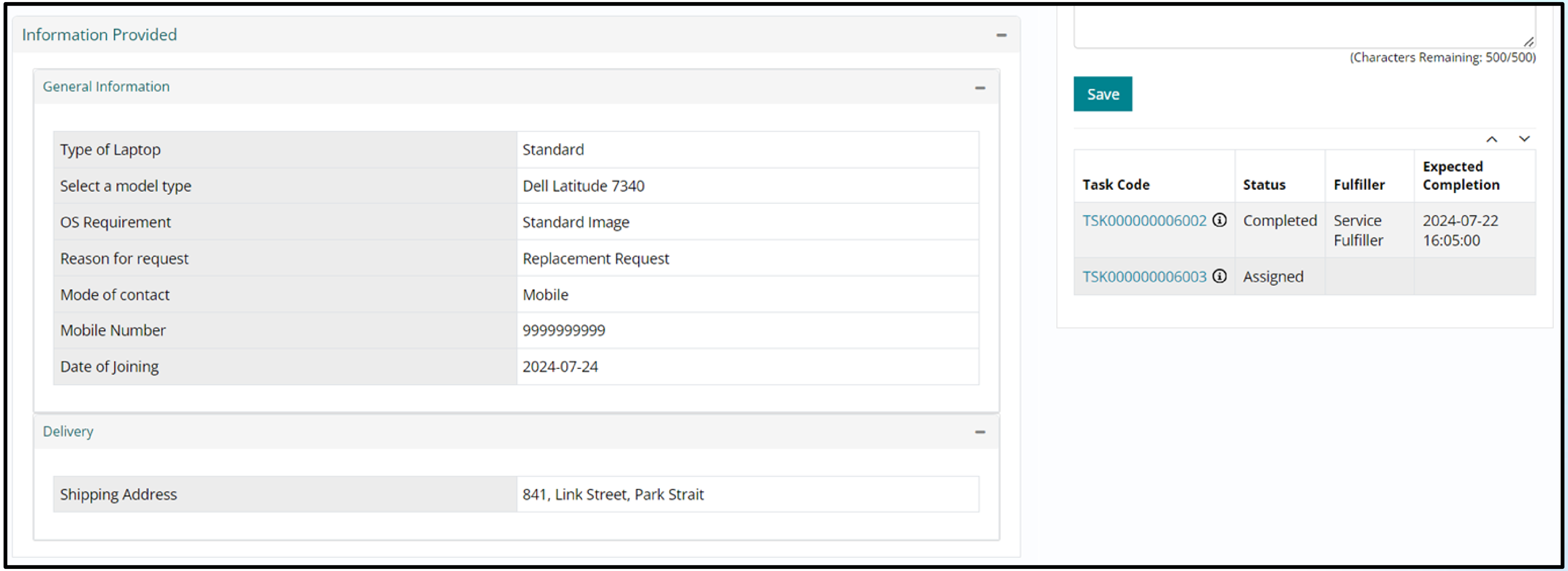
Parent Workitem / Fulfillment Form

- You have now landed on the parent ticket / fulfillment ticket form.
- Click on Task button towards the top right, to move to view the next task against this ticket.



Fulfillment - Task

- Upon scrolling down, you can see that the second task which was earlier in Draft status, has automatically moved to Assigned and is ready to be worked upon, since the first task was completed by you.
- Click on the second Task Code to open and view the task form.



Information Provided

General Information

Type of Laptop	Standard
Select a model type	Dell Latitude 7340
OS Requirement	Standard Image
Reason for request	Replacement Request
Mode of contact	Mobile
Mobile Number	9999999999
Date of Joining	2024-07-24

Delivery

Shipping Address	841, Link Street, Park Strait

(Characters Remaining: 500/500)

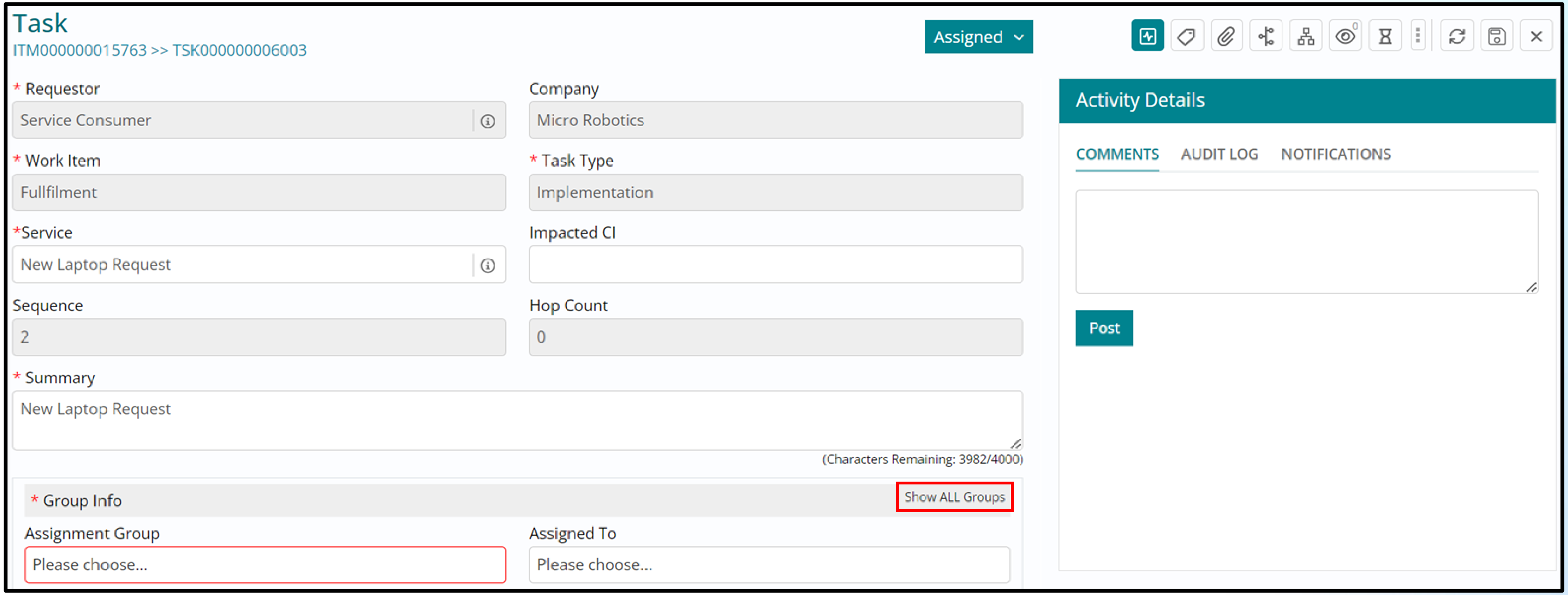
Save

Task Code	Status	Fulfiller	Expected Completion
TSK000000006002	Completed	Service Fulfiller	2024-07-22 16:05:00
TSK000000006003	Assigned		

Task - Reassignment

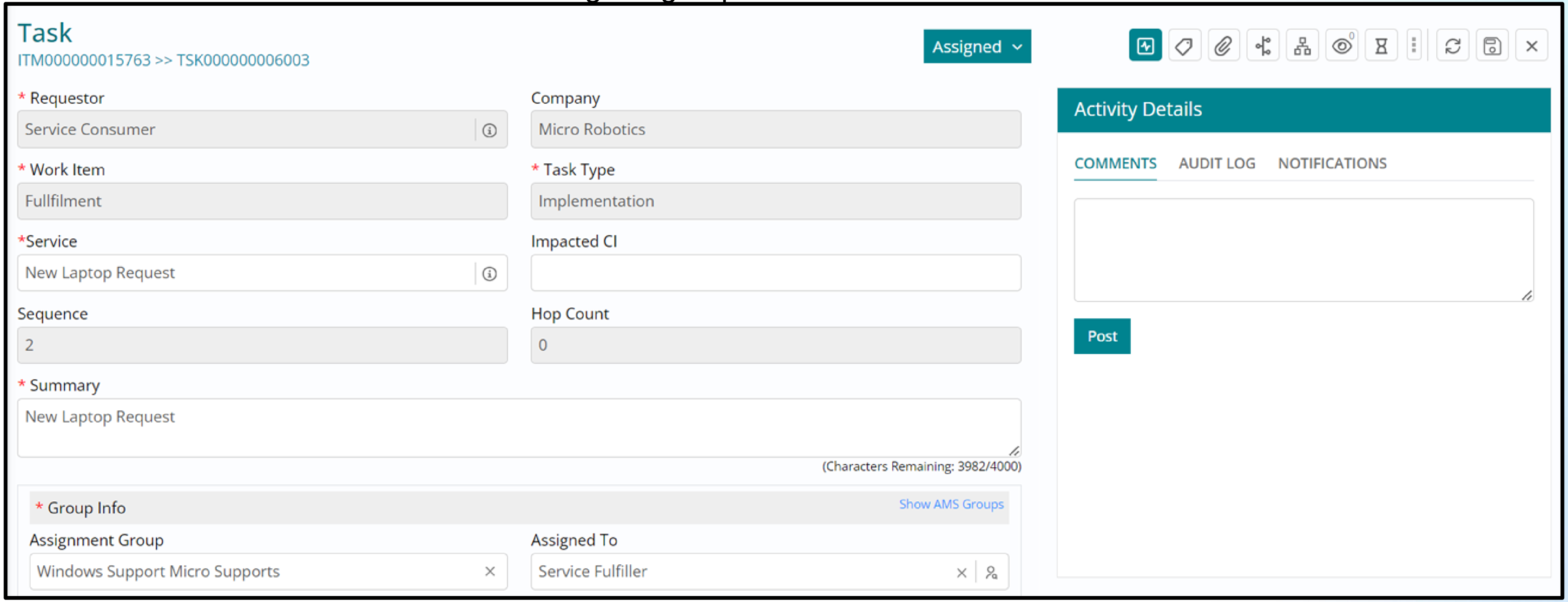
- Click on the cross button against the Assignment Group field under Group Info section of the task form, to clear the current assignment group selected.

- Click on Show ALL Groups in the same section, to ensure that the Assignment Group section shows all groups available.



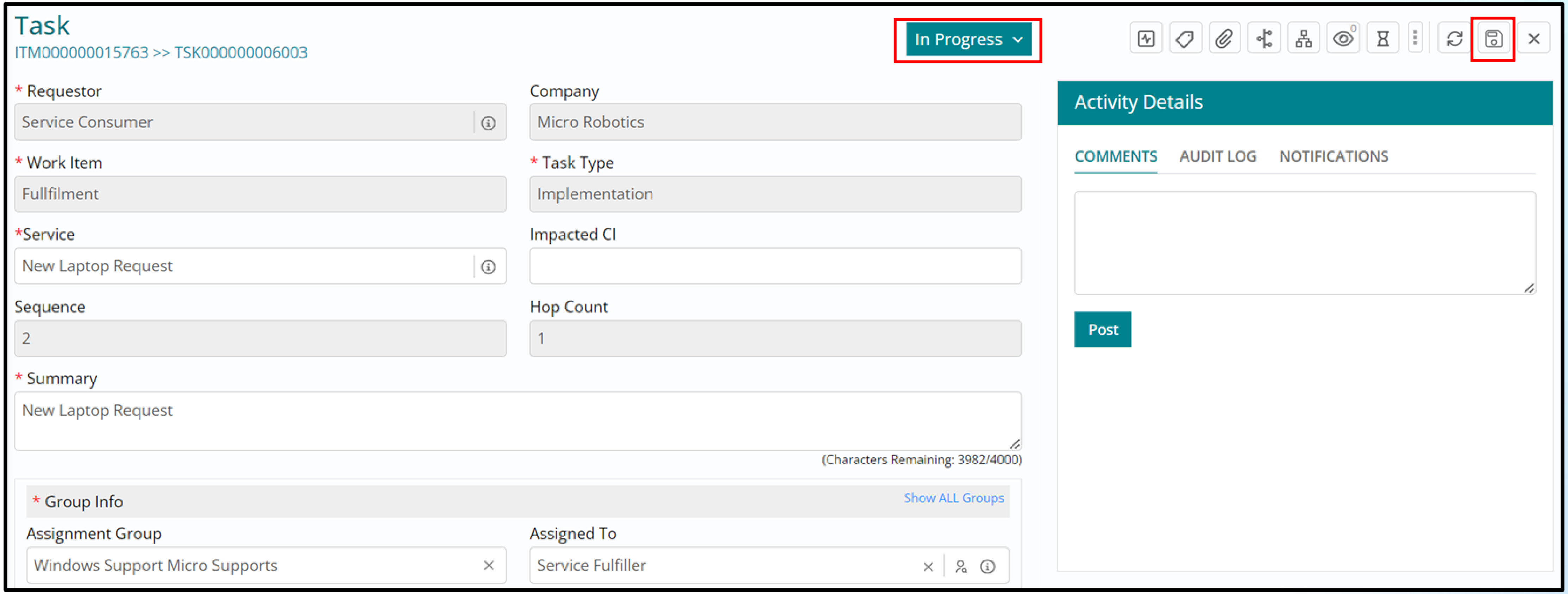
Task - Group Reassignment and Individual Assignment

- Click on the Assignment Group field and from the list of groups available, reassign the ticket to Windows Support group by selecting the group.
- Next, click on the Individual button and select Service Fulfiller (the role you are logged in with) to assign the ticket to yourself.
- Click on Save button to ensure that the reassigned group and individual details are saved.



