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HCL BigFix AEX Trial Guide

HCL BigFix AEX: An AI-Driven
Experience Platform



BigFix AEX Trial Guide Journey

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Scope of AEX Trial Program

The trial version provides a hands-on experience of our platform with certain usage limitations.

1. GenAI Messages per Day: 300
2. Number of Agents You Can Create: 5
3. Number of Custom Tools You Can Create: 5
4. Number of Collections Available: 1
5. Total Documents Size You Can Add: 500 mb
6. Out-of-the-Box (OTB) Tools: 50 (can be added as per the user requirement for the use case)
7. Number of Users You Can Add: 5
8. Number of Live Agents You Can Add: 5

Upgrade to the full version to unlock unlimited access and advanced features.

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Introduction to HCL BigFix AEX

Get an overview of the platform core capabilities.



◆ Introducing HCL BigFix AEX

HCL BigFix AEX is an enterprise-grade agentic AI platform that automates a wide range of use cases across industries while delivering a trusted AI employee experience.



Conversational Virtual Agent (CVA)

- Conversational, multilingual employee support
- Always-on self service
- Reduces wait times
- Contextual wait times



Self Heal

- Detects and resolves issues automatically
- Auto detects and resolves
- Prevent downtime
- Boost user satisfaction



Agent Assist

- AI-augmented service desk support
- AI-suggested solutions
- Faster ticket resolution
- Human and AI-driven collaboration



Voice Agents

- Hands-free, voice-first task automation
- Natural voice interface
- Hands-free execution
- Real- world workflows



Workflow Orchestrator

- No-code orchestration
- Facilitates cross-functional automation
- Governed secured automation

AEX Agentic AI Studio

Your central workspace to build, customize, and orchestrate AI agents.

Includes key components such as LLM Models · Tool Catalogue · Custom Tool Creation · AI Workflows · Multi-Agent Orchestration

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Getting Started

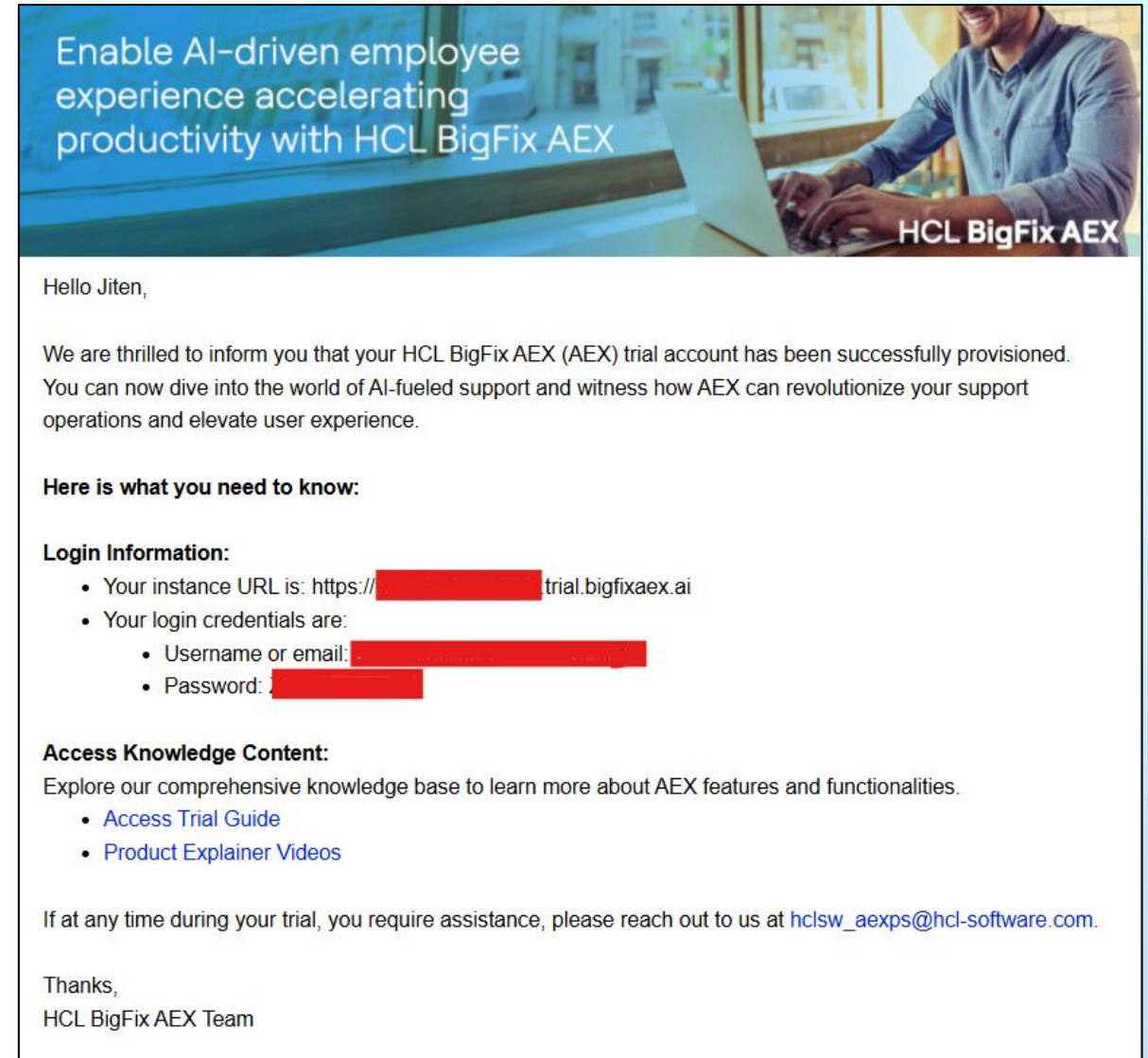
Set up your access and roles and configuration.



◆ Accessing Your AEX Trial Instance

Your access details are sent to you by email. Follow the below instructions to log in.

1. Open the email from HCL BigFix AEX.
2. Click the provided instance link.
3. Use the username and password mentioned in the email to log in.



User Roles and Access Levels

As a user, following are the different roles available on AEX:

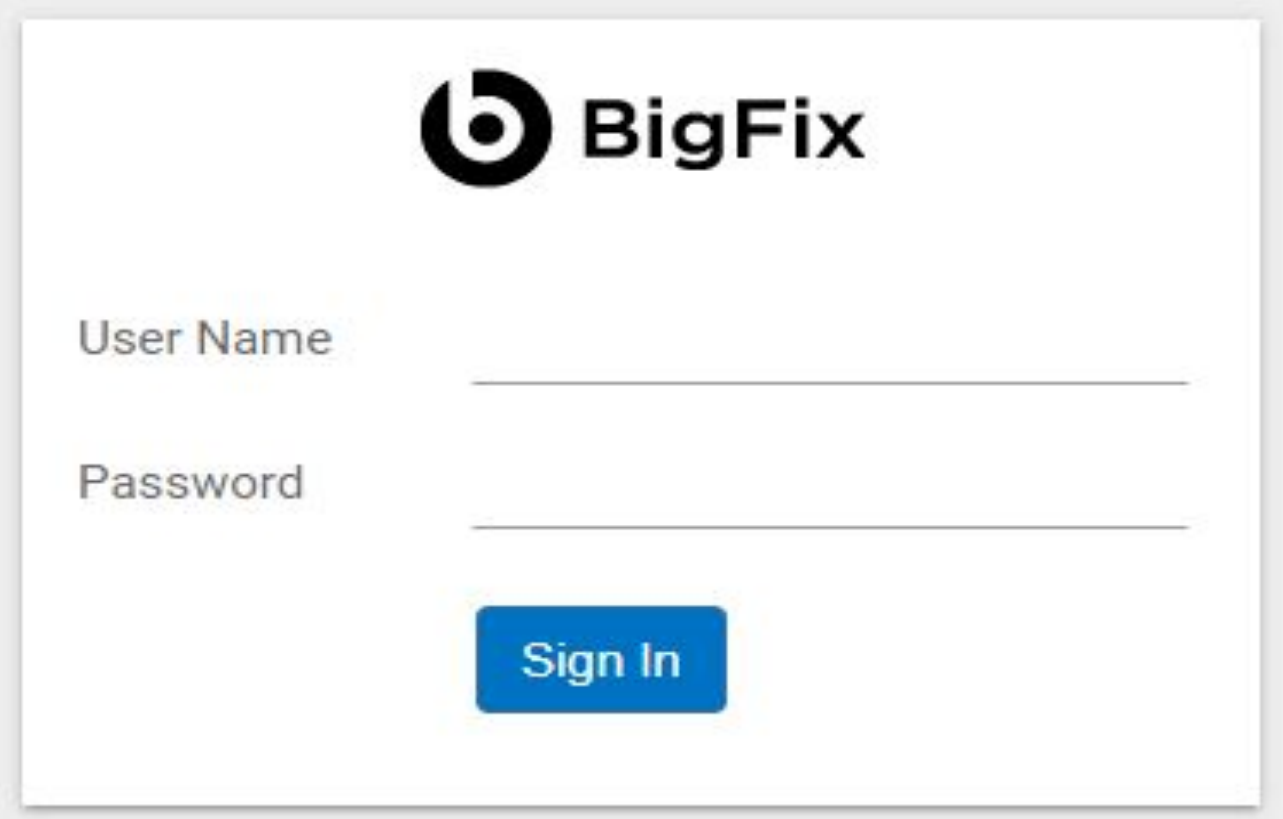
Role	Description
Admin	Full access to Cognitive & Bot consoles; manage platform configurations.
End User	Interacts with bots, executes queries, and uses available features.
Agent	Resolves end-user queries in real time.
Agent Supervisor	Manages support agents and assigns roles.

Admin access allows you to:

- Manage user roles
- Configure platform settings
- Simulate and evaluate all AEX role-based functionalities

◆ Log in to Your AEX Instance

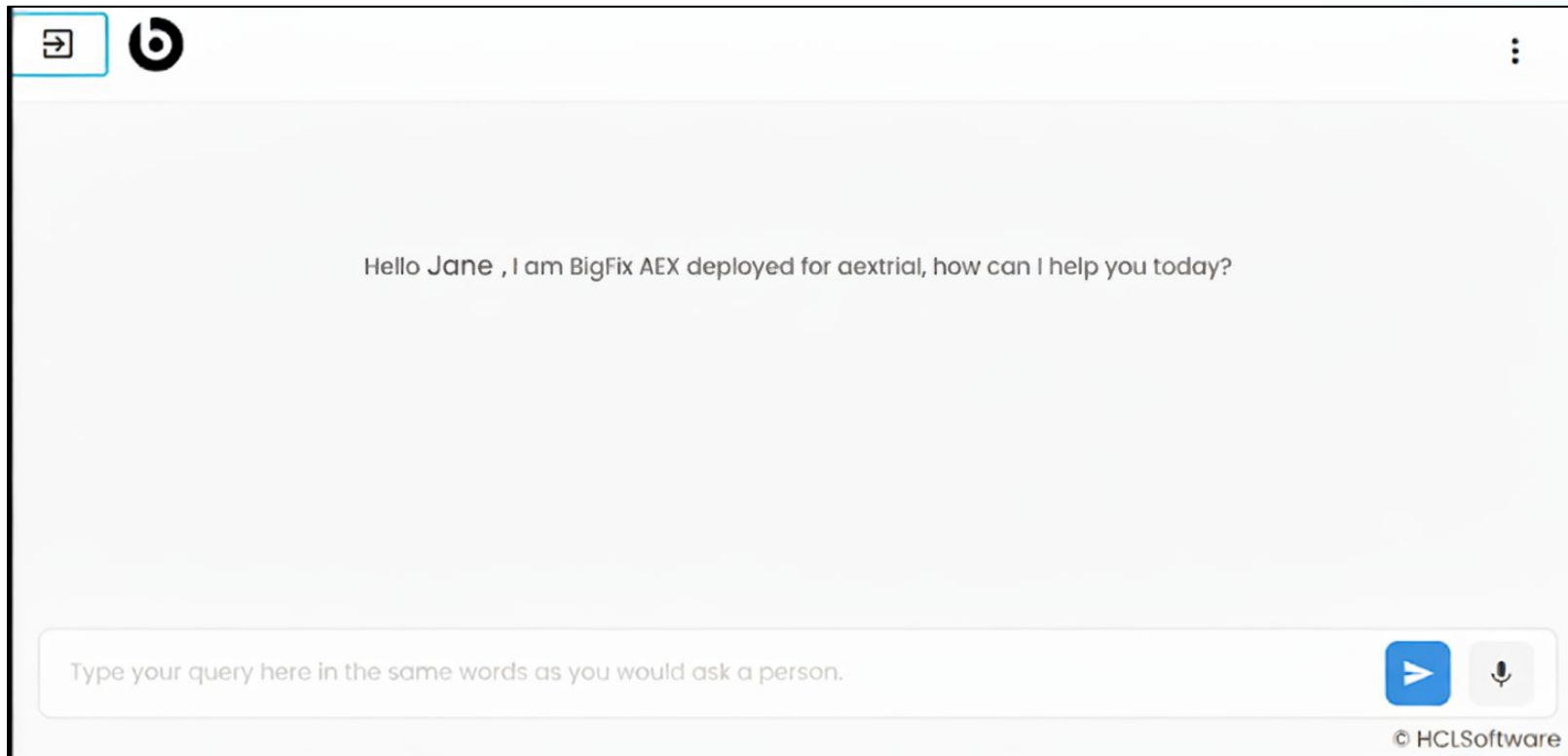
1. Navigate to the instance URL provided in the email.
2. Enter your credentials received in the welcome email.
3. Click “Sign In” to launch the AEX platform.

The image shows a login interface for the BigFix platform. At the top right, there is a logo consisting of a stylized 'b' inside a circle, followed by the text 'BigFix'. Below the logo, there are two input fields. The first field is labeled 'User Name' and the second is labeled 'Password'. Both fields have horizontal lines indicating where to enter text. Below these fields is a blue rectangular button with the text 'Sign In' in white.

◆ Tenant Landing Page

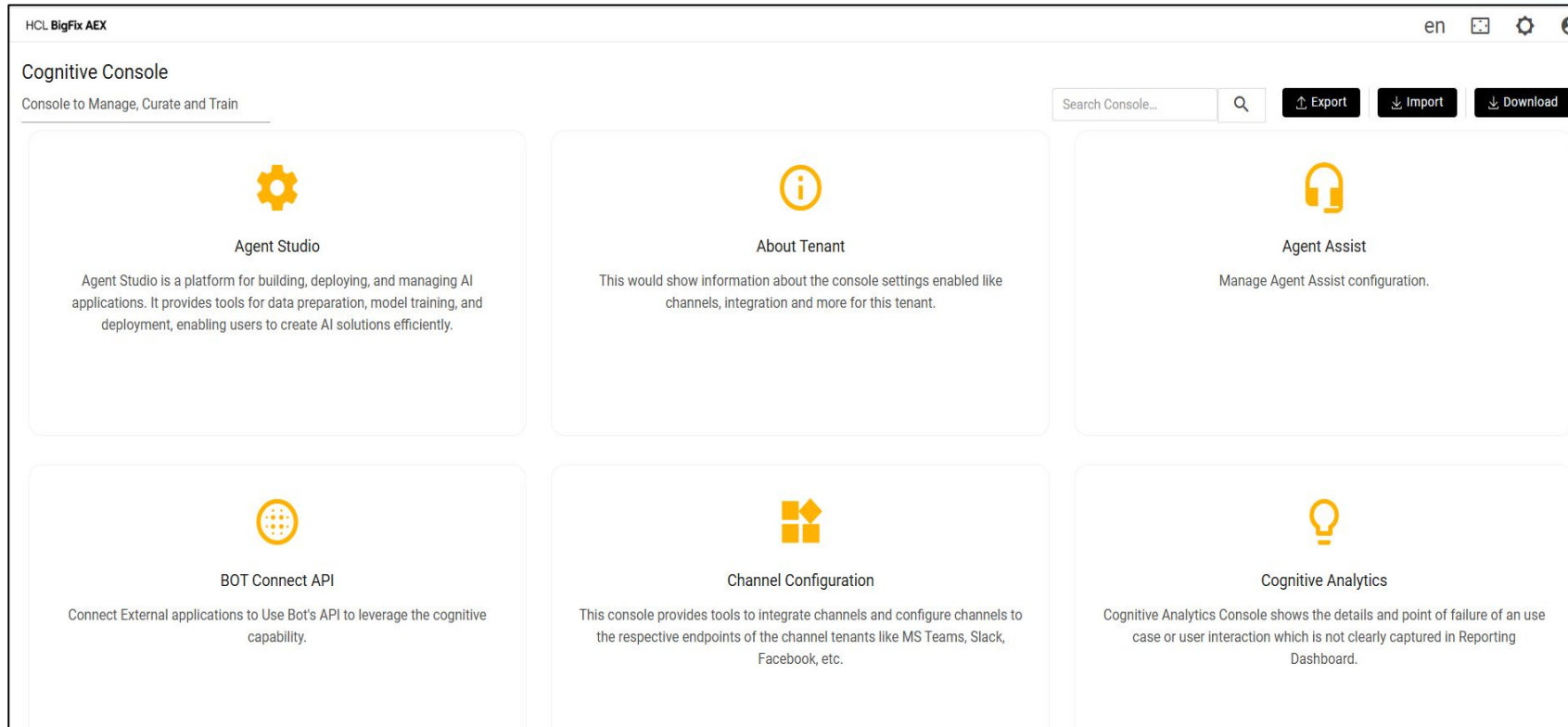
After signing in, the AEX chatbot opens automatically. This is where end users can interact with AI Agents.

1. Displays a welcome message personalized with the user's name.
2. Supports conversational queries related to configured agents.
3. Provides quick access to help, ticketing, and agent interactions.



◆ Admin Landing Page (Cognitive Console)

Admins can access the Cognitive Console by appending /admin to the tenant URL. This dashboard provides centralized control over the entire AEX platform.



From here admins can view and manage different consoles such as Agentic AI Studio, Agent Assist and User Management System.

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Exploring AEX Consoles

Modules Accessible under Trial



AEX Consoles Overview



Agent Studio

- **For:** Platform Administrators
- **Purpose:** Create, configure, and manage AI agents, tools, and workflows.
- **Utility:** Build intelligent automation using LLMs, memory, and orchestration.



Agent Assist

- **For:** Supervisors, Admins, and Agents.
- **Purpose:** Manage live agent interactions and AI-assisted service desk operations.
- **Utility:** Step-by-step guidance and ticket handling through chat dashboards.



User Management

- **For:** Platform Administrators.
- **Purpose:** Add or manage users, assign roles, and set permissions.
- **Utility:** Group-based access and tenant-level control.



Cognitive Virtual Assistant (CVA)

- **For:** End-users, IT support, and service agents
- **Purpose:** Handle user queries through conversational AI.
- **Utility:** Automates routine tasks, retrieves knowledge, and executes workflows.



Workflow

- **For:** End-users, Admins
- **Purpose:** Design and automate end-to-end business workflows that connect multiple systems, agents and data sources without writing code.
- **Utility:** Enable no-code orchestration of cross-functional processes ensuring governed, secured and efficient automation

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Ready-to-Use Agents

Explore pre-configured Agents



◆ Ready-to-Use Agents Overview

AEX comes with preconfigured agents that allow you to instantly explore AI-powered automation — **without building from scratch.**



These agents provide hands-on experience of AEX’s agentic architecture — from orchestration to execution.

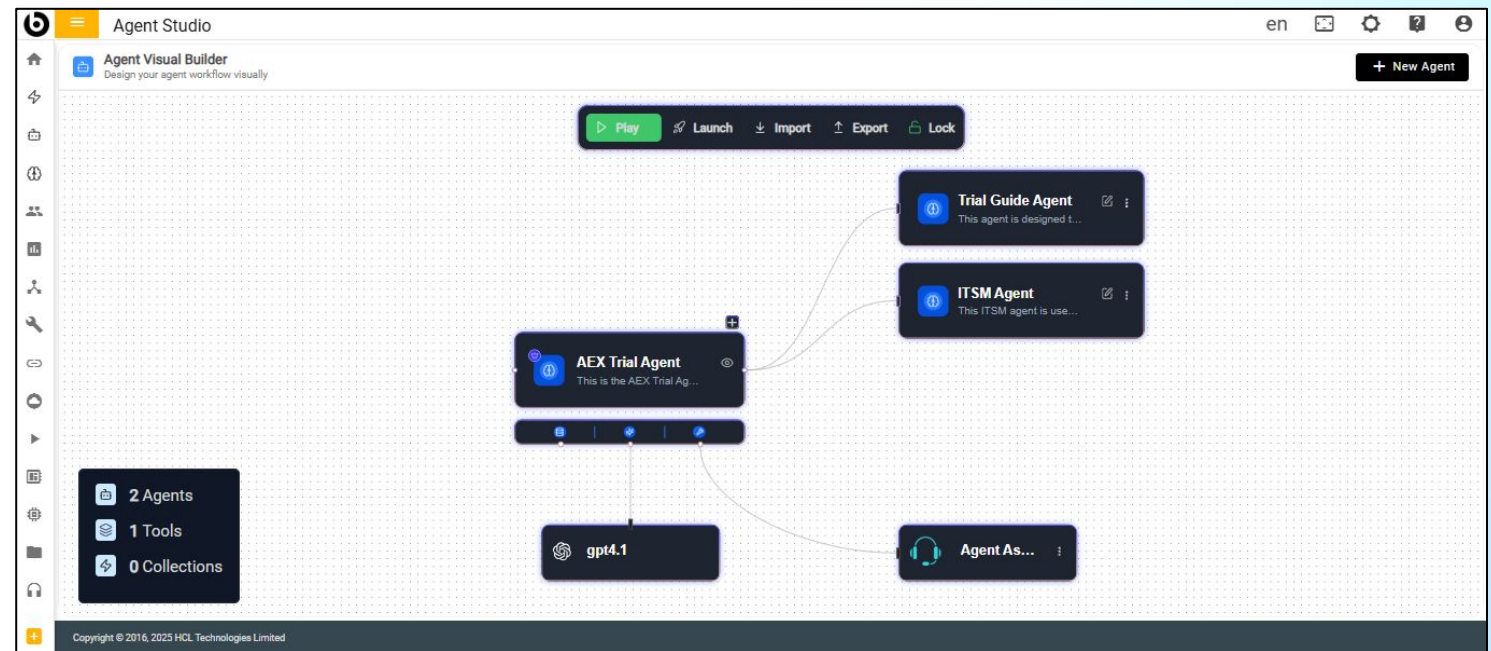
◆ AEX Trial Agent (Master Agent) - Ready To Use Agent

The AEX Trial Agent acts as a centralized hub that manages and routes queries to other agents and ensuring context-aware responses.

