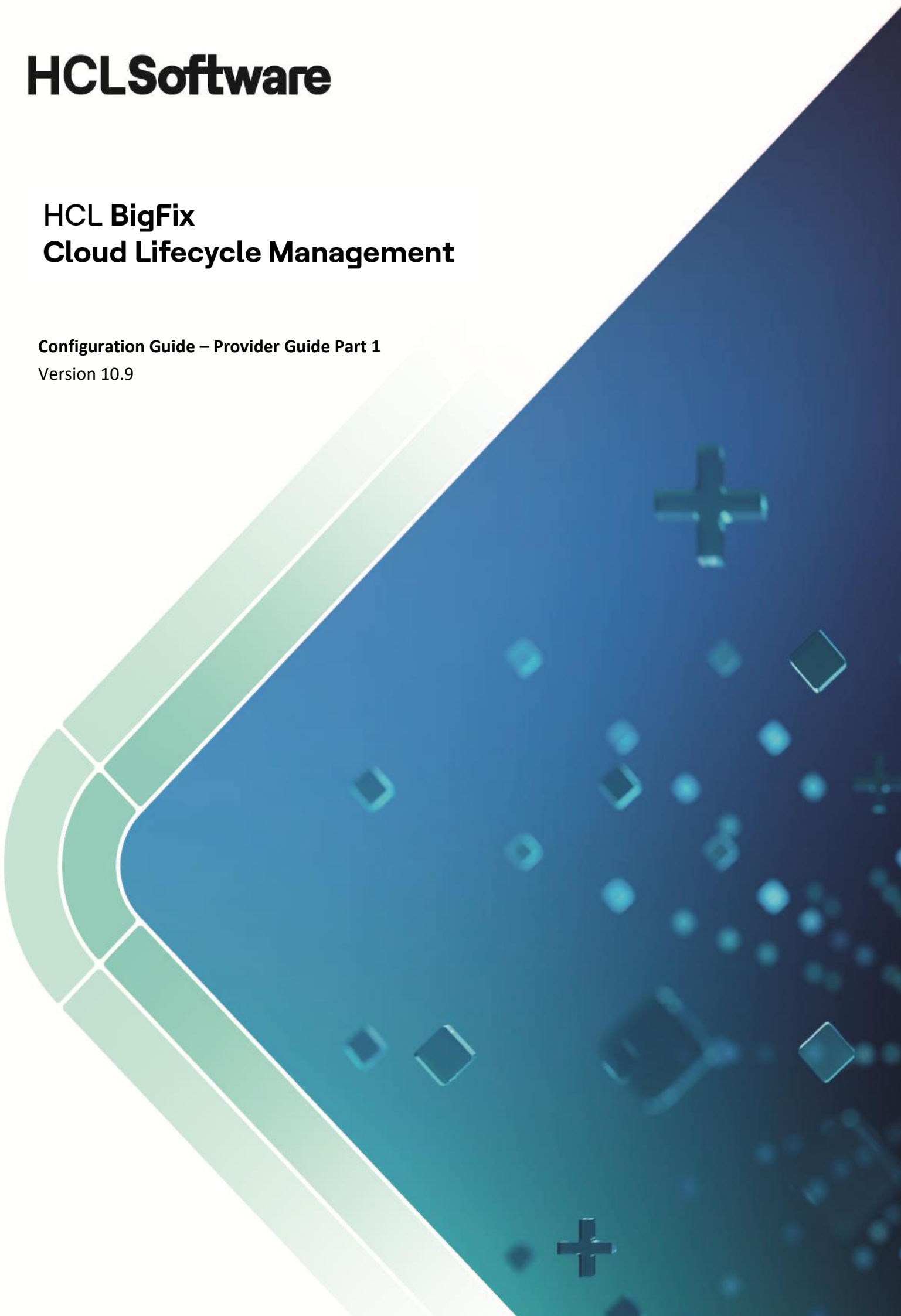




# HCL BigFix Cloud Lifecycle Management

**Configuration Guide – Provider Guide Part 1**

Version 10.9



The data contained in this document shall not be duplicated, used, or disclosed as a whole or in part for any purpose. If a contract is awarded to chosen parties because of or in connection with the submission of this data, the client or prospective client shall have the right to duplicate, use, or disclose this data to the extent provided in the contract. This restriction does not limit the client's or prospective client's right to use the information contained in the data if it is obtained from another source without restriction. The data subject to this restriction is contained in all marked sheets. HCL has more than 200 offices worldwide. Addresses, phone numbers, and fax numbers are listed on the HCL website at [www.hcltechsw.com](http://www.hcltechsw.com).

Copyright © 2025 HCL Technologies Limited.

## Table of Contents

|          |                                                          |           |
|----------|----------------------------------------------------------|-----------|
| <b>1</b> | <b>Preface .....</b>                                     | <b>16</b> |
| 1.1      | Intended Audience .....                                  | 16        |
| 1.2      | About this Guide .....                                   | 16        |
| 1.3      | Related Documents .....                                  | 16        |
| 1.4      | Conventions .....                                        | 16        |
| <b>2</b> | <b>HCL BigFix CLM Overview .....</b>                     | <b>18</b> |
| 2.1      | HCL BigFix CLM Features .....                            | 18        |
| 2.2      | HCL BigFix CLM Component Overview .....                  | 19        |
| 2.3      | HCL BigFix CLM Benefits .....                            | 20        |
| <b>3</b> | <b>HCL BigFix CLM Configuration and Management .....</b> | <b>21</b> |
| 3.1      | Logging into the System .....                            | 21        |
| 3.1.1    | Change Password .....                                    | 23        |
| 3.1.2    | Forgot Password .....                                    | 25        |
| 3.2      | Regions .....                                            | 26        |
| 3.2.1    | Add Region .....                                         | 26        |
| 3.2.2    | View Region .....                                        | 28        |
| 3.2.3    | Edit Region .....                                        | 28        |
| 3.2.4    | Delete Region .....                                      | 29        |
| 3.3      | Cloud Account .....                                      | 30        |
| 3.3.1    | Add Configuration .....                                  | 30        |
| 3.3.2    | View Endpoints .....                                     | 36        |
| 3.3.3    | Edit Endpoint .....                                      | 37        |
| 3.3.4    | Delete Endpoint .....                                    | 38        |
| 3.4      | Integrations .....                                       | 39        |
| 3.4.1    | Add Integration .....                                    | 40        |
| 3.4.2    | View Integrations .....                                  | 41        |
| 3.4.3    | Edit Integrations .....                                  | 41        |
| 3.4.4    | Delete Integrations .....                                | 43        |

|       |                                   |    |
|-------|-----------------------------------|----|
| 3.5   | Network Enablement .....          | 43 |
| 3.5.1 | Single IP Network Assignment..... | 46 |
| 3.6   | ITSM .....                        | 49 |
| 3.6.1 | Add Integration .....             | 49 |
| 3.6.2 | View Configuration .....          | 51 |
| 3.6.3 | Edit Configuration .....          | 51 |
| 3.6.4 | Delete Configuration .....        | 52 |
| 3.6.5 | Import ITSM .....                 | 53 |
| 3.7   | Custom Tables.....                | 54 |
| 3.7.1 | Create Custom Table.....          | 54 |
| 3.7.2 | View Custom Table.....            | 56 |
| 3.7.3 | Edit Custom Table .....           | 56 |
| 3.7.4 | Delete Custom Tables .....        | 57 |
| 3.7.5 | Add Records .....                 | 57 |
| 3.7.6 | Import Data from CSV .....        | 59 |
| 3.7.7 | Refresh Custom Table .....        | 60 |
| 3.7.8 | Import Custom Table .....         | 60 |
| 3.8   | Service Types.....                | 61 |
| 3.8.1 | Add Service Type.....             | 62 |
| 3.8.2 | View Service Type .....           | 62 |
| 3.8.3 | Edit Service Types .....          | 63 |
| 3.8.4 | Change Status .....               | 64 |
| 3.9   | Organization.....                 | 64 |
| 3.9.1 | Add Organization .....            | 64 |
| 3.9.2 | Configure Domains.....            | 66 |
| 3.9.3 | Configure SAML2.0.....            | 71 |
| 3.9.4 | Configure Widgets.....            | 72 |
| 3.9.5 | Configure Menu .....              | 72 |
| 3.9.6 | View Organization .....           | 74 |
| 3.9.7 | Edit Organization.....            | 74 |

|          |                                              |            |
|----------|----------------------------------------------|------------|
| 3.9.8    | Delete Organization .....                    | 76         |
| 3.9.9    | Manage Domain Organizational Unit (OU) ..... | 76         |
| 3.9.10   | WorkFlow Management .....                    | 87         |
| <b>4</b> | <b>Support .....</b>                         | <b>112</b> |

## Table of Figures

|                                                             |    |
|-------------------------------------------------------------|----|
| Figure 1 – HCL BigFix CLM Login Page .....                  | 22 |
| Figure 2 – HCL BigFix CLM Login Page .....                  | 22 |
| Figure 3 – HCL BigFix CLM Home Page .....                   | 23 |
| Figure 4 - Change Password .....                            | 23 |
| Figure 5 - Change Password .....                            | 24 |
| Figure 6 - Success Message .....                            | 24 |
| Figure 7 - Provider Module.....                             | 25 |
| Figure 8 – HCL BigFix CLM Login Page .....                  | 25 |
| Figure 9 – Forgot Password Screen .....                     | 26 |
| Figure 10 – Region.....                                     | 26 |
| Figure 11 – Add New Region .....                            | 27 |
| Figure 12 – Add New Region(cont.) .....                     | 27 |
| Figure 13 – View Region.....                                | 28 |
| Figure 14 – Edit Region .....                               | 28 |
| Figure 15 – Edit Region (Cont.).....                        | 29 |
| Figure 16 – Delete Region .....                             | 29 |
| Figure 17 – Delete Region (Cont.) .....                     | 29 |
| Figure 18 – Alert Message.....                              | 30 |
| Figure 19 – Cloud Account .....                             | 30 |
| Figure 20 – Cloud Account – Add Configuration .....         | 31 |
| Figure 21 – Cloud Account – Add Configuration (Cont.) ..... | 31 |
| Figure 22 – Cloud Account – Add Configuration (Cont.) ..... | 32 |
| Figure 23 – Cloud Account – Add Configuration (Cont.) ..... | 32 |
| Figure 24 – Secret Selector.....                            | 35 |
| Figure 25 – Secret Selector.....                            | 35 |
| Figure 26 – Check Connectivity .....                        | 36 |
| Figure 27 – Add endpoints to Platform .....                 | 36 |
| Figure 28 – View Endpoints at Platform.....                 | 37 |

|                                                                |    |
|----------------------------------------------------------------|----|
| Figure 29 – Edit endpoints at Platform (Cont.) .....           | 38 |
| Figure 30 – Edit endpoints at Platform (Cont.) .....           | 38 |
| Figure 31 – Delete Endpoint.....                               | 38 |
| Figure 32 – Success Confirmation Message .....                 | 39 |
| Figure 33 – Integrations .....                                 | 39 |
| Figure 34 – Integrations (Cont.).....                          | 39 |
| Figure 35 – Select Integration .....                           | 40 |
| Figure 36 – Add Integration for Ansible Tower .....            | 40 |
| Figure 37 – Integrations .....                                 | 41 |
| Figure 38 – Manage Software Provisioning Platform.....         | 42 |
| Figure 39 – Edit Software Provisioning Platform .....          | 42 |
| Figure 40 – Delete Software Provisioning Platform .....        | 43 |
| Figure 41 – Delete Software Provisioning Platform (cont.)..... | 43 |
| Figure 42 – Provider Network Enablement.....                   | 43 |
| Figure 43 – Network Assignment .....                           | 44 |
| Figure 44 – Network Assignment (Cont.) .....                   | 45 |
| Figure 45 – Confirmation Message.....                          | 46 |
| Figure 46 – Success Message .....                              | 46 |
| Figure 47 – Single IP Network Assignment.....                  | 46 |
| Figure 48 – Add New Network .....                              | 46 |
| Figure 49 – Confirmation Message .....                         | 47 |
| Figure 50 – Delete Network .....                               | 47 |
| Figure 51 – Delete Network (Cont.) .....                       | 47 |
| Figure 52 – IP Range Network Assignment .....                  | 48 |
| Figure 53 – Add New Network .....                              | 48 |
| Figure 54 – Confirmation Message .....                         | 48 |
| Figure 55 – Add Configuration .....                            | 49 |
| Figure 56 – Add Configuration .....                            | 50 |
| Figure 57 – Confirmation Message .....                         | 50 |

|                                               |    |
|-----------------------------------------------|----|
| Figure 58 – View Configuration .....          | 51 |
| Figure 59 – Edit ITSM .....                   | 52 |
| Figure 60 – Confirmation Message .....        | 52 |
| Figure 61 – Delete Configuration .....        | 52 |
| Figure 62 – Delete Configuration .....        | 53 |
| Figure 63 – Delete Configuration .....        | 53 |
| Figure 64 – Import Configuration .....        | 53 |
| Figure 65 – ITSM Configuration (Cont.) .....  | 54 |
| Figure 66 – Success Message .....             | 54 |
| Figure 67 – Create Custom Table .....         | 55 |
| Figure 68 – Confirmation Message .....        | 55 |
| Figure 69 – View Custom Table .....           | 56 |
| Figure 70 – Edit Custom Table (Cont.) .....   | 56 |
| Figure 71 – Confirmation Message .....        | 57 |
| Figure 72 – Delete Custom Table (Cont.) ..... | 57 |
| Figure 73 – Confirmation Message .....        | 57 |
| Figure 74 – Add Records .....                 | 58 |
| Figure 75 – AppMaster .....                   | 58 |
| Figure 76 – Confirmation Message .....        | 58 |
| Figure 77 – Custom Table .....                | 59 |
| Figure 78 – Import Record .....               | 59 |
| Figure 79 – Upload File .....                 | 60 |
| Figure 80 – Manage Custom Table .....         | 60 |
| Figure 81 – Manage Custom Table .....         | 60 |
| Figure 82 – Import Custom Table .....         | 61 |
| Figure 82 – Import Custom Table (Cont.) ..... | 61 |
| Figure 83 - Add Service Type .....            | 62 |
| Figure 84 - Confirmation Message .....        | 62 |
| Figure 85 - View Service Type .....           | 63 |

|                                                            |    |
|------------------------------------------------------------|----|
| Figure 86 - Edit Service Type .....                        | 63 |
| Figure 87 - Edit Service Type (Cont.) .....                | 63 |
| Figure 88 - Confirmation Message .....                     | 64 |
| Figure 89 – Add Organization.....                          | 64 |
| Figure 90 – Add Organization (Cont.).....                  | 65 |
| Figure 91 – Add Organization (Cont.).....                  | 65 |
| Figure 92 – Add Organization Confirmation Message .....    | 66 |
| Figure 93 – Add Domain .....                               | 67 |
| Figure 94 – Domain details.....                            | 67 |
| Figure 95 – Add domain Successful Message.....             | 68 |
| Figure 96 – Configure Groups .....                         | 68 |
| Figure 97 – Configure Groups .....                         | 69 |
| Figure 98 – Confirmation Message .....                     | 69 |
| Figure 99 – Configure Groups .....                         | 69 |
| Figure 100 – Success Message .....                         | 70 |
| Figure 101 – AD Column Mapping .....                       | 70 |
| Figure 102 – AD User Column Mapping .....                  | 70 |
| Figure 103 – Confirmation Message .....                    | 70 |
| Figure 104 –SAML2.0 Details .....                          | 71 |
| Figure 105 – Add Organization confirmation message .....   | 71 |
| Figure 106 – Configure Widgets.....                        | 72 |
| Figure 108 – Configure Widgets Contd. ....                 | 72 |
| Figure 109 – Success Message .....                         | 72 |
| Figure 110 – Configure Menu for Organization .....         | 73 |
| Figure 111 – Configure Menu for Organization (Cont.) ..... | 73 |
| Figure 112 – Configure Menu Confirmation Message .....     | 74 |
| Figure 113 – View Organization .....                       | 74 |
| Figure 114 – Edit organization Details.....                | 75 |
| Figure 115 – Edit Organization Details .....               | 75 |

|                                                                        |    |
|------------------------------------------------------------------------|----|
| Figure 116 – Edit Organization Details .....                           | 75 |
| Figure 117 – Success Confirmation Message .....                        | 75 |
| Figure 118 – View Organization .....                                   | 76 |
| Figure 119 – Success Message .....                                     | 76 |
| Figure 120 – Manage Domain Organizational Unit (OU) .....              | 76 |
| Figure 121 – Manage Domain Organizational Unit (OU) .....              | 77 |
| Figure 122 – Manage Domain Organizational Unit (OU) .....              | 77 |
| Figure 123 – Edit Domain Organizational Unit (OU) .....                | 78 |
| Figure 124 – Confirmation Message Organizational Unit (OU).....        | 78 |
| Figure 125 – Confirmation Message Organizational Unit (OU).....        | 78 |
| Figure 126 – Create Organizational Unit (OU) .....                     | 79 |
| Figure 127 – Create Organizational Unit (OU) .....                     | 79 |
| Figure 128 – Allocate Resource to Organization .....                   | 80 |
| Figure 129 – Allocate Resource to Organization (Cont.) .....           | 80 |
| Figure 130 – Allocate Resource to Organization (Cont.) .....           | 80 |
| Figure 131 – Allocate Resource to Organization (Cont.) .....           | 81 |
| Figure 132 – Success Message .....                                     | 81 |
| Figure 133 – Delete Allocated Resource from Organization .....         | 81 |
| Figure 134 – Delete Allocated Resource from Organization (Cont.) ..... | 82 |
| Figure 135 – Organization Network Assignment.....                      | 82 |
| Figure 136 – Organization Network Assignment (Cont.) .....             | 82 |
| Figure 137 – Organization Network Assignment (Cont.) .....             | 83 |
| Figure 138 – Organization Network Assignment (Cont.) .....             | 83 |
| Figure 139 – Organization Network Assignment Confirmation (Cont.)..... | 84 |
| Figure 140 – Organization Network Assignment (Cont.) .....             | 84 |
| Figure 141 – Organization Network Assignment (Cont.) .....             | 84 |
| Figure 142 – Organization Network Assignment (Cont.) .....             | 85 |
| Figure 143 – Organization Network Assignment (Cont.) .....             | 85 |
| Figure 144 – Organization Network Assignment (Cont.) .....             | 85 |

|                                                             |    |
|-------------------------------------------------------------|----|
| Figure 145 – Delete Assigned Network from Organization..... | 86 |
| Figure 146 – Confirmation Message .....                     | 86 |
| Figure 147 – Delete Assign Network from Organization.....   | 86 |
| Figure 148 – Delete Network Confirmation Message .....      | 87 |
| Figure 149 – Add Cloud Templates .....                      | 87 |
| Figure 150 – Add Cloud Templates Confirmation Message ..... | 88 |
| Figure 151 – Manage Cloud Templates.....                    | 89 |
| Figure 152 – Edit Cloud Template .....                      | 89 |
| Figure 153 – Edit Cloud Template (Cont.) .....              | 90 |
| Figure 154 – Delete Cloud Template.....                     | 90 |
| Figure 155 – Delete Cloud Template (Cont.).....             | 90 |
| Figure 156 – Delete Cloud Template (Cont.).....             | 90 |
| Figure 157 – Change Status of Template (Cont.) .....        | 91 |
| Figure 159 – Import Templates.....                          | 91 |
| Figure 160 – Import Template (Cont.).....                   | 92 |
| Figure 161 – Import Template (Cont.).....                   | 92 |
| Figure 162 – Add Approval Group.....                        | 93 |
| Figure 163 – Add Approval Group (Cont.).....                | 94 |
| Figure 164 – Add Approval Group (Cont.).....                | 94 |
| Figure 165 – View Approval Group .....                      | 94 |
| Figure 166 – Edit Approval Group (Cont.) .....              | 95 |
| Figure 167 – Edit Approval Group (Cont.) .....              | 95 |
| Figure 168 – Delete Approval Group.....                     | 95 |
| Figure 169 – Delete Approval Group (Cont.).....             | 96 |
| Figure 170 – Delete Approval Group (Cont.).....             | 96 |
| Figure 171 – Manage Template .....                          | 97 |
| Figure 172 – Manage Approval Workflow Template .....        | 97 |
| Figure 173 – Approval Stages.....                           | 97 |
| Figure 174 – Mail Template .....                            | 98 |

|                                                       |     |
|-------------------------------------------------------|-----|
| Figure 175 – Success Message .....                    | 98  |
| Figure 176 – View Template.....                       | 99  |
| Figure 177 – Edit Manage Template (Cont.) .....       | 99  |
| Figure 178 – Confirmation Message .....               | 100 |
| Figure 179 – Approval Workflow Delete Template.....   | 100 |
| Figure 180 – Delete Template (Cont.) .....            | 100 |
| Figure 181 – Delete Template (Cont.) .....            | 100 |
| Figure 182 – Rules Configuration .....                | 101 |
| Figure 183 – Add Rule .....                           | 101 |
| Figure 184 – Add Rule (Cont.) .....                   | 101 |
| Figure 185 – Rule Detail .....                        | 102 |
| Figure 186 – Edit Rule Detail .....                   | 102 |
| Figure 187 – Edit Rule Detail (Cont.) .....           | 102 |
| Figure 188 – Delete Rule Detail (Cont.).....          | 103 |
| Figure 189 – Delete Rule Detail (Cont.).....          | 103 |
| Figure 190 – Filter Rule Configuration .....          | 103 |
| Figure 191 – Filter Rule Configuration .....          | 104 |
| Figure 192 – Add Template .....                       | 104 |
| Figure 193 – Add Template .....                       | 105 |
| Figure 194 – Add Template (Cont.) .....               | 105 |
| Figure 195 – Add Template (Cont.) .....               | 106 |
| Figure 196 – Success Message .....                    | 106 |
| Figure 197 – Edit Email Template.....                 | 107 |
| Figure 198 – Edit Template (cont.).....               | 107 |
| Figure 199 – Edit Template (cont.).....               | 107 |
| Figure 200 – Confirmation Message .....               | 108 |
| Figure 201 - Create Catalog .....                     | 108 |
| Figure 202 - Create Catalog Confirmation Message..... | 109 |
| Figure 203 - View Catalog.....                        | 109 |

Figure 204 - Edit Catalog (Cont.) ..... 110

Figure 205 - Edit Catalog Confirmation Message ..... 110

Figure 206 - Delete Catalog ..... 110

Figure 207 - Delete Catalog (Cont.) ..... 110

Figure 208 - Delete Catalog Confirmation Message..... 111

Figure 209 – View Catalog (Cont.)..... 111

Figure 210 – Confirmation Message ..... 111

## List of Tables

|                                                                                                   |     |
|---------------------------------------------------------------------------------------------------|-----|
| Table 1 - Conventions .....                                                                       | 16  |
| Table 2 – HCL BigFix CLM Component with their roles and responsibilities and pre-requisites ..... | 19  |
| Table 3 – Built-in Roles .....                                                                    | 21  |
| Table 4 – Authentication Type .....                                                               | 22  |
| Table 5 – Add New Region .....                                                                    | 27  |
| Table 6 – Edit Region Fields .....                                                                | 28  |
| Table 7 – Provisioning Platform .....                                                             | 32  |
| Table 8 – Edit Endpoints at Platform .....                                                        | 37  |
| Table 9 – Add Software Provisioning Platform .....                                                | 40  |
| Table 10 – View Puppet .....                                                                      | 41  |
| Table 11 – Edit Software Provisioning Platform .....                                              | 42  |
| Table 12 – Network Assignment .....                                                               | 44  |
| Table 13 – Network Assignment .....                                                               | 45  |
| Table 14 – Add Configuration .....                                                                | 50  |
| Table 15 – Create Custom Table .....                                                              | 55  |
| Table 16 – Service Types .....                                                                    | 62  |
| Table 17 – Add Organization .....                                                                 | 65  |
| Table 18 – Domain Attributes .....                                                                | 67  |
| Table 19 – SAML2.0 Attributes .....                                                               | 71  |
| Table 20 – View Organization .....                                                                | 74  |
| Table 21 – Manage Domain OU .....                                                                 | 79  |
| Table 22 – Organization Network Assignment .....                                                  | 82  |
| Table 23 – Cloud Templates .....                                                                  | 88  |
| Table 24 – Edit Cloud Template .....                                                              | 89  |
| Table 25 – Approval Group .....                                                                   | 93  |
| Table 26 – Add Template .....                                                                     | 105 |

## Document Revision History

This guide is updated with each release of the product or when necessary.