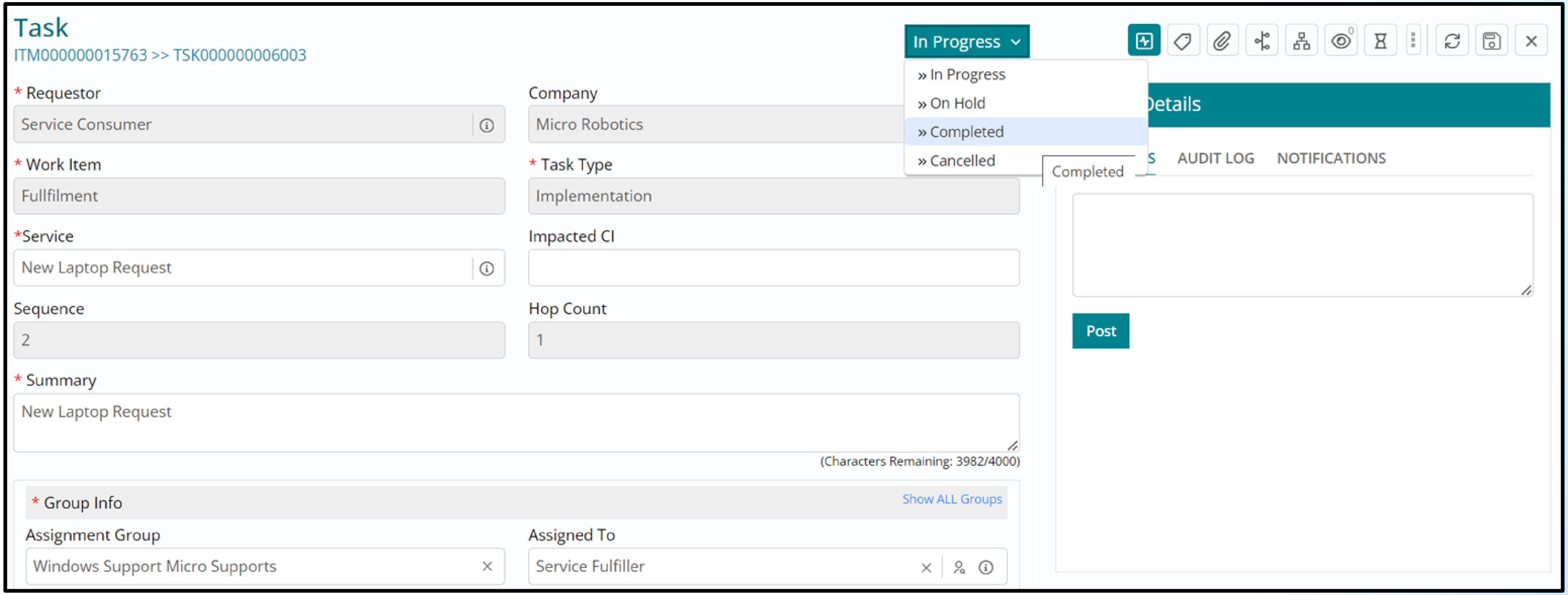
Task - In Progress Status Change

- Click on the status drop down and change the status of the task to In Progress indicating that you are working on the ticket.
- Click on the Save button to record the status change.



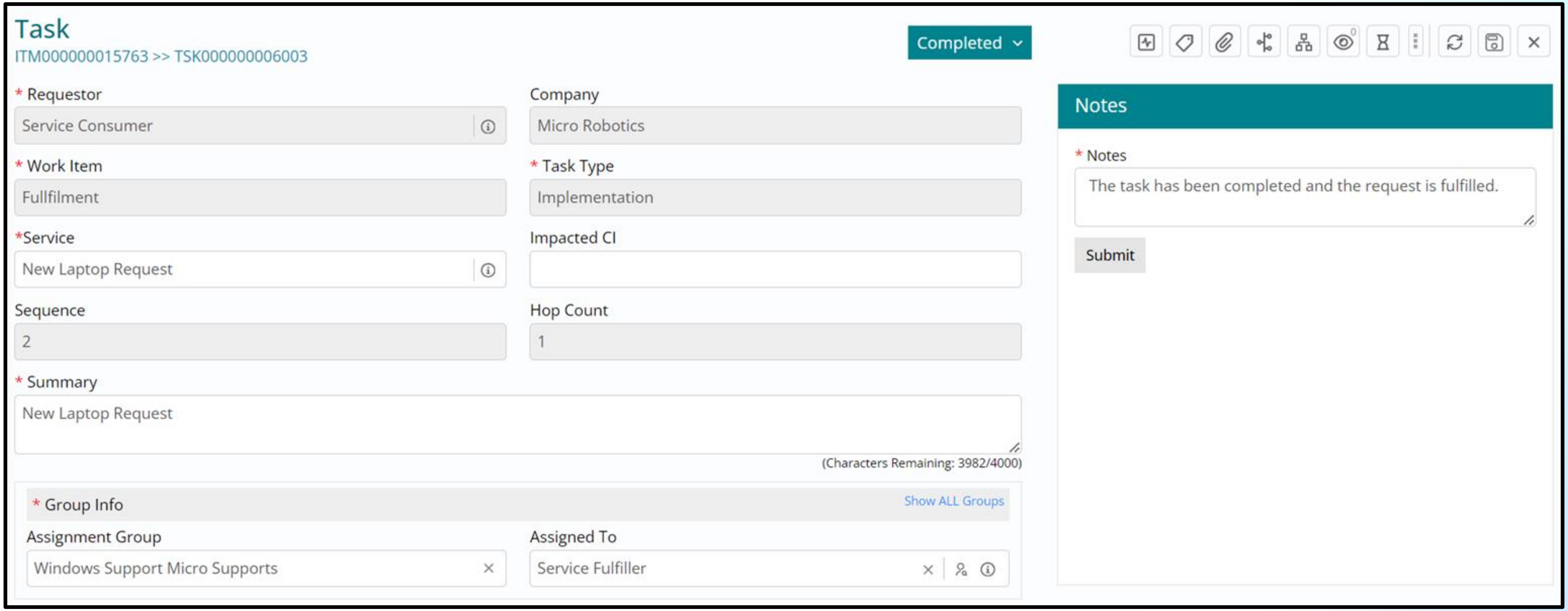
Task – Task Completion

- Click on the status drop down and change the status of the task to Completed, indicating that you have completed working on the ticket.



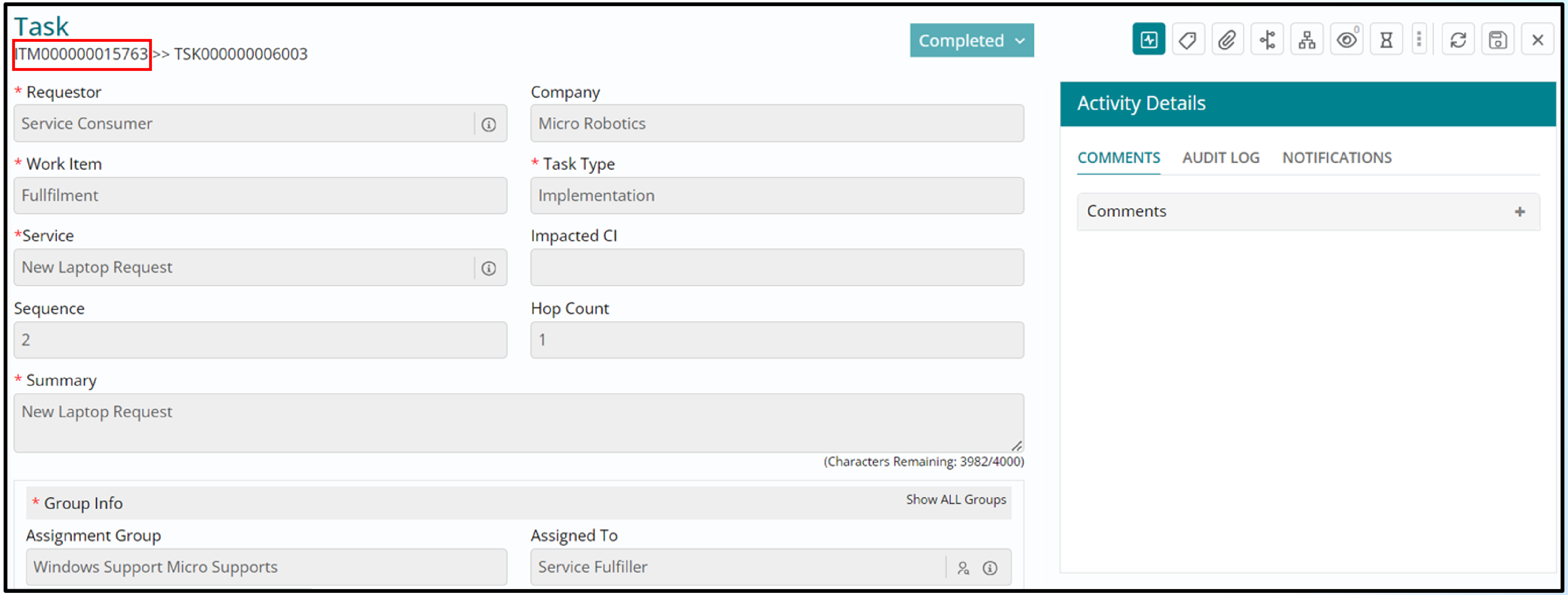
Task – Task Completion Notes

- Type in comments in the Notes field followed by clicking on Submit, to record the status change and the comments entered.



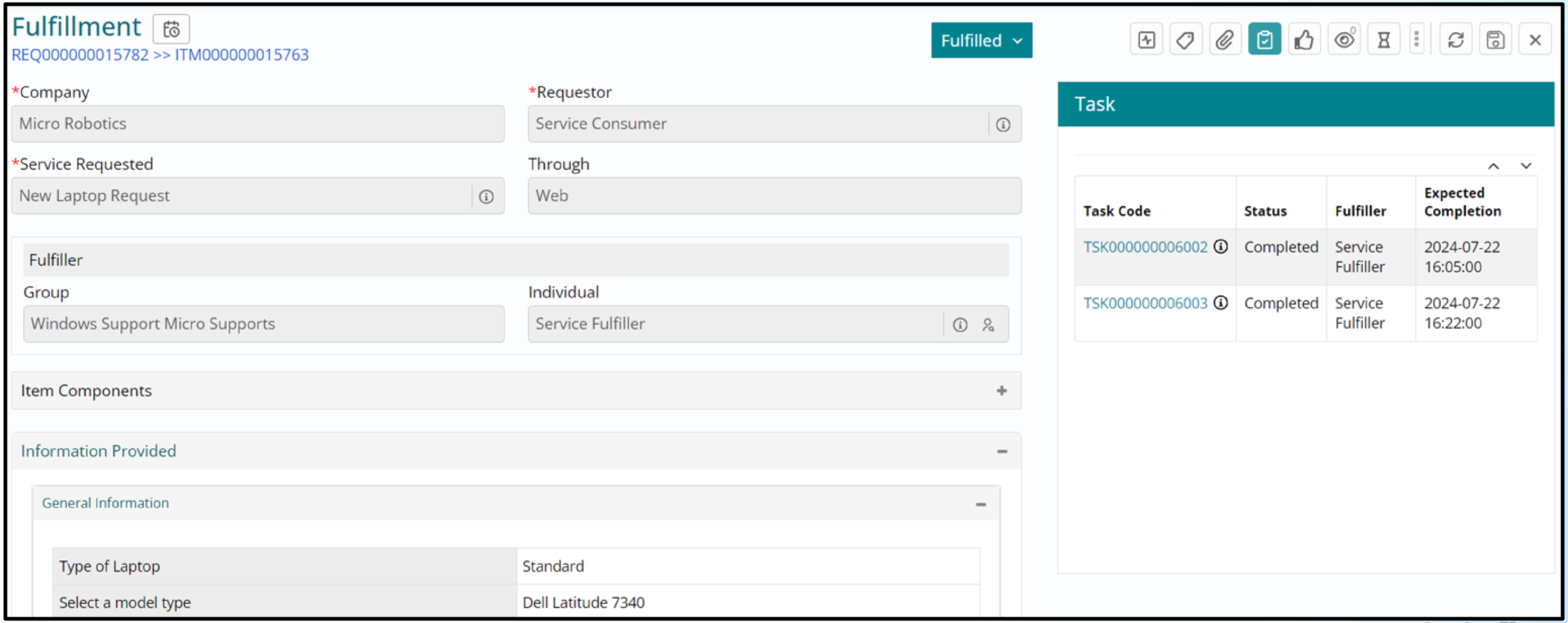
Navigation to Parent Workitem

- This task is now completed, and you can notice this from the fading out of the Status button.
- Next, since you have access to view the parent ticket form, click on the hyperlink towards the top left of the task form with the ITM number, to navigate to the parent ticket form.