- IT-related queries are routed to ITSM Agent
- Setup or trial-related queries are routed to Trial Guide Agent

Prompts used to define the conditions and flow for this agent:

- You are an AEX Trial Agent designed to assist users with queries related to ITSM, ServiceNow, IT issues, or the trial guide.
- For ITSM or IT-related queries, route the request to the ITSM Agent; for trial guide or usage-related queries, route it to the Trial Guide Agent.

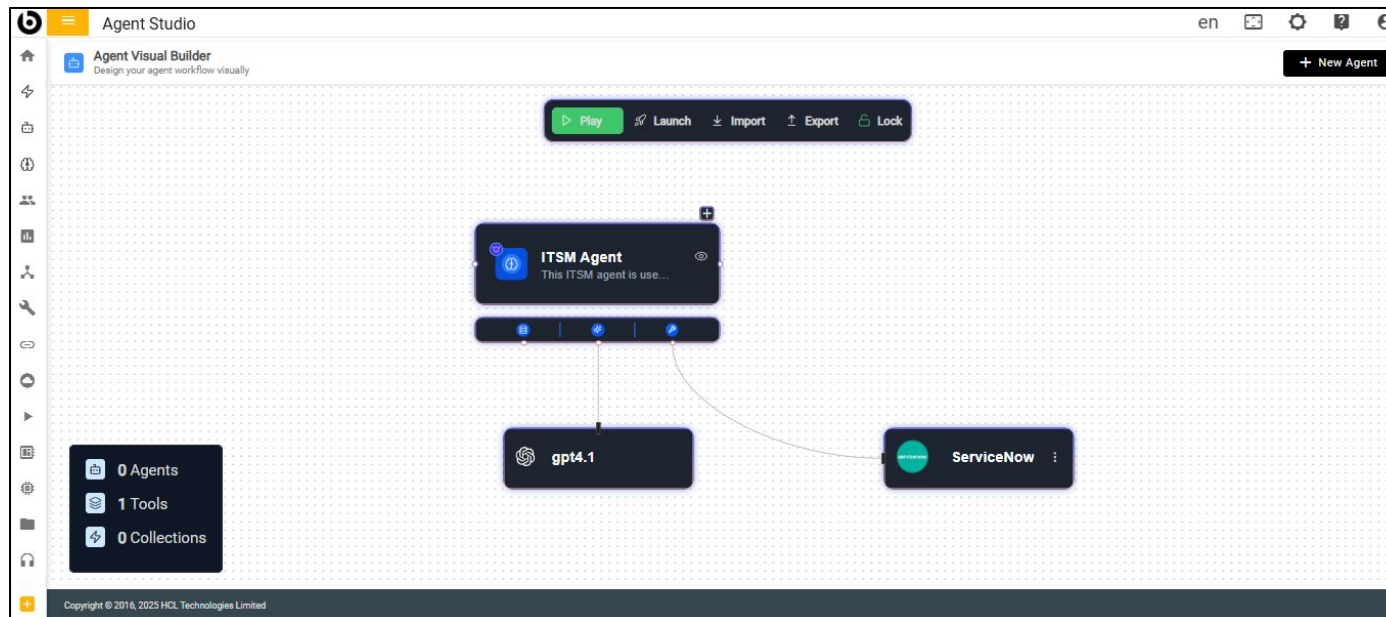


◆ ITSM Agent - Ready To Use Agent

The ITSM Agent is pre-integrated with ServiceNow to automate IT ticketing workflows.

- Handles incident creation, updates, and status checks.
- Connects to ServiceNow via configured credentials.
- Enables live IT query resolution directly through the chatbot.

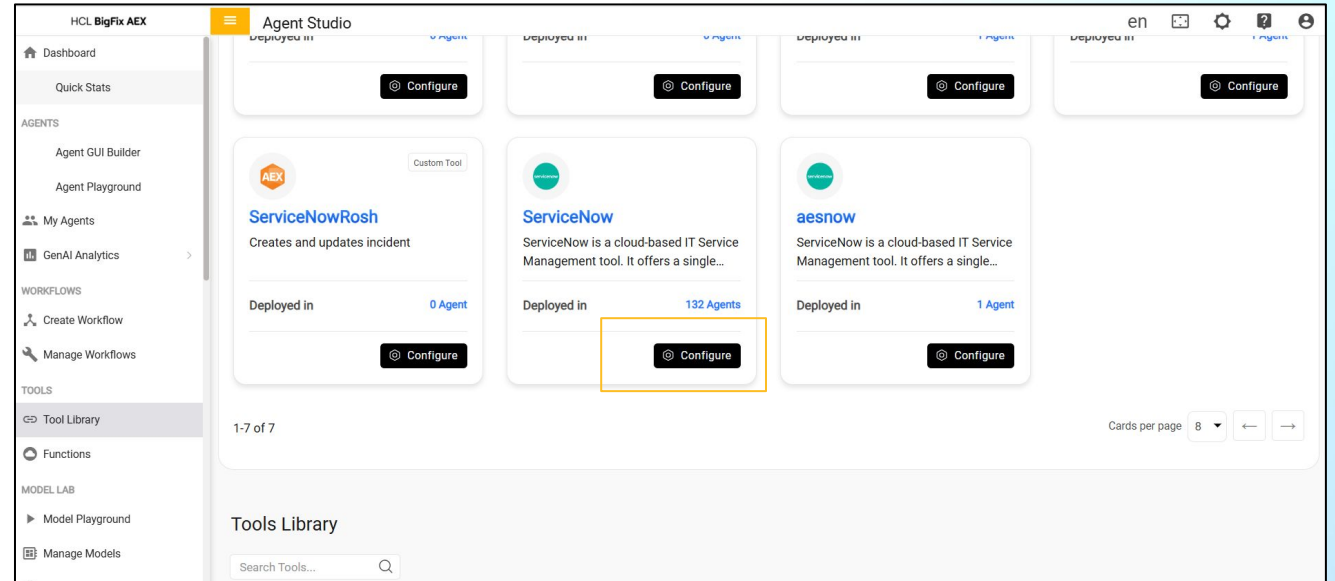
The ServiceNow requires credential configuration (refer to the next slide)



◆ Configuring and Launching the ITSM Agent (1/2)

1. Navigate to Tool Library in Agent Studio.
2. Locate the ServiceNow Tool and click Configure.
3. Enter details:
 - Username
 - Password
 - Instance URL
4. Click Save

Note : Enter credentials for your ServiceNow Application.



ServiceNow Tool

Secrets

ServiceNow Username*

ServiceNow Password*

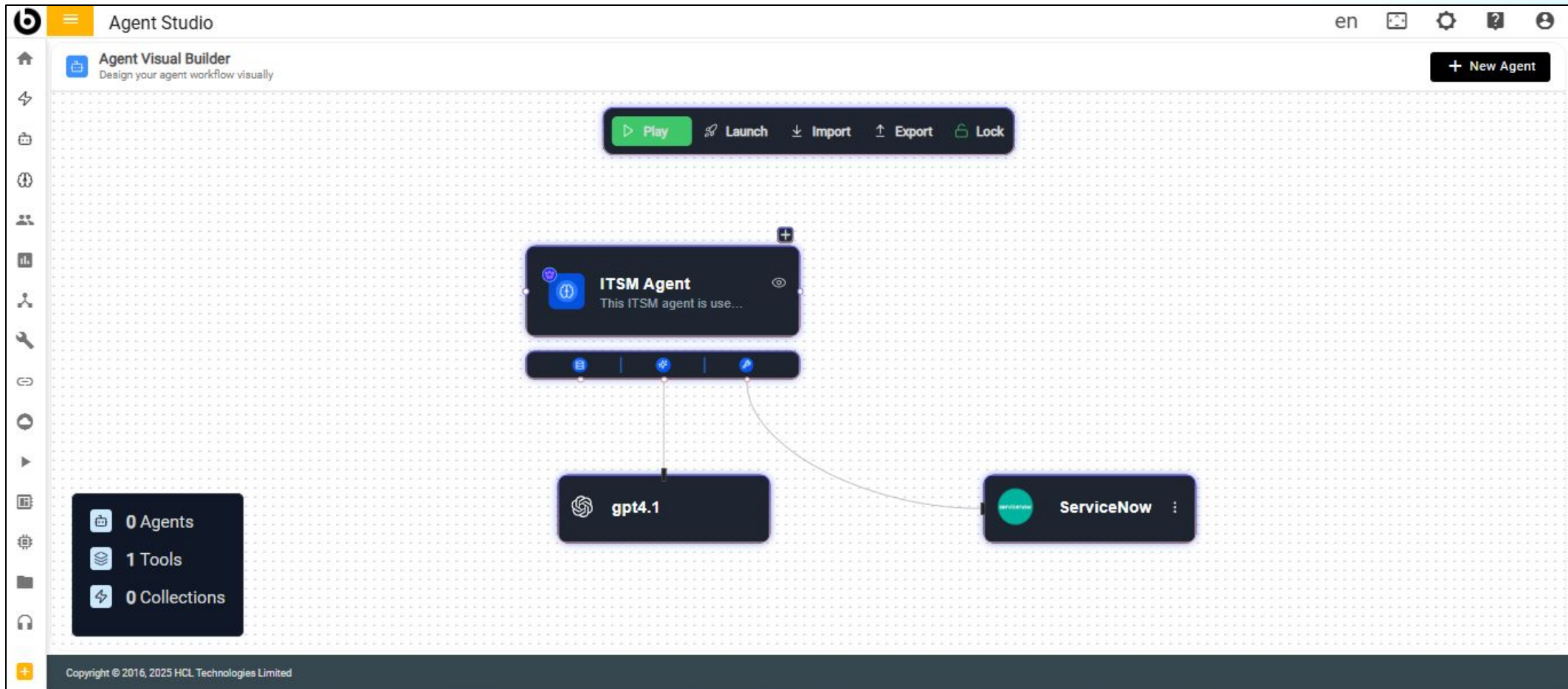
Config

ServiceNow Instance URL*

https://dryicegbp.service-now.com

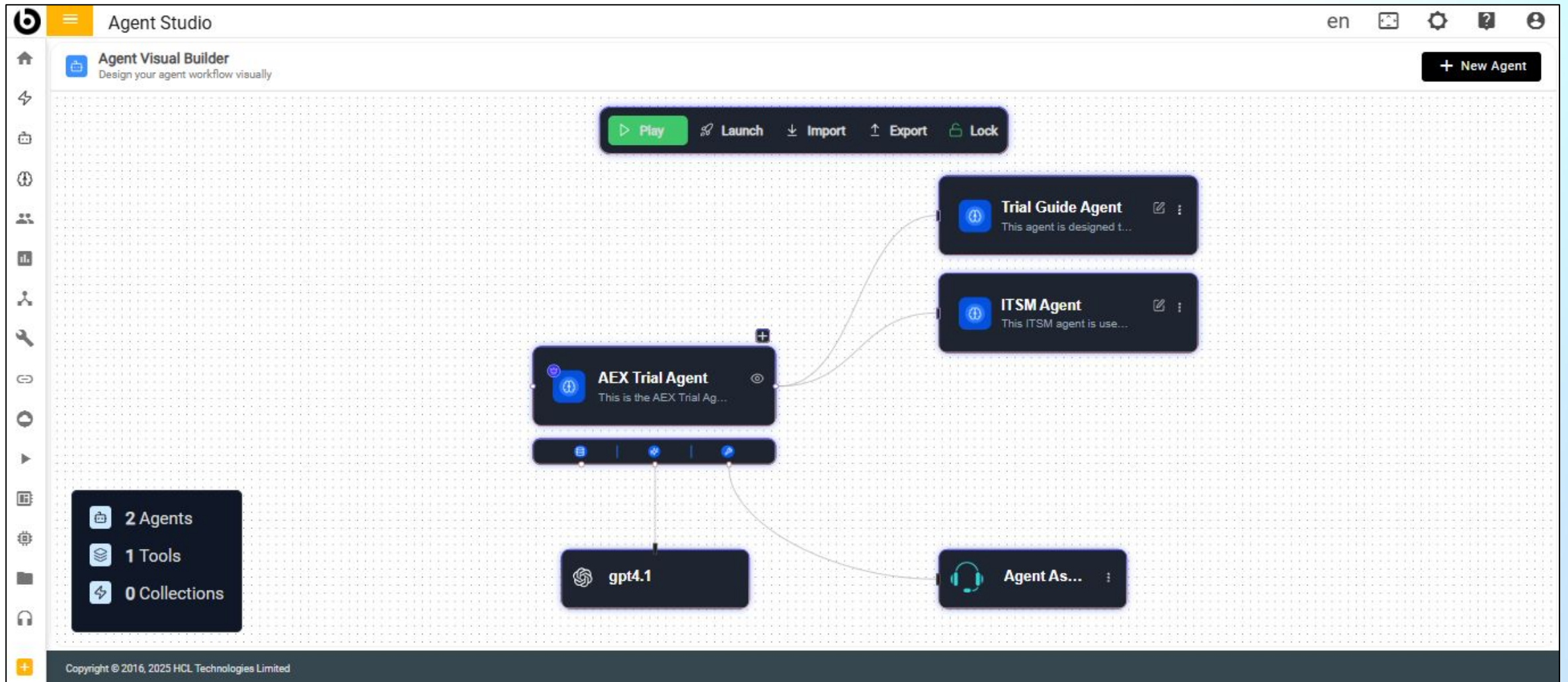
◆ Configuring and Launching the ITSM Agent (2/2)

5. Open the ITSM Agent canvas.
6. Click Launch to test the agent.



Trial Guide Agent

This agent will allow you to query about your trial program functionalities and scope.



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Agentic AI Studio

Overview of core modules

Refer this section to build your own AI Agents

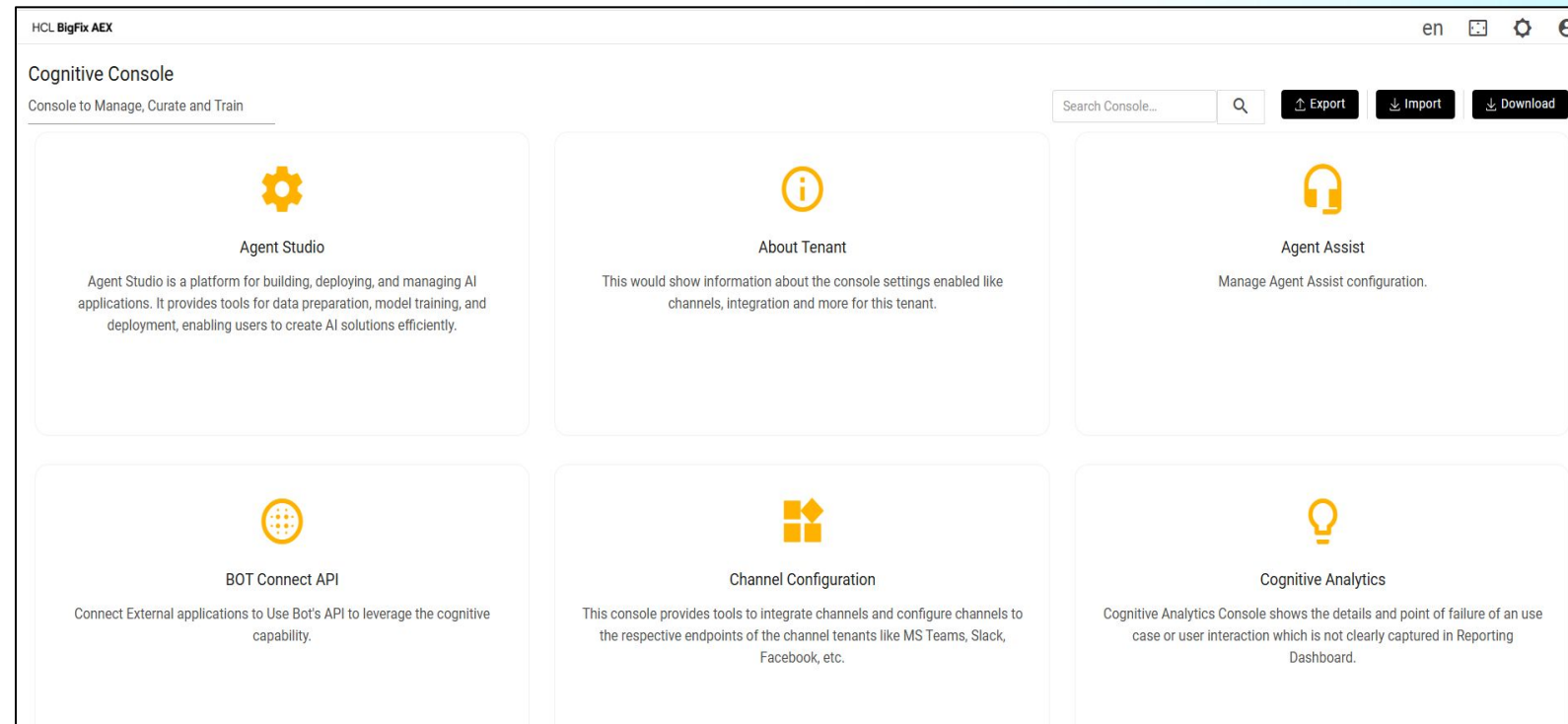


◆ Introducing Agentic AI Studio

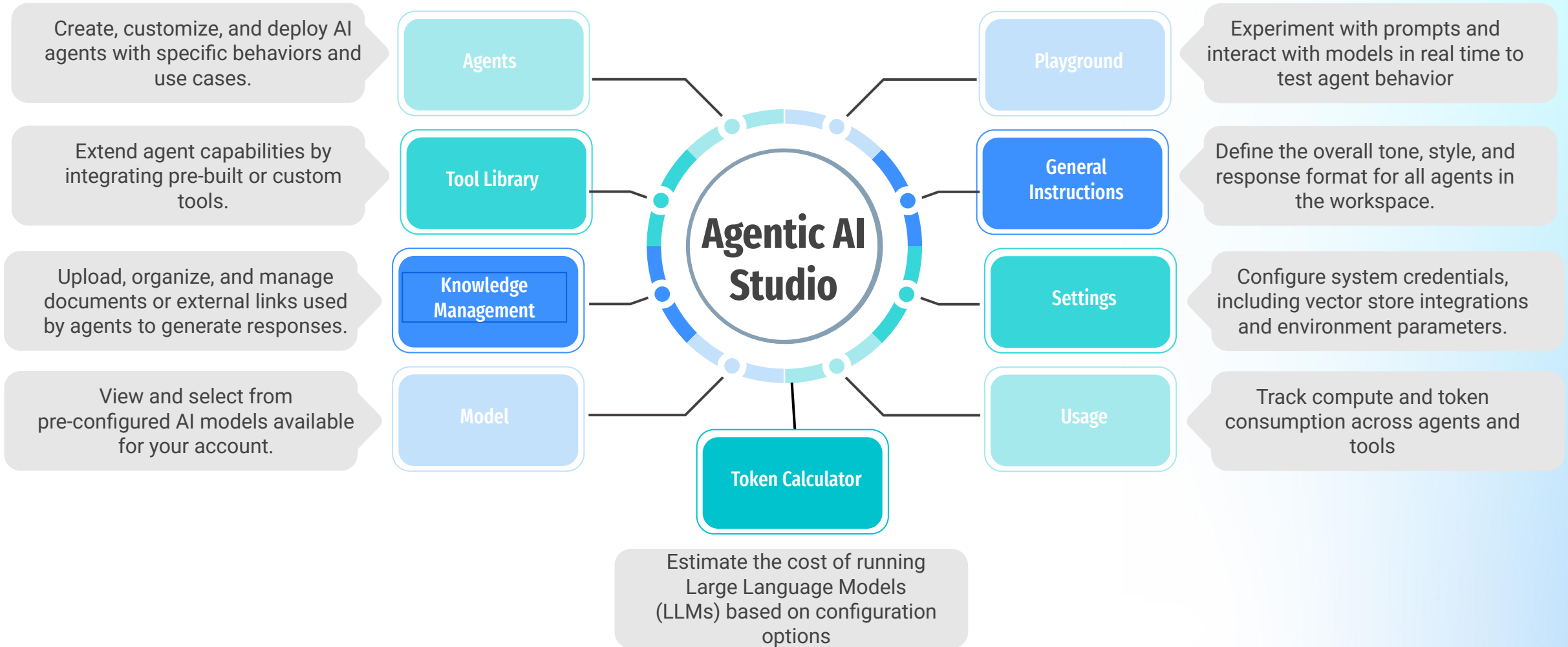
Agentic AI Studio is a **no-code / low-code platform** that enables users to **build, test, and deploy AI-powered agents** seamlessly.

To access Agentic AI Studio you can add “/admin” at the end of your URL

The Studio provides an integrated environment with modules designed to manage every stage of the agent lifecycle from creation to deployment and monitoring.