This table provides the revision history of this Configuration Guide.

| Version Date    | Description                                                                   |
|-----------------|-------------------------------------------------------------------------------|
| May, 2020       | DRYiCE MyCloud v9.2 Configuration Guide – Provider Module (Part 1)            |
| August, 2020    | DRYiCE MyCloud v10.0 Configuration Guide – Provider Module (Part 1)           |
| November, 2020  | DRYiCE MyCloud v10.1 Configuration Guide – Provider Module (Part 1)           |
| February, 2021  | DRYiCE MyCloud v10.2 Configuration Guide – Provider Module (Part 1)           |
| April, 2021     | DRYiCE MyCloud v10.4 Configuration Guide – Provider Module (Part 1)           |
| October, 2021   | DRYiCE MyCloud v10.5 Configuration Guide – Provider Module (Part 1)           |
| September, 2022 | DRYiCE MyCloud v10.6 Configuration Guide – Provider Module (Part 1)           |
| August, 2023    | HCL_DRYiCE_MyCloud_10.7_Configuration_Provider_Guide_Part1                    |
| April, 2024     | HCL_DRYiCE_MyCloud_10.8_Configuration_Provider_Guide_Part1                    |
| September, 2024 | HCL_DRYiCE_MyCloud_10.8.1_Configuration_Provider_Guide_Part1                  |
| February, 2025  | HCL_DRYiCE_MyCloud_10.8.2_Configuration_Provider_Guide_Part1                  |
| July, 2025      | HCL_BigFix_Cloud_Lifecycle_Management_10.9_Configuration_Provider_Guide_Part1 |

# 1 Preface

This section provides information about the HCL BigFix Cloud Management Lifecycle Configuration Guide and includes the following topics:

- [Intended Audience](#)
- [About This Guide](#)
- [Related Documents](#)
- [Conventions](#)

## 1.1 Intended Audience

This document is intended for IT administrators/ Business Administrators those are responsible for configuring HCL BigFix CLM (Provider Module) and enabling end-users to consume HCL BigFix CLM services.

## 1.2 About this Guide

This guide provides instructions to configure HCL BigFix CLM. This includes the post-installation and configuration procedures for the product.:

- HCL BigFix CLM Overview
- HCL BigFix CLM Configuration and Management

## 1.3 Related Documents

The following documents can be referenced in addition to this guide for further information on HCL BigFix CLM.

- HCL BigFix CLM Introduction Guide
- HCL BigFix CLM Installation Guide
- HCL BigFix CLM User Guide
- HCL BigFix CLM Troubleshooting Guide
- HCL BigFix CLM API Guide
- HCL BigFix CLM Developer Guide
- HCL BigFix CLM Configuration Guide - Admin Module
- HCL BigFix CLM Configuration Guide - Provider Module - Part 2

## 1.4 Conventions

The following typographic conventions are used in this document:

Table 1 - Conventions

| Convention      | Element                                                                                                         |
|-----------------|-----------------------------------------------------------------------------------------------------------------|
| Boldface        | Indicates graphical user interface elements associated with an action, or terms defined in text or the glossary |
| Underlined blue | Indicates cross-reference and links                                                                             |
| Italic          | Indicates document titles, occasional emphasis, or glossary terms                                               |

|                    |                                                                                                                            |
|--------------------|----------------------------------------------------------------------------------------------------------------------------|
| Courier New (Font) | Indicates commands within a paragraph, URLs, code in examples, and paths including onscreen text and text input from users |
| Numbered lists     | Indicates steps in a procedure to be followed in a sequence                                                                |
| Bulleled lists     | Indicates a list of items that is not necessarily meant to be followed in a sequence                                       |

## 2 HCL BigFix CLM Overview

HCL BigFix Cloud Lifecycle Management (CLM) is a proactive multi-cloud lifecycle management product that empowers organizations to govern, provision, monitor, and manage cloud infrastructure. It combines data exploration and data visualization in an easy-to-use application to enable an effective analysis and actionable insights for IaaS and PaaS. The data-driven recommendations and advisories of HCL BigFix CLM ensure continuous optimization of the cloud environment across areas that include cost, security, faults, and utilization.

### 2.1 HCL BigFix CLM Features

- **Self Service Catalog based Provisioning and Auto-decommissioning:**  
Self Service Catalog based Provisioning & Auto-decommissioning– Provisioning of IaaS, PaaS, and multi-machine blueprints in a multi-cloud environment, through an intuitive self-service catalog and auto-decommissioning post a defined interval to avoid cost leakages.
- **Metering & show back:**  
Track utilization of resources across BUs, enabling transparency and visibility.
- **Advisory & Recommendation:**  
Proactive recommendations around Cost Optimization, Fault Tolerance, Performance and Security.
- **Dynamic User interface:**  
Flexibility to customize the service request form templates to capture configuration parameters while placing provisioning requests.
- **Dynamic Process Workflows:**  
Enables automation of generic & custom tasks like installing agents, machine cloning etc. with support for parallel execution.
- **Script Library:**  
Create new or leverage out-of-the-box scripts in process workflows across environments.
- **Forecasting & RI recommendation:**  
Enables cost optimization and resource utilization by analyzing the past usage patterns & recommending the most optimal resource types on AWS and Azure.
- **Role Based Access Control:**  
Manage user privileges based on their roles, eligibility and policies.
- **Policy driven Orchestration:**  
Be in control of your cloud orchestration ecosystem aligned to your organizational policies.
- **Rich Integration Ecosystem:**  
Enables integration with industry leading third party tools through REST APIs and CLI.
- **Enterprise-Grade Security:**  
Ensure security of end-to-end cloud management and orchestration ecosystem through various mechanisms.

## 2.2 HCL BigFix CLM Component Overview

HCL BigFix CLM has various service components to cater respective responsibilities. Each component has pre-requisites. Below table lists all the components, their roles and responsibilities and pre-requisites required for each component.

Table 2 – HCL BigFix CLM Component with their roles and responsibilities and pre-requisites

| Component Name         | Description                                                                                                                                                                                                                                                                         | Pre-requisites                                                         |
|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|
| HCL BigFix CLM Portal  | It comprises three sub-components:<br>Web UI: HCL BigFix CLM Web Portal<br>HCL BigFix CLM API: Rest API to Interact with HCL BigFix CLM<br>Key Rotation Service: To rotate the encryption key on a periodic basis.<br>This component requires HCL BigFix CLM database connectivity. | IIS, HCL BigFix CLM Certificate, .Net Framework 4.8                    |
| Job Listener           | It helps in the execution of HCL BigFix CLM jobs and interacting with different components internally. This is a window service.<br>This component requires the HCL BigFix CLM database connectivity.                                                                               | HCL BigFix CLM Certificate, .Net Framework 4.8                         |
| Sync Service           | It is responsible for synchronization of the underlying infrastructure cloud resources. It supports vCenter, AWS, AzureRM, SCVMM 2012 and GCP. This is a self-hosted WCF service.                                                                                                   | HCL BigFix CLM Certificate, .Net Framework 4.8                         |
| Ad Sync Service        | It fetches AD group user data. This is a self-hosted WCF service.                                                                                                                                                                                                                   | HCL BigFix CLM Certificate, .Net Framework 4.8                         |
| Workflow Service       | It triggers HCL BigFix CLM process workflow and notification service. This is a self-hosted WCF service. It requires HCL BigFix CLM database connectivity.                                                                                                                          | HCL BigFix CLM Certificate, .Net Framework 4.8, MSMQ/Rabbit MQ         |
| Orchestrator           | It helps in provisioning and automating other Tasks. This is a self-hosted WCF service.                                                                                                                                                                                             | HCL BigFix CLM Certificate, .Net Framework 4.8, PowerShell, Python 3.6 |
| ITSM executor          | It helps with interacting with ITSM tools. Currently, it only supports ServiceNow and Remedy. It is a self-hosted WCF service and requires HCL BigFix CLM database connectivity.                                                                                                    | HCL BigFix CLM Certificate, .Net Framework 4.8                         |
| Health Monitor Service | It helps in monitoring the health of HCL BigFix CLM Components. It is a self-hosted WCF Service and requires HCL BigFix CLM database connectivity.                                                                                                                                  | HCL BigFix CLM Certificate, .Net Framework 4.8                         |

| Component Name                | Description                                                                                                                                                        | Pre-requisites                                 |
|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------|
| Generic Task Executor         | It helps with Private Cloud Billing, Data Purging and Cost Models Activation. This is a self-hosted WCF service and requires HCL BigFix CLM database connectivity. | HCL BigFix CLM Certificate, .Net Framework 4.8 |
| Billing Service               | It enables Public Cloud Billing. This is a self-hosted WCF service and requires HCL BigFix CLM database connectivity.                                              | HCL BigFix CLM Certificate, .Net Framework 4.8 |
| Performance Service           | It is responsible for metering and Public Cloud advisory data collection. This is a self-hosted WCF service.                                                       | HCL BigFix CLM Certificate, .Net Framework 4.8 |
| Database                      | HCL BigFix CLM uses DB to store configuration and transactional data of request.                                                                                   | SQL Server 2016 Standard/Enterprise edition    |
| Cisco Intersight Sync Service | It is responsible to sync cisco Intersight resources. This is a self-hosted WCF service.                                                                           | HCL BigFix CLM Certificate, .Net Framework 4.8 |

#### 2.2.1.1 Component URL Configuration

To configure the below components of HCL BigFix CLM, Provider needs to follow the steps as described in Component URL section under Admin module in the Admin Guide. Please refer to the document ***HCL BigFix CLM Configuration Guide - Admin Module*** for the same.

- AD
- Performance
- Orchestrator
- Sync

## 2.3 HCL BigFix CLM Benefits

- **Reduce Costs**
  - Higher cost savings through Process standardization & Automation
  - Provide visibility of usage of virtual assets & cost obligations to key custodians
  - Optimize virtual asset utilization to avoid cost leakages.
- **Mitigate Risks**
  - Transform the process from Human driven to Automation driven and eliminate human error from the equation.
  - Mitigate security related risks based on system driven suggestions.
- **Drive Efficiency**
  - Reduce VM provisioning cycle by up to 85%.
  - Achieve up to 50% faster deployment of services through automation.

### 3 HCL BigFix CLM Configuration and Management

HCL BigFix CLM environment is an extensive open distributed system that stores the data and protects the privacy of users. A user's role determines the tasks that the user will be able to perform. Each role is associated with permissions or rules that define the degree to access the features in HCL BigFix CLM.

The following lists five fundamental built-in roles.

Table 3 – Built-in Roles

| Section Name         | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| HCL BigFix CLM Admin | HCL BigFix CLM Admin has the right to manage providers, admin level jobs and other component related configurations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Provider Admin       | Provider Admin is a business manager or an IT administrator, responsible for configuring HCL BigFix CLM as per the organization requirements. The primary responsibilities are: <ul style="list-style-type: none"><li>• Manages and configures the Organization.</li><li>• Manages the users and groups (within the Organization)</li><li>• Manages UI Template</li><li>• Manages services Catalog.</li><li>• Creates Approval Groups and Workflows.</li><li>• Manage Organization Resources</li><li>• Manage Domains/AD Users in Organizations</li><li>• Request status tracking</li></ul> |
| Organization Admin   | Organization Admin has the right to manage the users, roles, and groups assigned to them (organization-specific)                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Requester            | Requester has the rights to request for Infrastructure resources (IaaS & PaaS services) view or manage reports related to the resources.                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Approver             | Approver has the right to approve the requests raised by the requesters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

#### 3.1 Logging into the System

1. Firstly, obtain the URL and admin credentials for HCL BigFix CLM. Reach out to the person who has installed HCL BigFix CLM. Drop an email to [hclfixm-prodsupport-team@hcl-software.com](mailto:hclfixm-prodsupport-team@hcl-software.com).
2. Launch the web browser (Chrome or Edge) and use the HCL BigFix CLM URL and Admin credentials to login to the system.  
To log into a system, follow the following steps -
3. Currently HCL BigFix CLM is supporting 5 different languages such as English, Japanese, Portuguese, Deutsche, Francis.
4. Choose language from Language dropdown. The default language is English.
5. Post entering the Email ID, system automatically detects the Authentication Type. For admin role Authentication type is Form Based.

You are advised to change the password frequently and log out when not using the application.

Table 4 – Authentication Type

| Authentication Type       | Description                                                                                                         |
|---------------------------|---------------------------------------------------------------------------------------------------------------------|
| Form Based                | It authenticates users through the credentials that are stored in the database                                      |
| LDAP                      | It authenticates users to login through Active Directory (AD) credentials                                           |
| SAML Based Authentication | It authenticates users through third party Identity Access Management (IAM) that supports SAML based authentication |

HCL BigFix CLM admin has the right to change the default username and password.

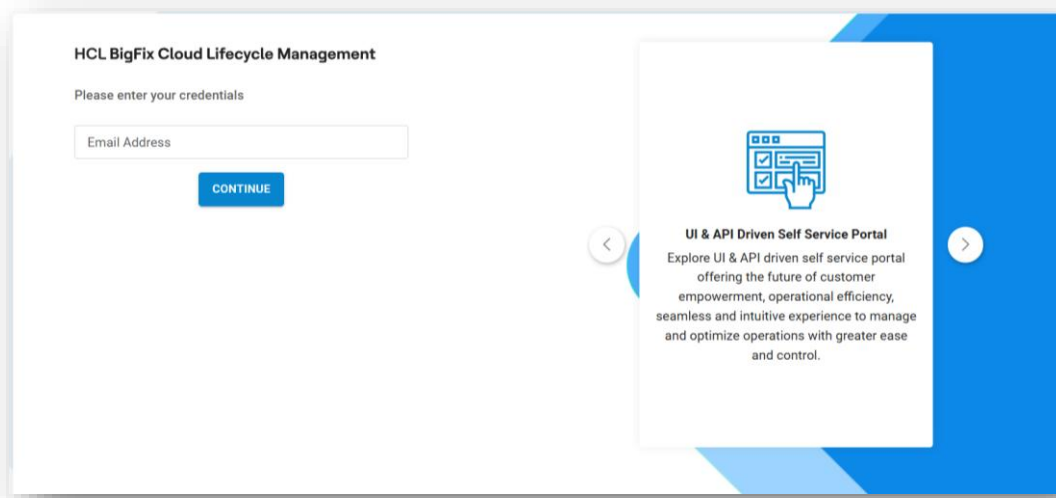
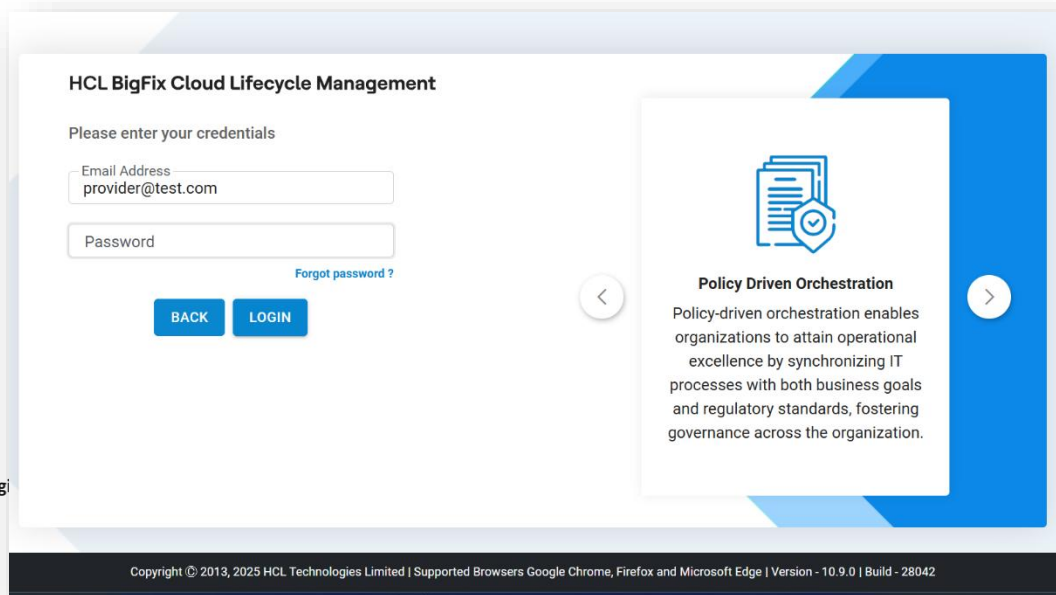


Figure 1 – HCL BigFix CLM Login Page

- Click **Continue** to proceed further.



- Click **Login**

Figure 2 – HCL BigFix CLM Login Page

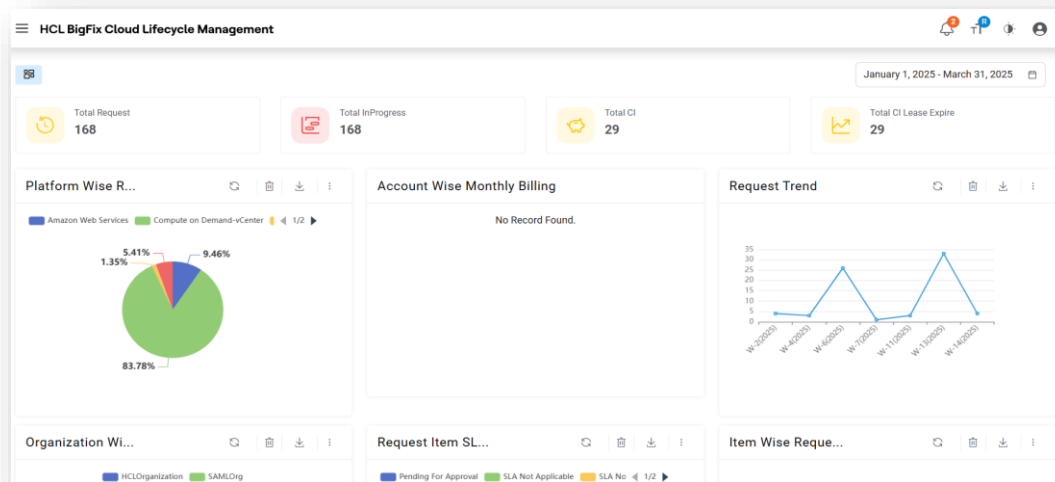
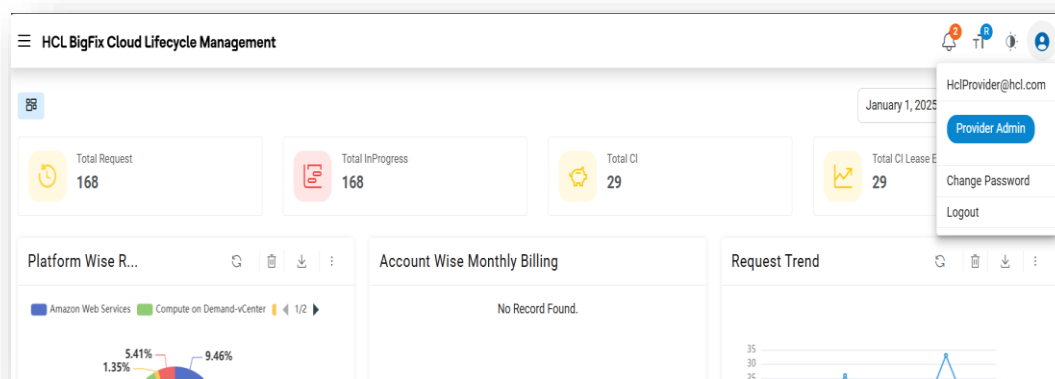


Figure 3 – HCL BigFix CLM Home Page

### 3.1.1 Change Password

In this section, HCL BigFix CLM Admin can change password from the Top of the HCL BigFix CLM screen.