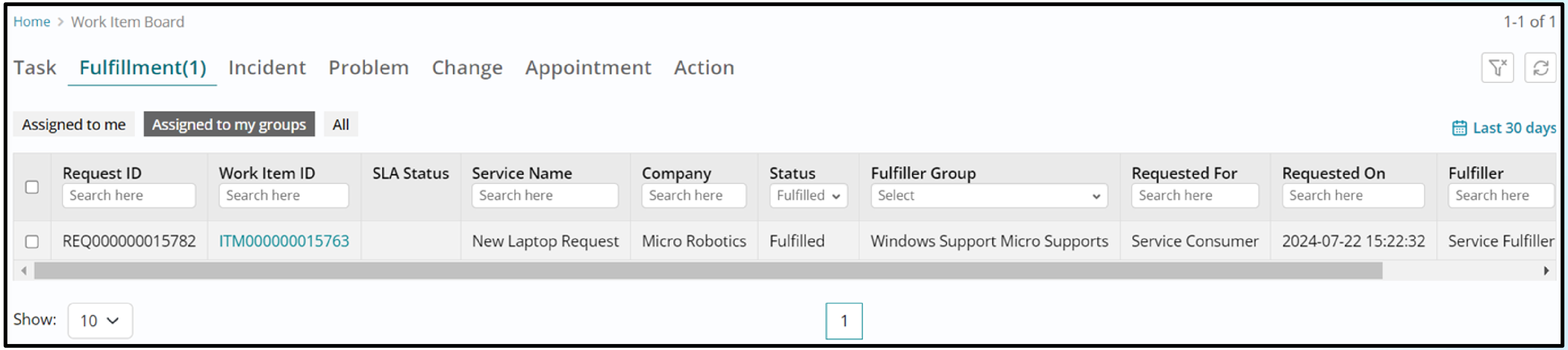
Parent Workitem Fulfillment

- You have now landed on the parent ticket / fulfillment ticket form.
- Click on Task button towards the top right and you can see that both the tasks required to fulfill this parent workitem were completed. and therefore, the status of the parent ticket has automatically moved to Fulfilled.
- Click on the cross button towards the top right to close the ticket and navigate to the work item board.



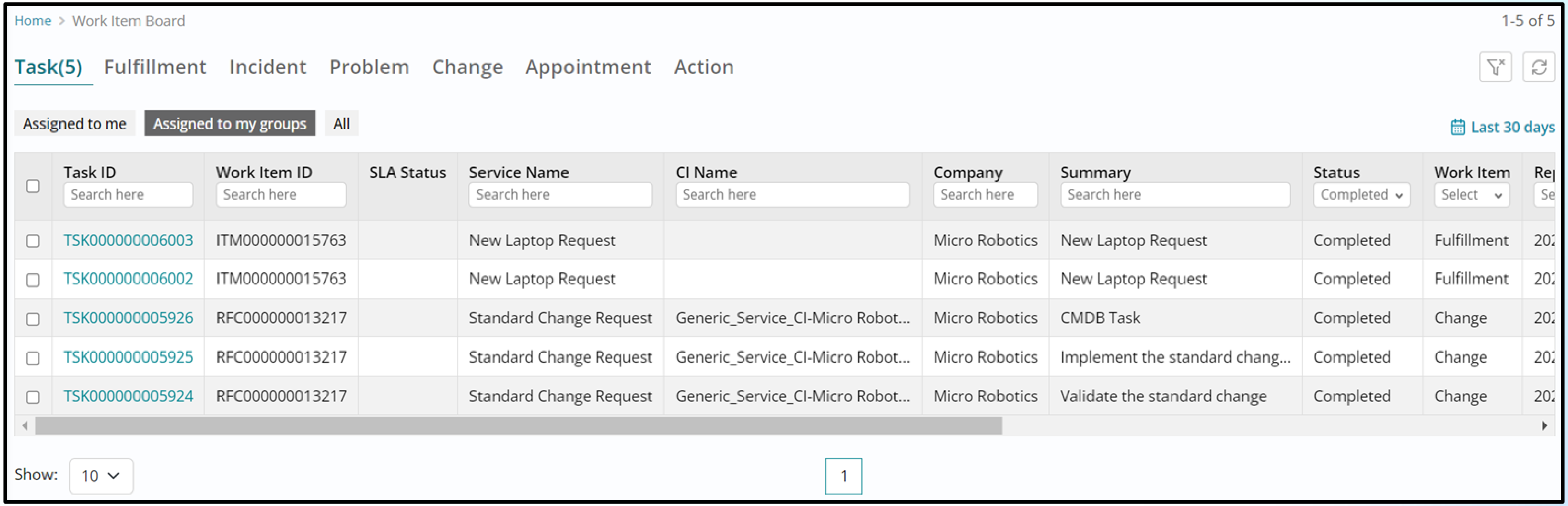
Fulfillment - Work Item Board

- Under Fulfillment section and Assigned to my groups sub-section, use the status filter to show Fulfilled tickets and you will be able to view the ticket you just fulfilled.
- You can also choose to explore other filters available on this page.



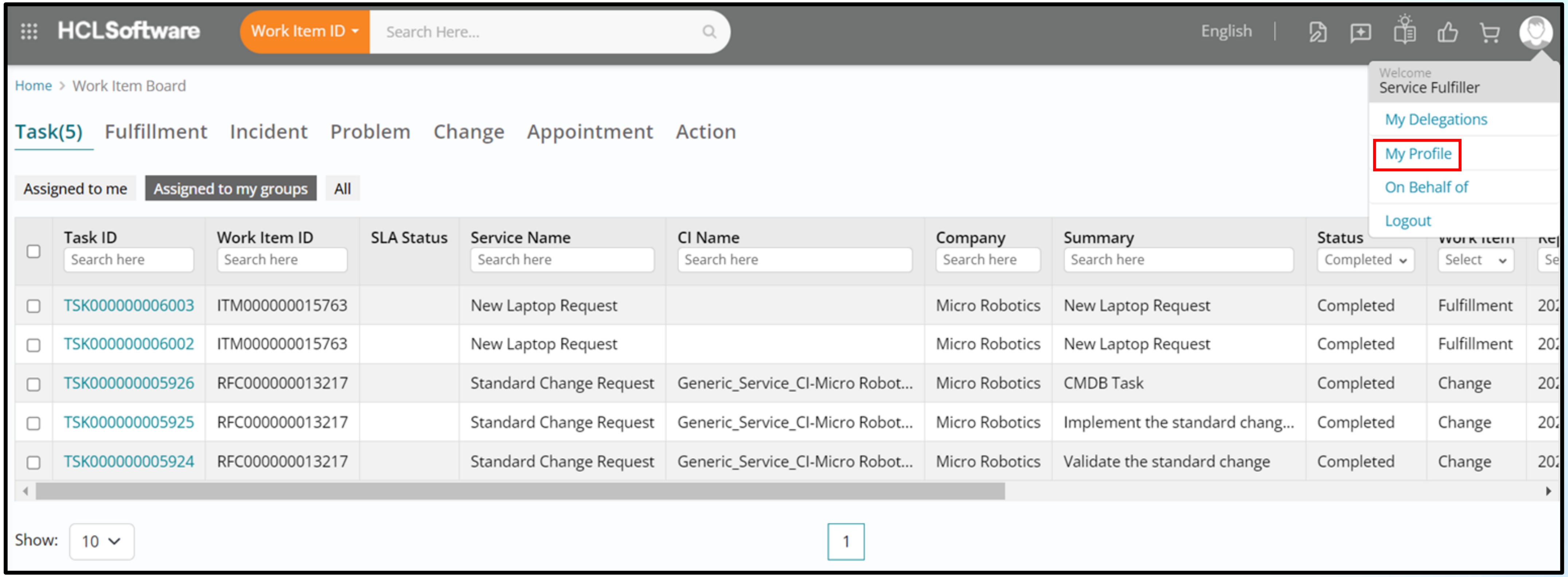
Task - Work Item Board

- Similarly, to view the completed tasks, click on Task section and Assigned to my groups sub-section followed by using the status filter to show Completed tasks.
- You can choose to explore other filters available on this page as well.



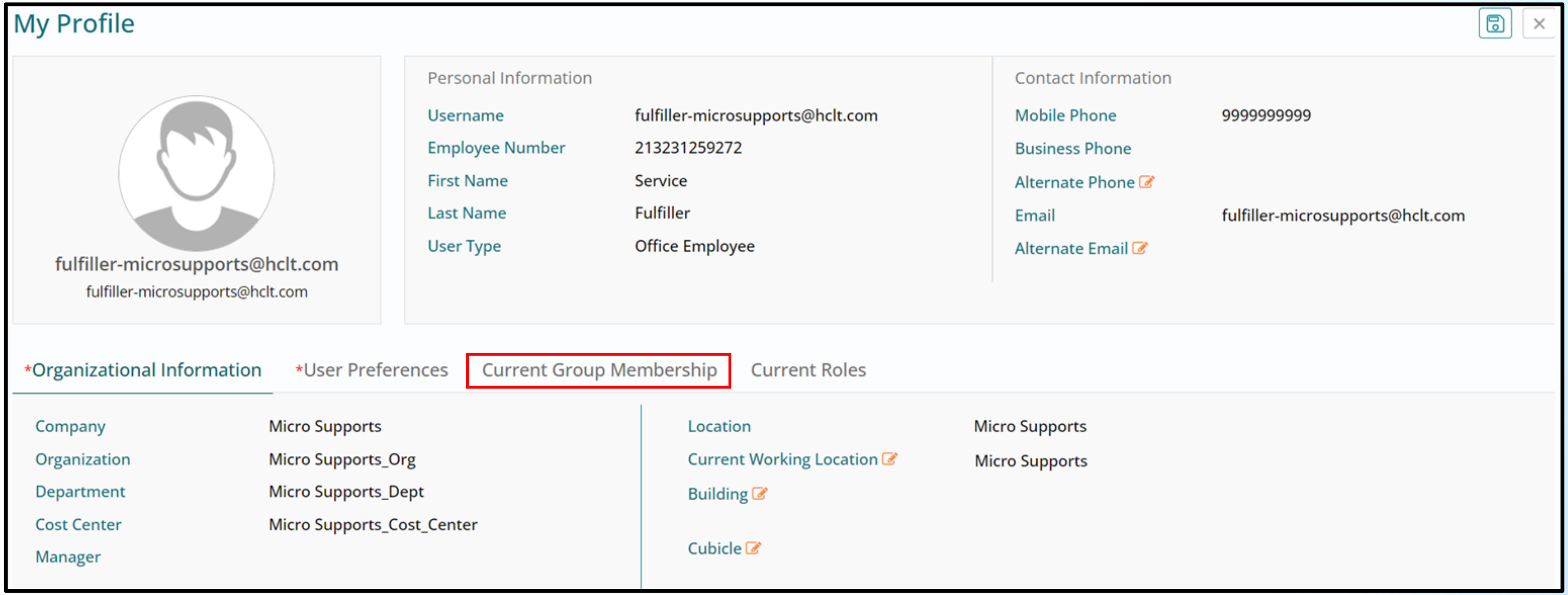
My Profile - Fulfiller

- Click on the My Account button (User icon) on the top right of your screen followed by clicking on My Profile.



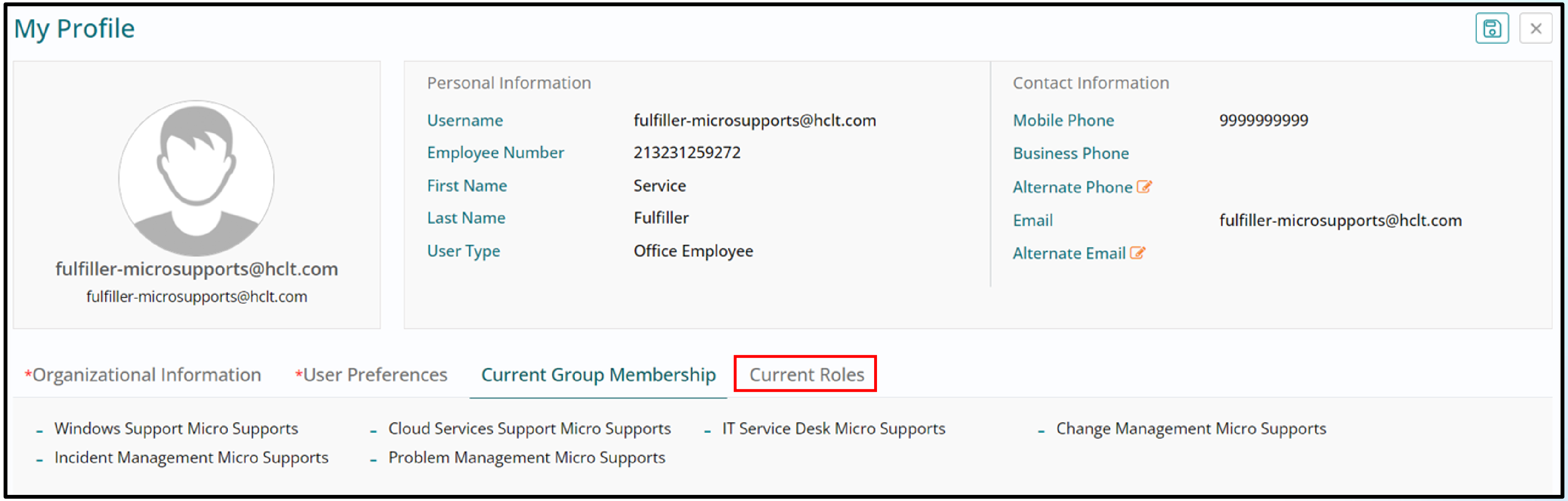
My Profile - Fulfiller

- You will land on the Organizational Information section, wherein you can view user organization details, personal and contact information. You also have the option of editing and updating a few details if needed.
- Click on Current Group Membership section next.