◆ Core modules in Agentic AI Studio



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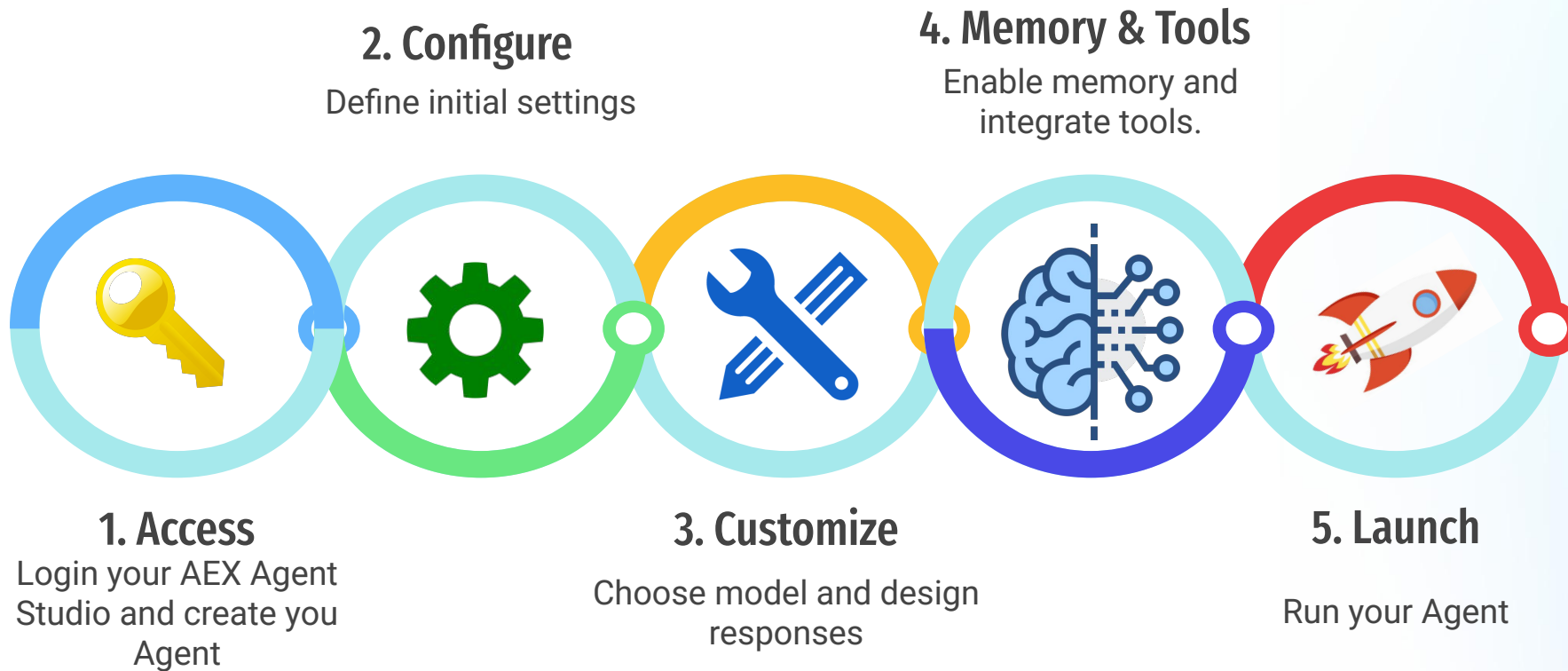
Building Your Own Agent

Create and configure custom AI agent



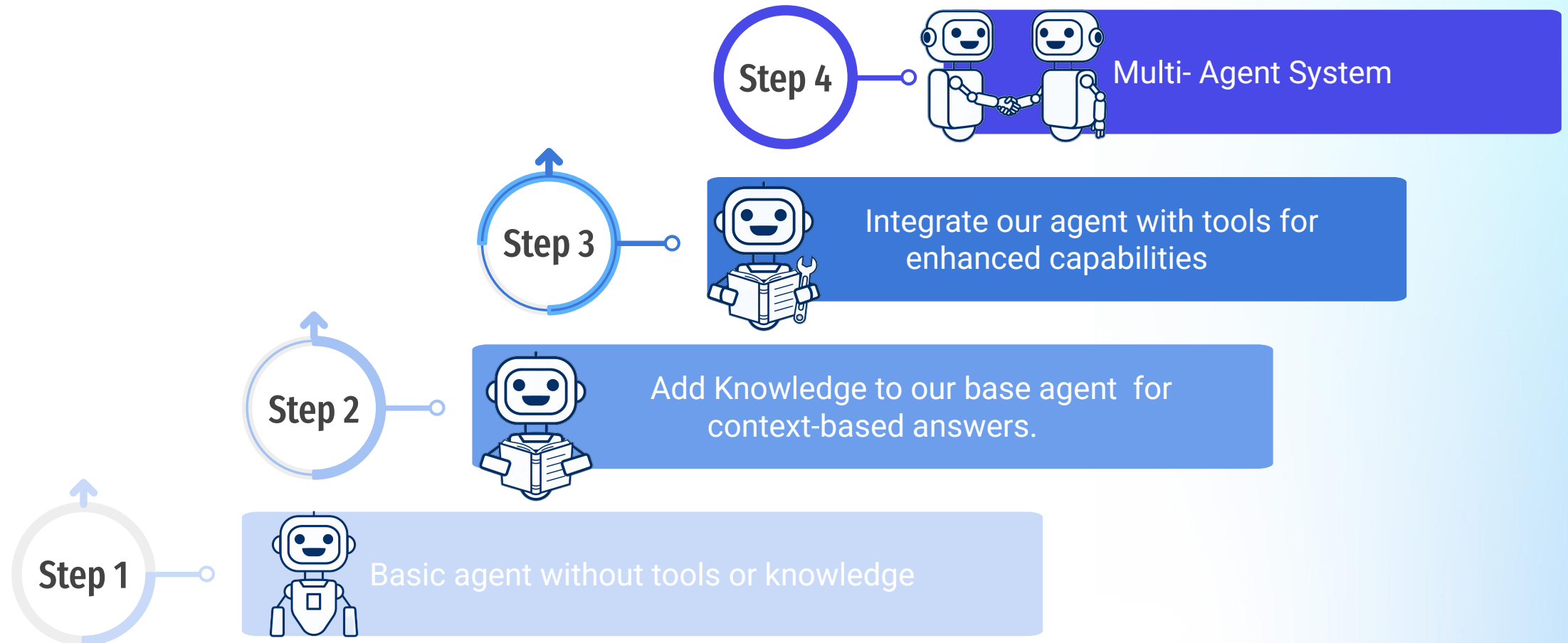
◆ Building Your Own Agent

Step-by-step process to create and configure a new agent in AEX Agent Studio.



◆ Building Your Own Agent

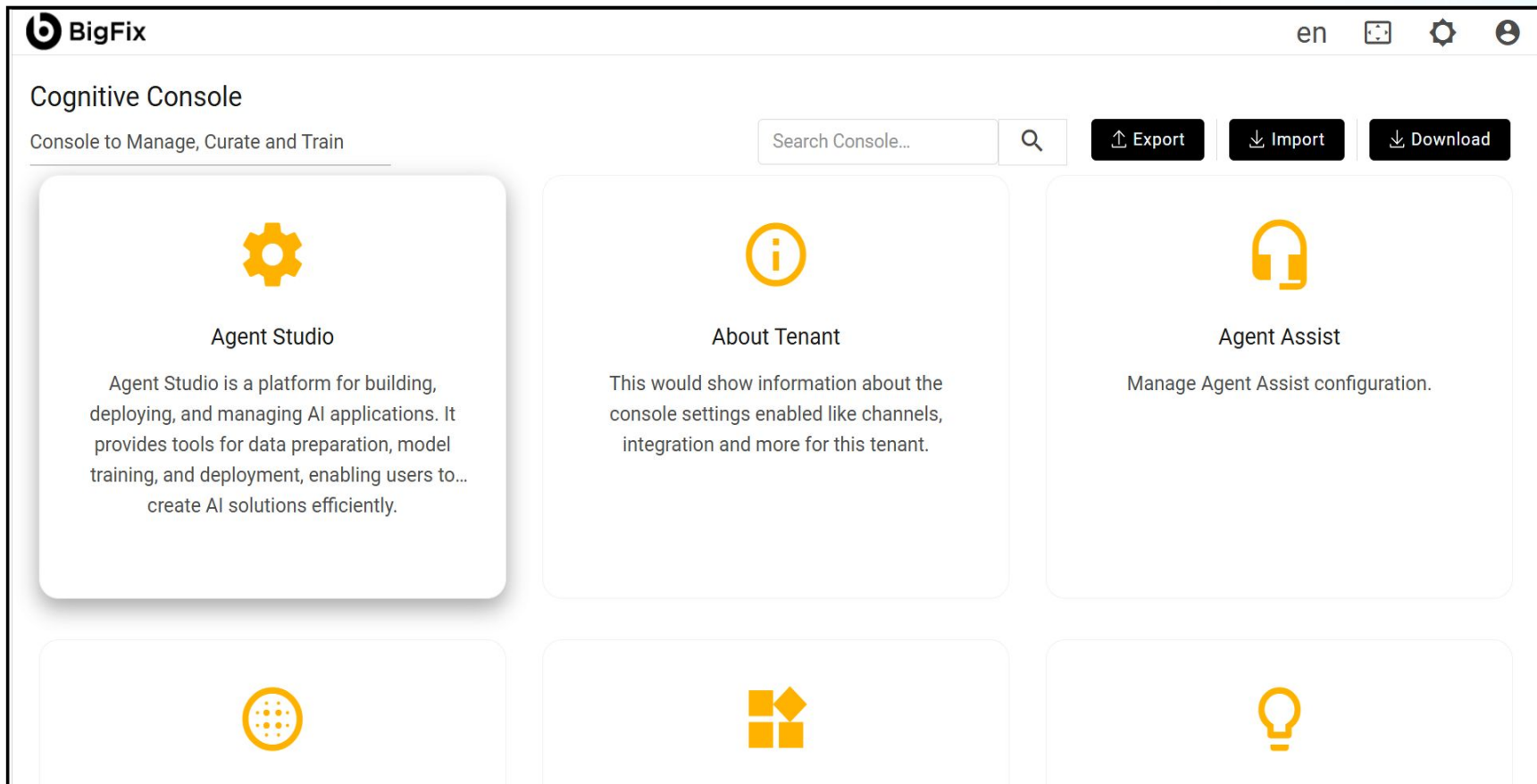
In the following section, we will progress from building a basic HR Agent to developing a fully integrated, multi-domain AI assistant.



◆ HR Agent Without Tools or Knowledge

Step 1: Open Agent Studio

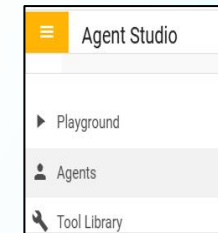
1. Log in to the Admin/Cognitive Console.
2. Navigate to Agent Studio via the dashboard or top navigation bar.
3. If not visible, use the Search Console bar to locate it.



◆ HR Agent Without Tools or Knowledge

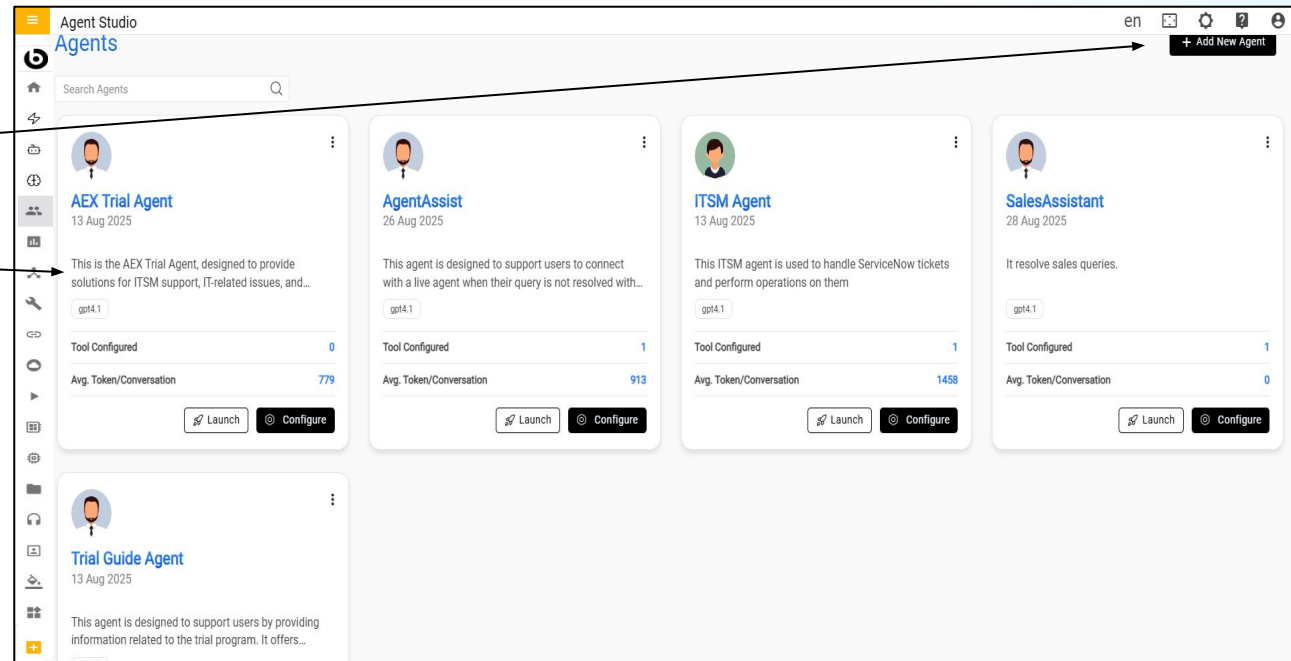
Step 2: Access the Agent Console

1. In Agent Studio, click the Agents tab on the left sidebar.
2. This section displays all existing agents and allows you to create new ones.



Here you can:

- Add New agent
- View existing agents



◆ HR Agent Without Tools or Knowledge

Step 3: Add a New Agent

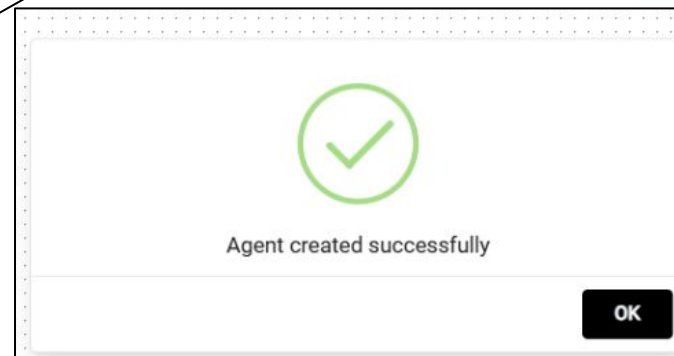
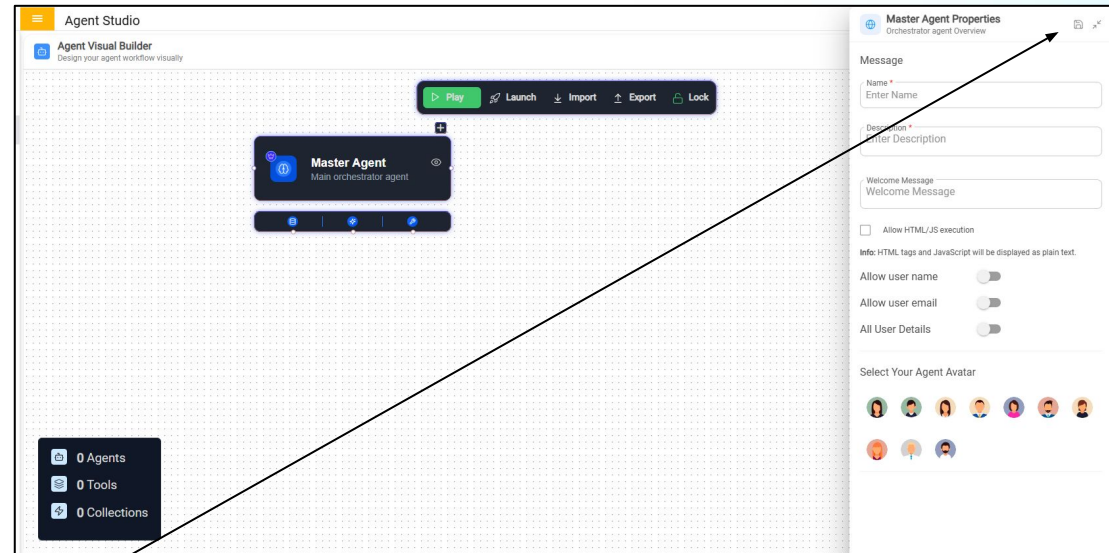
1. Click Add New Agent in the Agent Console.

2. Enter the following details:

- Agent Name – e.g., ServiSphere
- Description – e.g., AI powered IT operations assistant
- Select Your Agent Avatar
- Enable options as needed:
 - Allow HTML/JS Execution (for embedding code - use cautiously).
 - Allow User Details (Username / Email / All).

3. Click Save to proceed.

4. A confirmation message will appear once the agent is successfully created.



◆ HR Agent Without Tools or Knowledge

Explore the Agent Console

The console includes:



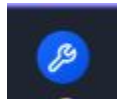
Model Configuration Node –

Connects to the AI model used for the agent (e.g., GPT).



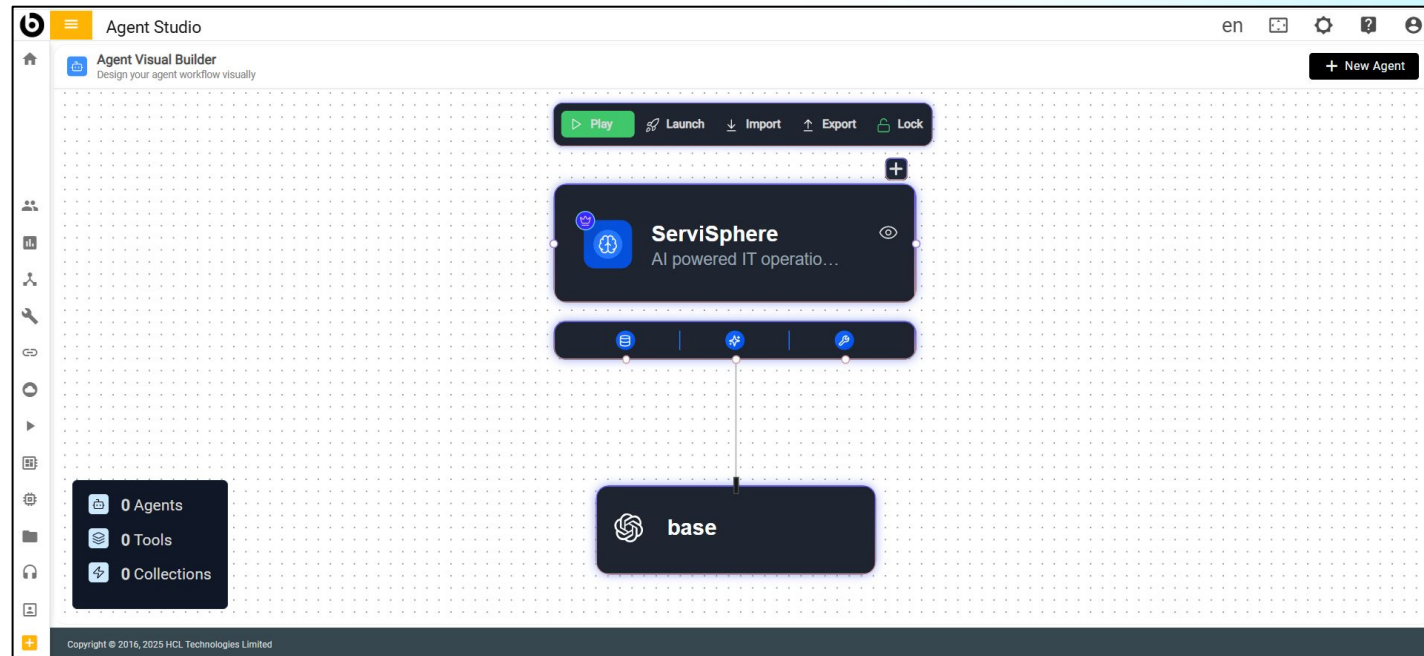
Knowledge Configuration Node –

Stores context from Knowledge Management



Tools Configuration Node –

Integrates APIs or external tools.



◆ HR Agent Without Tools or Knowledge

Step 4: Configure Chat Model & Prompts

1. Click Model Configuration Node
2. Select your Chat Model (LLM) - e.g., GPT-4.1, Claude, or other supported provider.
3. Adjust parameters to fine-tune performance:
 - Context Window: How much past conversation the agent remembers.
 - Temperature: Controls creativity (lower = focused, higher = varied).
 - Top-p, Frequency Penalty, Presence Penalty: Fine-tune style and repetition.
4. Enter a System Prompt to define tone or role. Example: “You are an AI power IT assistant that helps manage and automate enterprise workflows.”
5. Click on plus sign to add the prompt.
6. Click Save Configurations to save settings. Experiment with parameters and prompts to balance creativity and consistency.