1. Click on Change Password.
2. User will be redirected to **Change password** screen.

Figure 4 - Change Password

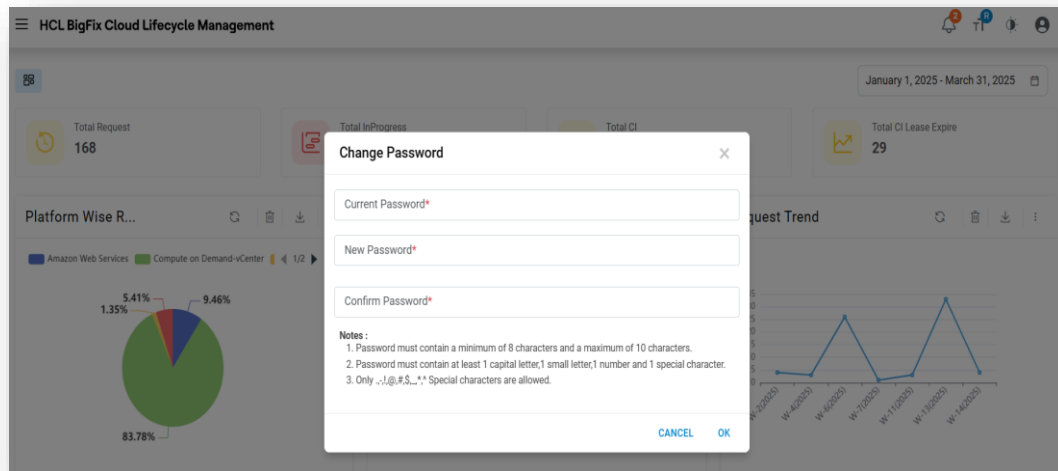


Figure 5 - Change Password

3. Enter the Current Password and New Password.
4. Enter Confirm Password.
5. Click **OK**.

A Success Message appears.

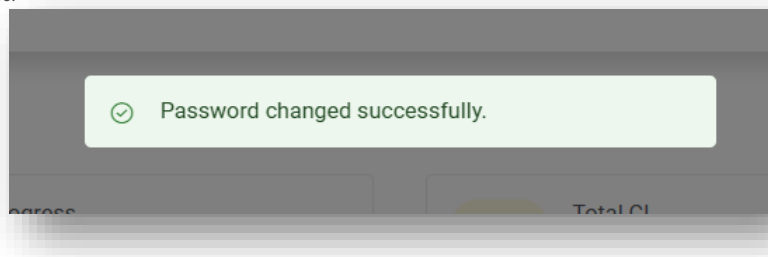


Figure 6 - Success Message

Use needs to enter new credentials to log in and proceed further.

Post login, HCL BigFix CLM Provider user page appears with below options:

- Administration
- Configuration
- Design
- Notifications
- Onboarding
- Publish
- Reports
- Requests
- Resources

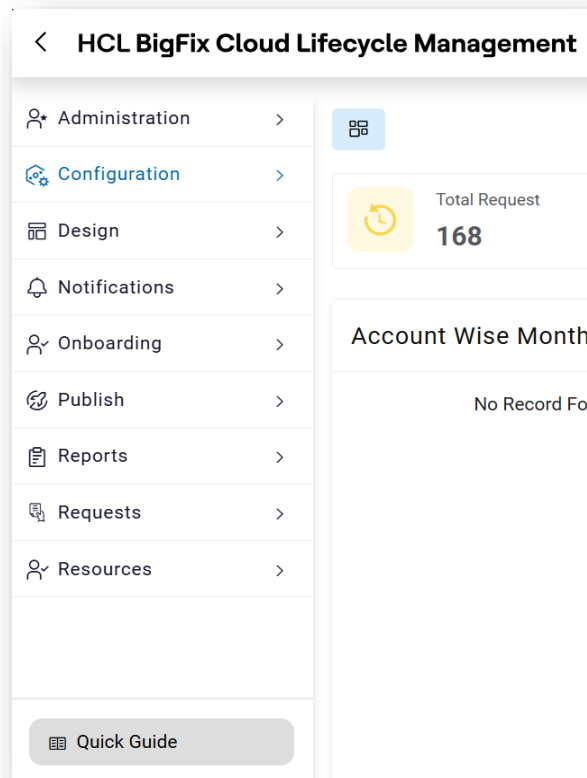
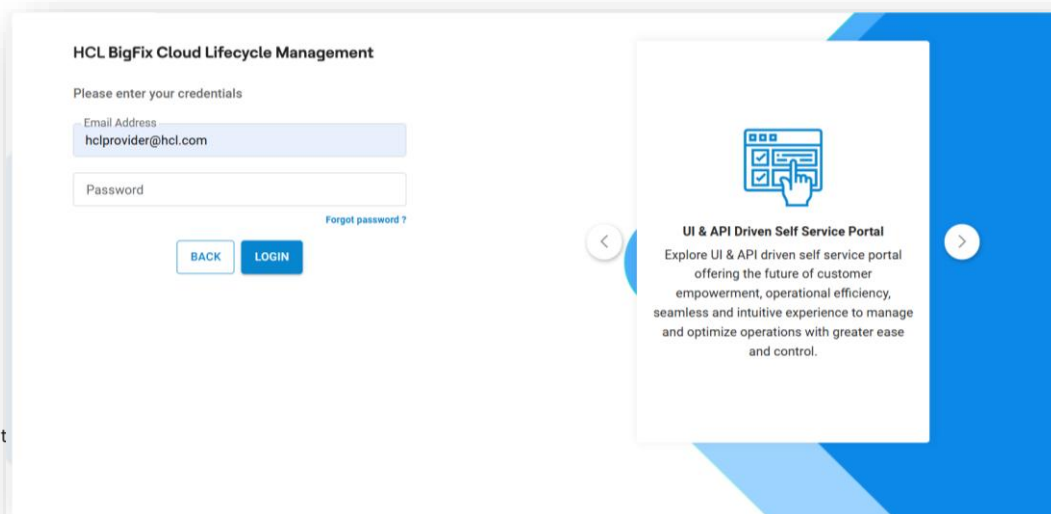


Figure 7 - Provider Module

### 3.1.2 Forgot Password

Forgot password link is on the login page for form-based users. **Forgot password** link allows users to reset his/her password.



1. Click on t

Figure 8 – HCL BigFix CLM Login Page

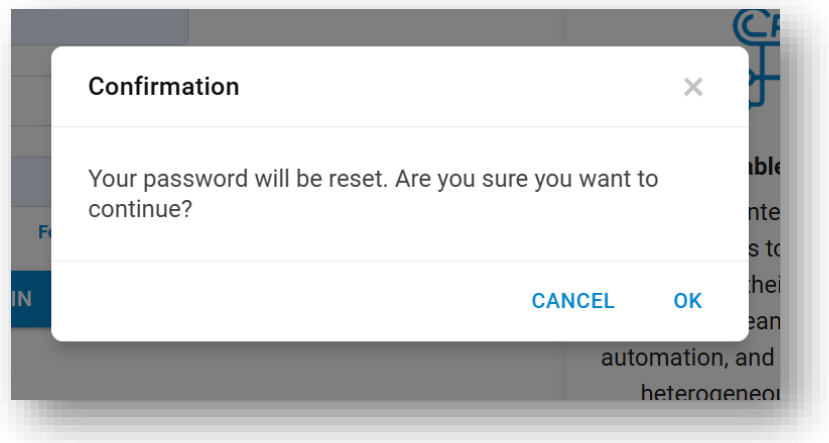


Figure 9 – Forgot Password Screen

If user belongs to multiple organization/Provider, the password will be reset for all the accounts with same email Id.

## 3.2 Regions

On the side menu bar, click **Configuration** and then click **Regions**. The following screen appears. Provider users manage the regions from this screen.

Home > Configuration > Regions

+ REGION

| Region      | Display Name | Platform                  | Action |
|-------------|--------------|---------------------------|--------|
| > tes2India | tes2India    | Compute on Demand-vCenter |        |
| > ssssss    | s            | Compute on Demand-vCenter |        |
| > t         | y            | Compute on Demand-vCenter |        |
| > ioui      | opp          | Compute on Demand-vCenter |        |
| > test567   | tyuu         | Compute on Demand-vCenter |        |
| > th1234    | thu          | Compute on Demand-vCenter |        |
| > TEST456   | TEST2        | Compute on Demand-vCenter |        |
| > DDD       | DD           | Compute on Demand-vCenter |        |

1. On the **Region** screen, click **+ REGION**.

Figure 10 – Region

### 3.2.1 Add Region

To add a new region, the provider user needs to follow the following steps:

Figure 11 – Add New Region

Refer to the table below to understand the fields mentioned in the above figure:

Table 5 – Add New Region

| Field                                                                                                                                                 | Description                                                                                   |
|-------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| Region Name                                                                                                                                           | The locations at which Private DCs are located/ Public Cloud services are getting consumed    |
| Display Name                                                                                                                                          | A reference name/original name of the Region                                                  |
| Platform                                                                                                                                              | Name of the cloud service providers                                                           |
| Location                                                                                                                                              | Contains details of the location                                                              |
| Display Name                                                                                                                                          | Location display name                                                                         |
| Description                                                                                                                                           | Description about the location and region                                                     |
| Adding location                                                                                                                                       | This option allows multiple locations to be added within a single region.                     |
| Add                                                                                                                                                   | This option helps the Provider to initiate the process of adding all the above details in HCL |
| 2. Populate the fields with the required details.<br>3. On clicking <b>Add</b> , a success message <b>Region has been saved successfully</b> appears. |                                                                                               |

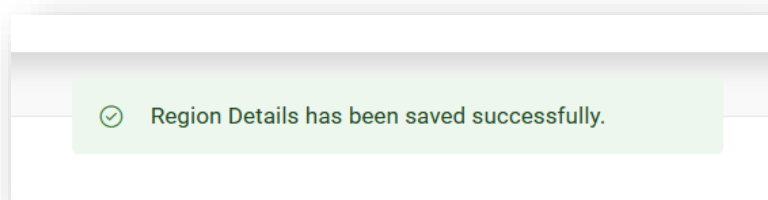


Figure 12 – Add New Region(cont.)

All the fields marked with asterisk (\*) mark are mandatory. Updating a region is not possible in Manage Region.

The region is created and appears in the list of regions.

3.2.2 View Region

This section lists out all the Regions that have been created by HCL BigFix CLM Provider user.

| Region            | Display Name    | Platform                  | Action                                                                                                                                                                  |
|-------------------|-----------------|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| > Test04_06_02    | Test04_06_02    | Compute on Demand-vCenter |   |
| > Test04_06_01    | Test04_06       | Compute on Demand-vCenter |   |
| > Test04_06       | Test04_06       | Compute on Demand-vCenter |   |
| > Common Region 2 | Common Region 2 | Hyper-V 12,16,19          |   |
| > Common Region   | Common Region   | Compute on Demand-vCenter |   |
| > My Region 2     | My Region 2     | Compute on Demand-vCenter |   |
| > TestRegion134   | TestRegion134   | Compute on Demand-vCenter |   |
| > SCVMMRegion2019 | SCVMMRegion2019 | Hyper-V 12,16,19          |   |
| > SCVMMRegion2022 | SCVMMRegion2022 | Hyper-V 12,16,19          |   |

Figure 13 – View Region

Refer to the table below to understand the fields mentioned in the above figure:

Table 6 – Edit Region Fields

| Field        | Description                                                                                |
|--------------|--------------------------------------------------------------------------------------------|
| Region Name  | The locations at which Private DCs are located/ Public Cloud services are getting consumed |
| Display Name | A reference name/ original name of the Region                                              |
| Platform     | Name of the cloud service providers                                                        |
| Action       | Provider user to take actions like Edit and Delete against the listed Regions              |

3.2.3 Edit Region

1. To edit/modify the existing regions, Provider user needs to follow the steps below:



| Region         | Display Name | Platform                  | Action                                                                                                                                                                      |
|----------------|--------------|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| > Test04_06_02 | Test04_06_02 | Compute on Demand-vCenter |   |

2. It shows the information about the selected region and location.  
3. Modify the region details.  
4. Click **Update** to save the settings. Once done, a success message appears.

Figure 14 – Edit Region

Figure 15 – Edit Region (Cont.)

All fields marked with asterisk (\*) are mandatory.

### 3.2.4 Delete Region

To delete a region, follow the steps below:



1. From the list of **regions**, click Delete ( ) icon corresponding to the region to be deleted.

| Region  | Display Name | Platform                  | Action |
|---------|--------------|---------------------------|--------|
| > test  | iop          | Compute on Demand-vCenter | Delete |
| > test1 | yhuuu        | Compute on Demand-vCenter |        |

2. When prompted to confirm, click **OK**.

Figure 16 – Delete Region

Figure 17 – Delete Region (Cont.)

If a region has any active locations, it cannot be deleted. So, all locations must be deleted before deleting the region.

⚠ Region cannot be deleted as it is associated with Active Location.

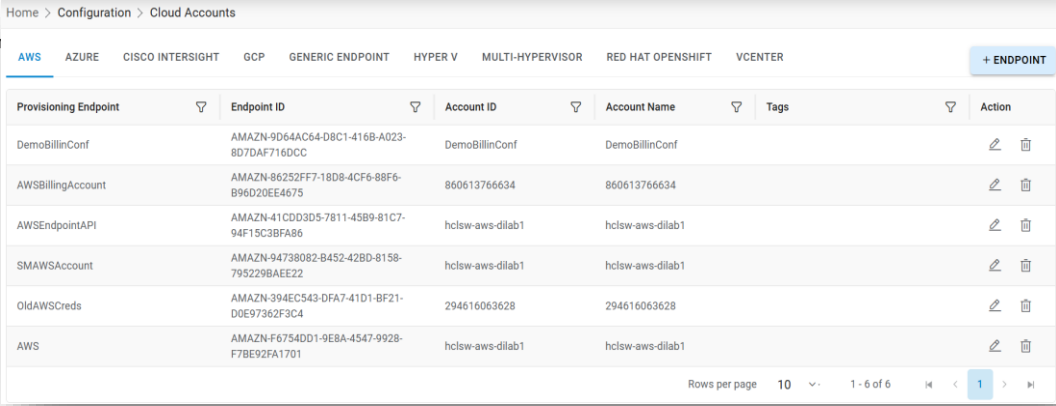
Figure 18 – Alert Message

### 3.3 Cloud Account

An endpoint is an underlying infrastructure that HCL BigFix CLM uses to complete provisioning. This can be a public cloud resource such as Amazon Web Services, Azure, Google Cloud Platform or a private cloud hosted by Hyper-V or vSphere or Cisco Intersight or Generic Endpoint or Multi-HyperVisor.

To define endpoints in HCL BigFix CLM, follow the steps below:

1. On the m



| Home > Configuration > Cloud Accounts                                                                         |                                            |                  |                  |      |        |  |
|---------------------------------------------------------------------------------------------------------------|--------------------------------------------|------------------|------------------|------|--------|--|
| AWS AZURE CISCO INTERSIGHT GCP GENERIC ENDPOINT HYPER V MULTI-HYPERVISOR RED HAT OPENSIGHT VCENTER + ENDPOINT |                                            |                  |                  |      |        |  |
| Provisioning Endpoint                                                                                         | Endpoint ID                                | Account ID       | Account Name     | Tags | Action |  |
| DemoBillinConf                                                                                                | AMAZN-9D64AC64-D8C1-416B-A023-8D7DAF716DCC | DemoBillinConf   | DemoBillinConf   |      |        |  |
| AWSBillingAccount                                                                                             | AMAZN-86252FF7-18D8-4CF6-88F6-B96D20EE4675 | 860613766634     | 860613766634     |      |        |  |
| AWSEndpointAPI                                                                                                | AMAZN-41CDD3D5-7811-45B9-81C7-94F15C3BFA86 | hclsw-aws-dilab1 | hclsw-aws-dilab1 |      |        |  |
| SMAWSAccount                                                                                                  | AMAZN-94738082-8452-42BD-8158-795229BAEE22 | hclsw-aws-dilab1 | hclsw-aws-dilab1 |      |        |  |
| OldAWSCredits                                                                                                 | AMAZN-394EC543-DF47-41D1-BF21-D0E97362F3C4 | 294616063628     | 294616063628     |      |        |  |
| AWS                                                                                                           | AMAZN-F6754DD1-9E8A-4547-9928-F7BE92FA1701 | hclsw-aws-dilab1 | hclsw-aws-dilab1 |      |        |  |
| Rows per page 10 1 - 6 of 6                                                                                   |                                            |                  |                  |      |        |  |

Figure 19 – Cloud Account

**Cloud Accounts:** It lists all the cloud service providers like AWS, Azure, GCP, VMware, Cisco Intersight, SCVMM/ Hyper-V, Generic Endpoint and Multi-HyperVisor.

1. On the **Cloud Accounts**, click **+ ENDPOINT**.

3.3.2. The following screenshot appears with reference to Add Endpoint.

To add endpoints, follow the steps below:

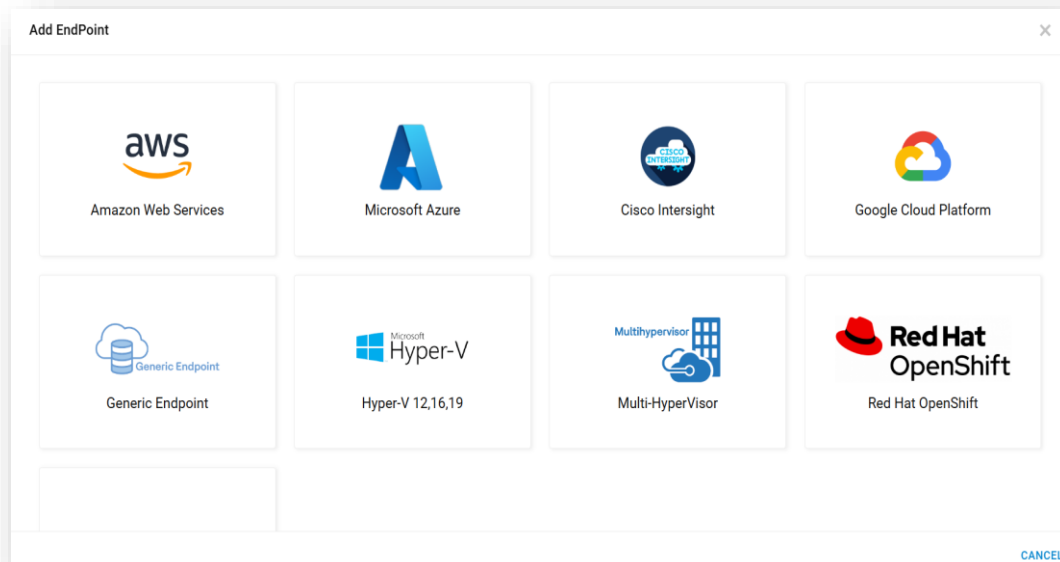


Figure 20 – Cloud Account – Add Configuration

The 'MICROSOFT AZURE' configuration form is divided into two main sections: 'Basic Information' and 'Optional Information'.

**Basic Information:**

- Provisioning Endpoint\*:** A text input field.
- Subscription ID\*:** A text input field.
- Tenant ID\*:** A text input field.
- Native Client ID\*:** A text input field.
- Secret Key\*:** A text input field with a copy icon.
- Cloud Type\*:** A dropdown menu with 'Generic' selected.

**Optional Information:**

- Optional Information-1** through **Optional Information-5**: Five text input fields, each with an information icon.

**Buttons:**

- CHECK CONNECTIVITY:** A blue button at the bottom right.

**Help Text:**

- Provisioning Endpoint:** Identifier chosen by the Organization admin for selection during the request submission process.
- Tenant Id:** Unique Number assigned to each endpoint.
- Subscription Id:** Unique identifier that grants access to Azure services and resources within a specific account or organization.
- Native Client Id:** Unique identifier used to authenticate and authorize native applications.
- Secret Key:** Confidential string used to authenticate securely.
- Regions:** Geographical areas around the world where Azure data centers are located to host and run cloud services.