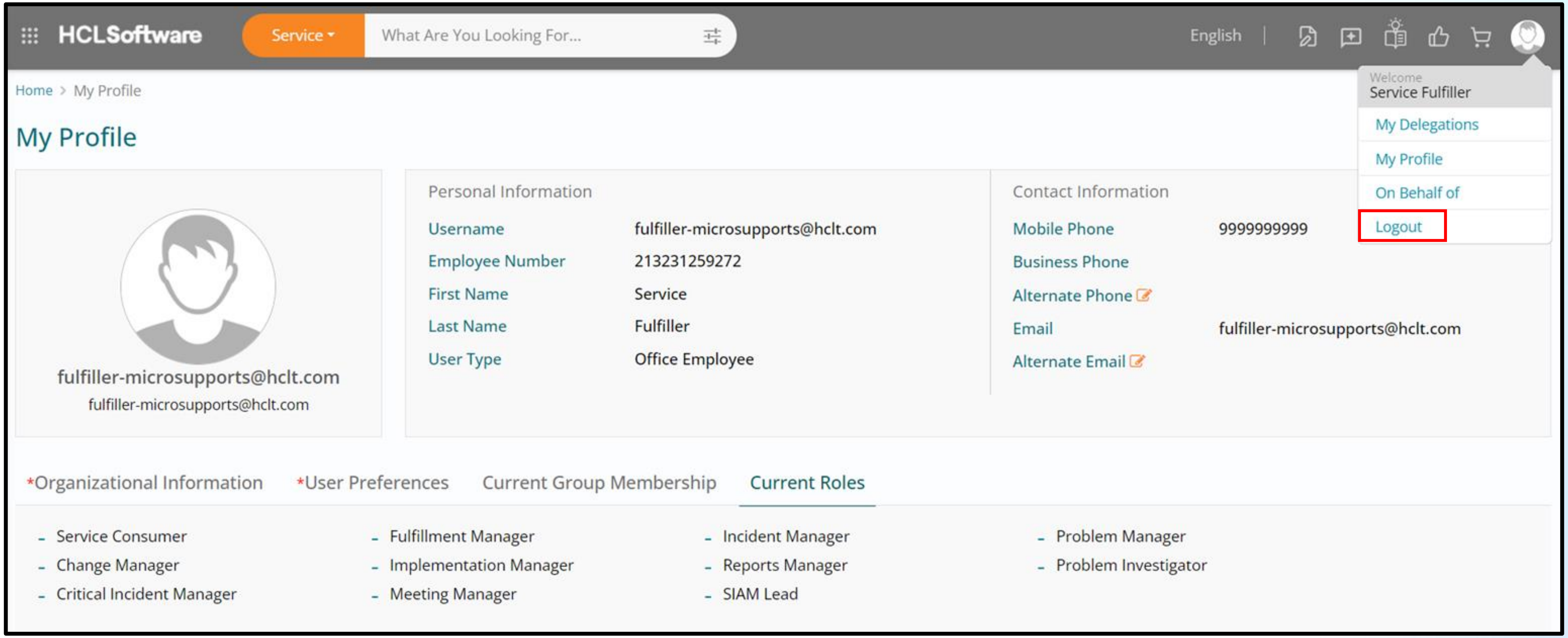
My Profile - Fulfiller - Current Group Membership

- In the Current Group Membership section, you can view all the groups that you are currently a part of.
- Click on Current Roles section next.



Current Roles and Logout of Fulfiller Role

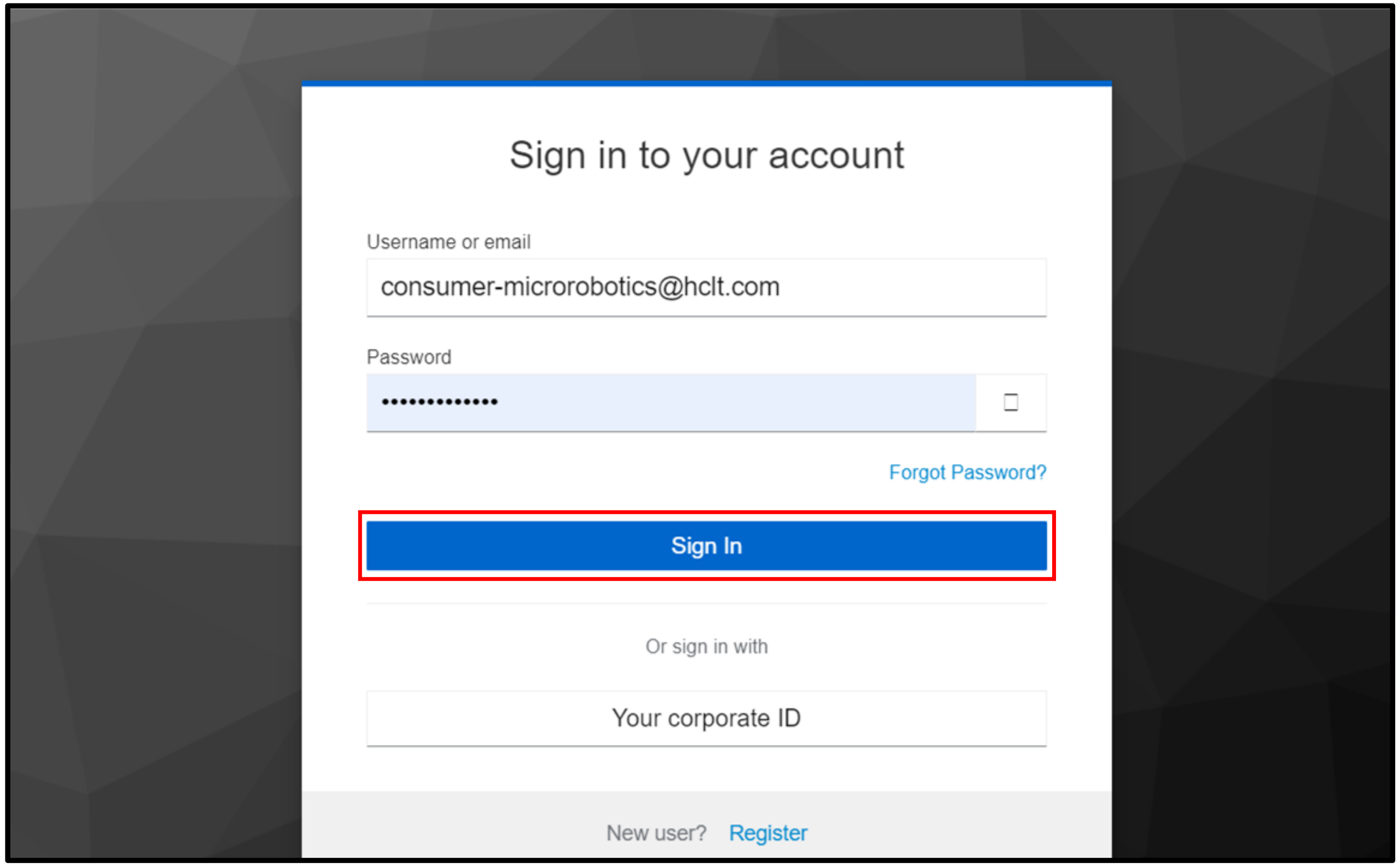
- You can view the roles assigned to the Service Fulfiller user in this section.
- Click on the My Account button (User icon) on the top right of your screen, followed by clicking on Logout. This will log you out of the Service Fulfiller role you are currently logged in with.
- We can proceed to using the consumer role next to respond to the fulfilled request's survey.



HCLSoftware

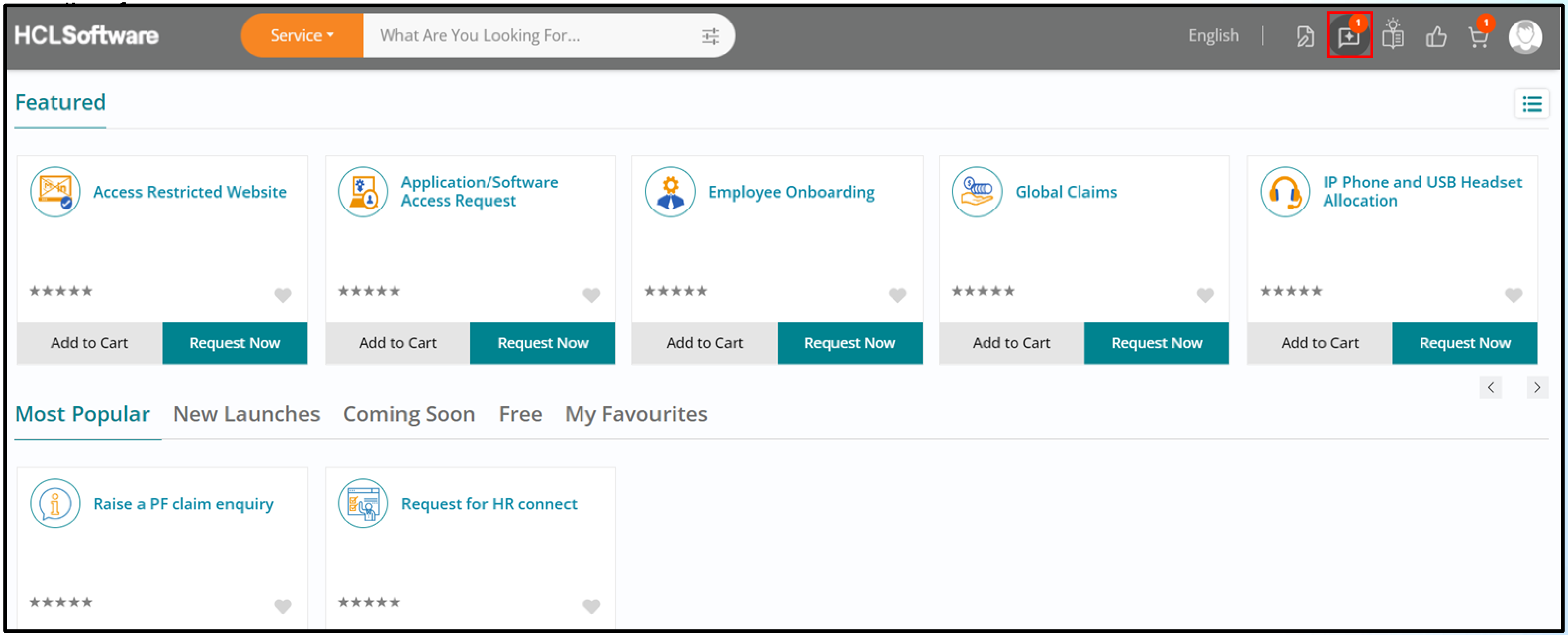
Login using Consumer Role

- Use the consumer role credentials to log into the instance.
- Click on Sign In upon entering the credentials.



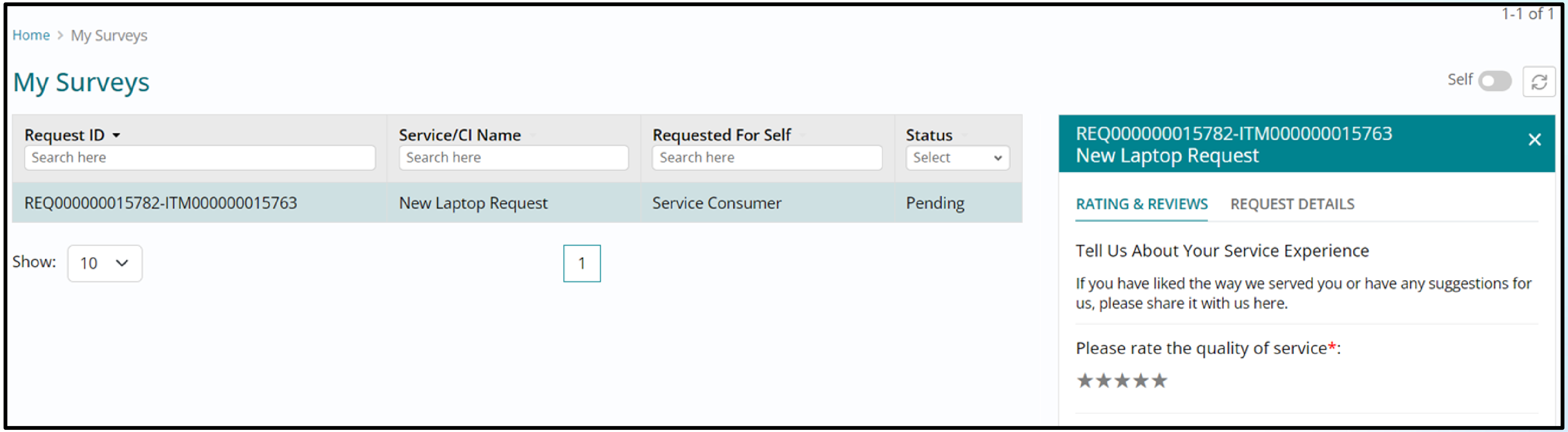
Landing Page

- Upon logging into the HCL BigFix Service Management consumer homepage, you will see all the service offerings available for consumption.
- Navigate to the top right of the BigFix Service Management page and click on Pending Surveys button, to view the surveys



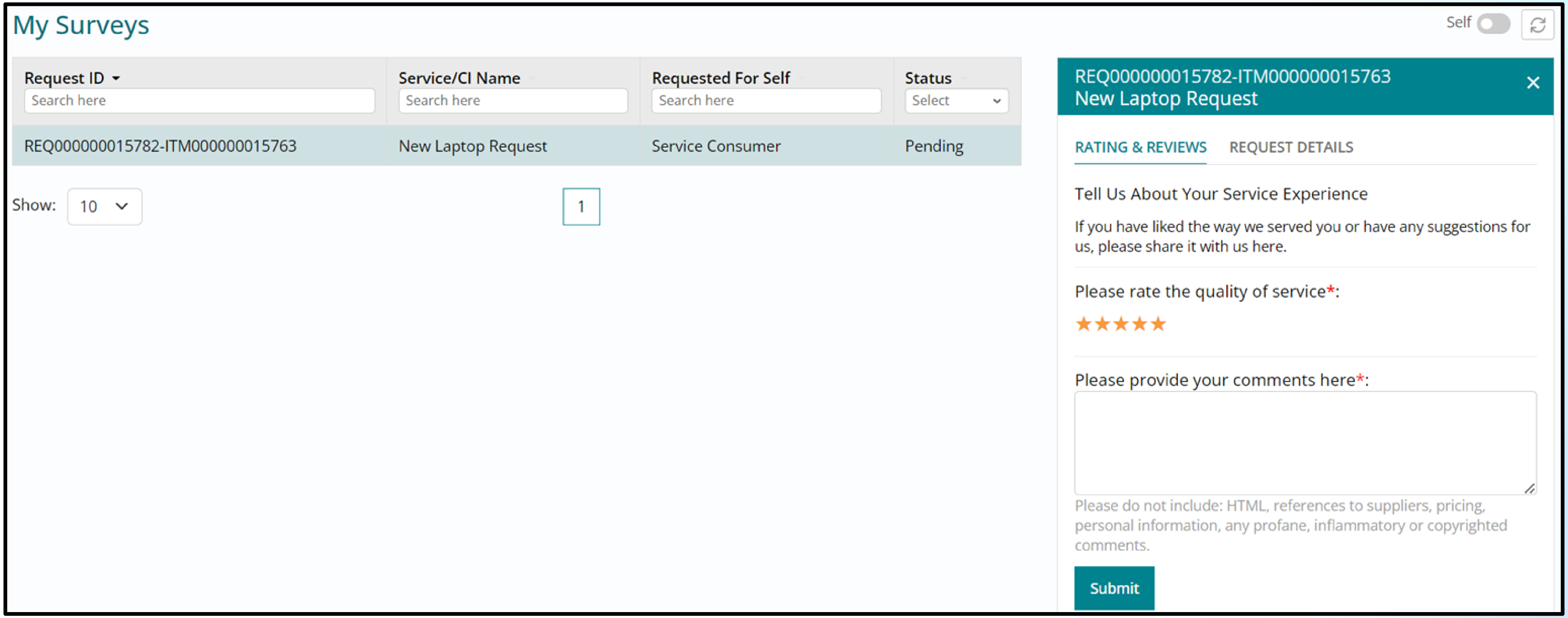
My Surveys

- Click on the request pending for survey response from the list view.
- You may choose to click on the Request Details section towards the right and browse through the ticket information.
- This is particularly useful if you have several requests pending for your survey to avoid confusion.