The screenshot shows a 'Configuration' dialog box with a close button (X) in the top right corner. It contains the following settings:

- Model***: A dropdown menu showing 'base - gpt-4.1'.
- Max Tokens: 100**: A slider control with a range from 0 to 4000, currently set at 100. Below it, the text 'Control randomness in responses(0-4000)' is visible.
- Temperature: 0.80**: A slider control with a range from 0.00 to 1.00, currently set at 0.80. Below it, the text 'Control randomness in responses(0.00-1.00)' is visible.
- Frequency Penalty: 0.20**: A slider control with a range from 0.00 to 1.00, currently set at 0.20. Below it, the text 'Control randomness in responses(0.00-1.00)' is visible.
- Context Window: 20**: A slider control with a range from 5 to 50, currently set at 20. Below it, the text 'Control randomness in responses(5-50)' is visible.
- Top p: 0.60**: A slider control with a range from 0.00 to 1.00, currently set at 0.60. Below it, the text 'Control randomness in responses(0.00-1.00)' is visible.
- Presence Penalty: 0.60**: A slider control with a range from 0.00 to 1.00, currently set at 0.60. Below it, the text 'Control randomness in responses(0.00-1.00)' is visible.

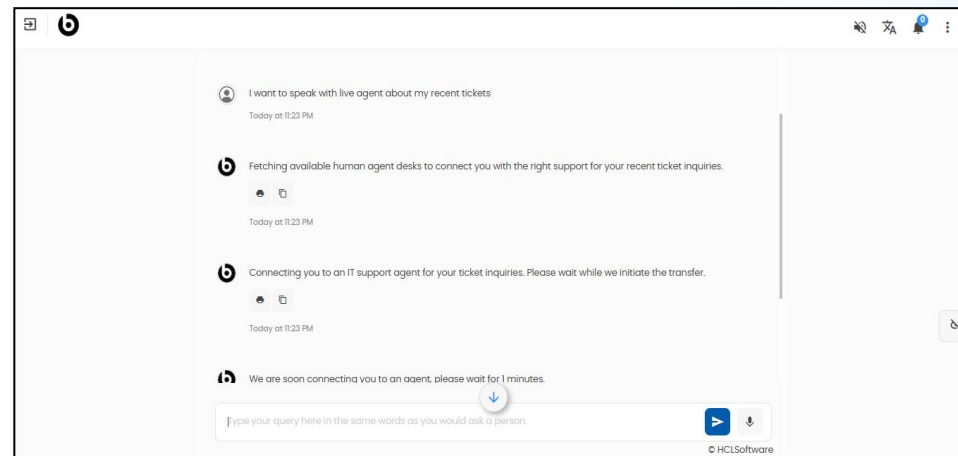
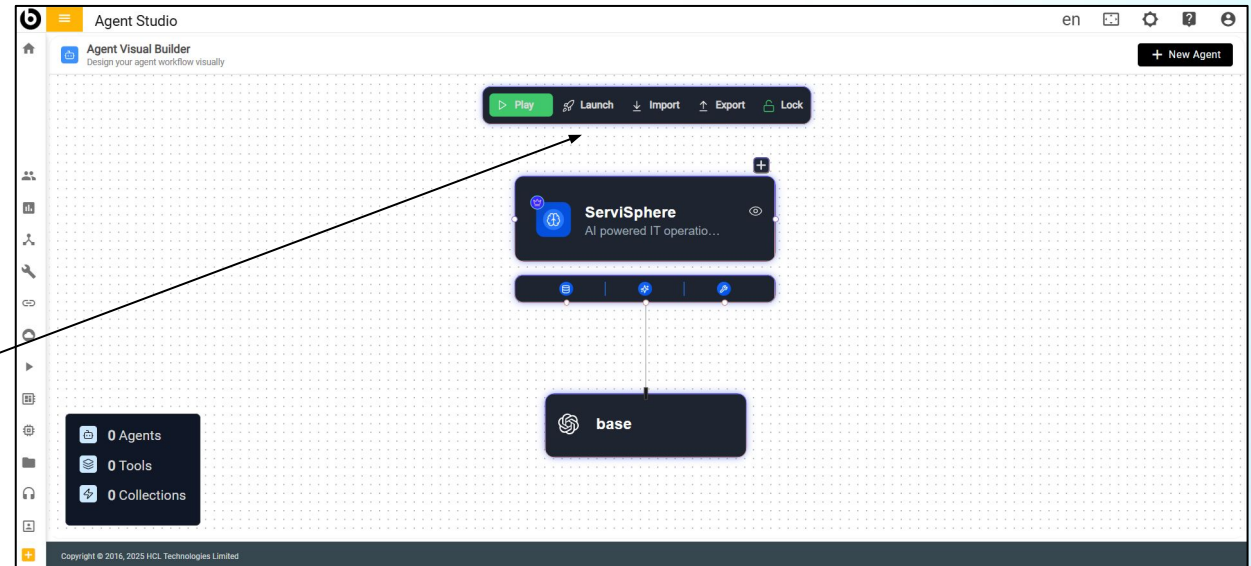
At the bottom right, there are two buttons: 'Cancel' and 'Save Configurations'.

◆ HR Agent Without Tools or Knowledge

Step 5: Launch the Agent

Once configuration is complete, launch your agent to begin real-time testing.

1. In the Agent Studio Canvas, click Launch.
2. The Agentic AI chat window opens in a new tab.
3. You can now test your agent by sending a query.



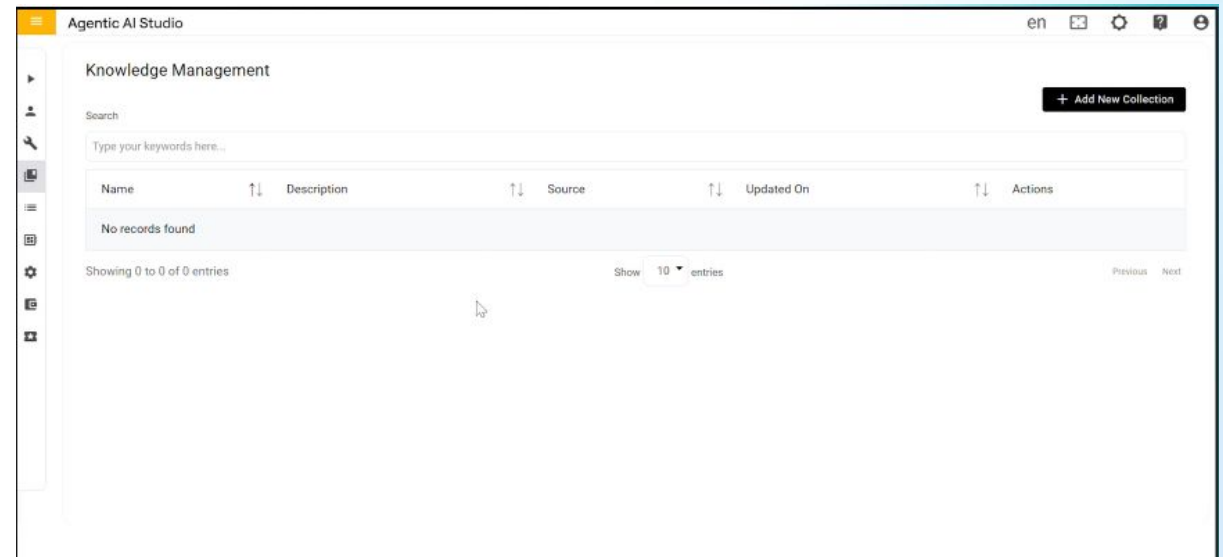
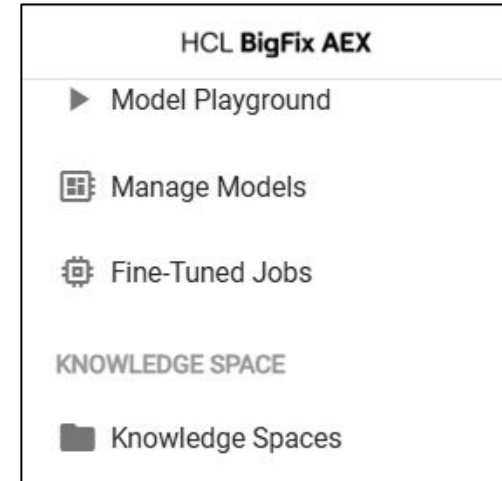
HR Agent With Knowledge

Let us now support our HR agent with contextual knowledge which the agent can use to generate its context aware responses for the user queries

◆ HR Agent With Knowledge

Step 1. Configure Knowledge Management

1. Click Knowledge Management in left panel
Here we can curate the datasets for agent's reference.



◆ HR Agent With Knowledge

Step 1. Configure Knowledge Management Continued

2. Click Add New Collection.
3. Fill the following details about the document to be uploaded :
 - Name : Example - HRPolicy
 - Description : Example - Contains organization's HR Policies
 - Source : Type of document Example - txt
4. Click Save

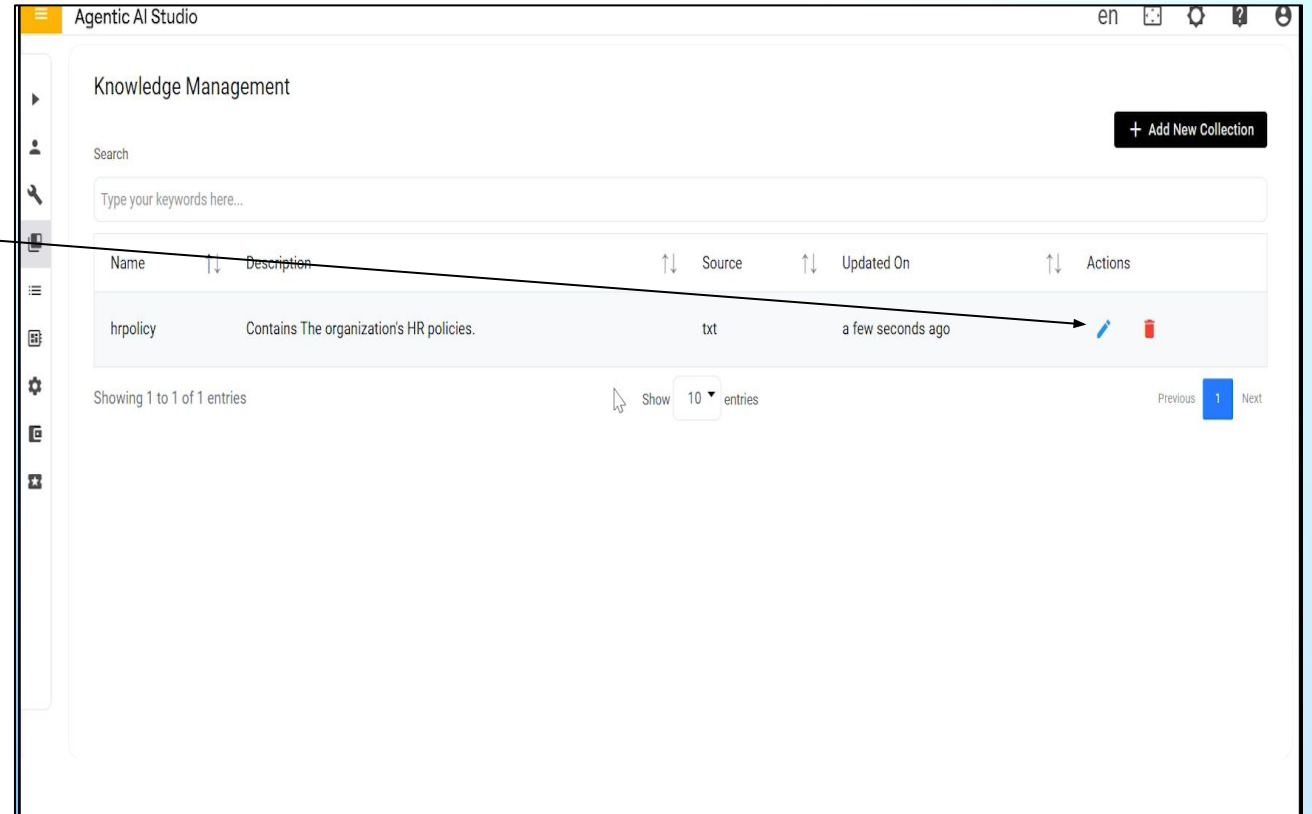


◆ HR Agent With Knowledge

Step 2. Add content to our Collection


1. Click edit on your collection name
2. Browse and upload your documents.
3. Click Save.

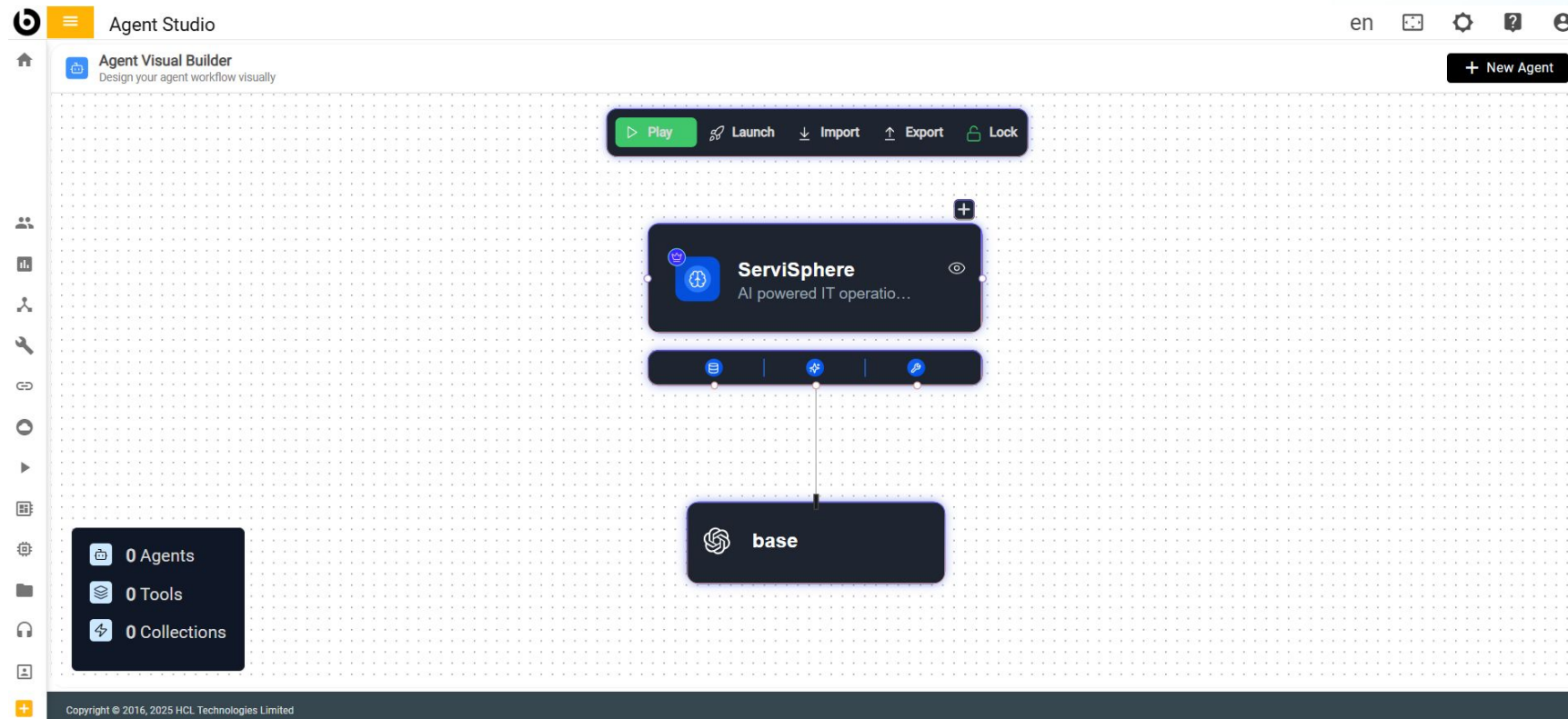
The document will not be directly visible because the retrieval is RAG based. You can try to search your document with relevant keywords using search bar.



◆ HR Agent With Knowledge

Step 3: Configure Memory

1. Click Configure for the required agent from Agent studio.
2. Click the Knowledge Configuration node  on the canvas.

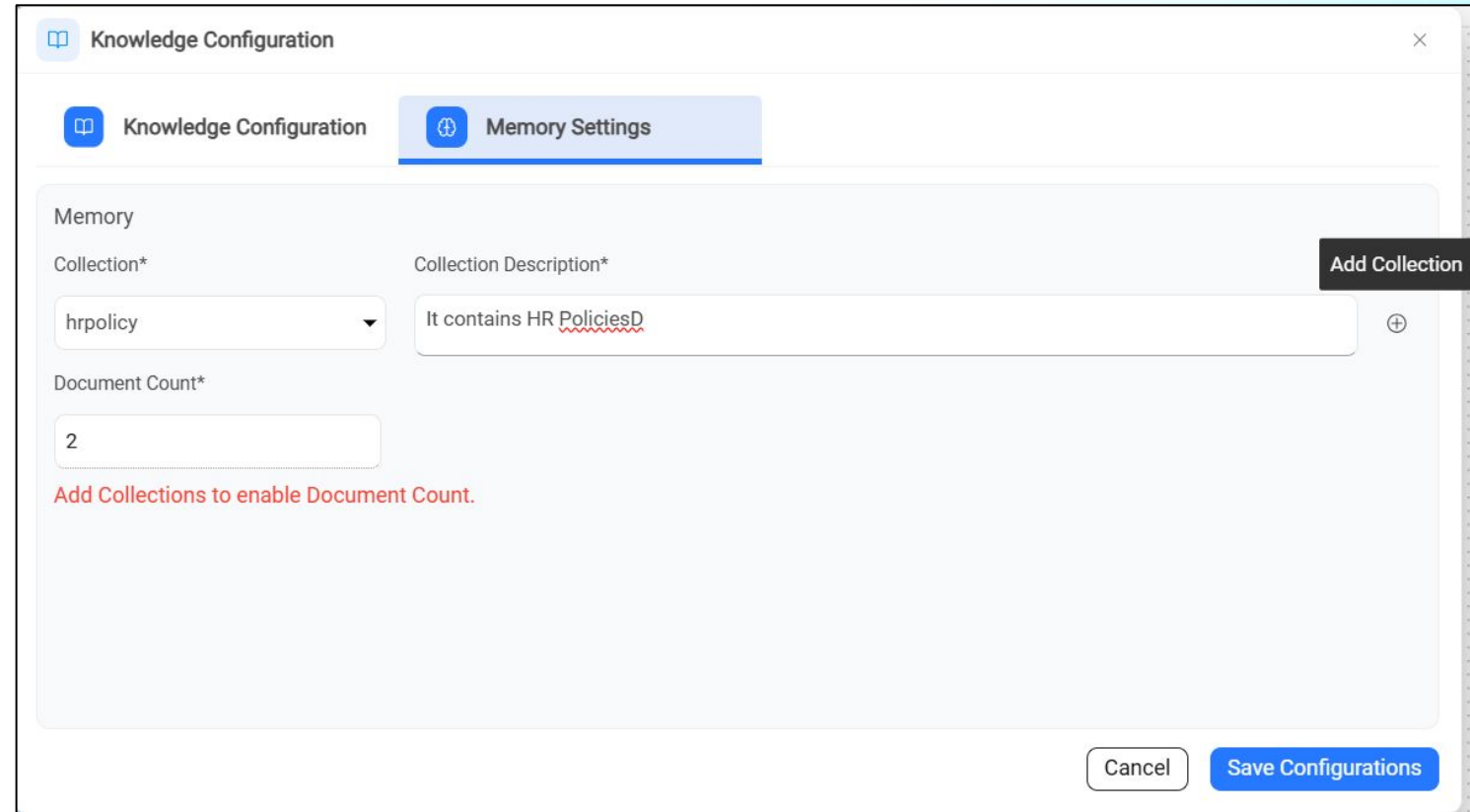


◆ HR Agent With Knowledge

Step 3: Configure Memory Continued

1. Add a description for your collection
2. Select '+' to add documents.
3. Click Save configurations to save.

Document Count is the number of documents to be fetched on retrieval.



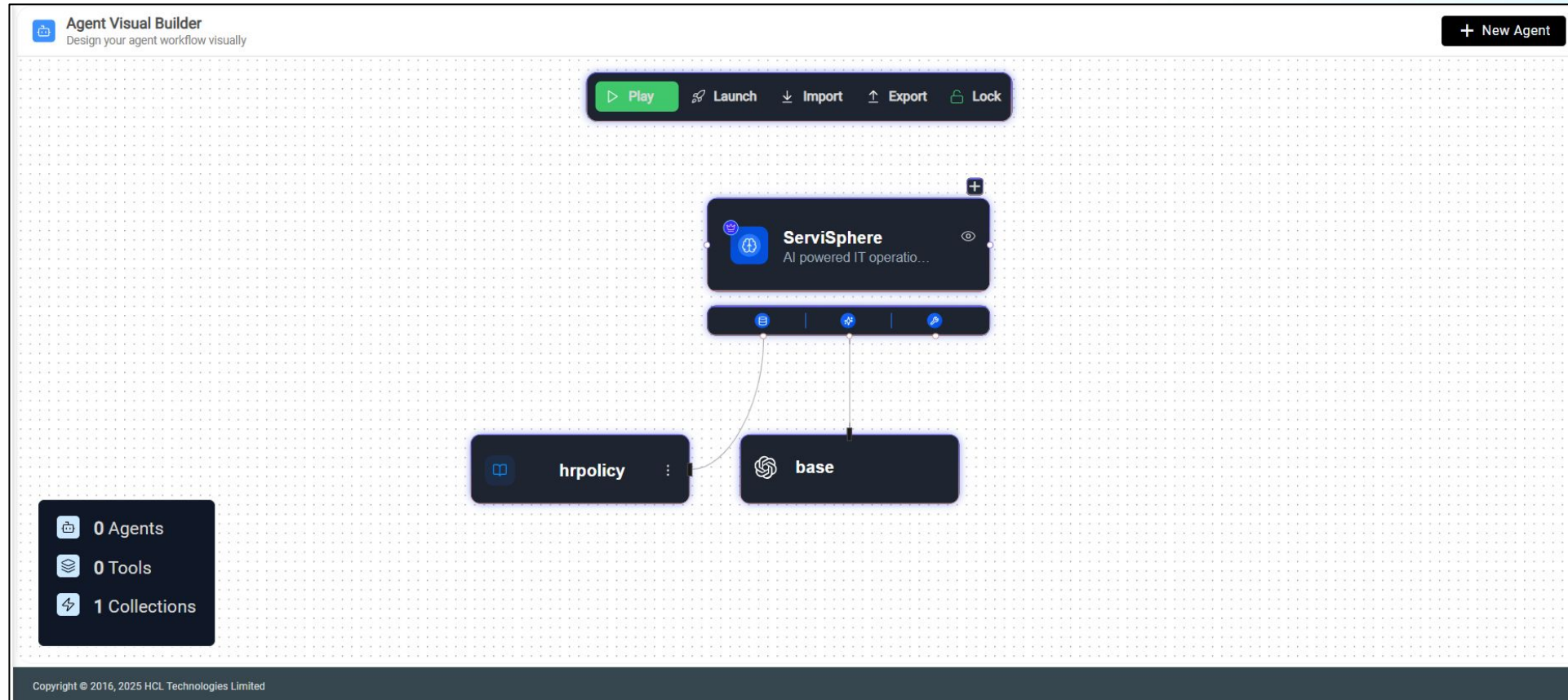
The screenshot shows a 'Knowledge Configuration' dialog box with a 'Memory Settings' tab selected. The 'Memory' section contains the following fields:

- Collection***: A dropdown menu with 'hrpolicy' selected.
- Collection Description***: A text input field containing 'It contains HR PoliciesD'. A red squiggly line is under 'PoliciesD'. A '+' icon is on the right.
- Document Count***: A text input field containing '2'.