Figure 21 – Cloud Account – Add Configuration (Cont.)

Figure 22 – Cloud Account – Add Configuration (Cont.)

Figure 23 – Cloud Account – Add Configuration (Cont.)

Refer to the table below to understand the fields on the Add Configuration tab for all the cloud service providers:

Table 7 – Provisioning Platform

| Platform | Field            | Description                                                                                |
|----------|------------------|--------------------------------------------------------------------------------------------|
| VMWAR    | Endpoint Name    | Name of the endpoint (subscription of cloud service provider)                              |
| VMWAR    | Region           | The regions at which Private DCs are located/ Public Cloud services are getting consumed   |
| VMWAR    | Location         | The locations at which Private DCs are located/ Public Cloud services are getting consumed |
| VMWAR    | Sdk Url          | It is the endpoint URL (only for vCenter)                                                  |
| VMWAR    | vCenter UserName | HCL BigFix CLM will use these credentials to interact with vCenter                         |

| Platform | Field                     | Description                                                                                                                                                                                                                                                   |
|----------|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| VMWAR    | vCenter Password          | HCL BigFix CLM will use these credentials to interact with vCenter                                                                                                                                                                                            |
| VMWAR    | Template Path             | It is the folder path where vCenter templates resides                                                                                                                                                                                                         |
| VMWAR    | Optional Information      | Information apart from the above                                                                                                                                                                                                                              |
| AMAZN    | Provisioning Account Name | Name of account which is meaningful                                                                                                                                                                                                                           |
| AMAZN    | Access key                | Access key are used to sign the request send to AMAZN s3 like Username and Password pair use to access AWS management console.                                                                                                                                |
| AMAZN    | Secret Key                | It is used for security purpose provided by AMAZN                                                                                                                                                                                                             |
| AMAZN    | Account ID                | It is 12-digit number that uniquely identifies an AWS resources.                                                                                                                                                                                              |
| AMAZN    | Assume Role ARN           | An Amazon Assume Role ARN (Amazon Resource Name) is a unique identifier assigned to an AWS IAM (Identity and Access Management) role that allows another AWS account or an entity within the same account to assume the permissions of that role temporarily. |
| AMAZN    | Optional Information      | Information apart from the above                                                                                                                                                                                                                              |
| GCP      | Provisioning Endpoint     | Name of the endpoint (subscription of cloud service provider)                                                                                                                                                                                                 |
| GCP      | Input Mode                | There will be 2 input Mode. A. Manual, B. JSON (In this, we need to upload JSON file).                                                                                                                                                                        |
| GCP      | Project Id                | Project Id provided by GCP Console.                                                                                                                                                                                                                           |
| GCP      | Private Key Id            | This is service account private key id (Source: GCP Service Account Key Json File)                                                                                                                                                                            |
| GCP      | Client Email              | GCP Service Accounts Client Email (Source: GCP Service Account Key Json File)                                                                                                                                                                                 |
| GCP      | Private Key               | GCP Service Accounts Private Key (Source: GCP Service Account Key Json File)                                                                                                                                                                                  |
| GCP      | Regions                   | The locations at which Public Cloud services are getting consumed                                                                                                                                                                                             |
| ARM      | Provisioning Account Name | Name of account which is meaningful                                                                                                                                                                                                                           |
| ARM      | Subscription ID           | It is a GUID that uniquely identifies your subscription to use Azure services.                                                                                                                                                                                |
| ARM      | Tenant ID                 | It is a globally unique identifier for Azure Active Directory instance.                                                                                                                                                                                       |
| ARM      | Native Client ID          | This identifier is assigned when going to set up as an application in the directory instance.                                                                                                                                                                 |
| ARM      | Client Secret Key         | It is secret key only to application and the authorized server. It protects resources by granting tokens to authorizes requestors.                                                                                                                            |
| ARM      | Cloud Type                | Cloud type selected according to regions else generic.                                                                                                                                                                                                        |
| ARM      | Optional Information      | Information apart from the above                                                                                                                                                                                                                              |
| ARM      | Regions                   | The regions at which Public Cloud services are getting consumed                                                                                                                                                                                               |

| Platform         | Field                      | Description                                                                                                                                                                                                             |
|------------------|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| SCVMM            | Provisioning Endpoint Name | Name of account which is meaningful.                                                                                                                                                                                    |
| SCVMM            | Region                     | The regions at which Private DCs are located/ Public Cloud services are getting consumed.                                                                                                                               |
| SCVMM            | Location                   | The location at which Private DCs are located/ Public Cloud services are getting consumed.                                                                                                                              |
| SCVMM            | Version                    | Version of SCVMM.                                                                                                                                                                                                       |
| SCVMM            | Server IP                  | It is SCVMM DataCenter Server.                                                                                                                                                                                          |
| SCVMM            | Port                       | To access SCVMM DataCenter.                                                                                                                                                                                             |
| SCVMM            | UserName                   | Username which is used to consume services.                                                                                                                                                                             |
| SCVMM            | Password                   | Password which is used to consume services.                                                                                                                                                                             |
| SCVMM            | Domain Name                | Domain where services will be consumed.                                                                                                                                                                                 |
| SCVMM            | Optional Information       | Information apart from the above.                                                                                                                                                                                       |
| Generic Endpoint | Endpoint Name              | Name of account which is meaningful.                                                                                                                                                                                    |
| Generic Endpoint | Display Name               | Name to be displayed to the end-user.                                                                                                                                                                                   |
| Generic Endpoint | Description                | Description of Generic Configuration.                                                                                                                                                                                   |
| Generic Endpoint | Configuration Type         | Type of configuration of Cloud Service Provider.                                                                                                                                                                        |
| Cisco Intersight | Provisioning Endpoint      | Name of the endpoint                                                                                                                                                                                                    |
| Cisco Intersight | API Key                    | Key to access the Cisco Intersight                                                                                                                                                                                      |
| Cisco Intersight | Secret Key                 | It is used for security purposes provided by Cisco Intersight                                                                                                                                                           |
| Cisco Intersight | Base URL                   | Base URL for Cisco Intersight                                                                                                                                                                                           |
| Cisco Intersight | Is Master                  | Master account for Cisco Intersight                                                                                                                                                                                     |
| RedHat OpenShift | Provisioning Endpoint      | Name of the endpoint which we will used later                                                                                                                                                                           |
| RedHat OpenShift | Auth URL                   | URL used to generate a token for the provided credentials.                                                                                                                                                              |
| RedHat OpenShift | User Name                  | Username for OCP used to generate the token.                                                                                                                                                                            |
| RedHat OpenShift | Password                   | Password for OCP used to generate the token.                                                                                                                                                                            |
| RedHat OpenShift | API URL                    | An API URL, used to validate API access using the generated token.                                                                                                                                                      |
| All Platform     | Tags                       | A tag is simply a character string added to a tags field in a resource, such as RBAC subscription. Tags will be used to define scope of permission. Objects with same Tag will be able to access same Tagged resources. |
| MultiHyperVisor  | Provisioning Endpoint      | Name of the endpoint ( )                                                                                                                                                                                                |
| MultiHyperVisor  | Description                | Description of the endpoint                                                                                                                                                                                             |
| MultiHyperVisor  | Add Endpoints              | Link existing endpoints                                                                                                                                                                                                 |
| All Platform     | Max Parallel Task Count    | Maximum task count can be processed concurrently in queue                                                                                                                                                               |

Multi Hypervisor Sync also caters for the case of VM Migration from one data center location to another data center location.

All fields marked with asterisk (\*) are mandatory.

3. Populate all the mandatory fields.

4. The search

Vault con

**Key Vault Configuration**

Secret Key \*  
Input Text

Text

SEARCH

Azure Key Vault  
CyberArk  
Input Text  
Secret Manager

SUBMIT

Figure 24 – Secret Selector

5. The follow

**Key Vault Configuration**

Secret Key \*  
Azure Key Vault

Add Configuration

| Configuration Name | Description    | Actions |
|--------------------|----------------|---------|
| a                  | a              | SELECT  |
| aaa                | aaa            | SELECT  |
| mycloudazure       | mycloudazure   | SELECT  |
| MyCloudCMKTest     | MyCloudCMKTest | SELECT  |

Rows per page 10 1 - 4 of 4

Figure 25 – Secret Selector

- **Secret Key:** Input type can be CyberArk, Secret Manager, Azure Key Vault and Input Text.
- **Value:** In case of CyberArk, Secret Manager and Azure Key Vault it represents configuration name. User must select the value configured in Key Vault Configuration screen. In the case of Input Text, it shows static value.

In the case of **Input Text**, HCL BigFix CLM saves the value in encrypted form.

6. Click **Select** to close the popup screen. On Closing the popup, the value reflects in the corresponding field.

7. In the **Optional Information** fields, provide any other information apart from the above fields.

8. After pop

infrastru

9. Click **Add**

The screenshot shows a configuration window titled "MICROSOFT AZURE". It has a "Basic Information" tab selected. The window contains several input fields and a "CHECK CONNECTIVITY" button. The fields are: "Provisioning Endpoint\*" (value: Azure), "Subscription ID\*" (value: t122), "Tenant ID\*" (value: testtenant), "Native Client ID\*" (value: id), "Secret Key\*" (value: a(azurekeyvault)), and "Cloud Type\*" (value: Generic). There are also five "Optional Information" fields (Optional Information-1 to Optional Information-5). A "CHECK CONNECTIVITY" button is located at the bottom right of the form.

Figure 26 – Check Connectivity

The screenshot shows the same "MICROSOFT AZURE" configuration window, but with the "Optional Information" tab selected. The "Optional Information" section contains a text area for "Optional Information: Please provide cloud specific additional information (if applicable) like offset, timezone, culture code, etc." and a "Region" section. The "Region" section has a text area for "Region" and a list of regions. The regions are: AUSTRALIA CENTRAL, AUSTRALIA CENTRAL 2, AUSTRALIA EAST, AUSTRALIA SOUTHEAST, BRAZIL SOUTH, CANADA CENTRAL, CANADA EAST, CENTRAL INDIA, CENTRAL US, CENTRAL US EUAP, EAST ASIA, EAST US, EAST US 2, EAST US 2 EUAP, FRANCE CENTRAL, FRANCE SOUTH, GERMANY CENTRAL, GERMANY NORTH, GERMANY NORTHEAST, GERMANY WEST CENTRAL, ISRAEL CENTRAL, ITALY NORTH, JAPAN EAST, JAPAN WEST, KOREA CENTRAL, KOREA SOUTH, MEXICO CENTRAL, NEWZEALAND NORTH, NORTH CENTRAL US, NORTH EUROPE, NORWAY EAST, NORWAY WEST, POLAND CENTRAL, QATAR CENTRAL, SOUTH AFRICA NORTH, SOUTH AFRICA WEST, SOUTH CENTRAL US, SOUTH INDIA, SOUTHEAST ASIA, SPAIN CENTRAL, SWEDEN CENTRAL, SWITZERLAND NORTH, SWITZERLAND WEST, UAE CENTRAL, UAE NORTH, UK SOUTH, UK WEST, WEST CENTRAL US, WEST EUROPE, WEST INDIA, WEST US, WEST US 2, WEST US 3. At the bottom right, there are "CANCEL" and "ADD" buttons.

Figure 27 – Add endpoints to Platform

The new endpoint is created and appears in the list of configured endpoints.

All fields marked with asterisk (\*) are mandatory.

### 3.3.2 View Endpoints

This section lists all the endpoints that have been created by Provider User.

| AWS    AZURE    CISCO INTERSIGHT    GCP    GENERIC ENDPOINT    HYPER V    MULTI-HYPERVISOR    RED HAT OPENSIFT <b>VCENTER</b> |                                            |                           |                                       |                                |        |  |
|-------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|---------------------------|---------------------------------------|--------------------------------|--------|--|
| Provisioning Endpoint                                                                                                         | Endpoint ID                                | Location                  | Template Path                         | Tags                           | Action |  |
| DryIceLabsvCenterEndpoint                                                                                                     | VMWAR-8ABD0DFA-DACD-47CC-93FD-6646F8A28AC8 | DryIceLabsvCenterLocation | Site-B-Datacenter/vm/mycloud-template | CatalogTesting, sharedbyPSTeam |        |  |
| VMWARPBI21660MyCIUsera...                                                                                                     | VMWAR-81DE96FC-1794-4C4B-A9CF-FA808C6B1870 | VMWARPBI21660             | Site-B-Datacenter/vm/mycloud-template |                                |        |  |
| PBI21660VMWARNokiaUsera...                                                                                                    | VMWAR-896B74AA-616D-4B70-8F48-134ED81868D9 | PBI21660Location          | Site-B-Datacenter/vm/mycloud-template |                                |        |  |
| SCALTest125                                                                                                                   | VMWAR-267535B5-3E6D-4A90-85CF-B25CD51BD9C2 | LocationPBI21660          | Site-B-Datacenter/vm/mycloud-template |                                |        |  |
| NewEndpointMarch25                                                                                                            | VMWAR-4E2FD3DE-C2D9-427E-B2DA-5AD1F726DCE5 | New Location March        | mycloud-template                      |                                |        |  |
| VMWAREperf                                                                                                                    | VMWAR-843CF86C-522E-43A6-B6E0-13BA7378F69F | Perfvmware                | Mycloud-HCL-Portal                    |                                |        |  |
| vCenterEndpoint2                                                                                                              | VMWAR-4584B377-42BC-447F-B4A4-C63ED1AD594  | New Location1             | mycloud-template                      |                                |        |  |
| ContentLibraryEndpoint                                                                                                        | VMWAR-AA70537B-4FC4-4D6B-9771-779E0F2B877B | Loc2                      | mycloudtest1                          |                                |        |  |
| VMWARKislay                                                                                                                   | VMWAR-8086119E-8BDB-4DCD-9B1F-B8D49B9F972B | LOC1                      | Site-B-Datacenter/vm/mycloud-template |                                |        |  |

Figure 28 – View Endpoints at Platform

Refer to the table below to understand the fields mentioned in the above figure:

Table 8 – Edit Endpoints at Platform

| Field                 | Description                                                                                                                                                               |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Provisioning Endpoint | Name of the endpoint (subscription of cloud service provider)                                                                                                             |
| Endpoint ID           | It is a unique identity code for an endpoint                                                                                                                              |
| Location              | The locations at which Private DCs are located/ Public Cloud services are getting consumed                                                                                |
| Template Path         | It is the folder path where vCenter templates resides                                                                                                                     |
| Status                | Displays whether the endpoint is active or inactive. Based on the status, it's being understand whether services can be consumed through that endpoint via HCL BigFix CLM |
| Action                | It provides the Provider user to take actions like Edit and Delete against the listed Endpoints                                                                           |

The fields on the grid vary based on the selected platform

The Action column comprises of the following actions:

- Edit** (): To modify the details of existing endpoints.

- Delete** (): To delete the endpoints.

- On the View Configuration pane, click Edit (). It re-directs the user to the **Add Configuration** pane.
- Fill in the following information:

### 3.3.3 Edit Endpoint

To edit/modify an existing endpoint's information, follow the steps below:



- Endpoint Name
- Select **Region**.
- Select **Location**.
- Enter vCenter **sdk URL** and credentials.
- Provide the vCenter **Template Path**.

Figure 29 – Edit endpoints at Platform (Cont.)

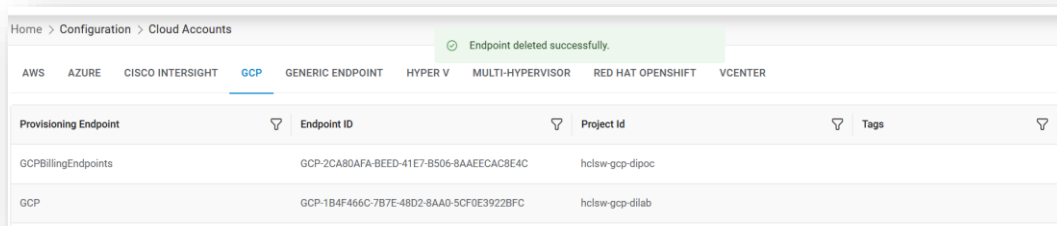
4. A Success message appears.

Figure 30 – Edit endpoints at Platform (Cont.)

- ## Delete Endpoint

3. A success

### Figure 31 – Delete Endpoint



Home > Configuration > Cloud Accounts

Endpoint deleted successfully.

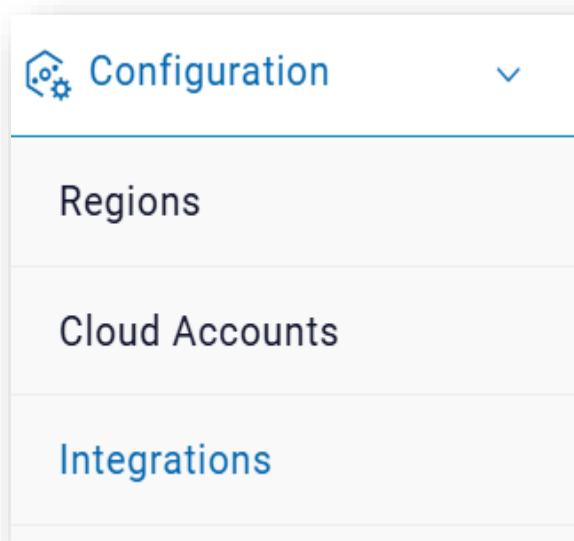
AWS   AZURE   CISCO INTERSIGHT   **GCP**   GENERIC ENDPOINT   HYPER V   MULTI-HYPERVISOR   RED HAT OPENSIFT   VCENTER

| Provisioning Endpoint | Endpoint ID                              | Project Id      | Tags |
|-----------------------|------------------------------------------|-----------------|------|
| GCPBillingEndpoints   | GCP-2CA80AFA-BEED-41E7-B506-8AAEECAC8E4C | hclsw-gcp-dipoc |      |
| GCP                   | GCP-1B4F466C-7B7E-48D2-8AA0-5CF0E3922BFC | hclsw-gcp-dilab |      |

Figure 32 – Success Confirmation Message

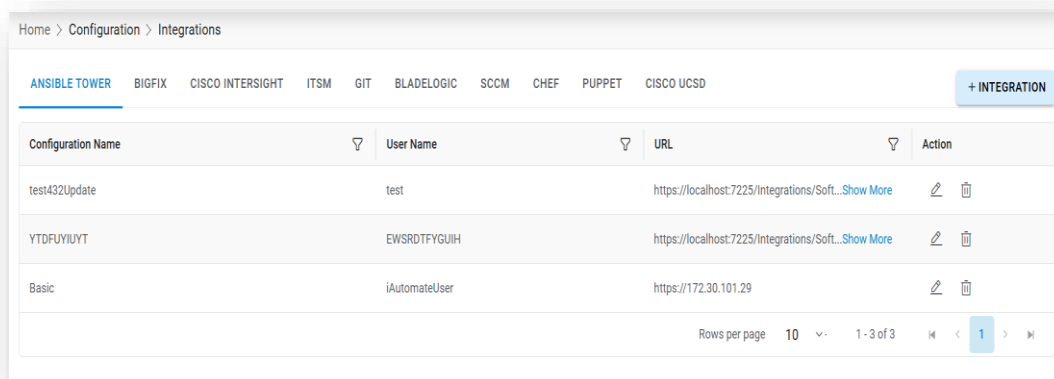
### 3.4 Integrations

Integrations/ tools automate software provisioning and support the entire fulfilment process. This section details on how to manage the software provisioning endpoints in HCL BigFix CLM.



1. On the main menu bar, click **Configuration** and then click **Integrations**.

Figure 33 – Integrations



Home > Configuration > Integrations

ANSIBLE TOWER   BIGFIX   CISCO INTERSIGHT   ITSM   GIT   BLADELOGIC   SCCM   CHEF   PUPPET   CISCO UCSD   **+ INTEGRATION**

| Configuration Name | User Name     | URL                                                                   | Action |
|--------------------|---------------|-----------------------------------------------------------------------|--------|
| test432Update      | test          | https://localhost:7225/integrations/Soft... <a href="#">Show More</a> |        |
| YTFUJYUJT          | EWSRDTFYGUIH  | https://localhost:7225/integrations/Soft... <a href="#">Show More</a> |        |
| Basic              | iAutomateUser | https://172.30.101.29                                                 |        |

Rows per page 10   1 - 3 of 3   **1**

Figure 34 – Integrations (Cont.)