My Surveys

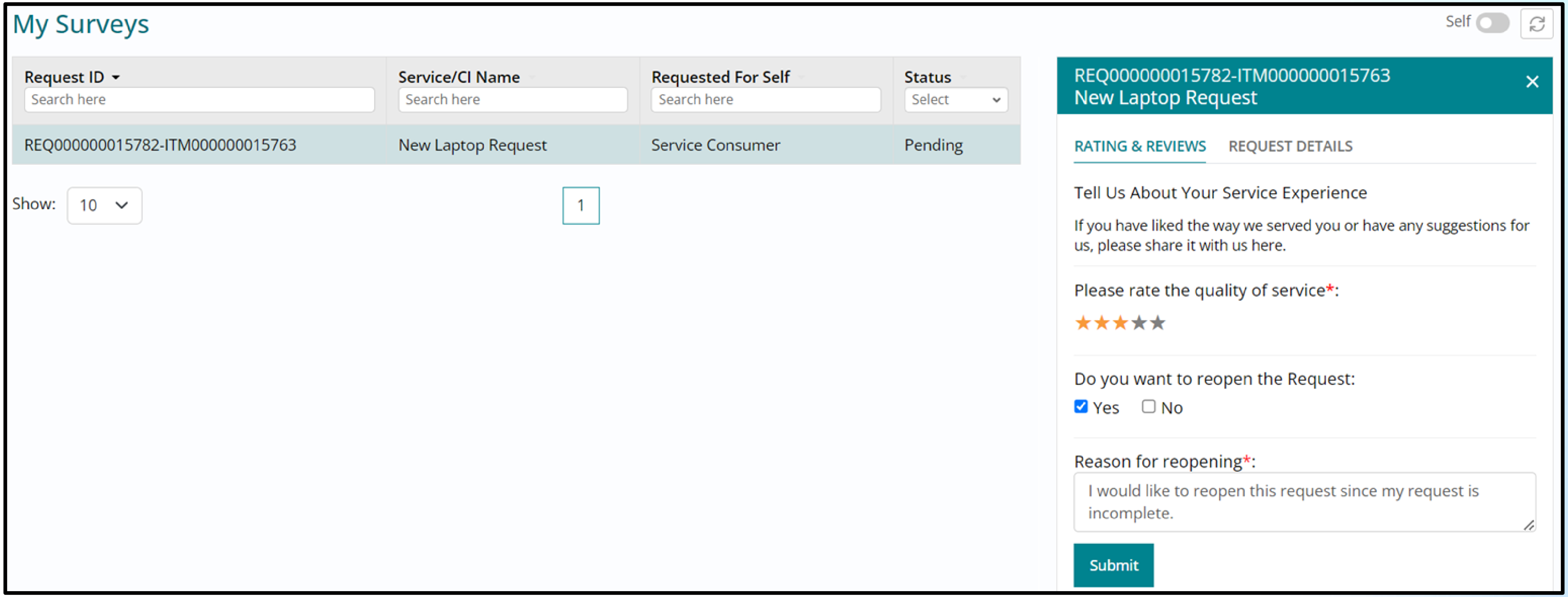
- There are one of two actions that you can take on a request pending survey.
- The first is wherein you can give a rating of 4 or 5 stars via selection followed by providing satisfaction comments. Ignore this step so that you can view what happens when you give a lesser rating. You can always try giving a good rating in any of your future requests during this trial.



My Surveys - Reopening Request

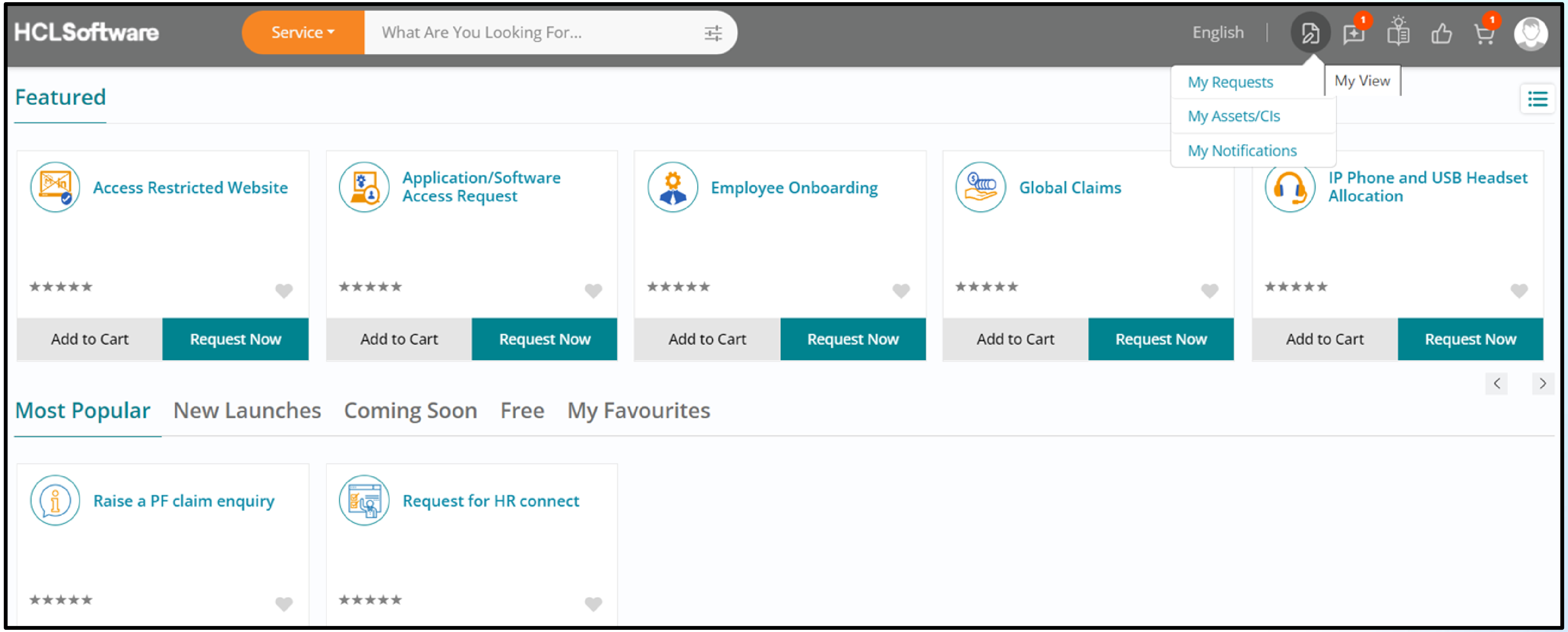
- The second action that is possible and which you must perform is, to try giving a rating of 3 or less than 3 via selection of stars, followed by clicking on Yes to reopen the request.

- Type the reason for reopening and click on Submit. The request will be reopened and assigned to the same fulfillment group for further action.



My View

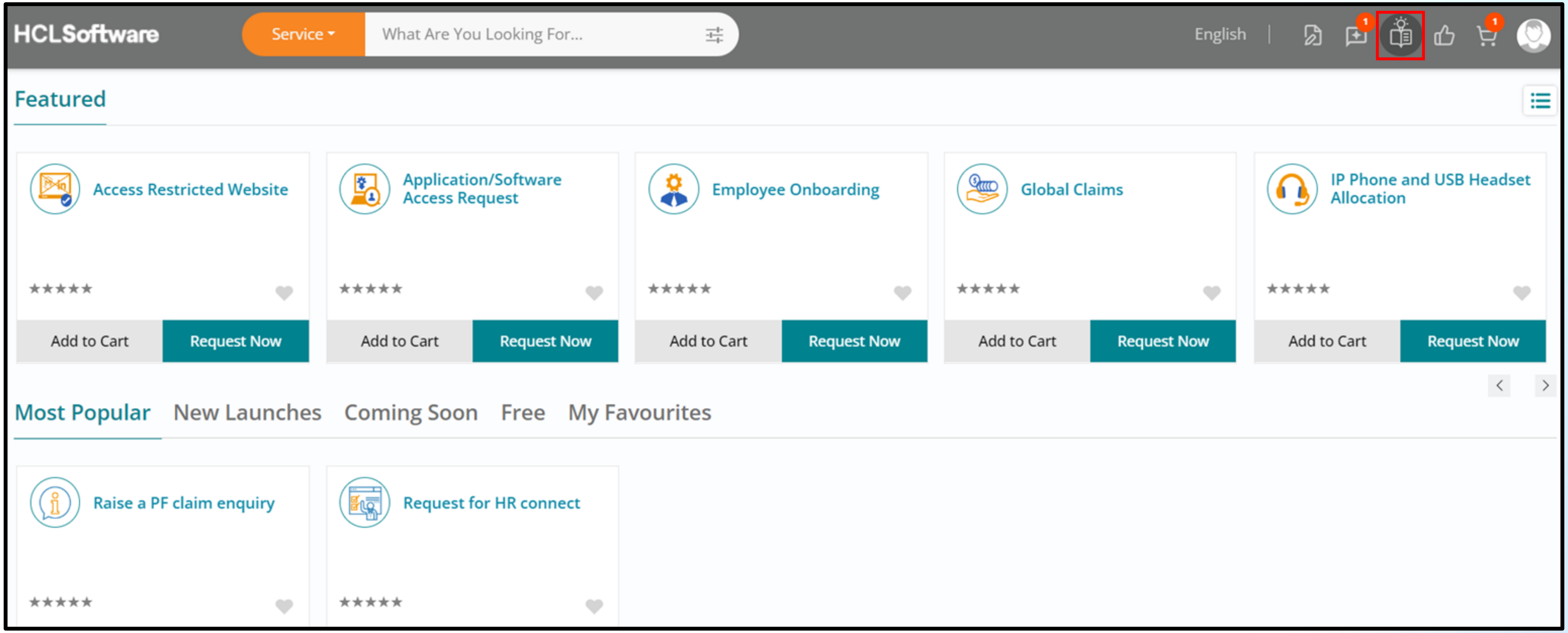
- Navigate to the top right of your page and click on My View button which will provide you an option to click and view the requests which you have raised for yourself or on behalf of someone.



Knowledge Center

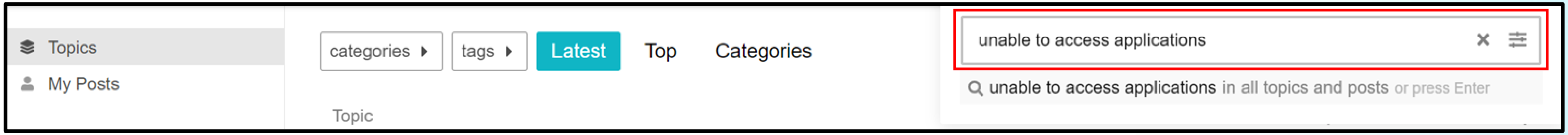
- HCL BigFix Service Management also has a knowledge management module which can be accessed by navigating to the top right of your page, followed by clicking on Knowledge Center button.

- Click on this button to view the knowledge center.

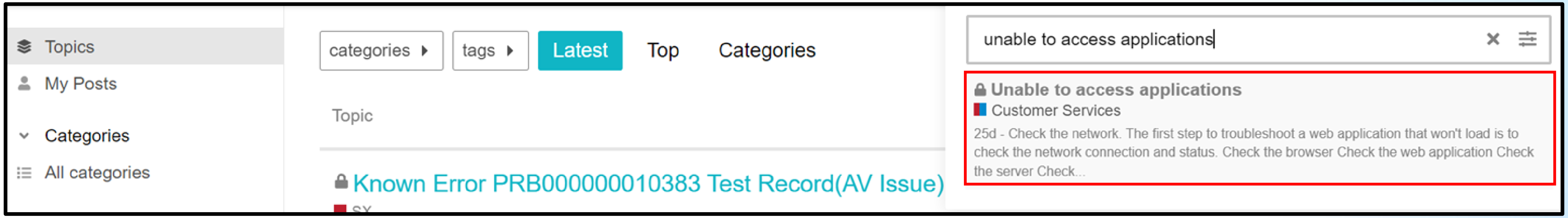


Knowledge Center

- The knowledge center will automatically open in a new tab on your browser.
- Click on Log In followed by typing 'unable to access applications' in the search bar on the top right of the page, and then click on Enter.