A red message at the bottom of the form states: 'Add Collections to enable Document Count.' At the bottom right of the dialog are 'Cancel' and 'Save Configurations' buttons. An 'Add Collection' button is also visible on the right side of the 'Collection Description' field.

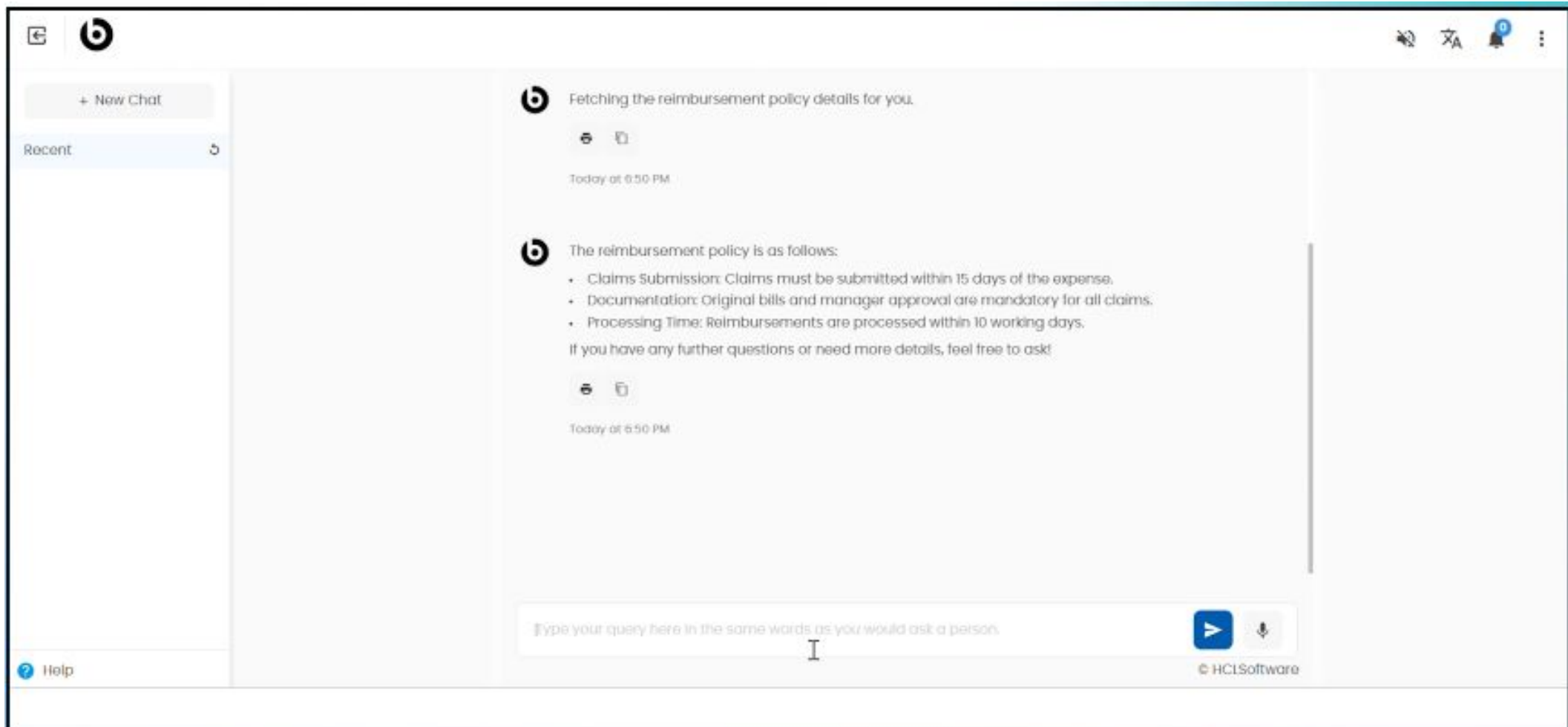
◆ HR Agent With Knowledge

The collection name will be visible on the agent canvas under memory node . Now launch your agent to test its performance.



◆ HR Agent With Knowledge

Write a query to get the response on the bot window. Example - Tell me about reimbursement.
Now the agent will provide precise details to your query.



HR Agent With Knowledge

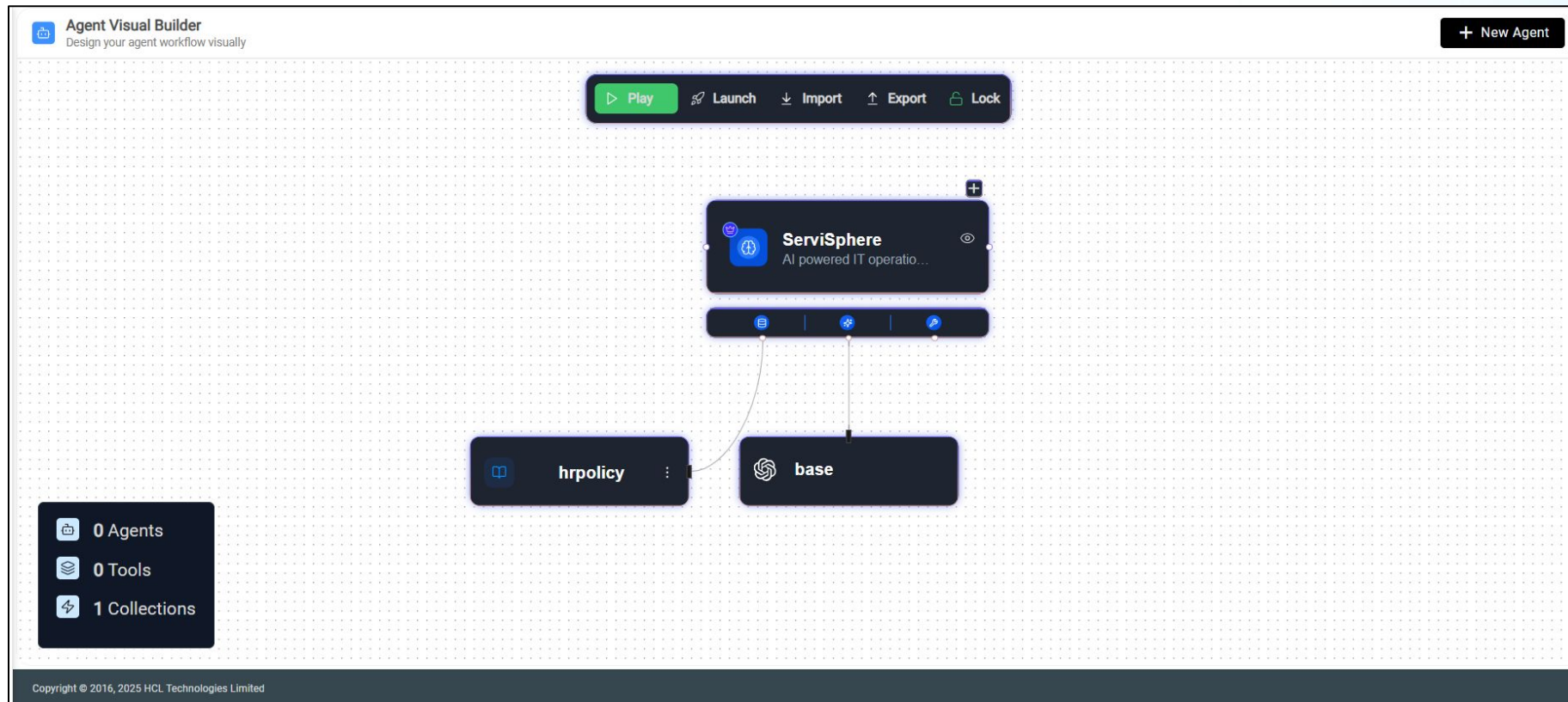
Tools extend your AI Agent's capabilities by connecting it to external applications - enabling actions like data retrieval, workflow automation, and API integration.

Now, let's enhance our existing agent (which already has memory configured) by adding tool functionality.

◆ HR Agent With Knowledge

Step 1: Add and Configure Tools

1. Click Configure for the agent from Agent studio.
2. Click the Tools Configuration node to open the Tools Library



◆ HR Agent With Knowledge

The Tool library will show all deployed tools available for your use.

Step 2: Configure the Tool

1. Search and select the tools you want to connect (e.g., Agent Assist, Azure, ServiceNow).
2. Click Save Configuration to save your selections.
3. The canvas updates automatically with new tool connections.

The screenshot shows a 'Tools Configuration' dialog box with two tabs: 'Tools Configuration' (active) and 'Tool Settings'. The 'Assigned Tools' section on the left contains a list with 'agentassist'. The 'Available Tools' section on the right has a search bar and a list of tools: 'agentassist' (checked), 'ansible', 'awsec2', 'azurevm', and 'bigfix'. A description for 'bigfix' is visible below its name. At the bottom right are 'Cancel' and 'Save Configurations' buttons.

Assigned Tools	Available Tools
agentassist	<input type="checkbox"/> Select All
	<input checked="" type="checkbox"/> agentassist
	<input type="checkbox"/> ansible
	<input type="checkbox"/> awsec2
	<input type="checkbox"/> azurevm
	<input type="checkbox"/> bigfix BigFix is a unified endpoint management and security platform that provides real-time visibility and control over endpoints.

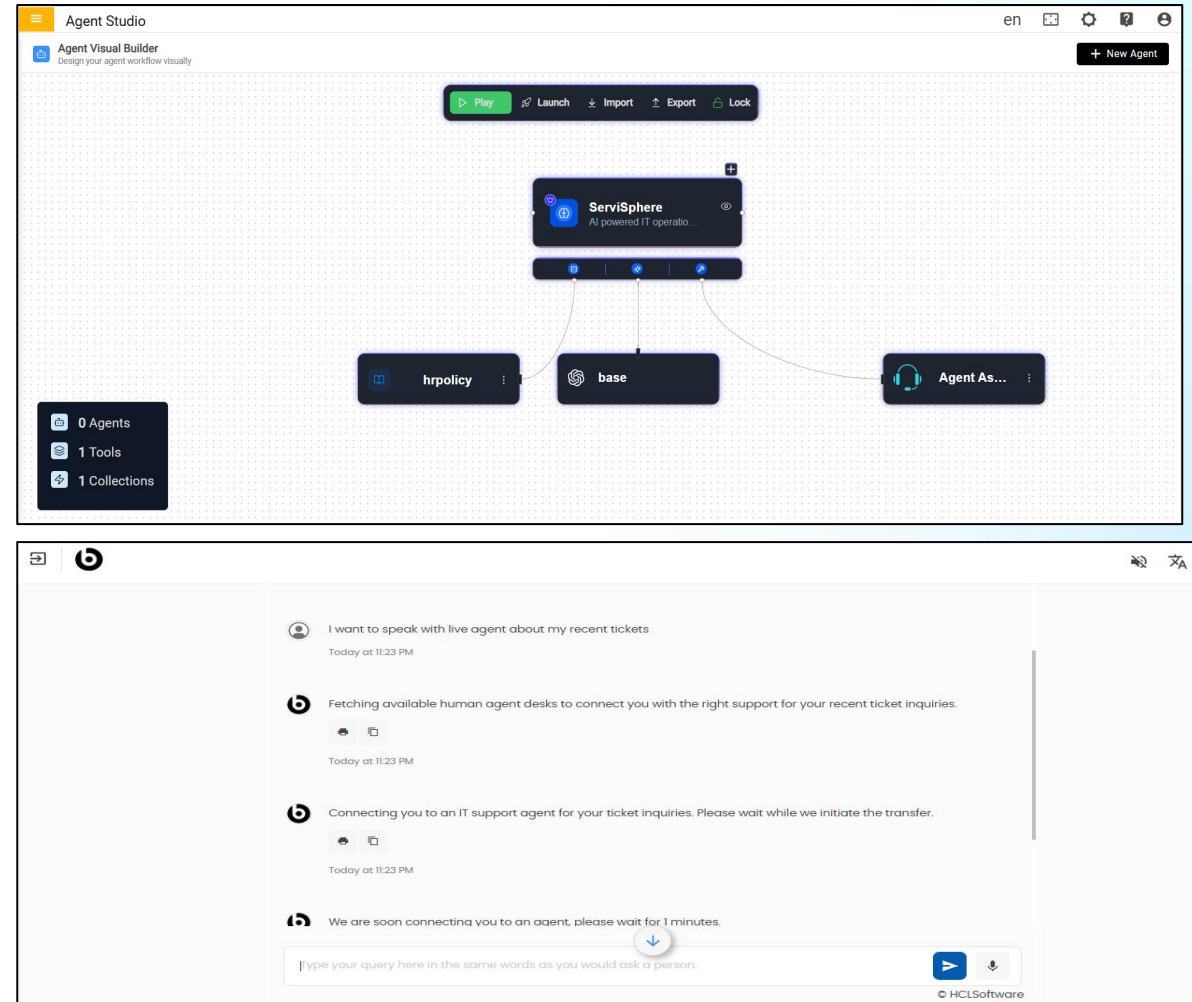
◆ HR Agent With Knowledge

Step 3: Launch the Agent

Once configuration is complete, launch your agent to begin real-time testing.

(Optional) Click the connected tool icon to configure specific functions and parameters as needed.

1. In the Agent Studio Canvas, click Launch.
2. The Agentic AI chat window opens in a new tab.
3. You can now test your agent by sending a query.



◆ HR Agent with ITSM Agent - A Multi- Agent System

A multi-agent system allows multiple AI agents to collaborate — each focusing on specific tasks — under a single orchestrated framework.

In AEX, one main agent acts as the coordinator, while sub-agents handle specialized functions.

Why it matters:

- Enables division of responsibilities across AI agents
- Improves scalability and response accuracy
- Simplifies orchestration for complex enterprise workflows

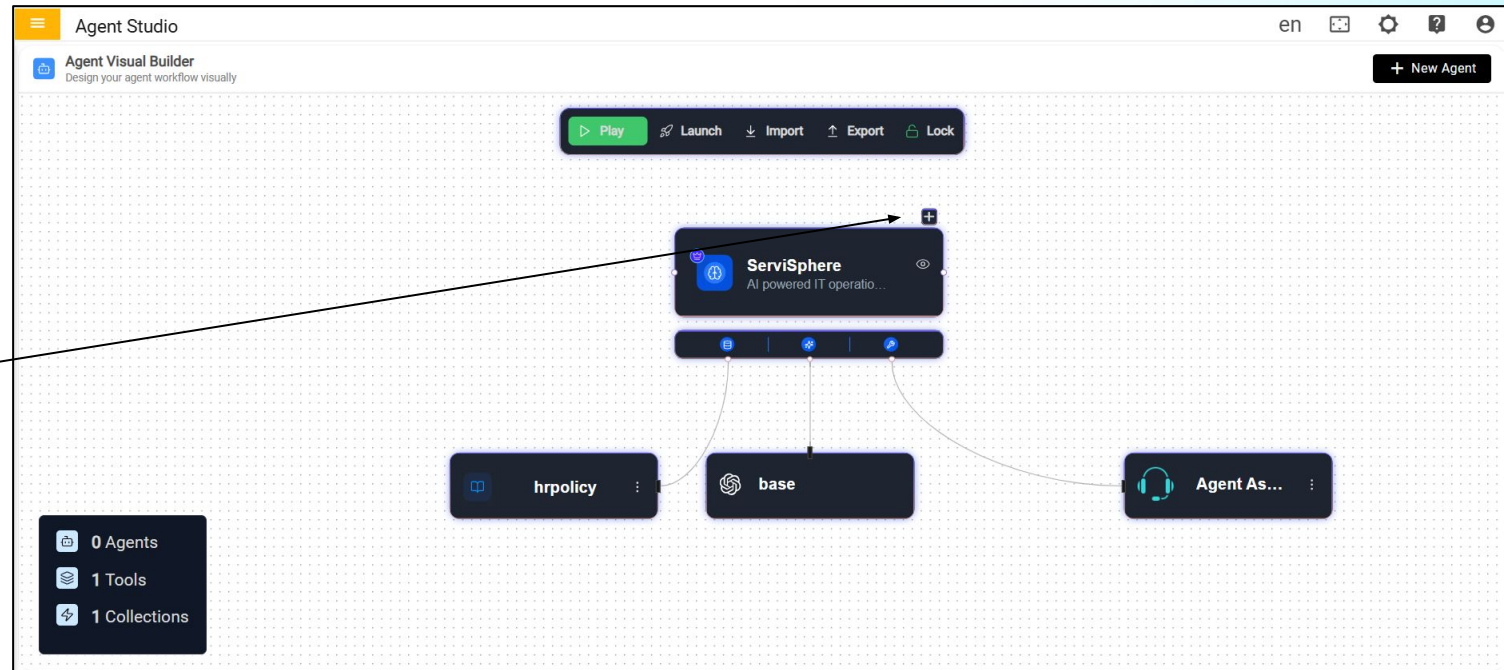


◆ HR Agent with ITSM Agent

Step 1: Designate Parent Agent

1. Open HR Agent from the Studio. This is designated as the Main Agent (Parent).
2. Inside the canvas, click the '+' to add new sub-agents section.

The main agent serves as the central controller that routes queries to the appropriate sub-agents. Each sub-agent adds a unique capability to your orchestration layer.



◆ HR Agent with ITSM Agent

Step 2: Select Sub-Agents to Add

1. In the Manage Agent window, you can create a new agent or select specialized agents such as ITSM Agent from List of Existing Agent section.
2. Once your sub-agent is selected, the canvas updates to display their connections to the main agent.
3. Click Launch to use your multi-agent.



The screenshot shows a web application window titled "Manage Agent". It has two tabs: "Create New Agent" (which is active and highlighted in blue) and "List of Existing Agent". The "Create New Agent" tab contains a form with two input fields: "Agent Name" with a red asterisk and the placeholder text "Enter Name", and "Description" with the placeholder text "Enter Description". At the bottom right of the window, there are two buttons: "Cancel" and "Save".

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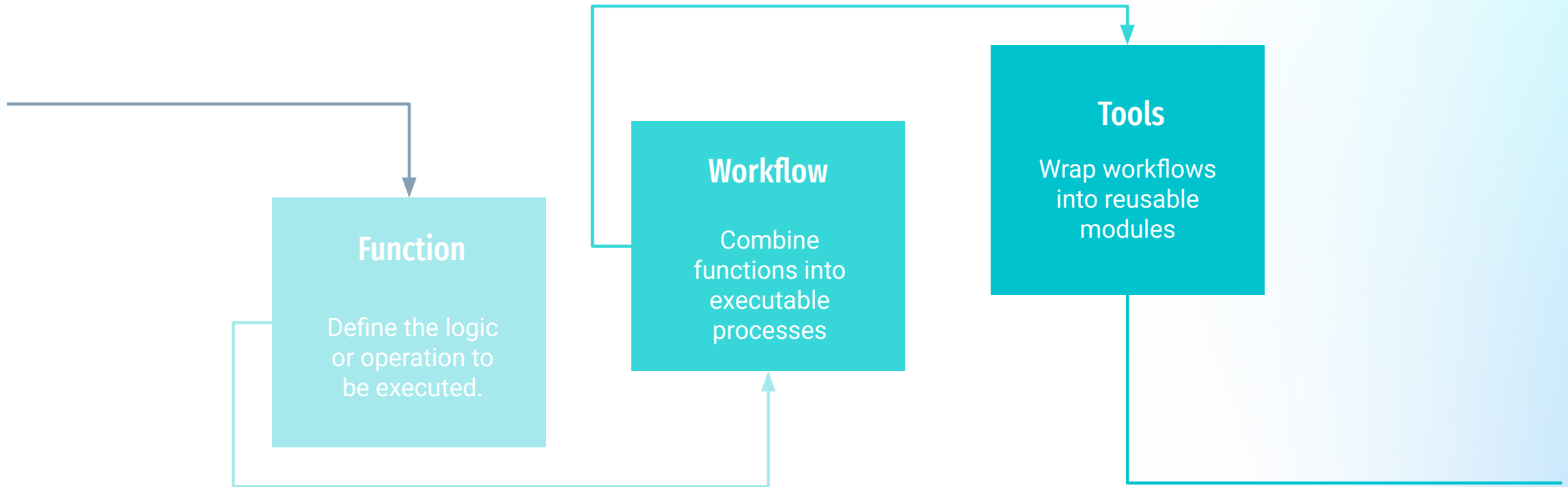
Building Custom Tools

Create Functions, Workflows and
Tools



◆ Building Custom Tools

The AEX platform enables you to extend and customize your agents through a three-layer modular system. Each layer build on the previous one- defining logic, orchestrating workflows and creating reusable custom tools for agent integration.