### 3.4.1 Add Integration

To add software, Provider user needs to follow the steps below:

1. On the In

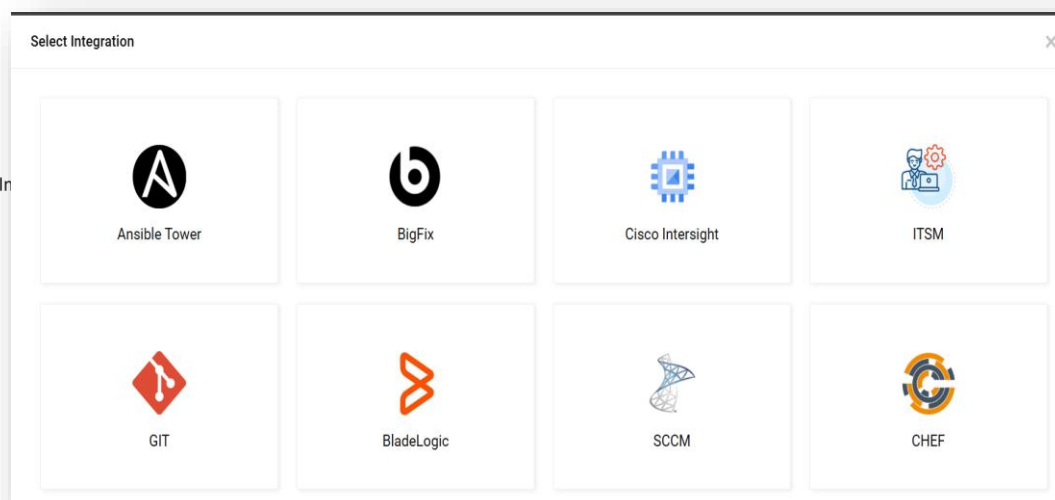


Figure 35 – Select Integration

2. Here, we are taking the example of Ansible Tower Integration. Select Ansible Tower.

**ANSIBLE TOWER**

**Basic Information**  
Please provide the details to add an Ansible Integration.

**Configuration Name:** Please enter a name for this Ansible Integration.

**User Name:** Please enter your Ansible Tower User Name.

**Password:** Confidential string used to authenticate securely.

**URL:** Please enter the URL of your Ansible Tower instance (e.g., "https://your-ansible-tower-server").

**Check Connectivity:** Please click the button below to verify the connection to Ansible Tower instance.

Configuration Name\* User Name\* Password \* URL\* hclprovider@hcl.com

CHECK CONNECTIVITY

CANCEL ADD

Figure 36 – Add Integration for Ansible Tower

Refer to the table below to understand the fields mentioned in the above figure:

Table 9 – Add Software Provisioning Platform

| Field              | Description                                                  |
|--------------------|--------------------------------------------------------------|
| Configuration Name | The provider user needs to provide the name of Integration   |
| Username           | User credentials which have access to native cloud endpoints |
| Password           | Password can be selected from secret selector popup          |
| URL                | Provide URL of Workspaces                                    |

All the fields given with asterisk (\*) mark are mandatory.

4. Enter Username and Password.
5. Enter URL.

### 3.4.2. Click Add New Integrations.

7. A new configuration is added.

This section lists out all the Integrations that have been created by Provider user.

| Configuration Name | User Name     | URL                                         | Action          |
|--------------------|---------------|---------------------------------------------|-----------------|
| test432Update      | test          | https://localhost:7225/integrations/Soft... | [Edit] [Delete] |
| YTDFUYIUYT         | EWSRDTFYGUIH  | https://localhost:7225/integrations/Soft... | [Edit] [Delete] |
| Basic              | iAutomateUser | https:// xxx.xx.xxx.xx                      | [Edit] [Delete] |

Figure 37 – Integrations

Refer to the table below to understand the fields mentioned in the above figure:

Table 10 – View Puppet

| Field              | Description                                    |
|--------------------|------------------------------------------------|
| Configuration Name | Software's provisioning platform endpoint name |
| Username           | Location of the endpoints                      |
| URL                | URL of the server                              |
| Action             | Take actions like Edit and Delete.             |

The Action column comprises of the following actions:

- **Edit** (  ): To modify the details of existing software provisioning platforms.

1. In the View Configuration page, Click Edit (  ).

- **Delete** (  ): To delete the existing software provisioning platforms.

### 3.4.3 Edit Integrations

To edit/modify existing software provisioning platforms, Provider user needs to follow the below steps:



Home > Configuration > Integrations

ANSIBLE TOWER   BIGFIX   CISCO INTERSIGHT   ITSM   GIT   BLADELOGIC   SCCM   CHEF   PUPPET   CISCO UCSD   [+ INTEGRATION](#)

| Configuration Name | User Name     | URL                                                                   | Action                                      |
|--------------------|---------------|-----------------------------------------------------------------------|---------------------------------------------|
| test432Update      | test          | https://localhost:7225/Integrations/Soft... <a href="#">Show More</a> | <a href="#">Edit</a> <a href="#">Delete</a> |
| YTDfUyIUYT         | EWSRDTFYGUIH  | https://localhost:7225/Integrations/Soft... <a href="#">Show More</a> | <a href="#">Edit</a> <a href="#">Delete</a> |
| Basic              | iAutomateUser | https:// xxx.x.x.x.x.x.x.x                                            | <a href="#">Edit</a> <a href="#">Delete</a> |

Rows per page 10 1 - 3 of 3

Figure 38 – Manage Software Provisioning Platform

2. It re-directs to the configuration page.
3. Modify the configuration details.

ANSIBLE TOWER

**Basic Information**

Please provide the details to add an Ansible Integration.

**Configuration Name:** Please enter a name for this Ansible Integration.

**User Name:** Please enter your Ansible Tower User Name.

**Password:** Confidential string used to authenticate securely.

**URL:** Please enter the URL of your Ansible Tower instance (e.g., "https://your-ansible-tower-server").

**Check Connectivity:** Please click the button below to verify the connection to Ansible Tower instance.

Configuration Name\* test432Update

User Name\* test

Password \*

URL\* https://localhost:7225/Integrations/SoftwareEndPoi

[CHECK CONNECTIVITY](#)

[CANCEL](#) [UPDATE](#)

Figure 39 – Edit Software Provisioning Platform

Table 11 – Edit Software Provisioning Platform

| Field              | Description                                         |
|--------------------|-----------------------------------------------------|
| Configuration Name | Name of the software provisioning platform endpoint |
| Username           | Location of endpoint                                |
| URL                | URL of the server                                   |
| Username           | Display the Username                                |
| Action             | Take actions like Edit, Delete                      |

All the fields given with asterisk (\*) mark are mandatory.

3.4.4 Delete Integrations

To delete existing integrations, Provider user needs to follow the below steps:



1. Click the

ANSIBLE TOWER

BIGFIX

CISCO INTERSIGHT

ITSM

GIT

BLADELOGIC

SCCM

CHEF

PUPPET

CISCO UCSD

+ INTEGRATION

| Configuration Name | User Name     | URL                                                          | Action |
|--------------------|---------------|--------------------------------------------------------------|--------|
| test432Update      | test          | https://localhost:7225/integrations/Soft... <a>Show More</a> |        |
| YTFUJYUJT          | EWSRDTFYGUIH  | https://localhost:7225/integrations/Soft... <a>Show More</a> |        |
| Basic              | iAutomateUser | https:// xxx.xx.xxx.xx                                       |        |

Figure 40 – Delete Software Provisioning Platform

2. Click **OK** to confirm.

Confirmation

Are you sure you want to delete this record?

CANCEL   OK

3. Click **OK** to confirm. This deletes the selected integration.

Figure 41 – Delete Software Provisioning Platform (cont.)

- 3.5 Network Enablement
1. On the main menu bar, click **Configuration** → **Networks** → **Network Enablement**.

2. The Provider Network Enablement screen appears.

To configure the network or interface, follow the steps below:

3. Refer to

Home > Configuration > Networks > Network Enablement

Platform \*  
Compute on Demand-vCenter

Provisioning Endpoint \*  
vCenterEndpoint

Cluster \*  
SB-Management-Cluster

GO

Figure 42 – Provider Network Enablement

Table 12 – Network Assignment

| Field                 | Description                                                                                                                |
|-----------------------|----------------------------------------------------------------------------------------------------------------------------|
| Platform              | It is the cloud service provider                                                                                           |
| Provisioning Endpoint | The cloud endpoints that have been created in HCL BigFix CLM                                                               |
| Cluster               | It lists the cluster of vCenter and cloud of SCVMM                                                                         |
| Network Type          | It is the Network type applicable for Cisco Intersight, possible values could be Distributed Switch or Distributed Network |

4. Select **Platform**.
5. Select Provisioning Endpoint.
6. Select Cluster (in case of vCenter and Cloud in case of SCVMM) and select Network Type in case of Cisco Intersight.
7. Click **Go**.
8. All the av

Figure 43 – Network Assignment

To assign a network, select the checkbox against the network that needs to be assigned with the provider, and then click Select Network IP. It helps to specify the network in the following modes:

- Single IP
- IP Range

Figure 44 – Network Assignment (Cont.)

Refer to the table below to understand the fields mentioned in the above figure:

Table 13 – Network Assignment

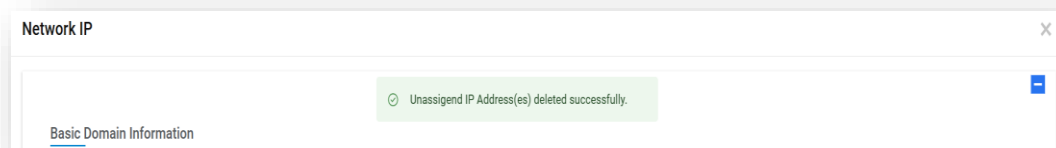
| Field           | Description                                                                                                    |
|-----------------|----------------------------------------------------------------------------------------------------------------|
| Single IP       | It is a single address of the device that communicates with other devices in a network                         |
| IP Range        | It is the range of IP addresses                                                                                |
| IP              | This is assigned to a device connected to a computer network that uses the Internet Protocol for communication |
| Subnet Mask     | IP address that is used in a network                                                                           |
| Default Gateway | It is the network gateway address                                                                              |
| Network Detail  | Details regarding the network that includes network name, purpose of the network, exceptions and many more     |

1. On the Network Details page, click the Delete Unassigned IP button.
2. All fields marked with asterisk (\*) are mandatory.

When prompted to confirm then please click OK.

To delete Unassigned IP in one shot, Provider user needs to follow steps below:

Figure 45 – Confirmation Message



3. A success message box appears.

Figure 46 – Success Message

### 3.5.1 Single IP Network Assignment

To assign the IP address, follow the steps below:

1. On the As...
2. It prompts

A screenshot of a form for 'Single IP Network Assignment'. It has a title 'Select IP Range' with two radio buttons: 'Single IP' (selected) and 'IP Range'. To the right are four input fields: 'IP \*', 'Default Gateway \*', and 'Subnet Mask \*'. At the bottom right are 'Add' and 'Close' buttons.

Figure 47 – Single IP Network Assignment

#### 3.5.1.1 Add Network

To add a network to a provider, follow the steps below:

1. Enter the IP address. It is a numerical label that is assigned to a device connected to a computer network for communication.
2. Enter the **Subnet Mask**.
3. Enter the Default Gateway.
4. Click **Add**.

5. The

A screenshot of a form for 'Add New Network'. It has a title 'Select IP Range' with two radio buttons: 'Single IP' (selected) and 'IP Range'. To the right are four input fields: 'IP \*', 'Default Gateway \*', and 'Subnet Mask \*'. At the bottom right are 'Add' and 'Close' buttons.

6. A success message box appears.

Figure 48 – Add New Network

All fields marked with asterisk (\*) are mandatory.

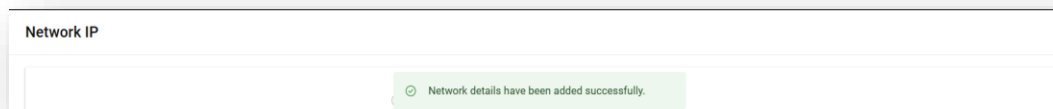


Figure 49 – Confirmation Message

### 3.5.1.2 Delete Network IP

To delete a network from provider environment, Provider user needs to follow steps below:

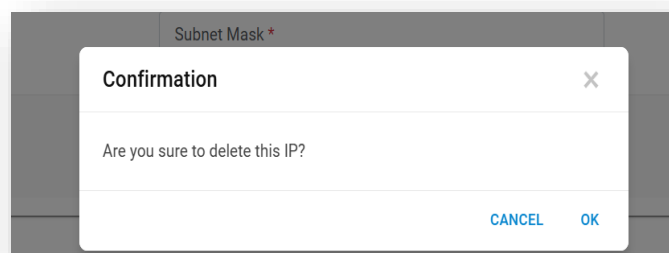


1. On the N

| IP           | Default Gateway | Subnet Mask     | Action    |
|--------------|-----------------|-----------------|-----------|
| 192.168.83.1 | 192.168.83.1    | 255.255.255.128 | Delete IP |

Figure 50 – Delete Network

2. When prompted to confirm, click **OK**.



3. A success message box appears.

Figure 51 – Delete Network (Cont.)

1. On the **Assign Network IP** screen, select IP Range on the top.

2. It prompts the IP Range that helps to add network range using the Add button provided existing networks. Provider does not have the option to delete the selected IP address, if it is assigned to any organization.

### 3.5.1.3 IP Range Network Assignment

To assign an IP address range for a VM on selected platform while provisioning, follow the steps below:

Figure 52 – IP Range Network Assignment

To assign a network range for a provider environment, follow the steps below:

- Enter the IP address range. This is assigned to a device connected to a computer network that uses the Internet Protocol for communication.
- Enter the **Subnet Mask**. IP address that is used in a network.
- Enter the Default Gateway.
- Click **Add** to add a network range.

- The new network range is added and appears in the list of networks on Network Details pane as shown above.

Figure 53 – Add New Network

- A success message box appears.

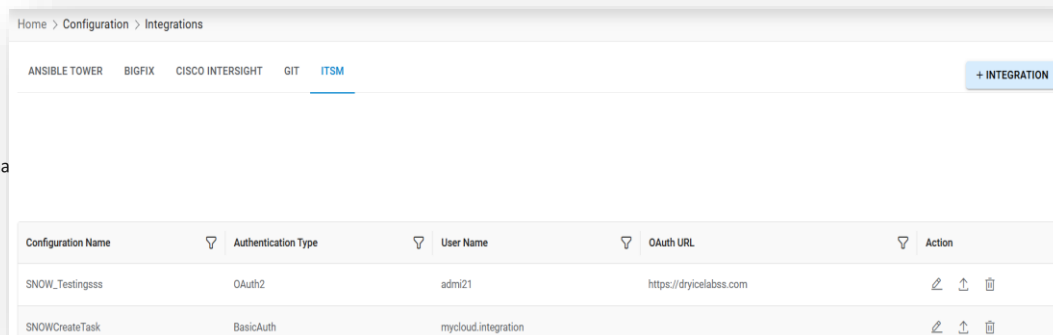
All fields marked with asterisk (\*) are mandatory.

Figure 54 – Confirmation Message

## 3.6 ITSM

This section describes how to manage the ITSM Configurations in HCL BigFix CLM. Through this module, the user manages configuration of ITSM tools along with parameters required for task creation/closure.

1. On the ma



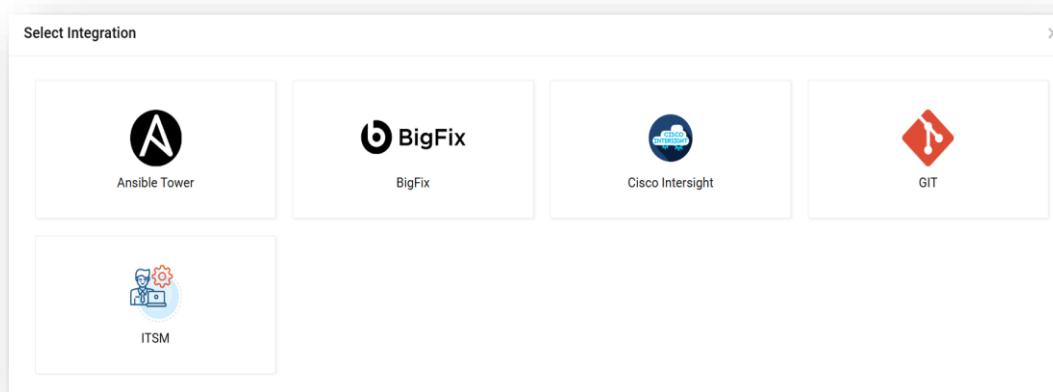
| Home > Configuration > Integrations                         |                     |                     |                         |                                                                 |
|-------------------------------------------------------------|---------------------|---------------------|-------------------------|-----------------------------------------------------------------|
| ANSIBLE TOWER   BIGFIX   CISCO INTERSIGHT   GIT <b>ITSM</b> |                     |                     |                         |                                                                 |
| <a href="#">+ INTEGRATION</a>                               |                     |                     |                         |                                                                 |
| Configuration Name                                          | Authentication Type | User Name           | OAuth URL               | Action                                                          |
| SNOW_Testingsss                                             | OAuth2              | admi21              | https://dryicelabss.com | <a href="#">Edit</a> <a href="#">Add</a> <a href="#">Delete</a> |
| SNOWCreateTask                                              | BasicAuth           | mycloud.integration |                         | <a href="#">Edit</a> <a href="#">Add</a> <a href="#">Delete</a> |

Figure 55 – Add Configuration

- Add Configuration
2. The following are the options that are available:
- View Configuration
  - Import Configuration

### 3.6.1 Add Integration

To add ITSM Integration, select on the ITSM



1. Select Tool type.
2. Select Organization.
3. Enter Configuration Name.
4. Select Authentication Type.
5. **Provider User needs to follow the below steps.**
6. Create steps by populating the following fields:

- Step Name,
- Step URL,
- Method Type
- Content Type.

7. Add the I
8. Click Add

ITSM

Basic Information

Organization

HCLOrganization

Tool Type \*

--Select--

Please provide the details to add an ITSM Integration,

Configuration Name\*

Authentication Details

Please provide the details to add an ITSM Integration,

Authentication Type:

Please select the Authentication Type.

--Select--

Content Type:

Please select the Content Type.

--Select--

Header Tags:

Please enter the Header Tags details in Key and Value.

Key

Value

+

Step Details

Step Name \*

Step URL \*

Method Type \*

--Select--

Content Type \*

--Select--

+

CANCEL

ADD

Figure 56 – Add Configuration

9. Refer to the table below to understand the fields mentioned in the above figure:

Table 14 – Add Configuration

| Fields              | Description                                                   |
|---------------------|---------------------------------------------------------------|
| Tool Type           | The name of ITSM tool                                         |
| Organization        | The organization that uses the ITSM tool                      |
| Configuration Name  | Name the configuration                                        |
| Authentication Type | The authentication types that are available in HCL BigFix CLM |
| Username            | User credentials which have access to ITSM endpoints          |
| Content Type        | Type of request. For example, JSON, XML, etc.                 |
| Header Tags         | Header tags passed in header in the form of Key Value pair.   |
| Step Details        | Provide the step details for the configuration                |

10. A success message box appears.

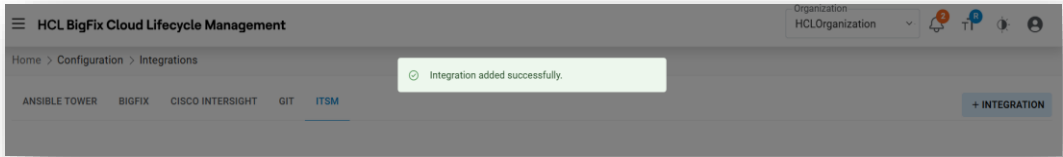


Figure 57 – Confirmation Message

All fields marked with asterisk (\*) are mandatory.

3.6.2 View Configuration

This section lists all the ITSM configurations that have been created by Provider User.

11. The ITSM

Home > Configuration > Integrations

ANSIBLE TOWER   BIGFIX   CISCO INTERSIGHT   GIT   ITSM   + IN

| Configuration Name | Authentication Type | User Name           | OAuth URL               | Action |
|--------------------|---------------------|---------------------|-------------------------|--------|
| test567            | BasicAuth           | test788             |                         |        |
| SNOW_Testingsss    | OAuth2              | adm121              | https://dryicelabss.com |        |
| SNOWCreateTask     | BasicAuth           | mycloud.integration |                         |        |
| SNOW_Test          | OAuth2              | adm121              | https://dryicelabss.com |        |
| 1                  |                     |                     |                         |        |
| VM and CMDB        | BasicAuth           | GSSMyCloudUser      |                         |        |
| SNOW               | BasicAuth           | MyCloudUser@hcl.com |                         |        |

Figure 58 – View Configuration

The Action column comprises of the following actions:

- Edit ( ): To modify the details of existing ITSM configurations.
- Delete ( ): To delete the ITSM configurations.
- Export Json ( ): To export ITSM configuration in JSON.

3.6.3 Edit Configuration

1. To edit/ modify the existing ITSM configuration (e.g. URL or User Credentials, Provider User needs to follow the following steps:
2. Modify the desired details.