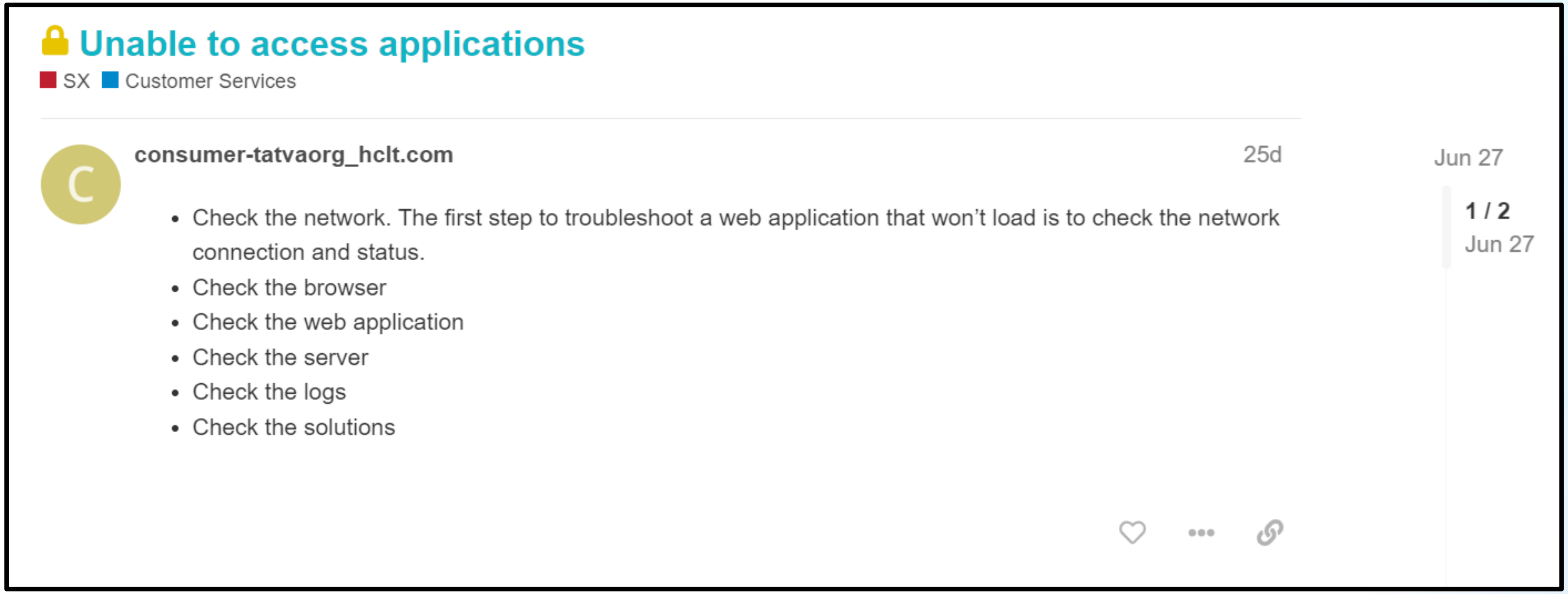


- An article which matches the keyword entered in will appear.
- Click the article and it will open on your screen.



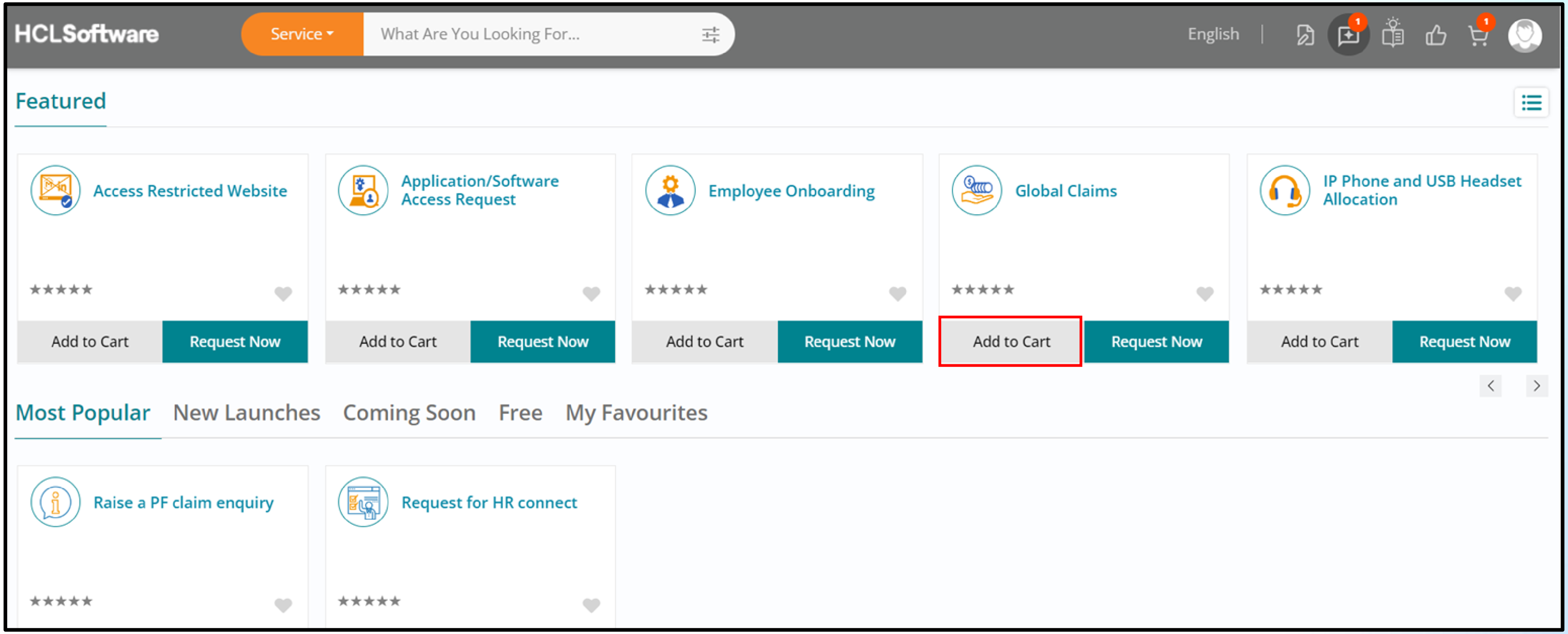
Knowledge Center

- The article will appear on your screen.
- HCL BigFix Service Management has this unique ability to use traditional knowledge management as well as crowdsourced knowledge as a part of its knowledge management offering.
- Click on the other tab on your browser to navigate back to the consumer homepage of HCL BigFix Service Management.



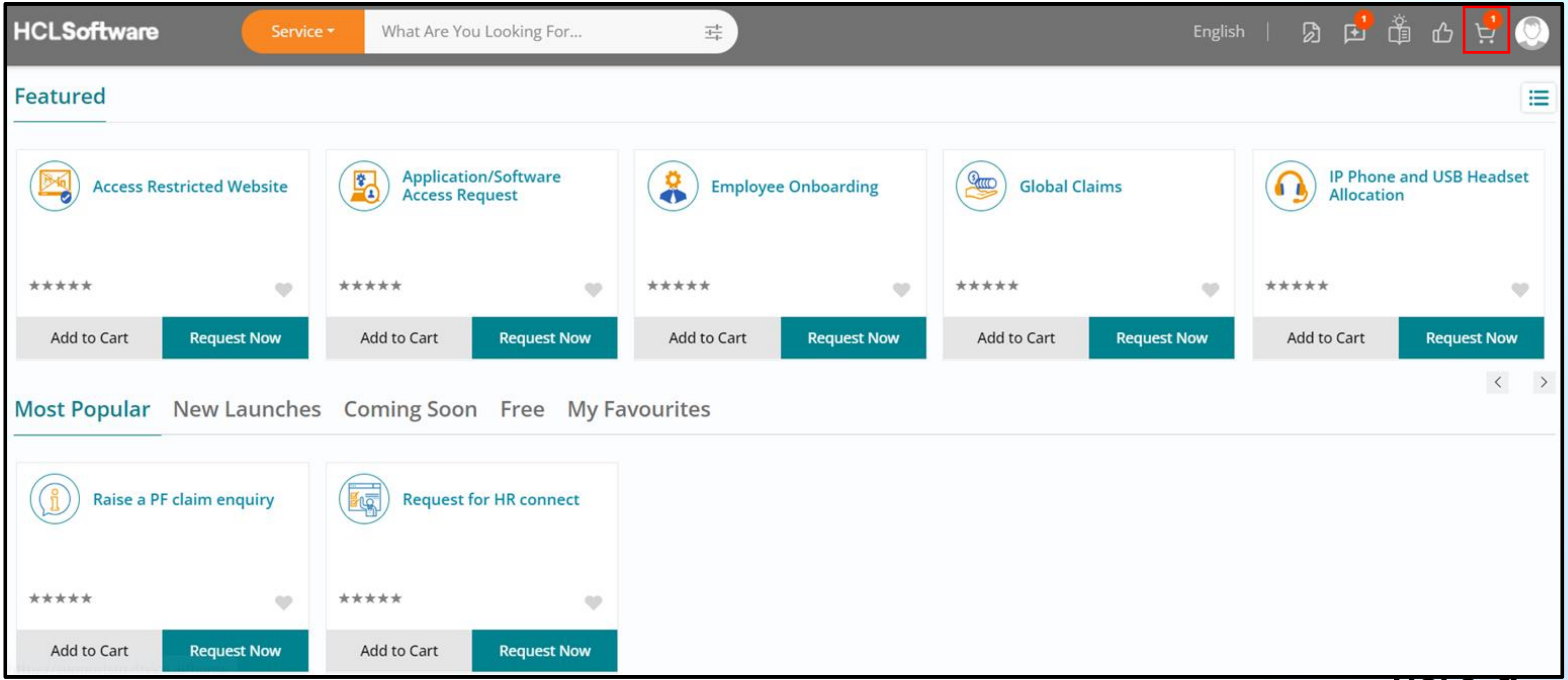
Landing Page

- Upon navigating back to the HCL BigFix Service Management consumer homepage, you will see all the service offerings available for consumption.
- Click on the Add to Cart button on the Global Claims offering under Featured section on the screen.



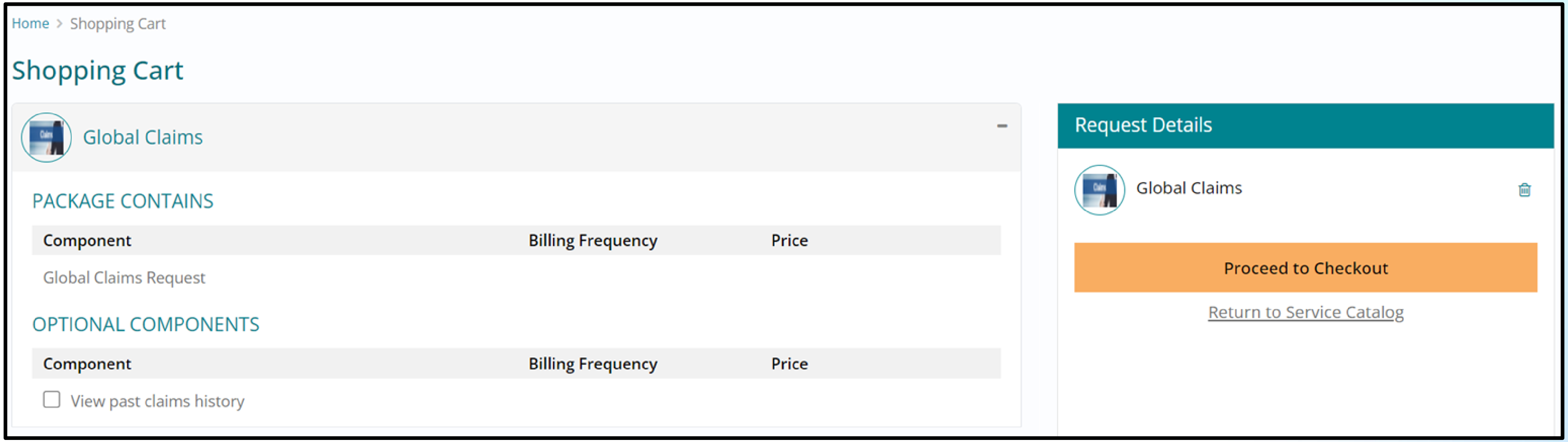
Shopping Cart

- You will automatically receive a prompt to navigate to the Cart.
- Alternatively, you can navigate to the top right of your page and click on the Shopping Cart option. This is the page that shows the offerings added to cart at any point in time.