◆ Function Overview

You can create functions to:

- Perform automation or integration tasks
- Interact with APIs or external systems
- Return dynamic results to workflows

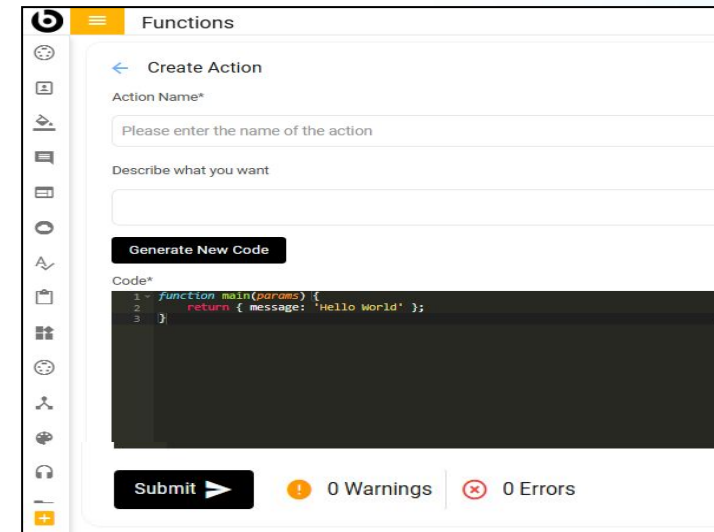
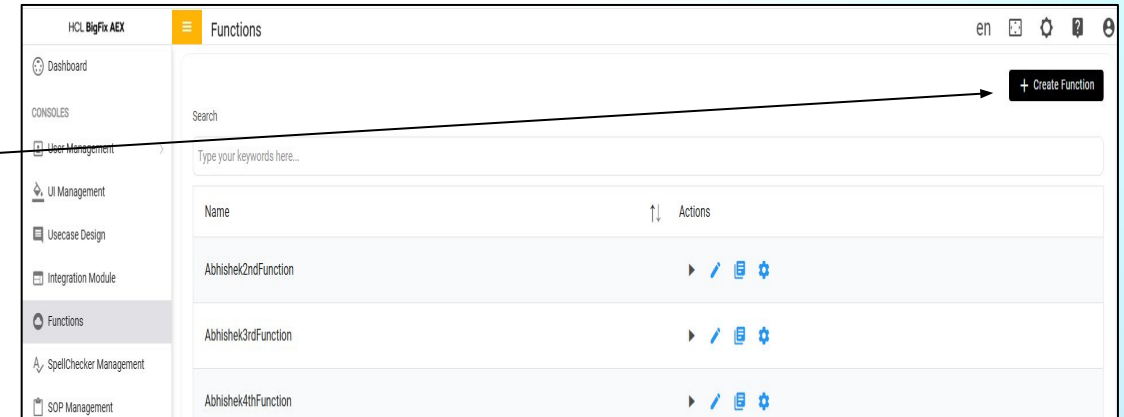
In AEX, functions are written in pure JavaScript, allowing you to logic that can be easily reused across workflows.

Let's go through how to create, configure, and save a function step-by-step.



◆ Creating a Function For AEX Custom Tools

1. Open the Functions Console from the left sidebar in Agent Studio.
2. Click Create Function in the top-right corner.
3. In the “Create Action” form, enter the following details:
 - Function Name: e.g., AzureVMCreation
 - Description: Short summary of the function’s purpose
4. Click Generate New Code to start defining your function logic.
5. Once completed, click Submit to save the function.
You can view all created functions in the Function List.



◆ Workflow Overview

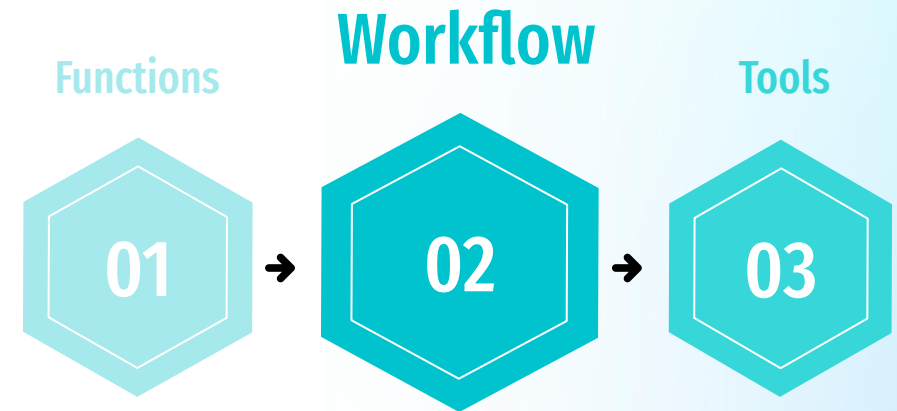
Workflows are sequence of steps that completes a business task.

In AEX, workflows drive agents and custom tools, letting them act intelligently and adapt to changes.

A workflow consists of the following key steps:

- Start Node - Define the trigger event.
- Action Node - Specify what function to execute.
- Join Nodes - Connect Start and Action to complete the flow.
- Save & Validate - Save and view in Workflow List.

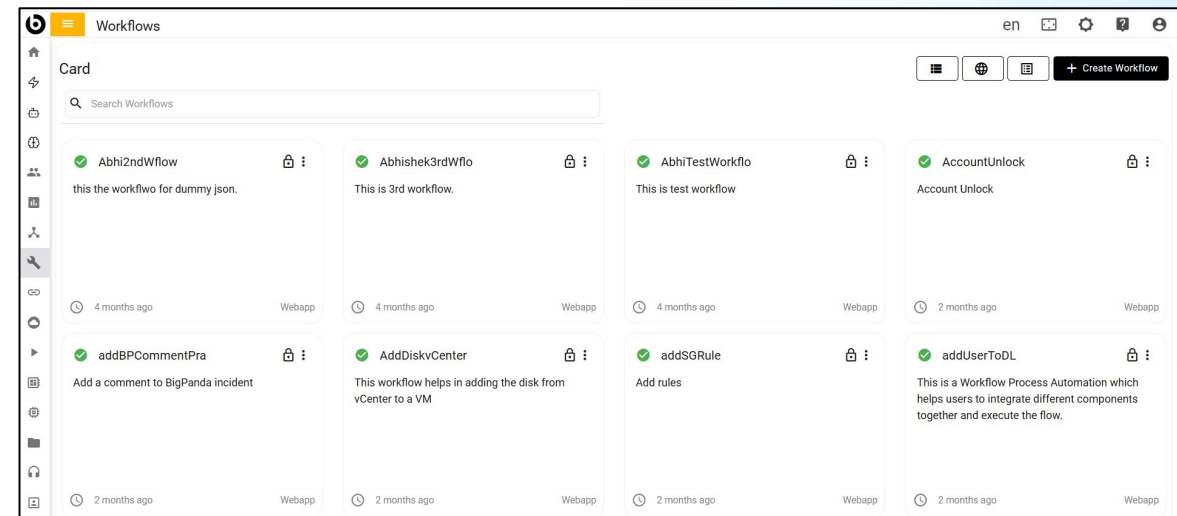
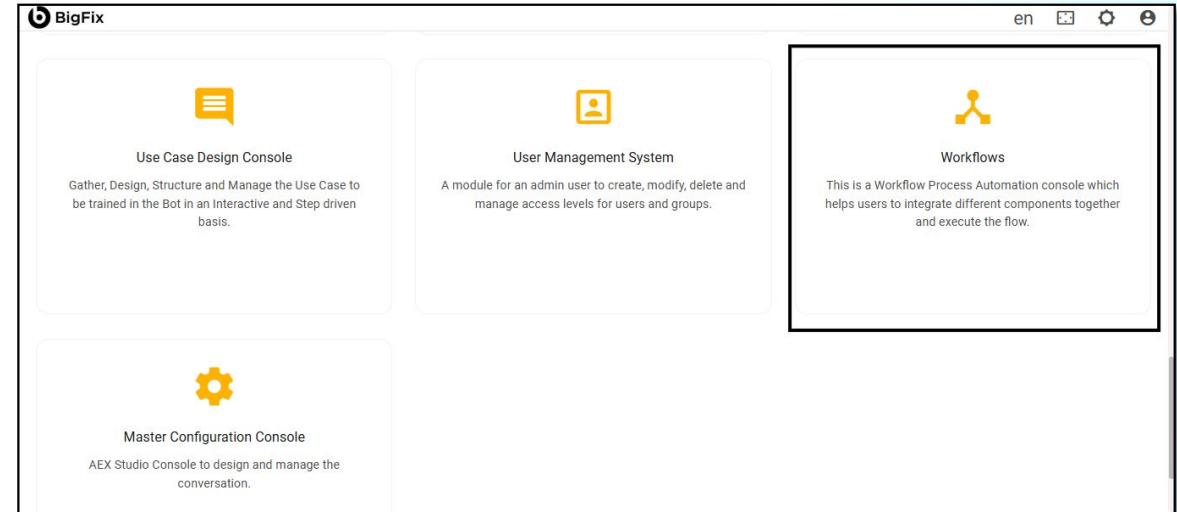
You'll now see how to create this workflow step-by-step.



◆ Create Workflow and Define Event Type

Step 1: Create Workflow and Define Event Type

1. Select Workflow Console from Admin/Cognitive Console
2. Click ' + Create Workflow ' to start a new workflow.

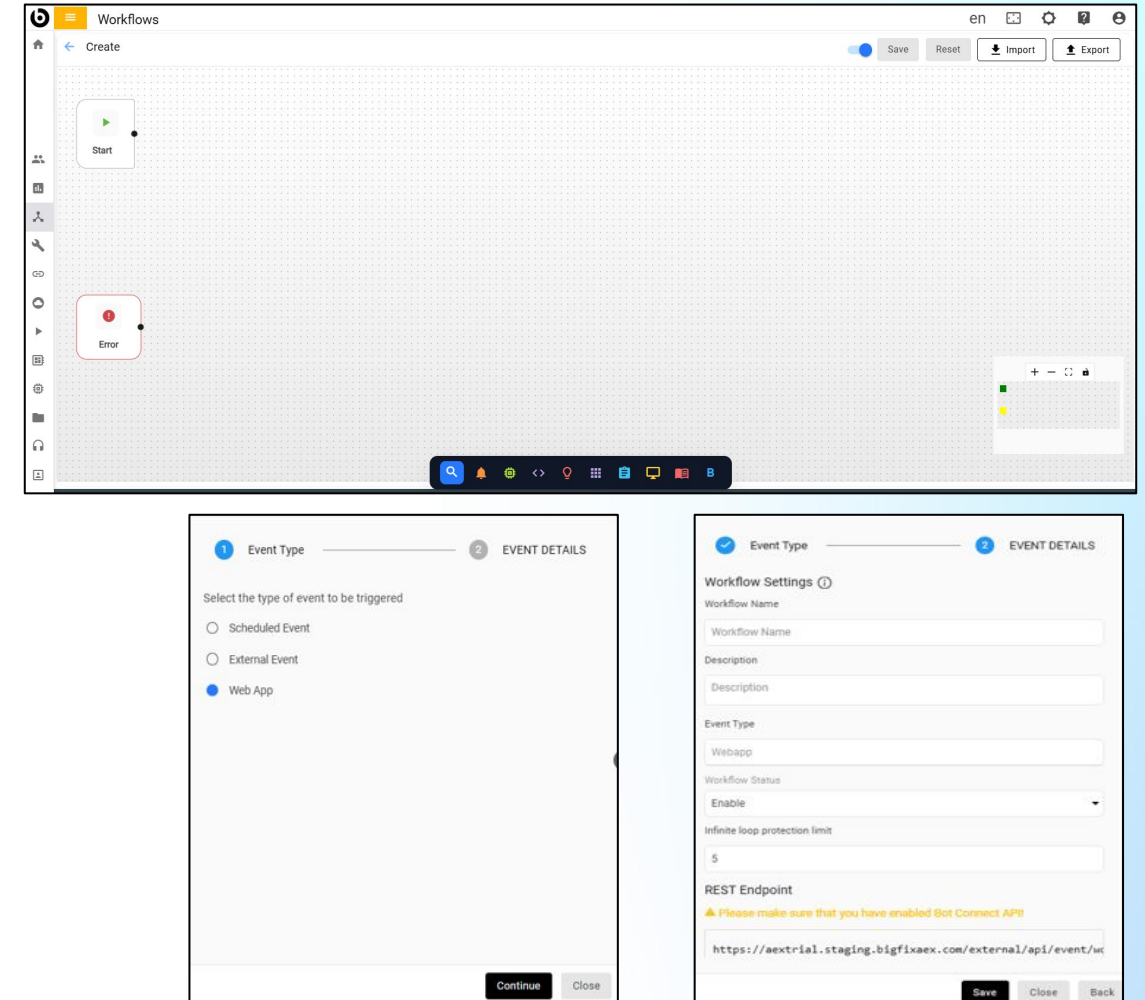


◆ Create Workflow and Define Event Type

Step 1: Create Workflow and Define Event Type Continued..

3. Click the Start Node box. A pop-up will appear.
4. Under Event Type, choose Web App and click Continue. A new pop-up will open.
5. Enter Workflow Name and Description, then click Save to create the workflow shell.

Tip: Ensure the “Bot Connect API” is enabled to activate your REST endpoint.

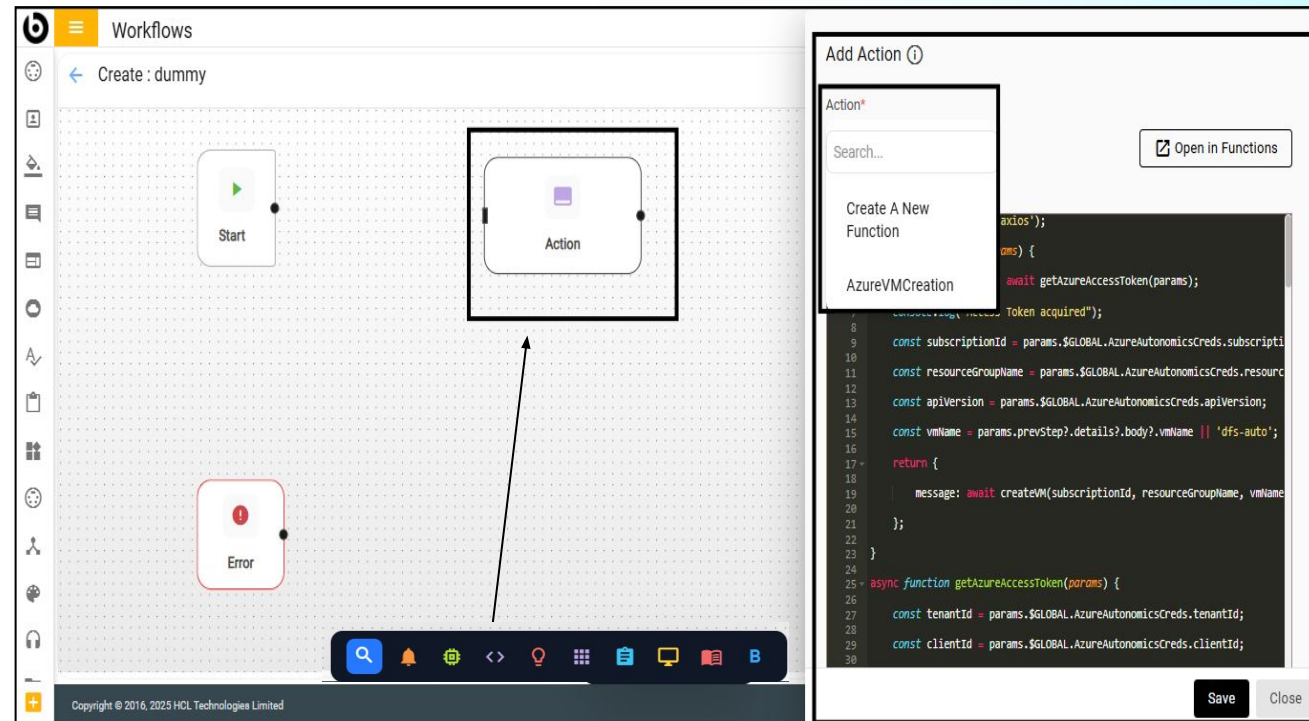


◆ Add and Configure Actions

Step 2: Add and Configure an Action Node

You will be redirected to Workflow dashboard after step 1

1. Click on the “<>” icon to add a node.
2. Choose Action from the pop-up.
3. Select the Action Node on the canvas.
4. From the Action dropdown, pick the desired function (e.g., AzureVM Creation) and click Save.

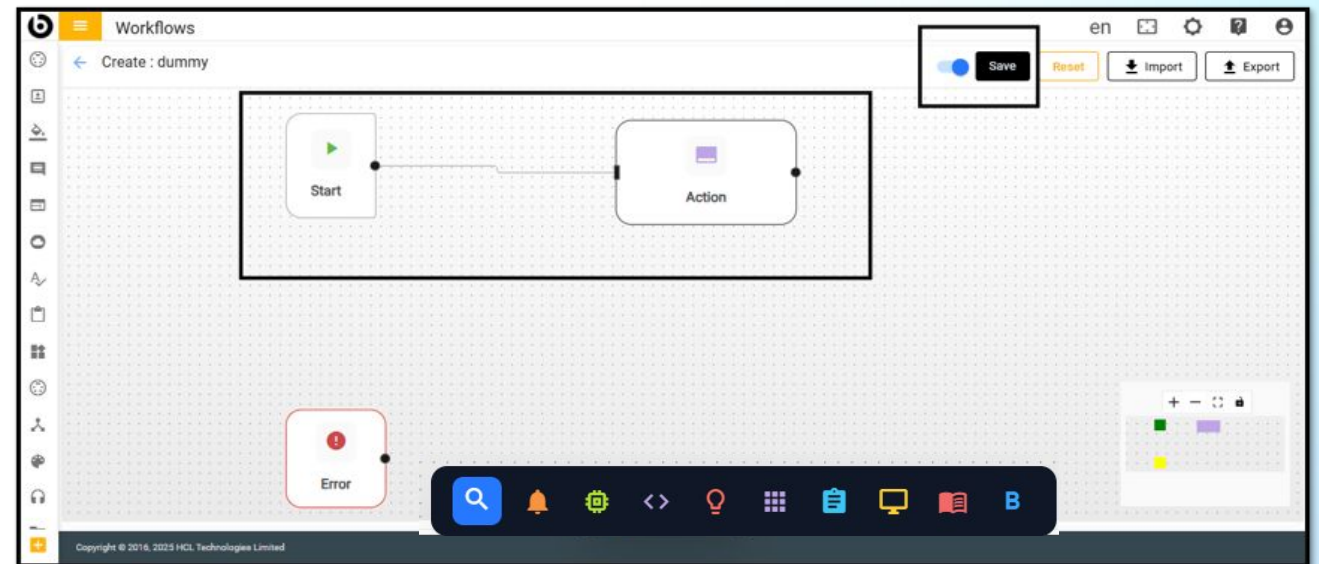


◆ Connect and Finalize Workflow

Step 3: Connect Nodes and Finalize Workflow

1. Connect the Start Node to the Action Node by dragging from the black dot on the Start to the Action.
2. Click Save to finalize the workflow.
3. Open the Workflow console to confirm your workflow appears and is active.

Your workflow is now ready to be linked with your custom tool under the “Add Function” step.

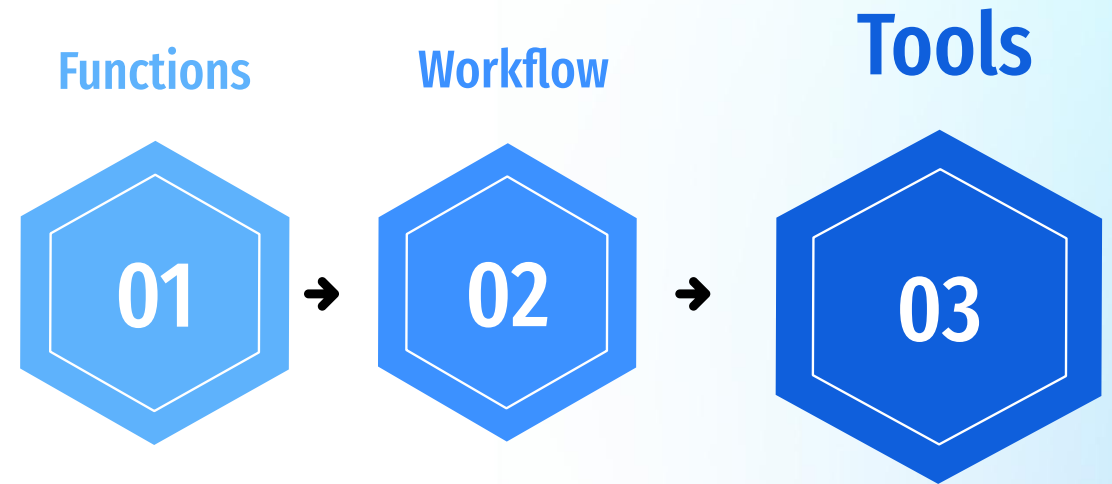


◆ Creating and Using Tools

Tools are pre-built integrations within AEX that bridge the AI Assistant with enterprise systems.