Figure 59 – Edit ITSM

3. Click **Update** to save the settings.
4. A success message box appears.

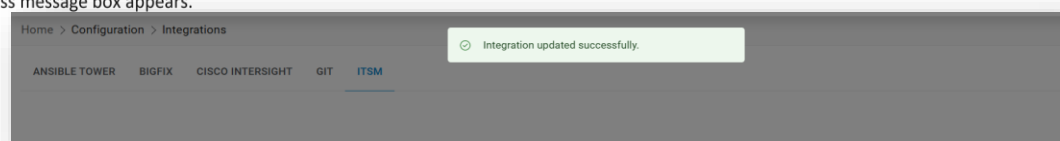


Figure 60 – Confirmation Message

### 3.6.4 Delete Configuration

1. Click Delete ( ) against the configuration that user wants to delete.

To delete the existing ITSM configuration, Provider user needs to follow the below steps:



2. Click **OK**

| Configuration Name | Authentication Type | User Name           | OAuth URL               | Action                                           |
|--------------------|---------------------|---------------------|-------------------------|--------------------------------------------------|
| test567            | BasicAuth           | test788             |                         | <div> <div>Delete</div> </div>                   |
| SNOW_Testingss     | OAuth2              | admi21              | https://dryicelabss.com | <div> <div></div> <div></div> <div></div> </div> |
| SNOWCreateTask     | BasicAuth           | mycloud.integration |                         | <div> <div></div> <div></div> <div></div> </div> |

Figure 61 – Delete Configuration

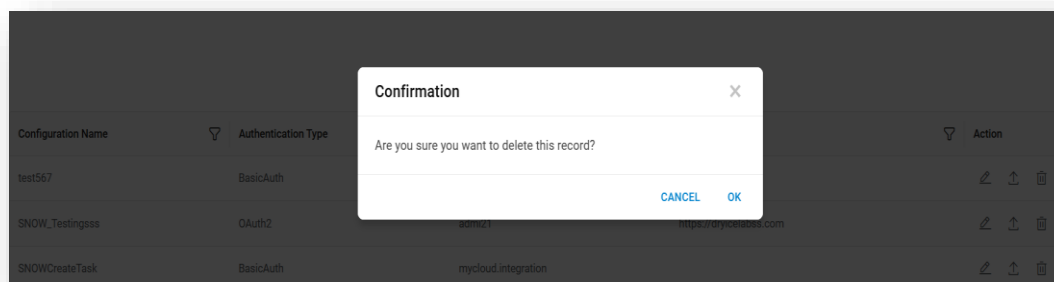


Figure 62 – Delete Configuration

3. A confirm

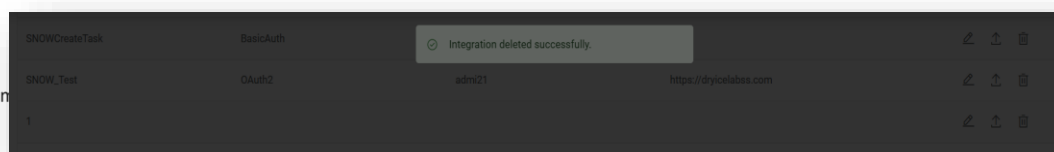
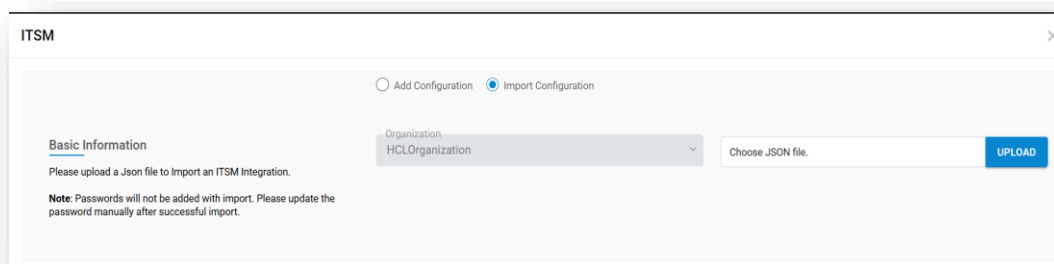


Figure 63 – Delete Configuration

### 3.6.5 Import ITSM

To import the existing ITSM configuration, Provider User needs to follow the steps below:



1. Select Organization and Choose File.
2. Click **Upload**. The **Add Integration ITSM** screen appears.

Figure 64 – Import Configuration

Figure 65 – ITSM Configuration (Cont.)

3. Click **Update**

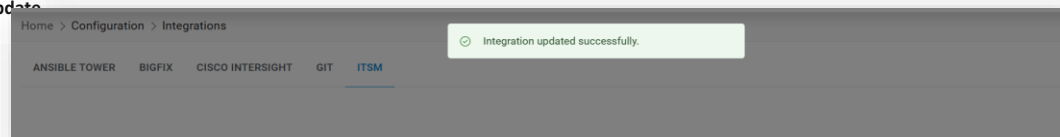


Figure 66 – Success Message

## 3.7 Custom Tables

Through this module, Provider users can create their own custom tables and manage customer data in HCL BigFix CLM.

1. On the main menu bar, click **Master** and then click **Manage Custom Tables**.
2. At the time of creation of Custom table, an API (by default) gets exposed to Fetch, Edit, and Insert Data in it. The same is used at the time of creating UI templates to populate request form fields.

- Create Custom Table
- View Custom Table

1. On the Manage Custom Table screen, click Create Custom Table.
  - Import Custom Table

### 3.7.1 Create Custom Table

To create Custom Table, provider users need to follow the following steps:

Figure 67 – Create Custom Table

Table 15 – Create Custom Table

2. Refer to the table below to understand the fields mentioned in the above figure:

| Field        | Description                                                           |
|--------------|-----------------------------------------------------------------------|
| Table Name   | Name the table                                                        |
| Description  | Describe its usage and who can use it                                 |
| Column Name  | A unique label for the column                                         |
| Organization | Name of the organization (Business units/ divisions in organizations) |
| Data Type    | The field type for the column                                         |

3. Select Organization from the top navigation.

- Enter Table Name and Description.
- Enter Column Name and their Data Types.
- Click **Save**.
- A success message box appears.

| Table test12 is created successfully. |                  |                 |        |
|---------------------------------------|------------------|-----------------|--------|
| Table Id                              | Table Name       | Description     | Action |
| 188                                   | 11111            | 1111            | ⋮      |
| 158                                   | AbhishekNewTable | Desc TableA     | ⋮      |
| 159                                   | AbhishekTesting  | AbhishekTesting | ⋮      |

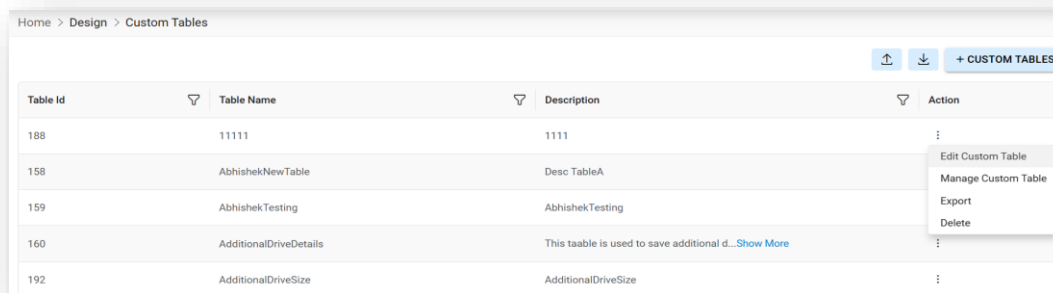
8. A new Cl

Figure 68 – Confirmation Message

All fields marked with asterisk (\*) are mandatory.

### 3.7.2 View Custom Table

This section lists all the custom tables that have been created by Provider users.



| Table Id | Table Name             | Description                                                           | Action |
|----------|------------------------|-----------------------------------------------------------------------|--------|
| 188      | 11111                  | 1111                                                                  | ⋮      |
| 158      | AbhishekNewTable       | Desc TableA                                                           | ⋮      |
| 159      | AbhishekTesting        | AbhishekTesting                                                       | ⋮      |
| 160      | AdditionalDriveDetails | This taable is used to save additional d... <a href="#">Show More</a> | ⋮      |
| 192      | AdditionalDriveSize    | AdditionalDriveSize                                                   | ⋮      |

Figure 69 – View Custom Table

It also comprises of the following actions:

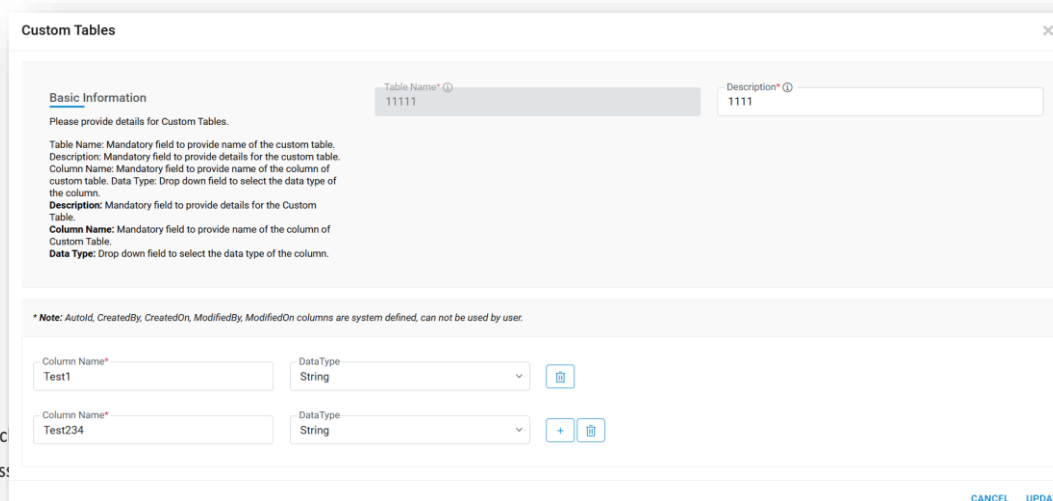
- **Edit Custom Table:** To modify the details of existing custom tables
- **Manage Custom Table:** To add the records selected custom tables
- **Delete:** To delete the details of existing custom tables
- **Export:** Export custom table from one environment into another.

### 3.7.3 Edit Custom Table

To edit/ modify existing Custom Table, the Provider user needs to follow the following steps:

1. Select **View Custom Table** and then click Edit ( ). It redirects it to **Create Custom Table**.
2. Modify the desired details.

3. Then clic
4. A success



Custom Tables

Basic Information

Please provide details for Custom Tables.

Table Name: Mandatory field to provide name of the custom table.  
Description: Mandatory field to provide details for the custom table.  
Column Name: Mandatory field to provide name of the column of custom table. Data Type: Drop down field to select the data type of the column.  
Description: Mandatory field to provide details for the Custom Table.  
Column Name: Mandatory field to provide name of the column of Custom Table.  
Data Type: Drop down field to select the data type of the column.

\* Note: Autoid, CreatedBy, CreatedOn, ModifiedBy, ModifiedOn columns are system defined, can not be used by user.

Column Name\* Test1 Data Type String

Column Name\* Test234 Data Type String

CANCEL UPDATE

Figure 70 – Edit Custom Table (Cont.)

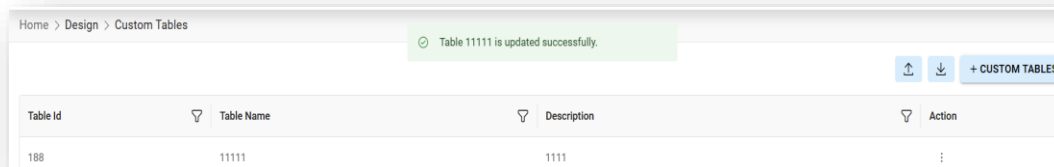


Figure 71 – Confirmation Message

### 3.7.4 Delete Custom Tables

To delete a custom table, Provider User needs to follow the following steps:



1. Select View

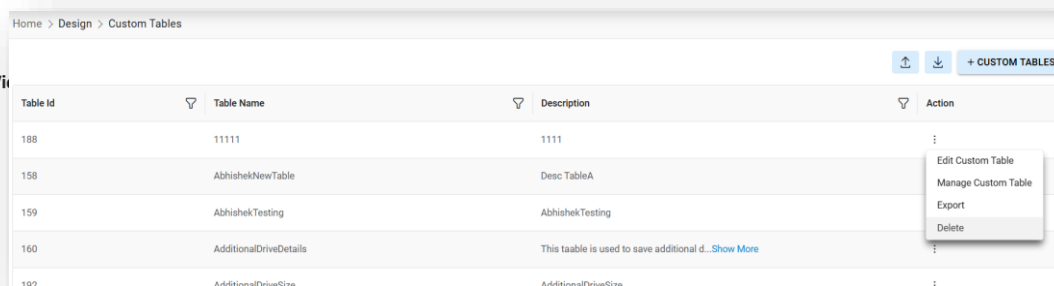


Figure 72 – Delete Custom Table (Cont.)

2. When prompted to confirm, click **OK**.

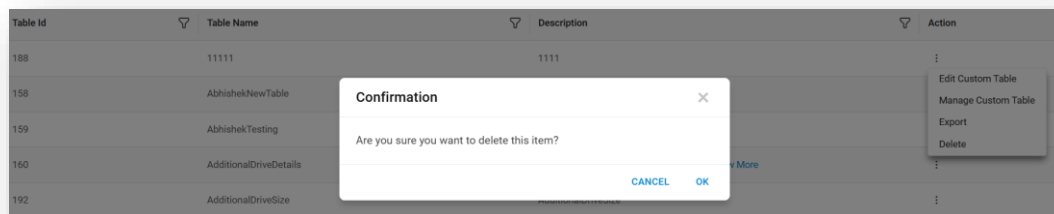


Figure 73 – Confirmation Message

3.7.5. Select **Manage Custom Table**, and then click **Add Records**.

This section describes how to Add records in the existing custom table. To add records, Provider user needs to follow the below steps:



**Custom Tables**

Organization: HCLOrganization Table Name: AbhishekNewTable

Download Refresh Add EXPORT TO CSV

| Record ID | Name   | Dept    | Action      |
|-----------|--------|---------|-------------|
| 1         | Test   | test    | Edit Delete |
| 2         | Test2  | Test2   | Edit Delete |
| 3         | test3  | test3   | Edit Delete |
| 4         | jpgfh  | asfs    | Edit Delete |
| 5         | ghfth  | dfghfgf | Edit Delete |
| 6         | Puneet | IT      | Edit Delete |

Rows per page 10 1 - 6 of 6 1

Figure 74 – Add Records

- Click Add button.
- A pop up appears with columns to enter values.
- Enter the

**AbhishekNewTable**

**Basic Information**  
Please enter the values of columns of custom table. This helps in data entry in custom tables.

|                     |              |
|---------------------|--------------|
| Column Name<br>Name | Column Value |
| Column Name<br>Dept | Column Value |

CANCEL ADD

- A success message box appears.

Figure 75 – AppMaster

- All records

**Custom Tables**

Organization: HCLOrganization Table Name: AbhishekNewTable

Download Refresh Add EXPORT TO CSV

Data has been saved successfully.

| Record ID | Name  | Dept  | Action      |
|-----------|-------|-------|-------------|
| 1         | Test  | test  | Edit Delete |
| 2         | Test2 | Test2 | Edit Delete |

Figure 76 – Confirmation Message

| Record ID | Name   | Dept    | Action |
|-----------|--------|---------|--------|
| 1         | Test   | test    |        |
| 2         | Test2  | Test2   |        |
| 3         | test3  | test3   |        |
| 4         | jgfh   | asfs    |        |
| 5         | ghfhfh | dfghfgf |        |
| 6         | Puneet | IT      |        |
| 7         | test   | testing |        |

Figure 77 – Custom Table



### 3.7.6 Import Data from CSV

- To Edit ( ) and Delete ( ) the information, please click the respective options to perform the activity.

This section describes the processes to import records in a custom table. The Provider user needs to follow the following steps:



1. Select **Custom Table**, and then click **Import** .

| Record ID | Name   | Dept    | Action |
|-----------|--------|---------|--------|
| 1         | Test   | test    |        |
| 2         | Test2  | Test2   |        |
| 3         | test3  | test3   |        |
| 4         | jgfh   | asfs    |        |
| 5         | ghfhfh | dfghfgf |        |
| 6         | Puneet | IT      |        |
| 7         | test   | testing |        |

2. A pop up appears with the upload file option.

Figure 78 – Import Record

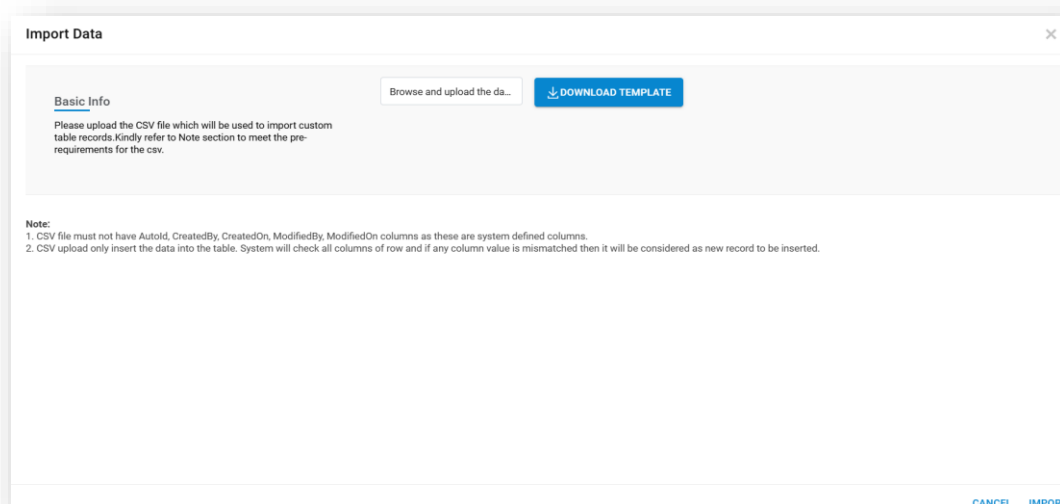
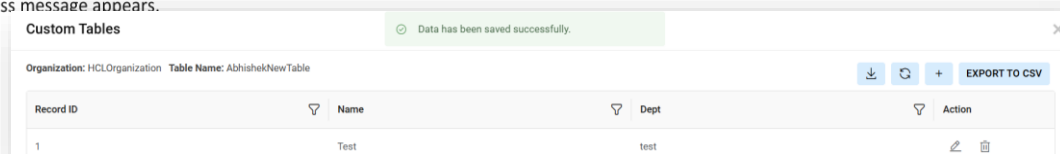


Figure 79 – Upload File

3. Click on **Download Template**. This template will guide the user to import data with prescribed format.
4. Click **Choose File** and **Upload File**. Or else, Click **Cancel** to discard the changes
5. A success message appears.



6. All records are displayed as below:

Figure 80 – Manage Custom Table

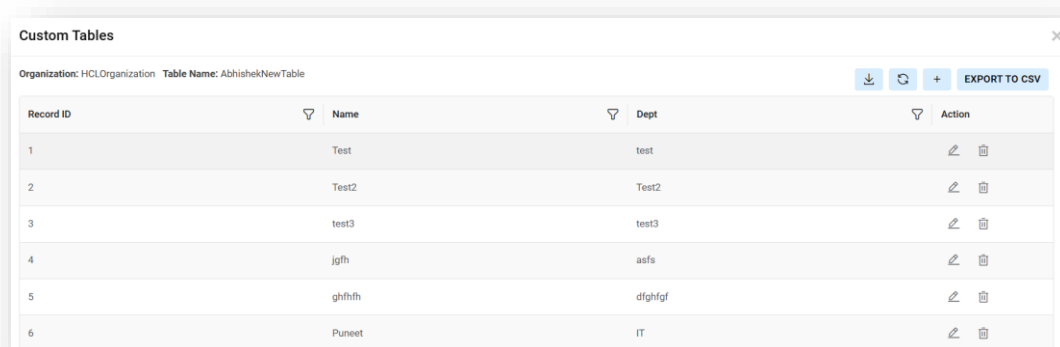


Figure 81 – Manage Custom Table

### 3.7.7 Refresh Custom Table

To refresh records, Provider user needs to click on the Refresh button .

### 3.7.8 Import Custom Table

To import Custom Table, provider user needs to follow the steps below:

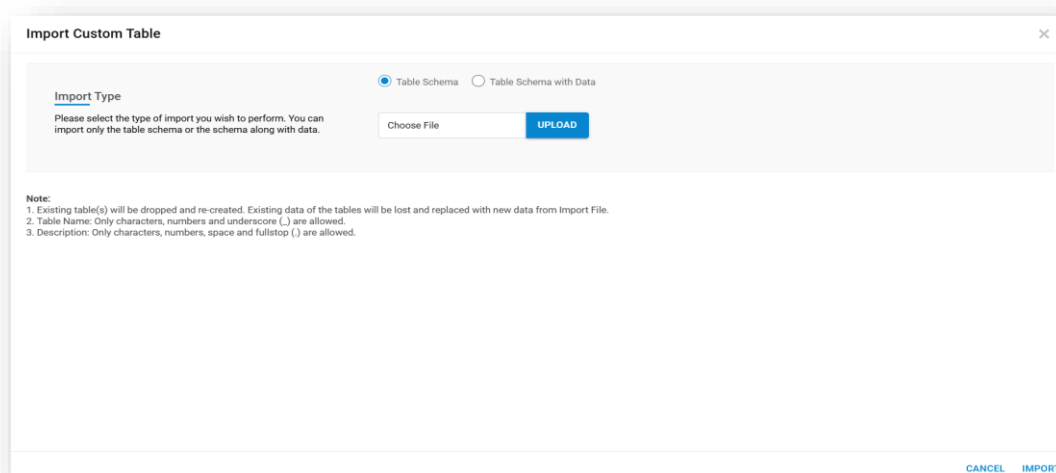
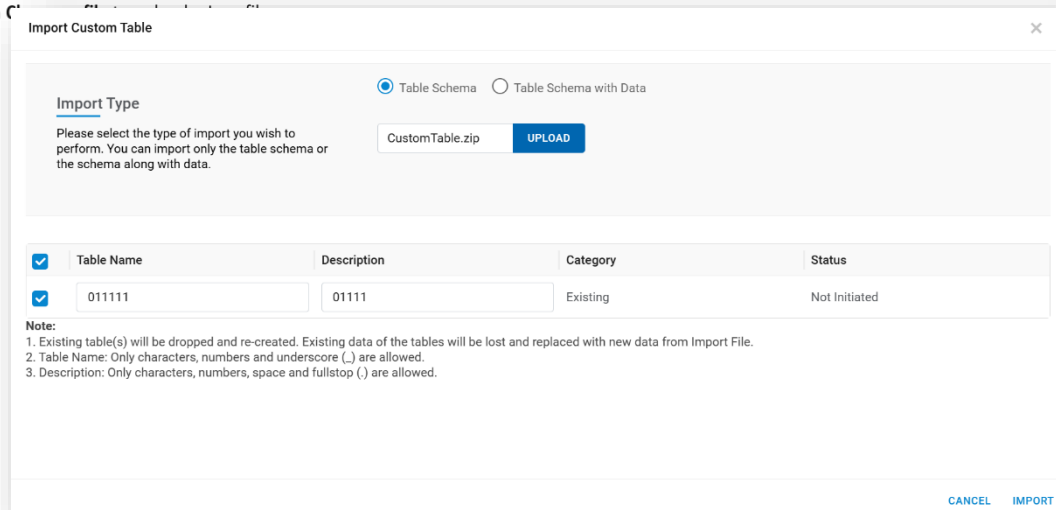


Figure 82 – Import Custom Table

1. Select Organization.
2. Choose **Import Type**: Table Schema, Table Schema with Data, Table Data.
3. Click on **Custom Table**.