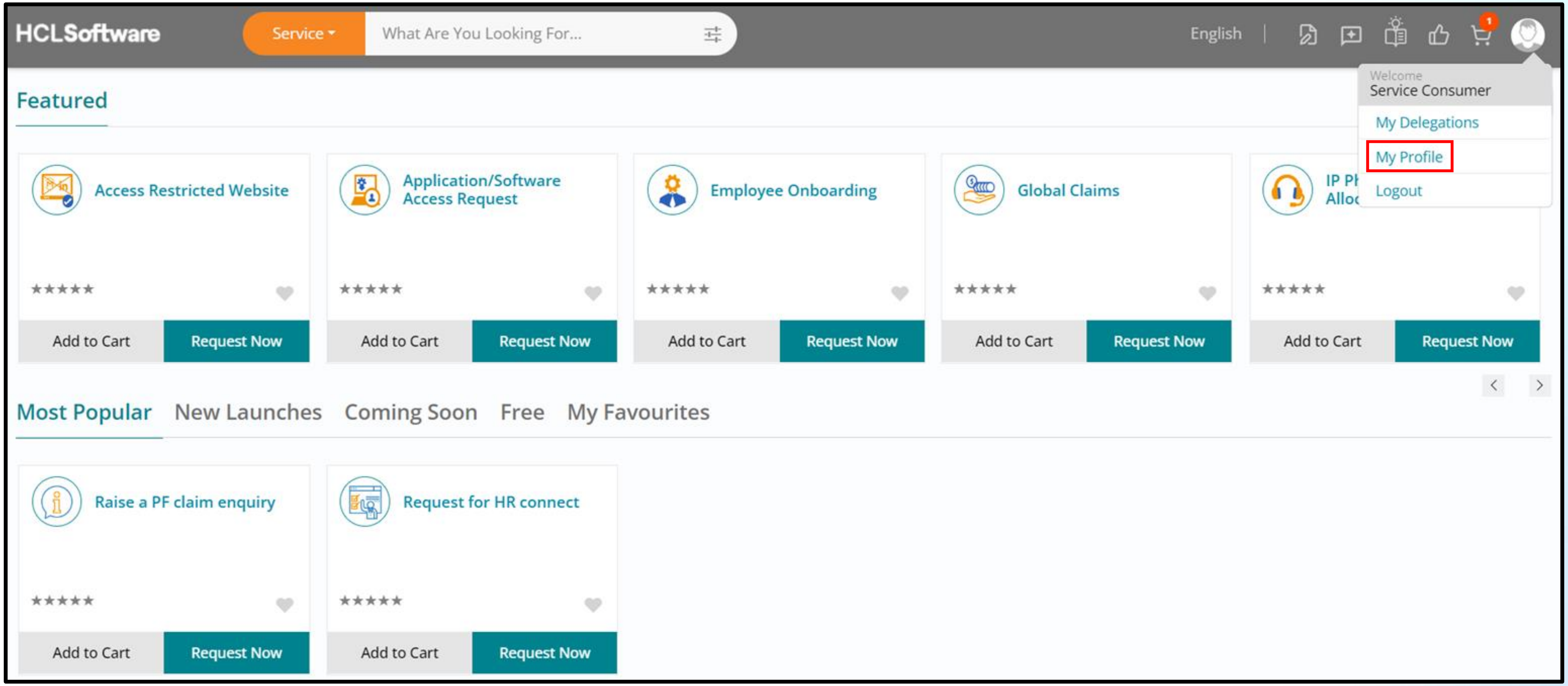
Shopping Cart

- Once you are in the shopping cart section, you can view the offering(s) added to cart and choose to Proceed to Checkout if required.
- At some point in your trial, feel free to utilize this option as well.



My Profile - Consumer

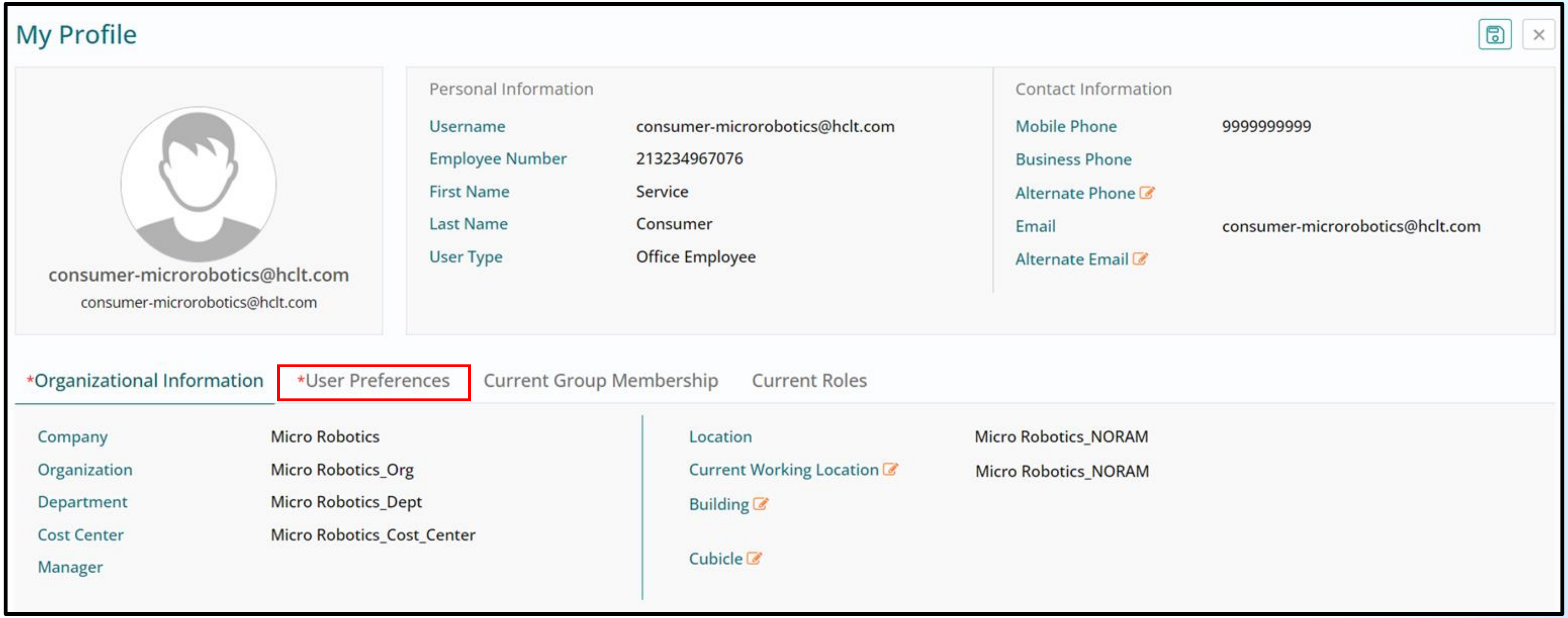
- Click on the My Account button (User icon) on the top right of your screen followed by clicking on My Profile.



My Profile - Consumer

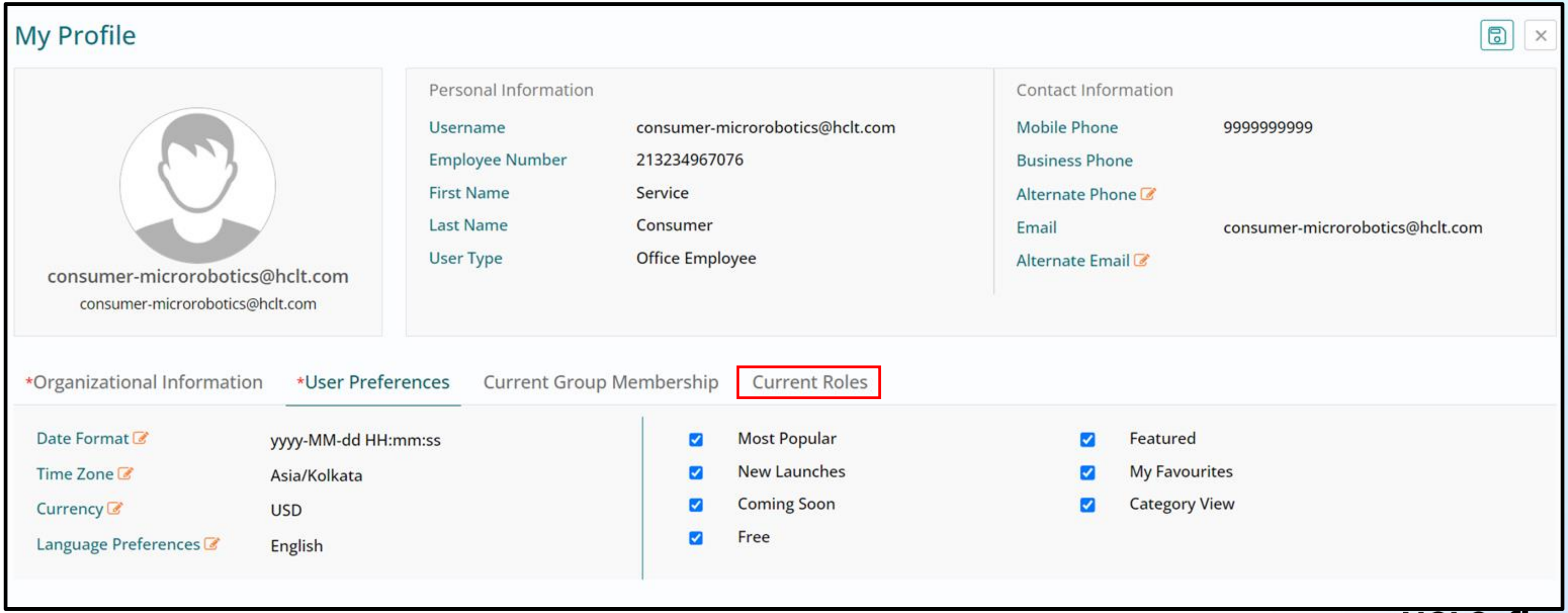
- You will land on the Organizational Information section, wherein you can view user organization details, personal and contact information. You also have the option of editing and updating a few details if needed.

- Click on User Preferences section next.



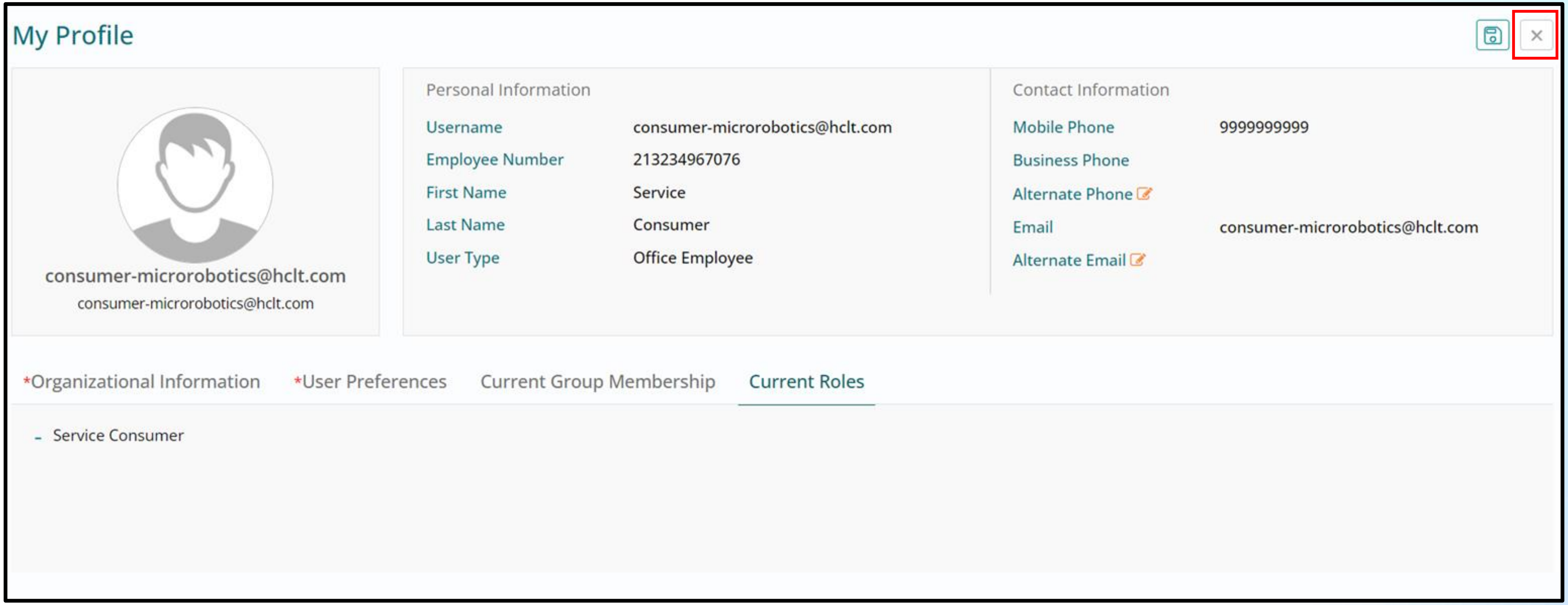
My Profile - Consumer - User Preferences

- In the User Preferences section, you can view several options wherein you can update details such as date format, time zone, currency and language preferences to name a few.
- You can also view the options such as Most Popular, Featured etc. which can be checked / unchecked for visibility on the consumer homepage. By default, the Featured and Most Popular sections are made visible on the homepage.
- Click on Current Roles section next.