They enable agents to securely retrieve data, trigger workflows, and deliver analytics through the no-code integration layer.

Example - **ServiceNow Tool** : Connects AEX with ServiceNow to let sub-agents automatically create and update tickets for IT or HR tasks and thus speeding up resolution and reducing manual effort.



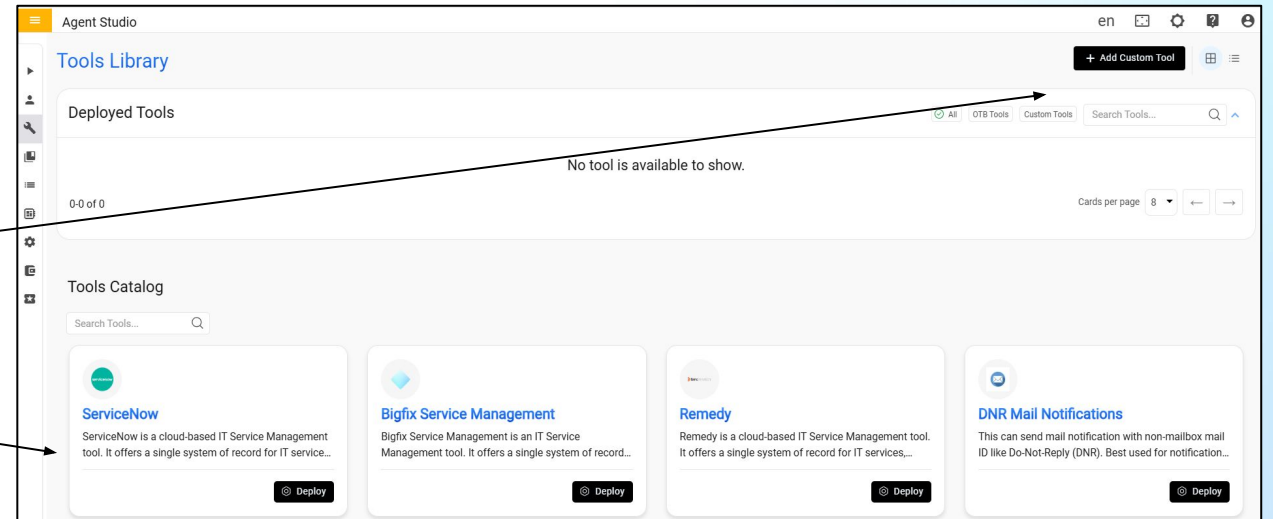
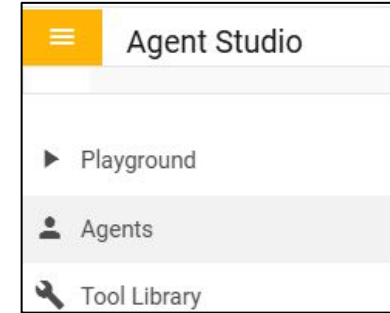
◆ Creating and Using Tools

Step 1: Access the Tool Console

1. In Agent Studio, click the Tools Library tab on the left sidebar.
2. This section displays all existing agents and allows you to create new ones.

Here you can:

- Create New tools
- Use existing (Out Of The Box) tools

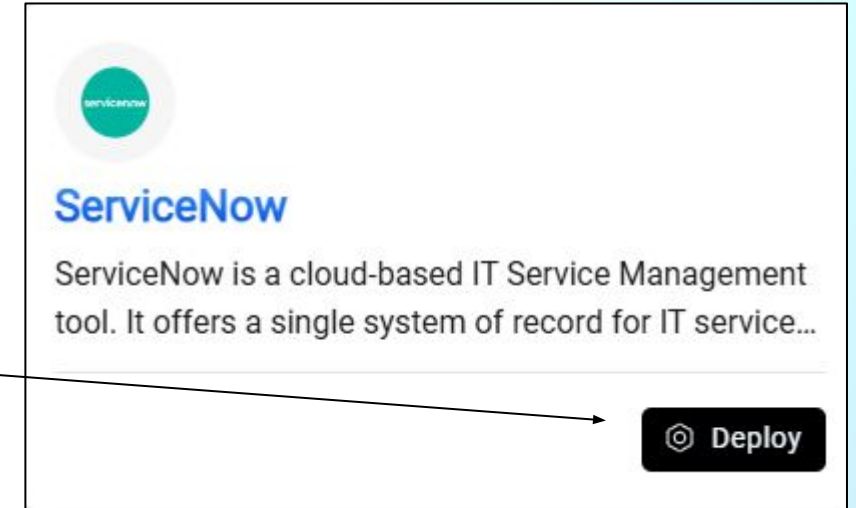


◆ Creating and Using Tools

Step 2.1: Use the OTB Tools

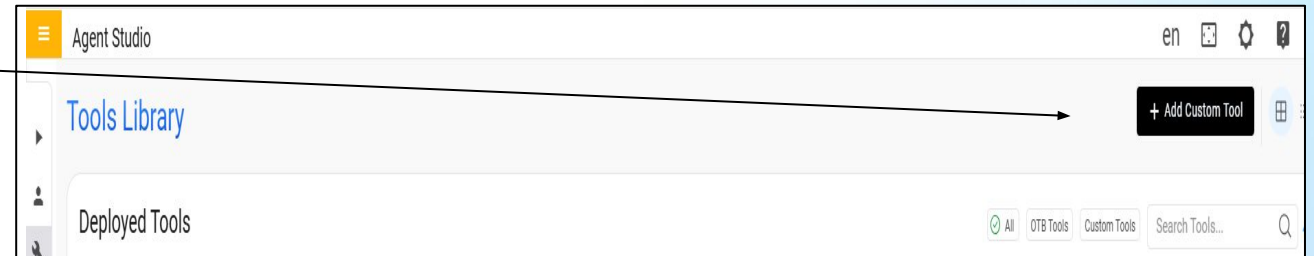
An Agent can only use a tool which has been deployed.

1. Click on Deploy and select Ok to deploy the tool.
2. The tool will be now visible in Deployed section.



Step 2.2.1: Create Custom Tools

1. Click Add Custom Tool.
2. Enter the following details
 - Tool Name : Eg- Vmmanager
 - Tool Description : Eg - VMmanager for AI
3. Click Save. Now the tool is visible Tools Library console.





Creating and Using Tools

Step 2.2.2: Add Workflow to the Custom Tool

1. Click Configure.
2. Click Add Function and fill the details in the form and select your workflow.
3. Click Add.
4. Click update on Tool window.

Your tool is deployed successfully and is ready to be used by your agent.

Custom Tool

Vm manager

Vm_manager

Deployed in 0 Agent

Configure

Vm manager

Add Function

No functions available.

New Function

Function Name*

Function Description*

Workflow*

Select Workflow

Add Parameters

Name* Type* Mandatory* Description*

Enter Name Select Type Enter Description

Add Close

HCLSoftware

Agent Assist Console

Enable AI-assisted support features



◆ Introducing Agent Assist

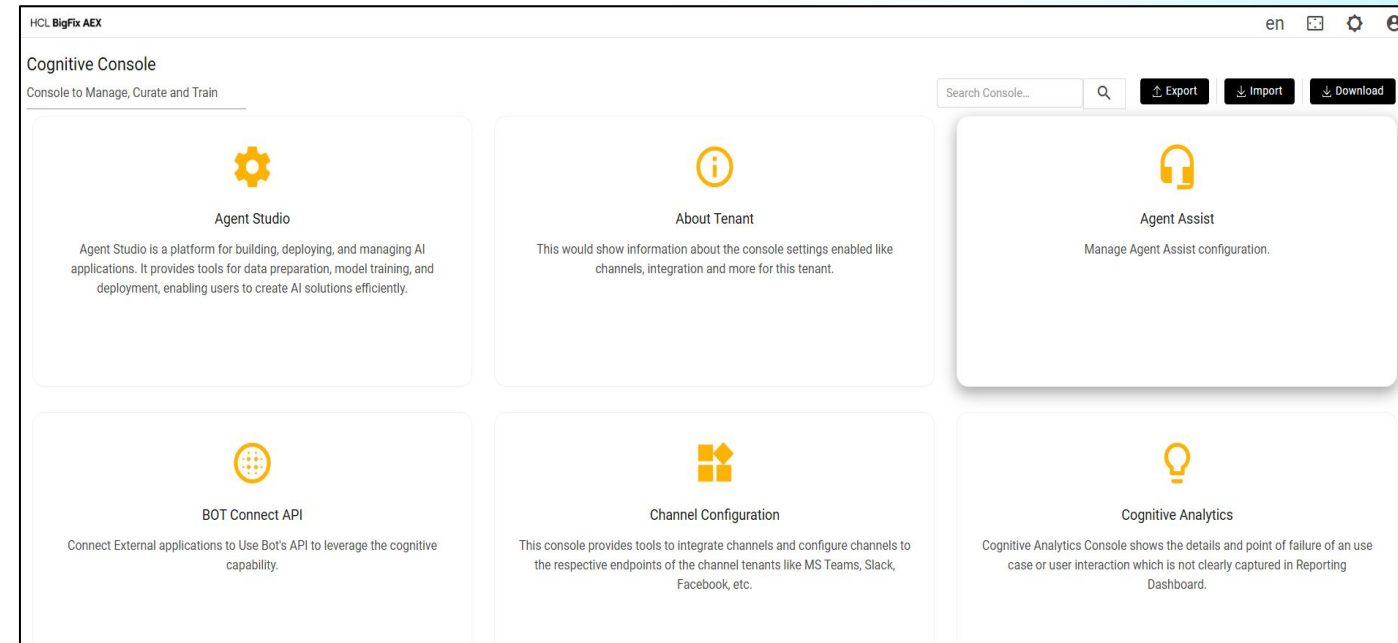
Agent Assist allows AI Agents to have Human-in-the-loop Mechanism wherever an AI Agent need some skilling or approval from humans. or to connect with live agents in case they are not satisfied with the responses from AI Agents

It includes:

- A configurable console for setup
- A dashboard for real-time agent performance
- A supervisor view for monitoring and configuration

Roles:

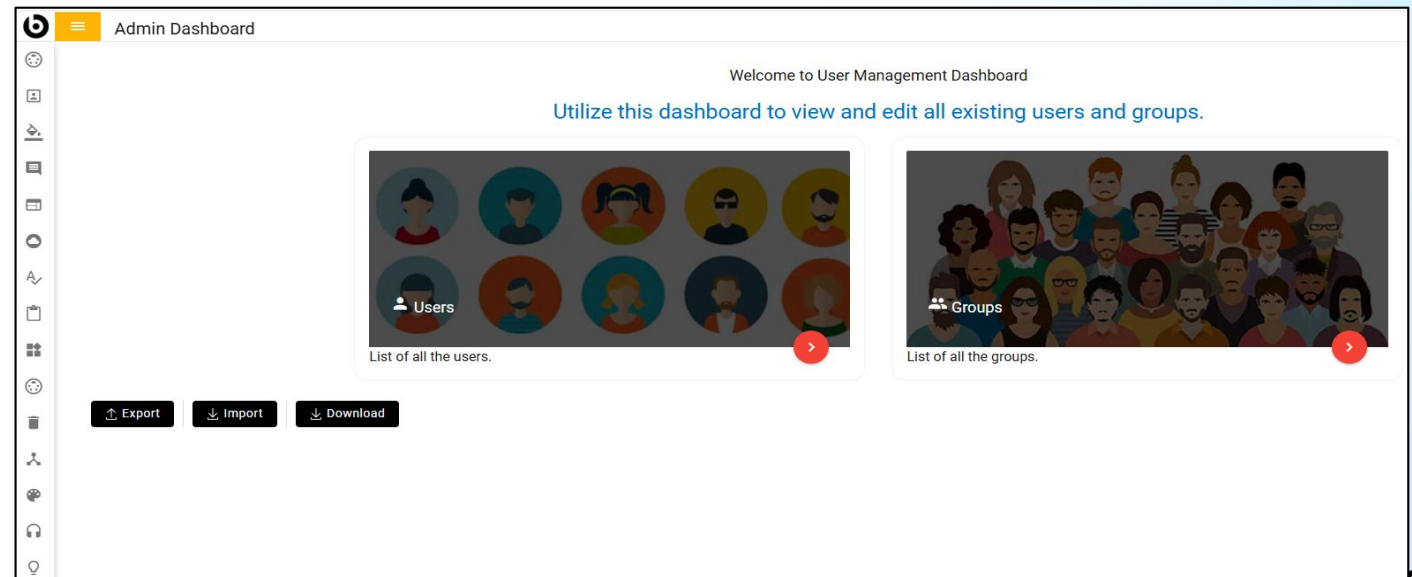
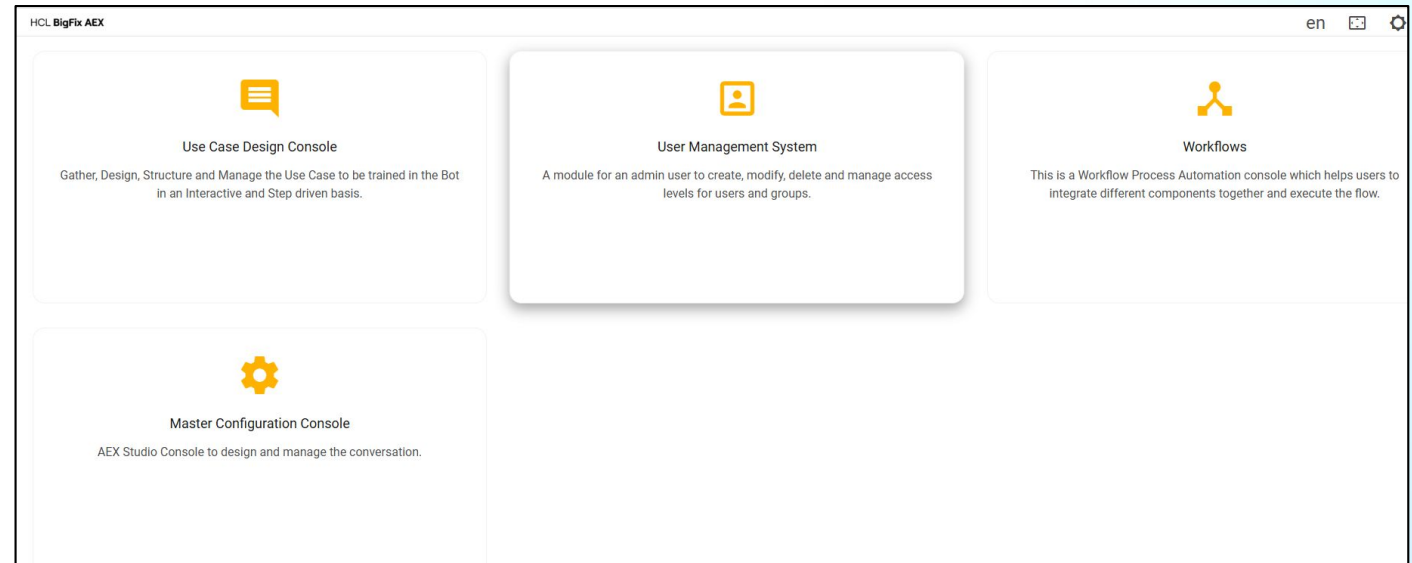
- Agent: Handles end-user queries in real time
- Supervisor: Manages agents, access, and escalations



◆ User Management Console

This setup is required before Agent Assist can be activated.

1. Click User Management Console from Cognitive Console
2. Click Groups Section. Ensure a group with Access Level 0 exists. If not, create a new admin user and group with access level 0.



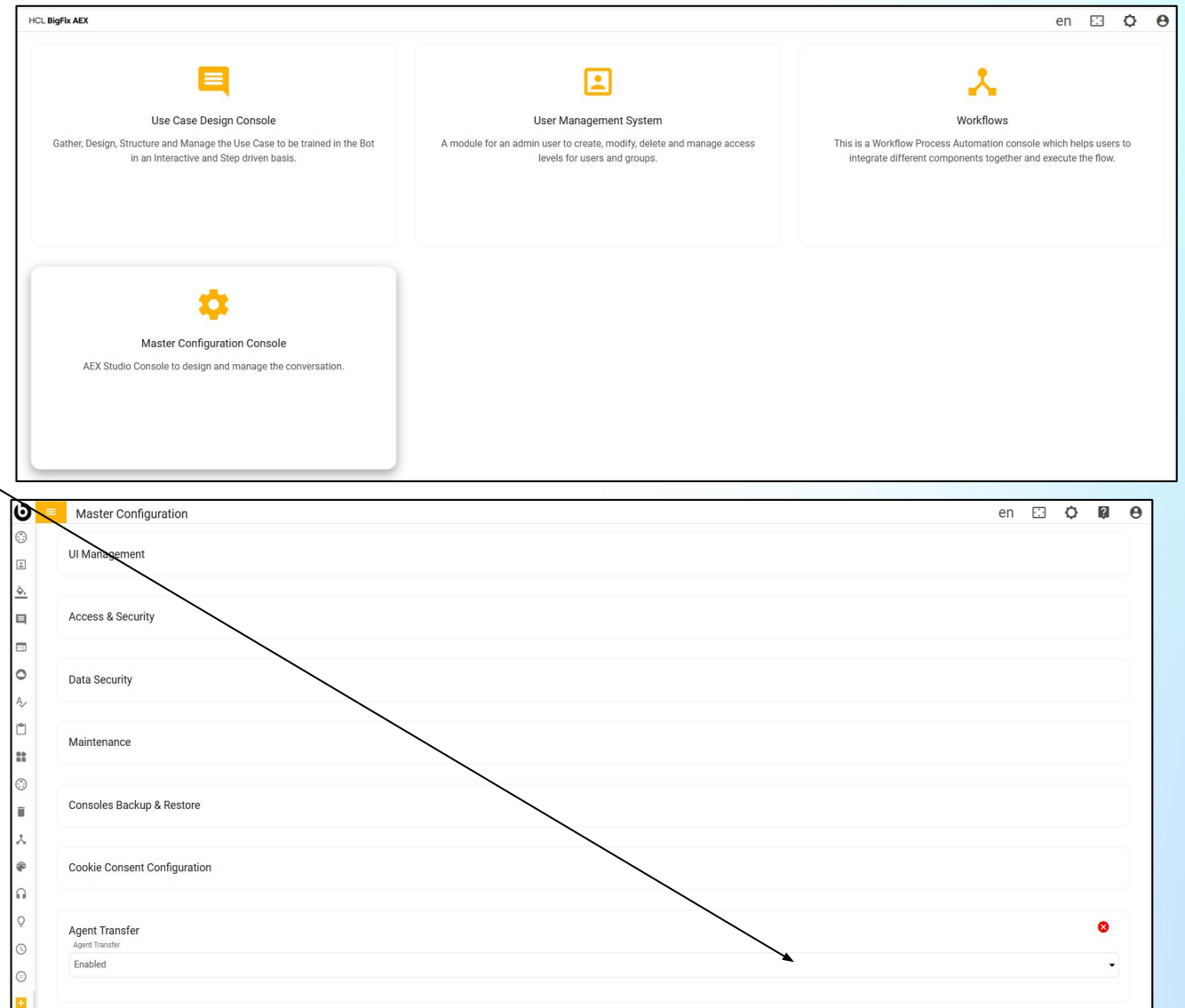


Master Configuration

To activate the agent transfer function

1. Click Master Configuration from Cognitive Console to enable agent transfer
2. Locate the Agent Transfer setting
3. Enable the option to allow chatbot-to-human transfer

This enables the system to route chats from AI to live agents.