4. Enter Table Name, Description.
5. Click **Import**.
6. Users will get a success message.

Figure 83 – Import Custom Table (Cont.)

1. On the main menu bar, click **Configurations** and then click **Service Types**.
2. It has the following options:

### 3.8 Service Types

**Service Types** are categorization of services that are provided by Cloud Providers. Provider User maps service catalogs with Service Types.

- Add Service Type

3.8.1 Add Service Type

To add Service Type, Provider user needs to follow the following steps:

1. On the M

2. Select Pla

3. Enter Ser

Create Service Type

Basic Information

Please select the cloud platform, provide input for the associated service type and display name which would be displayed on the request resource screen from where end user would be raising request for the cloud resources.

Platform \*  
--Select--

Service Type \*

Display Name \*

CANCEL

ADD

Figure 84 - Add Service Type

4. Refer to the table below to understand the fields mentioned in the above figure:

Table 16 – Service Types

| Fields       | Description                                                               |
|--------------|---------------------------------------------------------------------------|
| Platform     | Name of the service providers                                             |
| Service Type | Name the service that has been planned to get consumed via HCL BigFix CLM |
| Display Name | A reference name/ original name of the service type                       |

Home > Service Types

Active

Inactive

Service Type has been saved successfully.

6. The new Service type is created successfully.

Figure 85 - Confirmation Message

All fields marked with asterisk (\*) are mandatory.

3.8.2 View Service Type

This section lists all the service types that have been created by Provider users.

| Status                               | Service Type    | Display Name    | Platform Name             | Status                              | Action |
|--------------------------------------|-----------------|-----------------|---------------------------|-------------------------------------|--------|
| <span style="color: green;">●</span> | test34          | test45          | Amazon Web Services       | <input checked="" type="checkbox"/> |        |
| <span style="color: green;">●</span> | SCVMM           | SCVMM           | Hyper-V 12,16,19          | <input checked="" type="checkbox"/> |        |
| <span style="color: green;">●</span> | saas            | saas            | Amazon Web Services       | <input checked="" type="checkbox"/> |        |
| <span style="color: green;">●</span> | DemoServiceType | DemoServiceType | Compute on Demand-vCenter | <input checked="" type="checkbox"/> |        |
| <span style="color: red;">●</span>   | regre           | ergrg           | Amazon Web Services       | <input type="checkbox"/>            |        |
| <span style="color: green;">●</span> | greerger        | regeereg        | Amazon Web Services       | <input checked="" type="checkbox"/> |        |

Figure 86 - View Service Type

The Action column comprises of following action:

- **Edit** (): To modify the details of existing providers

### 3.8.3 Edit Service Types

To edit/ modify the Service Types, provider users need to follow the following steps:



1. On View Service Type tab, click Edit ().

| Status                               | Service Type | Display Name | Platform Name       | Status                              | Action      |
|--------------------------------------|--------------|--------------|---------------------|-------------------------------------|-------------|
| <span style="color: green;">●</span> | test34       | test45       | Amazon Web Services | <input checked="" type="checkbox"/> | <b>Edit</b> |
| <span style="color: green;">●</span> | SCVMM        | SCVMM        | Hyper-V 12,16,19    | <input checked="" type="checkbox"/> |             |
| <span style="color: green;">●</span> | saas         | saas         | Amazon Web Services | <input checked="" type="checkbox"/> |             |

2. Modify the desired details.

Figure 87 - Edit Service Type

#### Update service type

**Basic Information**

Please select the cloud platform, provide input for the associated service type and display name which would be displayed on the request resource screen from where end user would be raising request for the cloud resources.

Platform \*

Amazon Web Services

Service Type \*

test34

Display Name \*

test45

CANCEL

UPDATE

3. Click Upd

4. A success

Figure 88 - Edit Service Type (Cont.)

Home > Service Types

Service Type has been updated successfully.

Active Inactive

| Status | Service Type | Display Name | Platform Name       | Status | Action               |
|--------|--------------|--------------|---------------------|--------|----------------------|
| Active | test34       | test45       | Amazon Web Services | On     | <a href="#">Edit</a> |
| Active | SCVMM        | SCVMM        | Hyper-V 12,16,19    | On     | <a href="#">Edit</a> |
| Active | saas         | saas         | Amazon Web Services | On     | <a href="#">Edit</a> |

Figure 89 - Confirmation Message

### 3.8.4 Change Status

With the help of  provider user can change the status of service type from active to inactive or from inactive to active

## 3.9 Organization

Through this module, the Provider user manages an organization that includes activities like creation of the organization, adding & mapping of AD groups and modifying/ deleting an organization.

### 3.9.1 Add Organization

To add an organization in HCL BigFix CLM, a provider user needs to follow the following steps:

1. Click on +

Home > Administration > Organizations

+ ORGANIZATION

| Name                                          | Description                                   | Code         | Provider Entity Id                       | Object Id                                | Created By   | Action                                                           |
|-----------------------------------------------|-----------------------------------------------|--------------|------------------------------------------|------------------------------------------|--------------|------------------------------------------------------------------|
| VMWAR SAML Org                                | VMWAR SAML Org                                | VMWARSAMLOrg | PVD-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-8EAF121-2B1B-495D-A10B-9B7C83D0447D  | HCL Provider | <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">More</a> |
| ORG2                                          | ORG2                                          | ORG2         | PVD-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-3B7358A7-6FF0-4362-B9F6-C566840D7576 | HCL Provider | <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">More</a> |
| charanOrgcharanOrgcharanOrgcharanOrgcharan... | charanOrgcharanOrgcharanOrgcharanOrgcharan... | charanOrg    | PVD-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-B7207981-C8A9-481B-B078-5E86C7FB6029 | HCL Provider | <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">More</a> |
| wertyuyt                                      | werftg                                        | 234erty      | PVD-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-DEDC23F7-A372-4A4E-AB42-0A38793F3CF2 | HCL Provider | <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">More</a> |
| qwsdfsteshide                                 | werfg                                         | dfg          | PVD-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-09684CA9-A846-4B9B-B016-C7EC94A1C5DB | HCL Provider | <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">More</a> |

Figure 90 – Add Organization

**CREATE ORGANIZATION**

**Basic Information**  
Please provide the details to create a new organization.

Name \*

Code \*

Description \*

Currency \*  
Indian Rupee (INR)

Preferred Language \*  
English (US)

**Authentication**  
Please select the authentication type for this provider. Supported Types: LDAP, SAML, and Form-Based.

Authentication Type \*  
Form Based

**LDAP:** Lightweight Directory Access Protocol Authentication involves querying a directory service such as Active Directory (AD) or OpenLDAP, which stores user credentials and other directory information.

**SAML:** Security Assertion Markup Language is an XML-based open standard for exchanging authentication and authorization data between parties, specifically between an identity provider (IdP) and a service provider (SP).

Figure 91 – Add Organization (Cont.)

**Others**  
Please enter the additional information which will be required for request approval, reject, refer back.

Optional Information-1

Optional Information-2

Request Prefix ⓘ  
SRREQ

Reject Applicable For  
Portal Request

Approval Applicable For  
Portal Request

Referback Applicable For  
Portal Request

User Cancelled Applicable For  
Portal Request

Grace Period (In Days) ⓘ  
0

Delegation Enabled\* ⓘ  
Both(In Action Menu and Above My Objects grid)

Threshold ⓘ  
10

**Configuration**  
Please choose the option(s) to enable configuration at the organizational level.

DRAFT APPLICABLE SSO ENABLE QUESTIONNAIRE ENABLED ACTION SCHEDULING ENABLED

COPY REQUEST ENABLED IT VERIFICATION ENABLED MULTI-HYPERVISER ENABLED

CANCEL ADD

2. Refer to the table below to understand the fields mentioned in the above figure:

Figure 92 – Add Organization (Cont.)

Table 17 – Add Organization

| Field               | Description                                                                                                                   |
|---------------------|-------------------------------------------------------------------------------------------------------------------------------|
| Name                | Name of the organization (Business units/ divisions in organizations)                                                         |
| Code                | Code of that organization                                                                                                     |
| Description         | Details and the work of the organization, users associated with it and many more                                              |
| Currency            | In which currency, the bill gets generated                                                                                    |
| Preferred Language  | Select the language as per the preference                                                                                     |
| Authentication Type | Select the authentication type (Form based, LDAP or SAML)<br>In case of SAML, HCL BigFix CLM support windows hello mechanism. |

| Field                     | Description                                                                                                                                                                                                                                                                                                                                                                                               |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                           | <p>Windows Hello is a more personal and secure way to sign in to your Windows device. Instead of using a password, with Windows Hello you can sign in using facial recognition, fingerprint, or a PIN.</p> <p>These options help make it easier and safer to sign into your account because your PIN is only associated with one device, and it's backed up for recovery with your Microsoft account.</p> |
| SSO Enable                | Select the option to enable Single Sign On                                                                                                                                                                                                                                                                                                                                                                |
| Delegation Enabled        | To enable send email to delegate user.                                                                                                                                                                                                                                                                                                                                                                    |
| Action Scheduling Enabled | This option enables the Scheduling of an Action for this organization.                                                                                                                                                                                                                                                                                                                                    |
| IT Verification Enabled   | It enables IT verification stage for requests.                                                                                                                                                                                                                                                                                                                                                            |
| Copy Request Enable       | It will enable the clone request option for requesters in my request section.                                                                                                                                                                                                                                                                                                                             |
| Draft Applicable          | To Enable Draft Functionality at Org Level. If checked, then only Save Draft Can be enabled using Publish Service Catalog.                                                                                                                                                                                                                                                                                |

1. In the Create Organization tab, enter the Name and Description.
2. The **Preferred Language** field gets auto filed with the default language which is English.
3. Select **Currency & Authentication Type**.
4. Enter **Optional information-1**, **Optional information-2**, and **Request Prefix**
5. Select **Reject Applicable For**, **Approval Applicable For**, **Referback Applicable For**, and **User Cancelled Applicable For**
6. The supported Authentication Types are given below:
  - Form-Based
  - LDAP
  - SAML
7. Enter additional information in the Optional Information text box, if required.
8. Click **Add**.
9. A success message box appears.

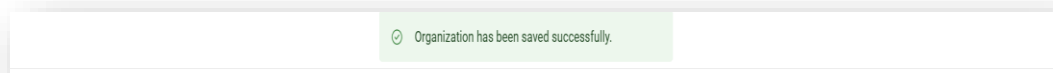


Figure 93 – Add Organization Confirmation Message

A new organization has been created, and it appears in the tabular view.

With every new organization, A default service account is created. This account is utilized for workflow task execution.

### 3.9.2 Configure Domains

Configure domains for syncing and Ldap authentication.

The **Add Domain** button allows you to map a domain to an organization.

Domains provide a way to organize the users of an organization and permit access according to their roles.

Figure 94 – Add Domain

1. To assign one or more domains to an organization, click Add Domain.
2. The Domain Details

3. Define domain attributes as described in the below table:

Figure 95 – Domain details

Table 18 – Domain Attributes

| Field                | Description                                                                            |
|----------------------|----------------------------------------------------------------------------------------|
| Domain Platform      | OS Platform of domain server                                                           |
| Domain Name          | Name of the domain                                                                     |
| LDAP URL             | It is a string that is used to encapsulate the address and port of a directory server. |
| Display Name         | It is used to easily identify the domain in platform.                                  |
| Domain Username      | It is used to specify a user account in the selected domain.                           |
| Domain User Password | It is used to authenticate the username in the domain.                                 |

|                            |                                                                                                                                                                                                                   |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| NET BIOS Name              | It is the name of a program that allows applications on different computers to communicate within a local area network (LAN).                                                                                     |
| Alternate DNS IP           | It is an alternate Internet service that translates domain names/hostnames to IP addresses (forward DNS) and IP addresses to their associated domain names/hostnames (Reverse DNS) with the help of a DNS server. |
| Primary and Secondary WINS | It dynamically updates name/address pairings as computers join and leave the network.                                                                                                                             |
| Optional information       | Additional information about the domains, if required                                                                                                                                                             |

All fields marked with asterisk (\*) are mandatory.

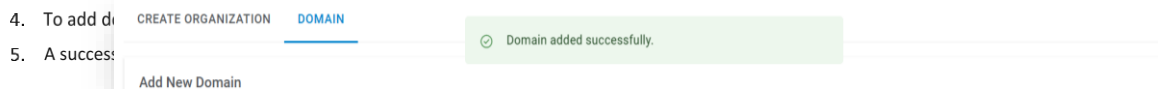


Figure 96 – Add domain Successful Message

Provider users can add multiple domains by clicking Add Domains button.

6. After adding domains, provider needs to configure AD Groups into HCL BigFix CLM against each domain.
7. To configure AD Group, provider needs to follow the steps below.

- a. Under the **Actions** column, click on **AD Group Mapping**.

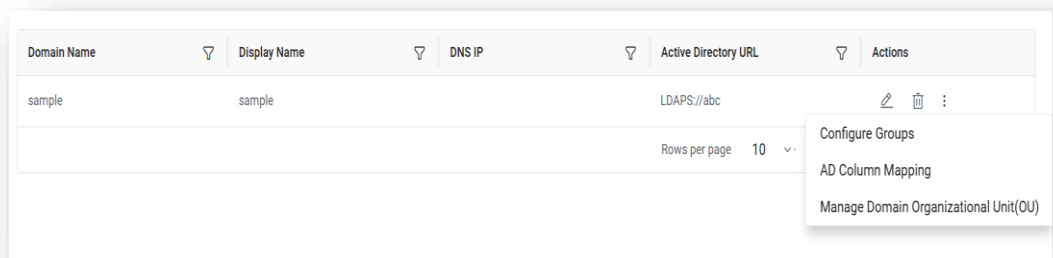


Figure 97 – Configure Groups

- b. Click on the Configure AD groups icon under View.

The pane appears as shown below:



Figure 98 – Configure Groups

- c. To add a group, enter the group name under **Group Name**.
- d. Click on Add (  ) to Add AD Group.
- e. Click on **Submit**.

A success message box appears.

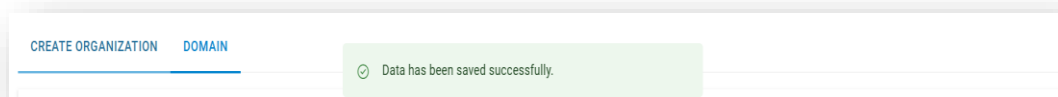


Figure 99 – Confirmation Message

8. To delete group, provider user needs to follow the following steps:

- a. Click on Delete against a group the user wishes to delete.

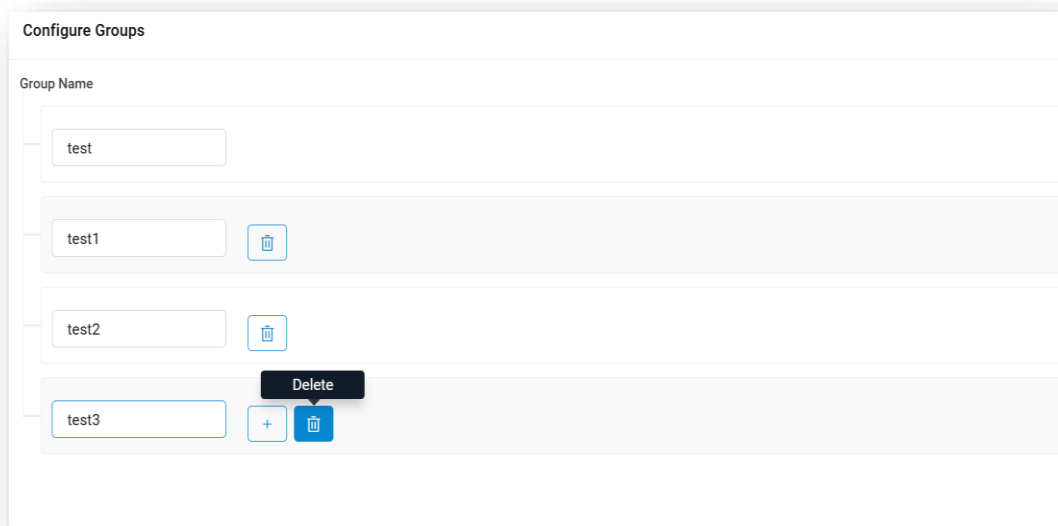


Figure 100 – Configure Groups

- b. Click on **Submit**.

A success message box appears.

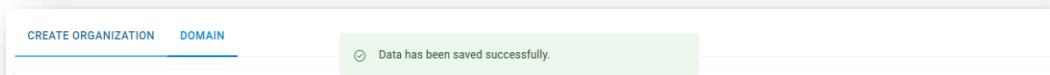


Figure 101 – Success Message

- a. Under View tab, click on AD Column Mapping.

9. Once the
10. To map A

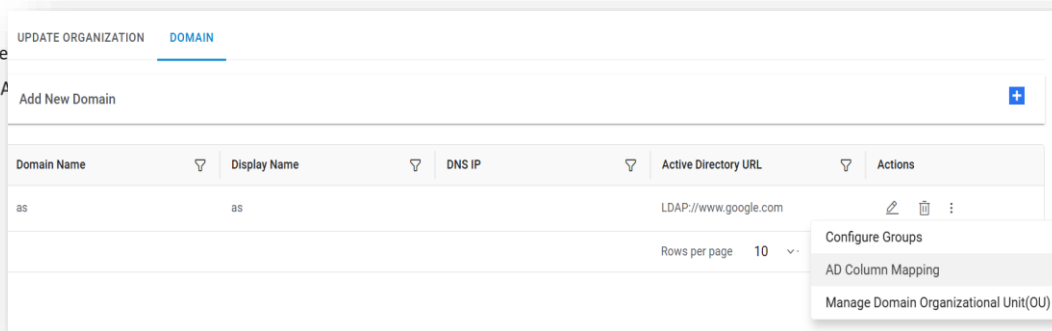


Figure 102 – AD Column Mapping

- b. Provide **AD Column Name** against each source.
- c. Click on **Submit**.

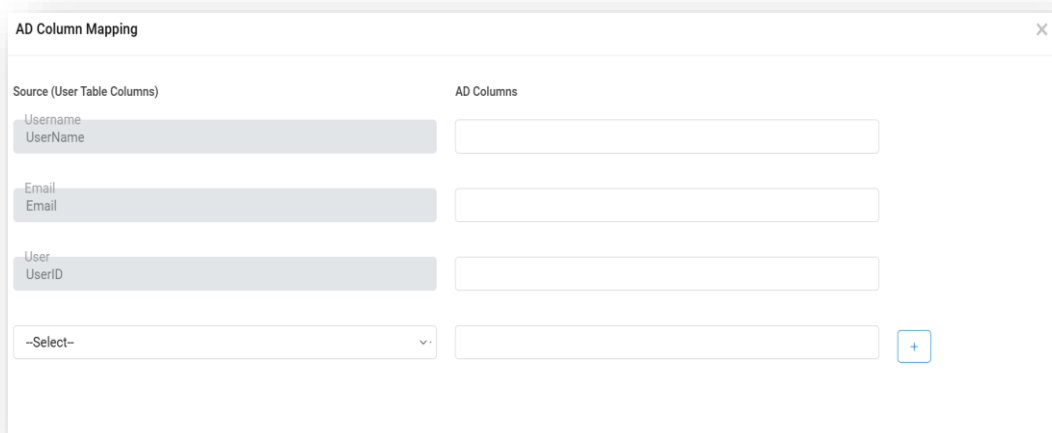


Figure 103 – AD User Column Mapping

A success message box appears.

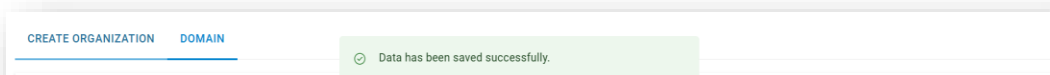


Figure 104 – Confirmation Message

After configuring LDAP, users need to enable jobs (refer to **Manage Jobs**) associated with AD components.

### 3.9.3 Configure SAML2.0

To Configure SAML Authentication,

1. Select au

**Authentication**

Please select the authentication type for this provider. Supported Types: LDAP, SAML, and Form-Based.