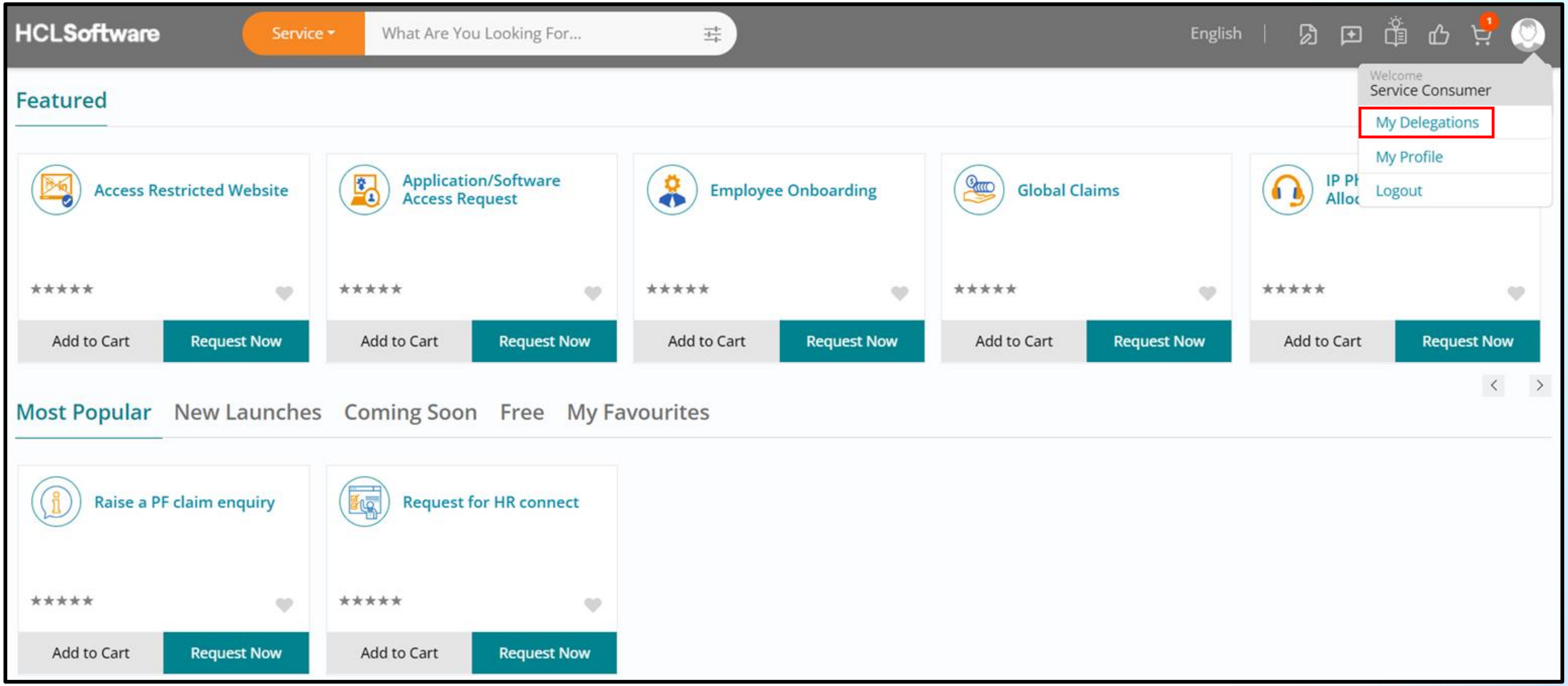
My Profile - Consumer - Current Roles

- You can view the roles assigned to the Service Consumer user in this section.
- By default, every user will have a Service Consumer role in HCL BigFix Service Management.
- Click on close button to close this section and navigate back to the consumer homepage.



My Delegations

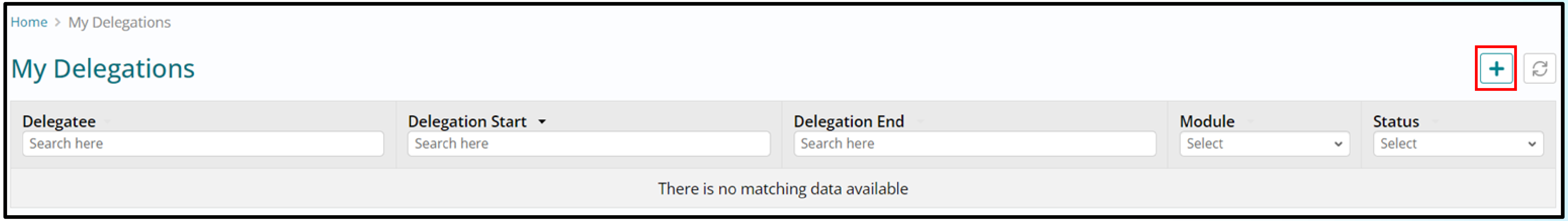
- Navigate to the top right of the page and click on the My Account button (User icon), followed by clicking on My Delegations.



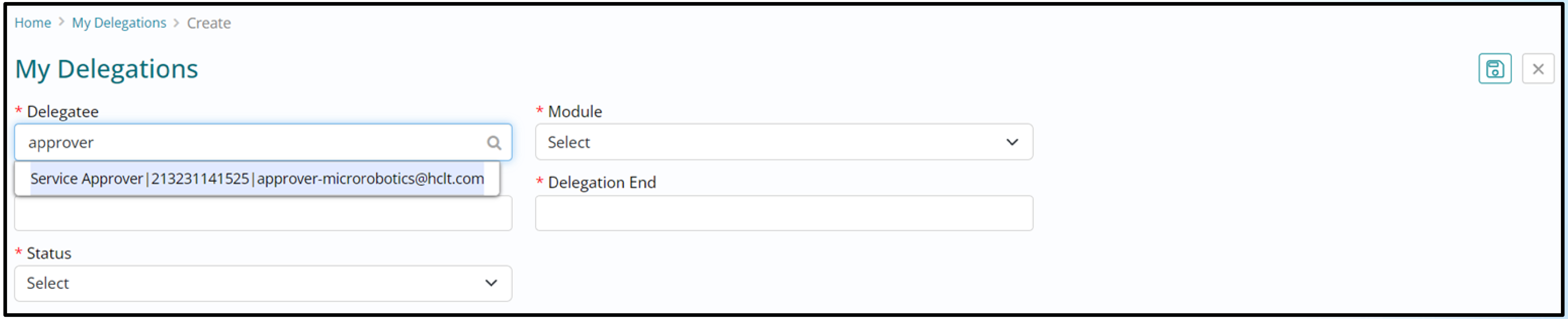
My Delegations

- HCL BigFix Service Management provides this useful feature to delegate service requests or change approvals for a specific time in your absence, via My Delegations page.

- Upon landing on this page, you can click on plus button and create a delegation.

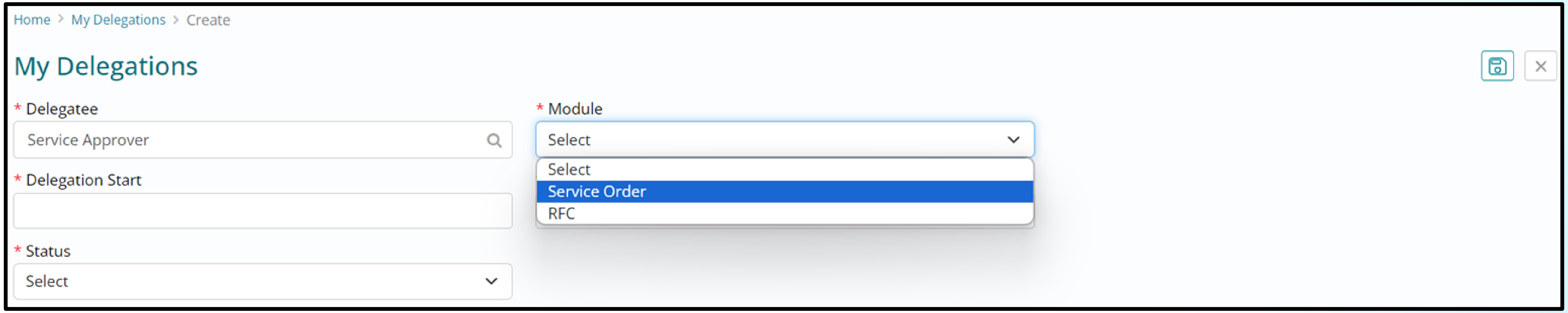


- Type in ;approver' (the role you would like to delegate to) in the Delegatee field and select the Service Approver user option.



My Delegations

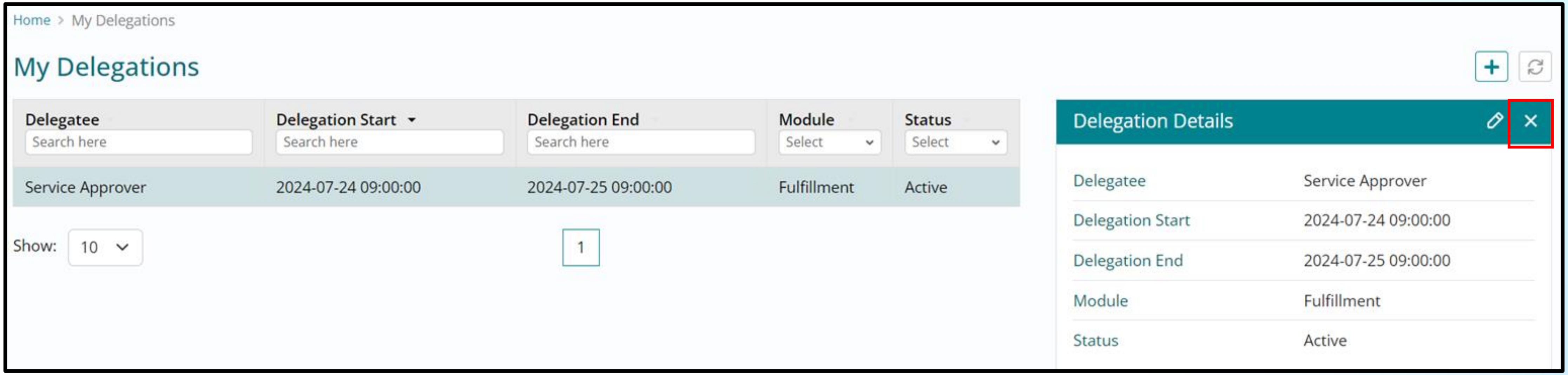
- Select the module as Service Order from the dropdown options.



- Choose the delegation start and end date and time followed by selecting status as Active and clicking on Save button.

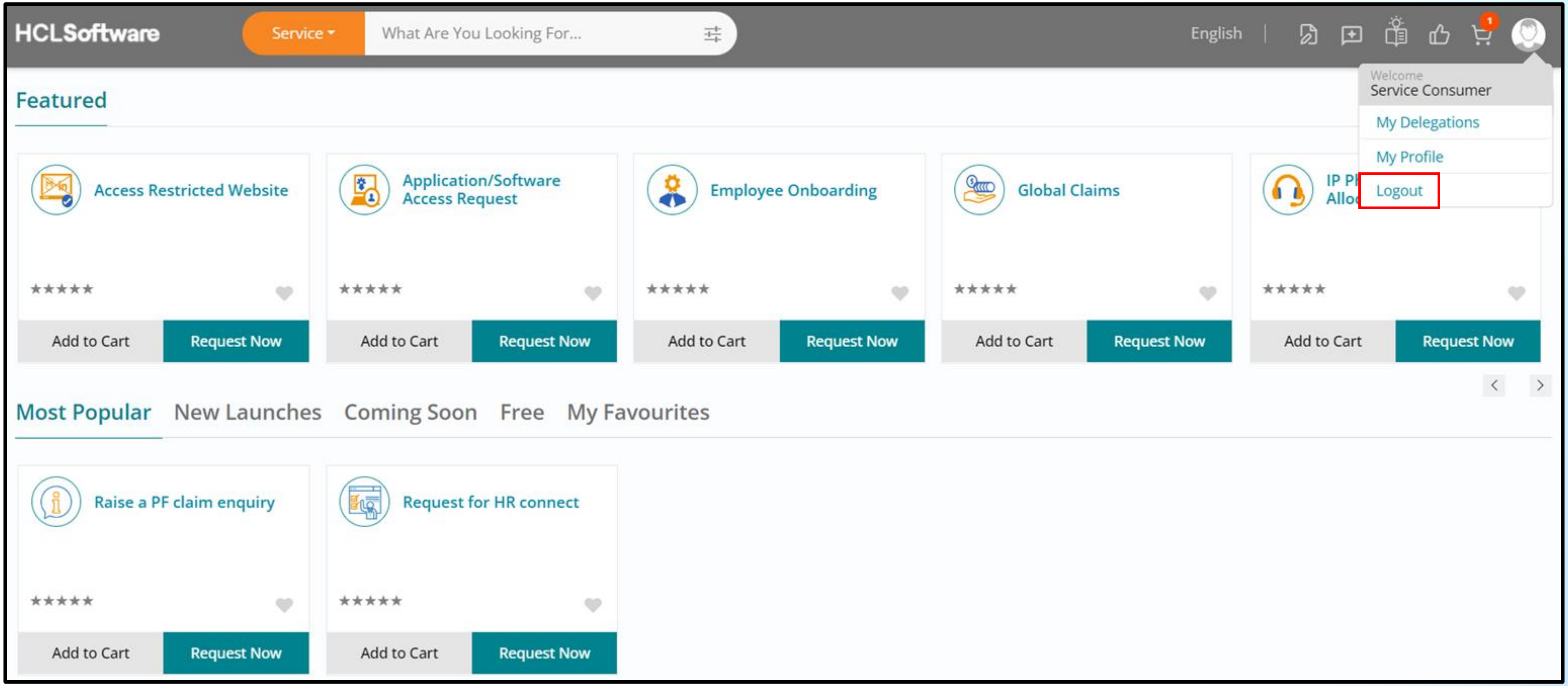
My Delegations

- The delegation will be saved, and you can click on it from the My Delegations list view to browse through its details.
- Click on close button to close this section and then navigate back to the consumer homepage



Logout

- Click on the My Account button (User icon) on the top right of your screen followed by clicking on Logout.
- This brings us to the end of consumer homepage and request fulfillment; you may choose to try more use cases.



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