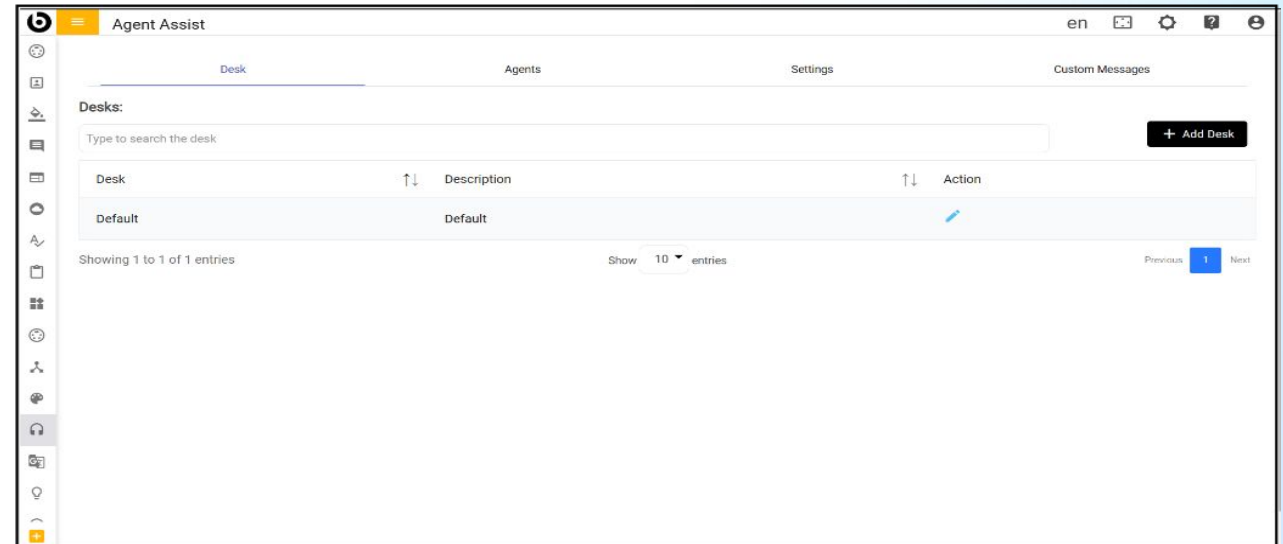
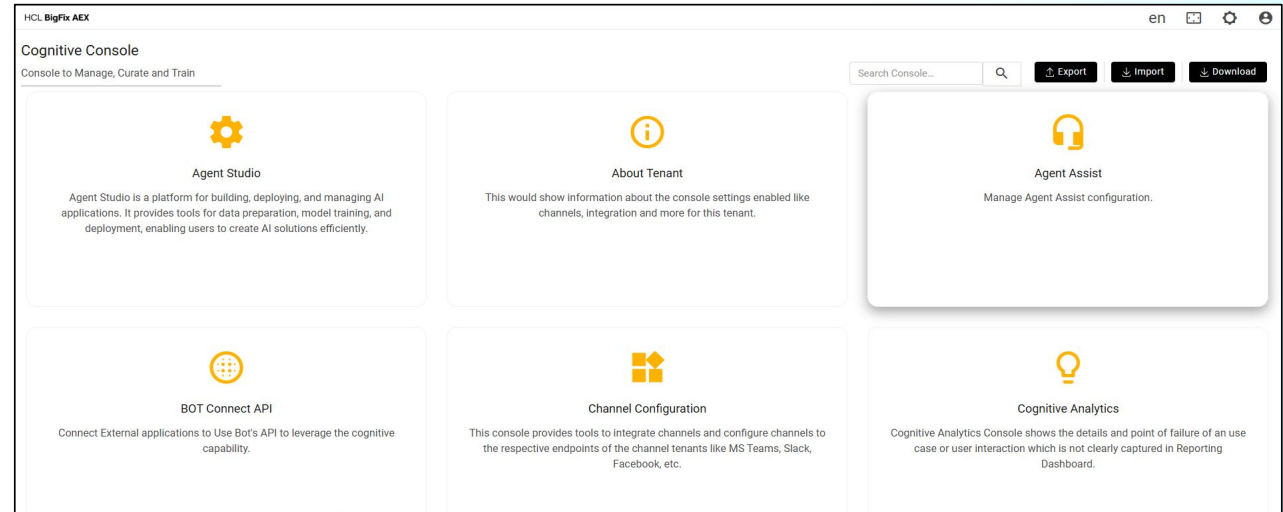


Access the Agent Assist Console

1. Click Agent Assist from Cognitive Console. Here we can configure settings for:

- Desk operations
- Agent management
- Supervisor roles

The console provides unified visibility into agent activities.





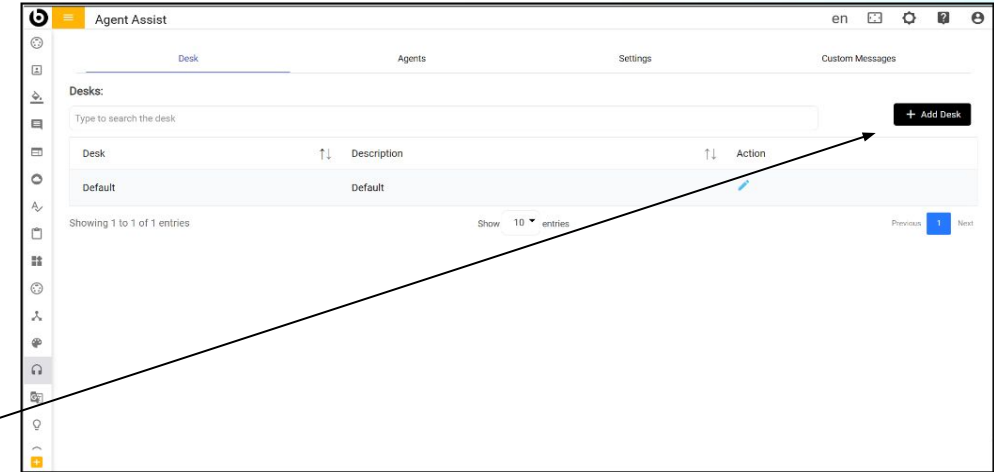
View And Manage Desks

Desks are organizational units for your support operations

Default Admin Desk is automatically created and cannot be deleted.

Add new desk name and description.

This description is used by Agentic AI to match user queries to the appropriate desk for automatic transfer.



The 'Add Desk' form has two input fields: 'Desk Name*' and 'Desk Description*'. At the bottom right, there are 'Add' and 'Cancel' buttons.



View And Manage Agents

Agent here defines who handles chats and who supervises operations.

Add human agents or supervisors to the platform.

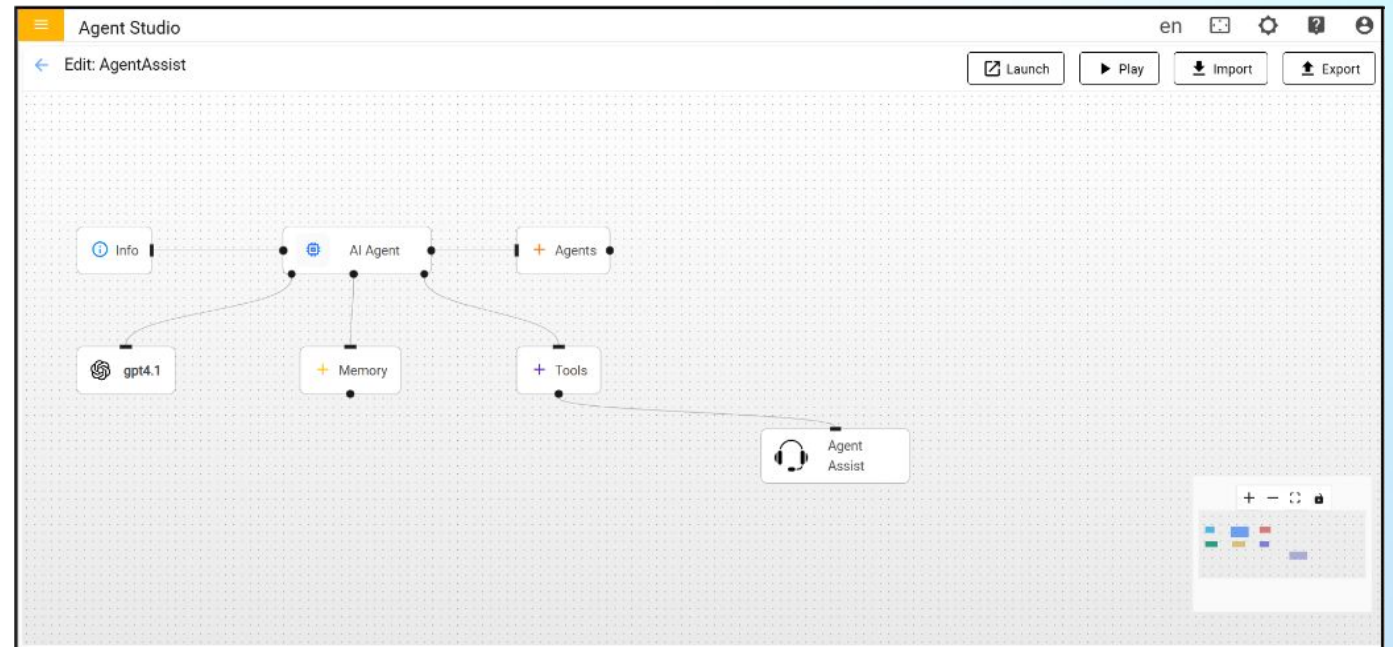
1. Click Add Agent under the Agents section
2. Fill in:
 - Agent Name
 - Email
 - Desk assignment
 - Role (Agent or Supervisor)
3. Click Add to confirm

The screenshot displays the 'Agent Assist' web application interface. A modal window titled 'Add Agent' is open in the center, containing the following fields: 'Agent Name*' (text input), 'Agent Email*' (text input), 'Agent Desk*' (dropdown menu with 'Choose your desk*' selected), 'Agent Role*' (dropdown menu with 'Select user role*' selected), and 'Select user role*' (dropdown menu). At the bottom of the modal are 'Add' and 'Cancel' buttons. In the background, the main interface shows a sidebar with navigation icons, a top bar with 'Agent Assist' and user settings, and a main content area with a table of agents. The table has columns for 'Role', 'Agent', and 'Supervisor', and shows three entries. A 'Custom Messages' section is visible on the right, and a '+ Add Agent' button is highlighted in the top right corner of the main content area.

◆ Connect Agent Assist with an AI Agent for Escalation Routing

Agent Assist with AI workflows enables seamless chat handoff.

1. Open Agent Studio
2. Click Tools
3. Click Agent Assist agent configured in the your agent.
4. Click Update

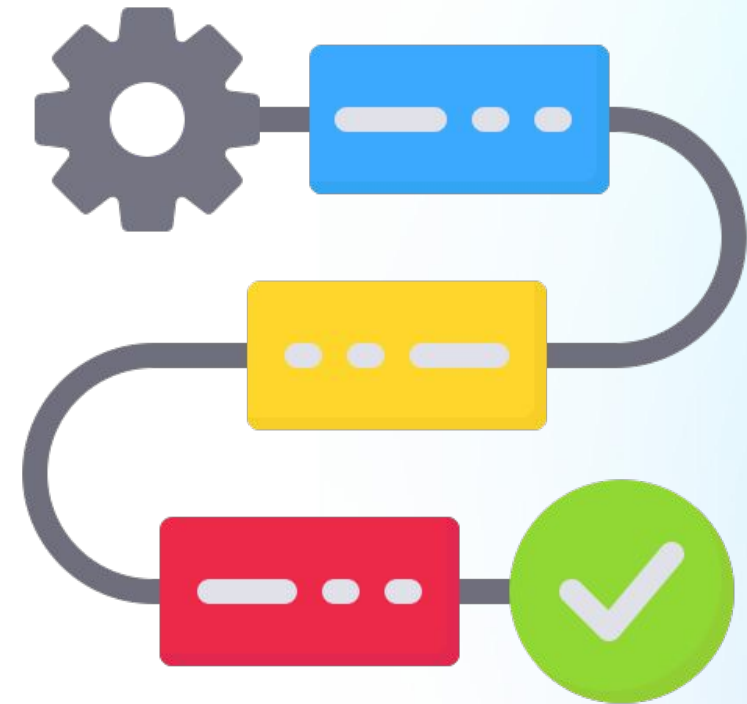


Your agent can now hand over unresolved queries to live agents.

◆ End-to-End Workflow Summary

Agent Assist ensures human-AI collaboration for faster, more empathetic resolutions.

1. User initiates chat
2. Bot identifies need for human help
3. Agentic AI routes to relevant desk
4. Agent accepts and initiates conversation
5. User and agent chat in real time until resolution



◆ Other Configuration Console Settings

The configuration console is accessible only to admins and supervisors.



Desks

- Admins can create and manage all desks, and move agents between them.
- Supervisors manage only their assigned desk and its agents.



Queue Management

- Auto Assign distributes chats to the agent with the fewest active chats.
- Requires at least two available agents.
- Queue limits can be customized to balance workload.



Service Level Agreements (SLAs)

- Supports both PSLA (Proactive SLA) and SLA.
- Minimum PSLA: 20 seconds | Minimum SLA: 40 seconds.
- Defines agent response and resolution targets.



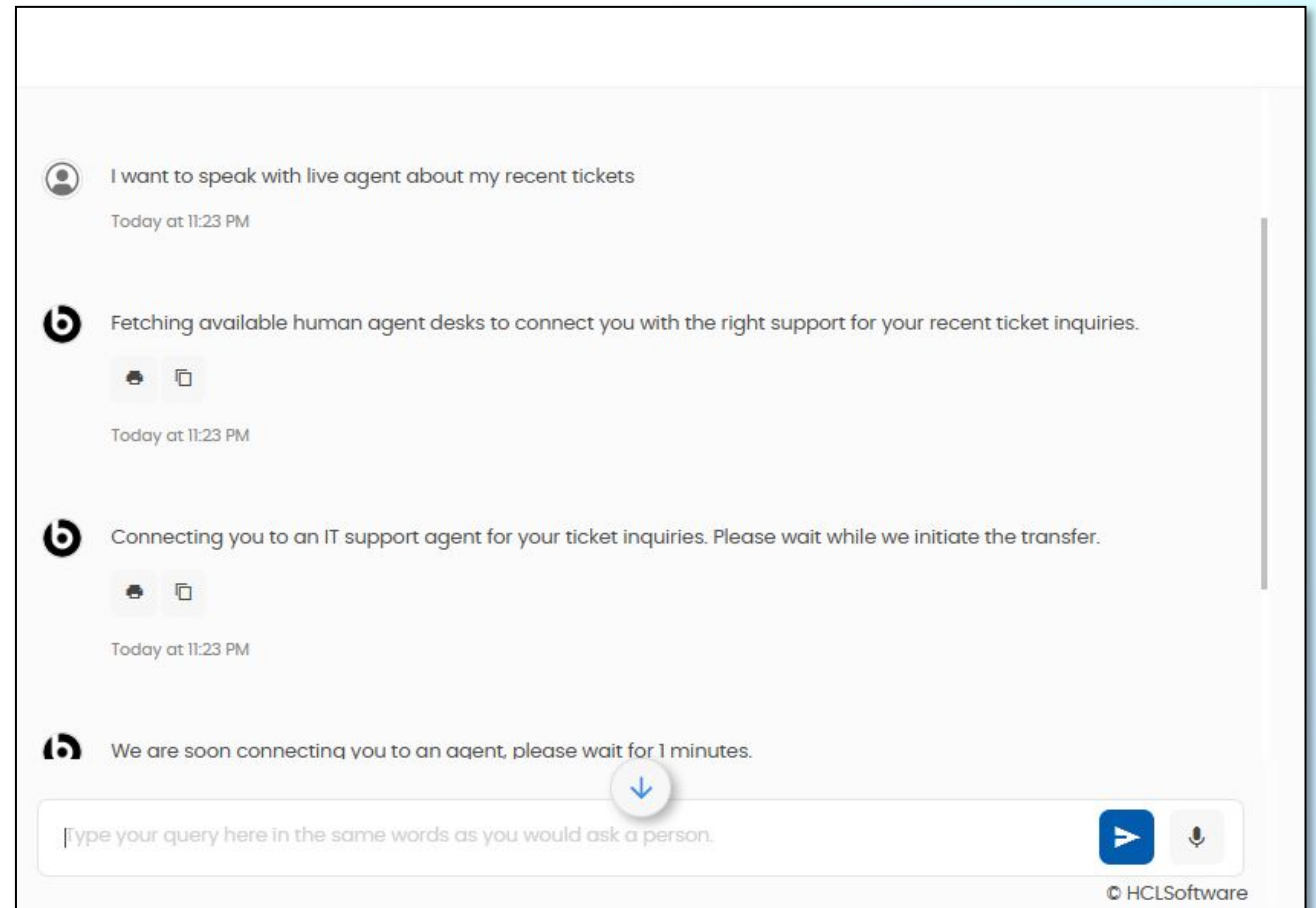
Additional Features

- Enable or disable multilingual support.
- Configure extended sessions (auto-renew every hour when active).
- Create custom forms and dashboards.
- Use Shadow Learning to train bots with resolved queries.

◆ Let's Try Your Agent

1. Launch the bot interface
2. Type: "I want to speak with a live agent about my tickets"
3. The bot fetches available desks and connects automatically

Shows how Agentic routes a query to the right support desk.

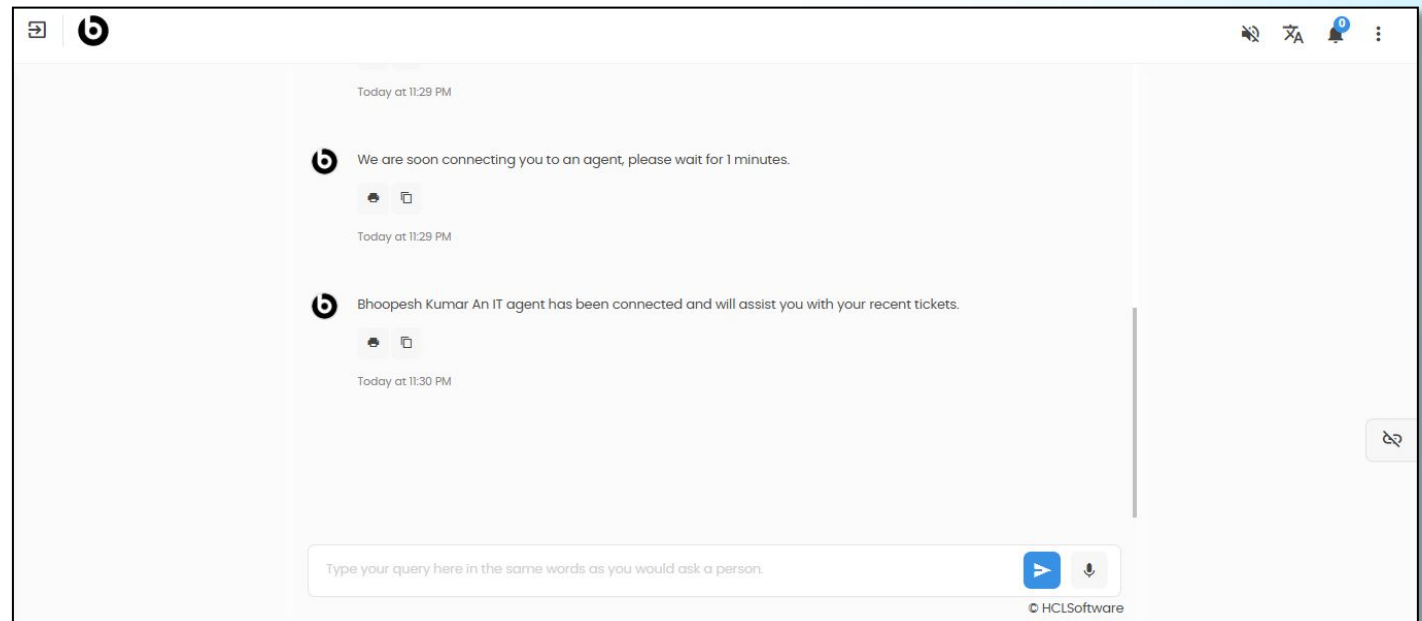




Let's Try Your Agent

Once the chat appears on the agent's chat dashboard, the agent can accept the chat and view user details and chat history.

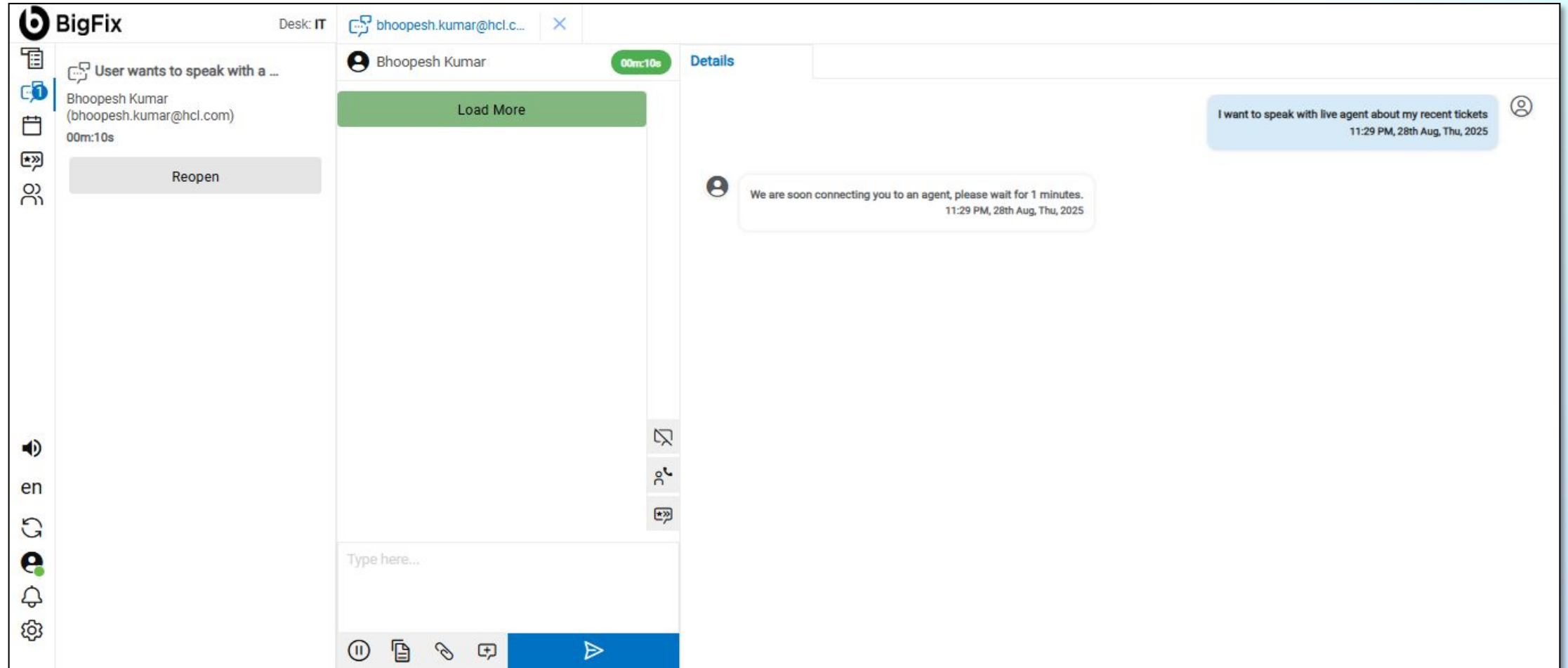
The agent's details are also displayed on the user's bot interface.





Let's Try Your Agent

Now agents can response to query, attach SOPs or can transfer chats to another agent or desk

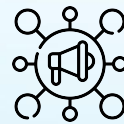


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