**LDAP:** Lightweight Directory Access Protocol Authentication involves querying a directory service such as Active Directory (AD) or OpenLDAP, which stores user credentials and other directory information.

**SAML:** Security Assertion Markup Language is an XML-based open standard for exchanging authentication and authorization data between parties, specifically between an identity provider

Authentication Type \*  
SAML 2.0

ID \*

idpSSO URL \*

Name ID \*

SSO Tool \*  
ADFS

Logout URL \*

Figure 105 –SAML2.0 Details

Table 19 – SAML2.0 Attributes

| Field      | Description                                                                                                                                                                                                                             |
|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Id         | Identity Provider might need this to establish the identity of the service provider requesting login. Basically, it is used for handshaking of the application. Example: HCL BIGFIX CLMDEV.                                             |
| idpSSO URL | Identity Provider Single Sign-on URL, where our website redirect for Authentication.<br>Example: https://XXX.COM/SAAS/auth/federation/sso.                                                                                              |
| Name ID    | NAMEID is the complete path of xmlnode where NameID value (USERNAME/EMAIL) exist. It based on identity provider.<br>Example: VMWAR Identity<br>Manager: /samlp:Response/saml:Assertion/saml:Subject/saml:NameID<br>ADFS : saml2:NameID. |
| SSO Tool   | Allowed values are ADFS, IDM, PINGFEDERATE, PINGIDENTITY                                                                                                                                                                                |
| Logout URL | Logout URL where application will take user after logging out the application.                                                                                                                                                          |

Organization has been saved successfully.

Figure 106 – Add Organization confirmation message

A new organization has been created, and it appears in the tabular view.

3.9.4 Configure Widgets

To configure the widgets for an organization in HCL BigFix CLM, the provider needs to follow the following steps:

| Name       | Description | Code    | Provider Entity Id                       | Object Id                                | Created By   | Action                                                                                                                                                                                                                                                      |
|------------|-------------|---------|------------------------------------------|------------------------------------------|--------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| s          | as          | as      | PVD-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-B68F11A3-E26B-4C82-B6B0-6B5DF5D2DF28 | HCL Provider |    |
| testing123 | xccxz       | test112 | PVD-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-B4EE2110-43B5-4E07-B6C0-3EBAB18E975D | HCL Provider |    |
|            |             |         | PVD-99466341-F53F-                       | ORG-1D20CFA3-D232-                       |              |                                                                                                                                                                                                                                                             |

1. On the View Organization tab, select Configure Widgets.

Figure 107 – Configure Widgets

2. The following p Organization: s
3. Select Parent R

CONFIGURE WIDGETS

Parent Role \*  
Organization Admin

☒ Select All

☒ Item Based Request Status

☒ Start vs Stop VM

☒ Category Based VM

☒ Request Item SLA

☒ Azure Account Based Billing

☒ Azure Meter Category Based Billing

☒ Amazon Account Based Billing

☒ Request Trend

☒ OS Based Provisioning Request

☒ Platform Based Request

☒ Azure Resource Group Based Billing

☒ Azure Product Based Billing

☒ Azure Location Based Billing

☒ Amazon Product Based Billing

☒ Size Based Billing

CANCEL

ADD

4. Click Add.

Figure 108 – Configure Widgets Contd.

Home > Administration > Organizations

Widgets have been updated successfully.

Figure 109 – Success Message

3.9.5 Configure Menu

To configure the menu for an organization in HCL BigFix CLM, the provider needs to follow the following steps:

1. On the V

| Name                 | Description          | Code              | Provider Entity Id                        | Object Id                                | Created By   | Action |
|----------------------|----------------------|-------------------|-------------------------------------------|------------------------------------------|--------------|--------|
| testing123           | xcccZ                | test112           | PVID-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-84EE2110-4385-4E07-B6C0-3EBAB18E975D | HCL Provider |        |
| sdf                  | sdf                  | sdf               | PVID-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-1020CFA3-0232-44BA-8D5D-8200534B00D4 | HCL Provider |        |
| LDAP2 AD Users Login | LDAP2 AD Users Login | LDAP2ADUsersLo... | PVID-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-6E7B5818-8101-40AC-A2A6-869C40C061DB | HCL Provider |        |
| LDAP AD Users Login  | LDAP AD Users Login  | LDAPADUsersLogin  | PVID-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-8D5A113A-8E76-4DB0-A6E4-43EE9EB85C31 | HCL Provider |        |

Figure 110 – Configure Menu for Organization

2. The following p

Organization: VMWAR SAML Org

CONFIGURE MENUS

Parent Role \*

Requester

Catalogs(1/1)

Requests(2/2)

Schedules(1/1)

Resources(1/1)

Reports(5/5)

☒ Select All

☒ Request Service

CANCEL

ADD

3. Select Menu options and click **Add**.

4. A success message appears.

Figure 111 – Configure Menu for Organization (Cont.)

All fields marked with asterisk (\*) are mandatory.

Home > Administration > Organizations

Menus have been updated successfully.

Figure 112 – Configure Menu Confirmation Message

### 3.9.6 View Organization

This section lists out all the organizations that have been created by Provider user.

| Name                 | Description          | Code           | Provider Entity Id                       | Object Id                                | Created By   | Action                                                                                                                                                                                                                                                      |
|----------------------|----------------------|----------------|------------------------------------------|------------------------------------------|--------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| s                    | as                   | as             | PVD-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-B68F11A3-E26B-4CB2-B6B0-6B5DF5D2DF28 | HCL Provider |    |
| testing123           | xccxz                | test112        | PVD-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-B4EE2110-43B5-4E07-B6C0-3EBAB18E975D | HCL Provider |    |
| sdf                  | sdf                  | sdf            | PVD-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-1D20CFA3-D232-44BA-8D5D-8200534BD0D4 | HCL Provider |    |
| LDAP2 AD Users Login | LDAP2 AD Users Login | LDAP2ADUser... | PVD-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-6E7B5818-B101-40AC-A2A6-869C40CD61DB | HCL Provider |    |

Figure 113 – View Organization

Refer to the table below to understand the fields mentioned in the above figure:

Table 20 – View Organization

| Field              | Description                                                                       |
|--------------------|-----------------------------------------------------------------------------------|
| Name               | Name of the organization (Business units/ divisions in organizations)             |
| Description        | Displays the details and the work of the organization                             |
| Code               | Code of the organization (Business units/ divisions in organizations)             |
| Object ID          | It is a unique ID generated by HCL BigFix CLM for the organization                |
| Provider Object ID | It is a unique ID generated by HCL BigFix CLM for the Provider                    |
| Created By         | Name of the person who has created the organization                               |
| Created On         | The date on which it has been created                                             |
| Action             | Provider user to take actions like Edit and View against the listed organizations |

The Action column comprises of following action:

- **Edit** (  ): To modify the details of an existing organization.

1. In the Manage Organization pane (below), click Edit (  ).

### 3.9.7 Edit Organization

To modify/ edit an organization's information. The provider needs to follow the following steps:



| Name                 | Description          | Code           | Provider Entity Id                       | Object Id                                | Created By   | Action                                                                                                                                                                                                                                                            |
|----------------------|----------------------|----------------|------------------------------------------|------------------------------------------|--------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| s                    | as                   | as             | PVD-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-B68F11A3-E26B-4CB2-B6B0-6B5DF5D2DF28 | HCL Provider |    |
| testing123           | xccxz                | test112        | PVD-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-B4EE2110-43B5-4E07-B6C0-3EBAB18E975D | HCL Provider |    |
| sdf                  | sdf                  | sdf            | PVD-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-1D20CFA3-D232-44BA-8D5D-8200534BD0D4 | HCL Provider |    |
| LDAP2 AD Users Login | LDAP2 AD Users Login | LDAP2ADUser... | PVD-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-6E7B5818-B101-40AC-A2A6-869C40CD61DB | HCL Provider |    |

Figure 114 – Edit organization Details

2. The follo

Organization: s

UPDATE ORGANIZATION DOMAIN

**Basic Information**

Please provide the details to create a new organization.

Name \* s Code \* as

Description \* as Currency \* Indian Rupee (INR)

Preferred Language \* English (US)

**Authentication**

Please select the authentication type for this provider. Supported Types: LDAP, SAML, and Form-Based.

Authentication Type \* Form Based

**LDAP:** Lightweight Directory Access Protocol Authentication involves querying a directory service such as Active Directory (AD) or OpenLDAP, which stores user credentials and other directory information.

Figure 115 – Edit Organization Details

Organization: s

UPDATE ORGANIZATION DOMAIN

**Form Based:** Form-based authentication is a method used by web applications to authenticate users via HTML forms. Here the credentials will be stored in HCL BigFix Cloud Lifecycle Management Db.

**Others**

Please enter the additional information which will be required for request approval, reject, refer back.

Optional Information-1 Optional Information-2

Request Prefix ⓘ SRREQ Reject Applicable For Portal Request

Approval Applicable For Portal Request Referback Applicable For Portal Request

User Cancelled Applicable For Portal Request Grace Period (In Days) ⓘ 0

Delegation Enabled\* ⓘ Both(In Action Menu and Above My Objects grid) Threshold ⓘ 10

**Configuration**

Please choose the option(s) to enable configuration at the organizational level.

DRAFT APPLICABLE SSO ENABLE QUESTIONNAIRE ENABLED ACTION SCHEDULING ENABLED

COPY REQUEST ENABLED IT VERIFICATION ENABLED MULTI-HYPERVISER ENABLED

CANCEL UPDATE

3. Modify the
4. Click **Cancel** to discard all changes.
5. A success message appears.

Figure 116 – Edit Organization Details

Organization: s

Organization has been updated successfully.

Figure 117 – Success Confirmation Message

3.9.8 Delete Organization



1. In the

| Name                 | Description          | Code | Provider Entity Id                       | Object Id                                | Created By   | Action |
|----------------------|----------------------|------|------------------------------------------|------------------------------------------|--------------|--------|
| as                   | as                   | as   | PVD-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-B68F11A3-E26B-4CB2-B6B0-6B5DF5D2DF28 | HCL Provider |        |
| testing123           | xcckz                |      | PVD-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-B68F11A3-E26B-4CB2-B6B0-6B5DF5D2DF28 | HCL Provider |        |
| sdf                  | sdf                  |      | PVD-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-B68F11A3-E26B-4CB2-B6B0-6B5DF5D2DF28 | HCL Provider |        |
| LDAP2 AD Users Login | LDAP2 AD Users Login |      | PVD-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-B68F11A3-E26B-4CB2-B6B0-6B5DF5D2DF28 | HCL Provider |        |
| LDAP AD Users Login  | LDAP AD Users Login  |      | PVD-99466341-F53F-4D0F-9981-EB6F4D9B1E2A | ORG-B68F11A3-E26B-4CB2-B6B0-6B5DF5D2DF28 | HCL Provider |        |

Confirmation

Are you sure you want to delete this record?

CANCEL OK

Figure 118 – View Organization

2. A success

Home > Administration > Organizations

Organization has been deleted successfully.

Figure 119 – Success Message

3.9.9 Manage Domain Organizational Unit (OU)

This module empowers HCL BigFix CLM Provider users with the capability to Manage Domain Organizational Unit. An organizational unit (OU) is like a container within a Microsoft [Active Directory](#) domain which can accommodate Users and Groups. It is the smallest unit to which an administrator can assign [Group Policy](#) settings or account permissions. An Organizational Unit can have multiple OUs within it, but all attributes within the containing OU must be unique. HCL BigFix CLM provides users to Create and View Organizational Units associated with domain.

1. On the side menu bar, click Organization and then click Domain tab. Under the Action column select the option Manage Domain Organizational Unit (OU).

2. The Man

Organization: testing123

UPDATE ORGANIZATION DOMAIN

Add New Domain

| Domain Name | Display Name | DNS IP | Active Directory URL | Actions |
|-------------|--------------|--------|----------------------|---------|
| windowq     | windowq      |        | LDAP://www.demo.com  |         |

Rows per page 10

Configure Groups  
AD Column Mapping  
Manage Domain Organizational Unit(OU)

Figure 120 – Manage Domain Organizational Unit (OU)

Manage Domain Organizational Unit(OU): testing123

Add new organizational unit (OU)

Basic Information

Please enter OU Name and OU Path. This is mapped with organization during domain mapping.

OU Name \*

OU Path \*

Description

CANCEL ADD

| OU Name           | Description | OU Path | Action |
|-------------------|-------------|---------|--------|
| No records found. |             |         |        |

Figure 121 – Manage Domain Organizational Unit (OU)

3. It has following sections,
  - View OU
  - Create OU.

#### 3.9.9.1.1 View OU

The Manage Domain Organizational Unit (OU) screen lists the existing Organizational Units (OU) created by Provider User.

Add new organizational unit (OU)

| OU Name  | Description | OU Path | Action |
|----------|-------------|---------|--------|
| test1234 | decription  | test    |        |

Rows per page 10 1 - 1 of 1 1

Figure 122 – Manage Domain Organizational Unit (OU)

The action column comprises of the following actions:

- **Edit** (): To modify the details of existing OU.
1. From the list of OU, click Edit () corresponding to the one you want to update.
    - **Delete** (): To delete existing OU.

#### 3.9.9.1.2 Edit Organizational Unit (OU)

To modify/ edit an Existing OU, the Provider needs to follow the following steps:



**Manage Domain Organizational Unit(OU): testing123**

Add new organizational unit (OU)

**Basic Information**  
Please enter OU Name and OU Path. This is mapped with organization during domain mapping.

OU Name \*  
test1234

OU Path \*  
test

Description  
description

CANCEL UPDATE

Figure 123 – Edit Domain Organizational Unit (OU)

2. Enter details like **OU Name**, **Description** and **OU Path** to update.
3. Click **Update**. (Click **Cancel** if no update is required).
4. A Success Message is displayed.

**Manage Domain Organizational Unit(OU): testing123**

OU Mapping updated successfully.

Add new organizational unit (OU)

| OU Name  | Description | OU Path | Action |
|----------|-------------|---------|--------|
| test1234 | description | test    |        |

Rows per page 10 1 - 1 of 1

Figure 124 – Confirmation Message Organizational Unit (OU)

### 3.9.9.1.3 Delete Organizational Unit (OU)

1. From the list of **OU**, click Delete ( ) corresponding to the one you want to delete.
2. To delete an existing **OU**, Provider needs to follow the below steps:



Add new organizational unit (OU)

| OU Name  | Description | OU Path | Action |
|----------|-------------|---------|--------|
| test1234 | description | test    |        |

Rows per page 10 1 - 1 of 1

**Confirmation**

Are you sure you want to delete this item?

CANCEL OK

3. Click **Cancel**
4. Click **OK**

Figure 125 – Confirmation Message Organizational Unit (OU)

3.9.9.1.4 Create OU

To Create New OU Mapping,

1. Click on C

Manage Domain Organizational Unit(OU): testing123

Add new organizational unit (OU)

Basic Information

Please enter OU Name and OU Path. This is mapped with organization during domain mapping.

OU Name \*

OU Path \*

Description

CANCEL ADD

Figure 126 – Create Organizational Unit (OU)

Refer to the table below to understand the fields mentioned in the above figure:

Table 21 – Manage Domain OU

| Field        | Description                                                                                                |
|--------------|------------------------------------------------------------------------------------------------------------|
| Organization | name of the organization (Business units/ divisions in organizations)                                      |
| Domain       | Domains provide a way to organize the users of an organization and permit access according to their roles. |
| OU Name      | Name of the Organizational Unit.                                                                           |
| OU Path      | Path of the Organizational Unit.                                                                           |
| Description  | Short description of OU.                                                                                   |

2. Select Organization and Domain.  
3. Enter OU Name, Description and OU Path.

4. Click **Add**.  
5. A Success Message appears.

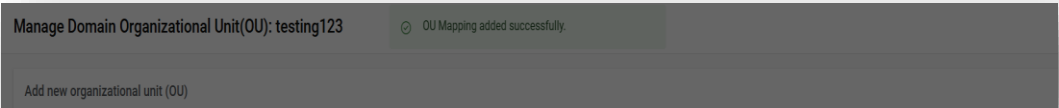


Figure 127 – Create Organizational Unit (OU)

1. On the main menu bar, click **Configuration**→ **Compute**→ **Resource Allocation**.  
2. The Allocate Resource to Organization screen appears as below:

3.9.9.2 Resource Allocate to Organization

This section details the specifics of allocating resources to an organization such as vCenter Cluster, Network, Public cloud subscription and Cisco Intersight.

Figure 128 – Allocate Resource to Organization

Resource allocation to an organization is totally platform dependent.

The reset button is used to reset the selection made to allocate resources.

3. Select Organization and Platform to allocate resources and then click Go.

4. All the av

| Cluster               | Total CPU (GHz) | Total Memory (GB) |
|-----------------------|-----------------|-------------------|
| SB-Management-Cluster | 165.60          | 1022.00           |
| SB-Compute-Cluster    | 443.20          | 4089.72           |

Figure 129 – Allocate Resource to Organization (Cont.)

### 3.9.9.2.1 Add Resource

1. Click Resource Allocation.

To allocate new resource, Provider user needs to follow the below steps:

Already allocated resources remain unavailable for re-allocation to another organization on the same platform.

| Cluster               | Total CPU (GHz) | Total Memory (GB) |
|-----------------------|-----------------|-------------------|
| SB-Management-Cluster | 165.60          | 1022.00           |
| SB-Compute-Cluster    | 443.20          | 4089.72           |

Figure 130 – Allocate Resource to Organization (Cont.)

2. Select the

ResourceSyncing [C](#) SKIP ANYWAY

Note: Allocated resources can not be modified \*

Cluster

| Cluster                                                   | Total CPU (GHz) | Total Memory (GB) |
|-----------------------------------------------------------|-----------------|-------------------|
| <input checked="" type="checkbox"/> SB-Management-Cluster | 165.60          | 1022.00           |
| <input type="checkbox"/> SB-Compute-Cluster               | 443.20          | 4089.72           |

SAVE

Figure 131 – Allocate Resource to Organization (Cont.)

All fields marked with asterisk (\*) are mandatory.

3. Click **Save**.

4. A success message appears.

Platform \* Compute on Demand-vCenter Provisioning Endpoint \* ContentLibraryEndpoint Organization Resource Allocation saved successfully.

MAPPED RESOURCES RESOURCE ALLOCATION

ResourceSyncing [C](#) SKIP ANYWAY

Figure 132 – Success Message

A new resource is allocated to an organization, and it appears in the tabular view.

### 3.9.9.2.2 Delete Allocated Resource

- On the Allocated Resource pane, select the allocated resource that the provider wants to delete, and click Delete
- To delete allocated resources, the provider user needs to follow the following steps:

Home > Configuration > Compute > Resource Allocation

Platform \* Amazon Web Services Provisioning Endpoint \* All GO

MAPPED RESOURCES RESOURCE ALLOCATION

ResourceSyncing [C](#) SKIP ANYWAY

| Resource Type         | Platform            | Provisioning Endpoint | Action |
|-----------------------|---------------------|-----------------------|--------|
| Provisioning Endpoint | Amazon Web Services | OldAWSCreds           |        |
| Provisioning Endpoint | Amazon Web Services | AWSBillingAccount     |        |

Figure 133 – Delete Allocated Resource from Organization

If a resource is deleted from an organization, then it is available for allocation to another organization.

2. Click **OK**, in response to the

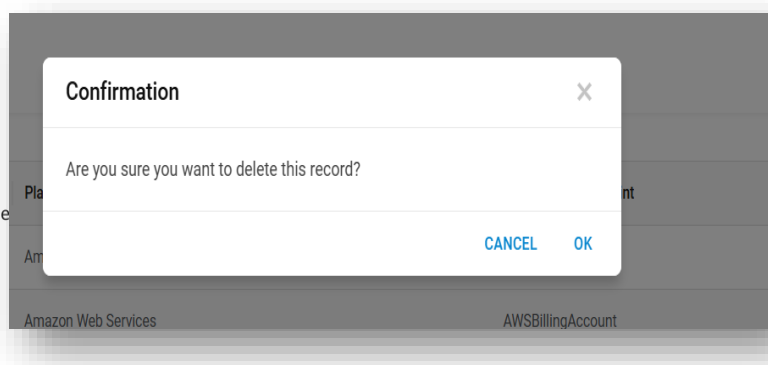


Figure 134 – Delete Allocated Resource from Organization (Cont.)

### 3.9.9.3 Organization Network Assignment

3. A success message appears.

This section details out how a Provider configures a network or interface for provisioning a VM on a respective platform, that is used for assign to VM while provisioning in an organization.

The following screenshots appear with reference to vCenter.

The IP range can be assigned to a provider for a specific network and the provider can allocate IPs to organizations.

1. On the main menu bar, click **Organization** and then click **Organization Network Assignment**.
2. The Organization Network Assignment page appears as below:

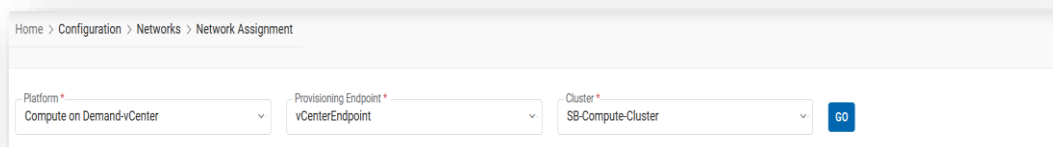


Figure 135 – Organization Network Assignment

3. Refer to

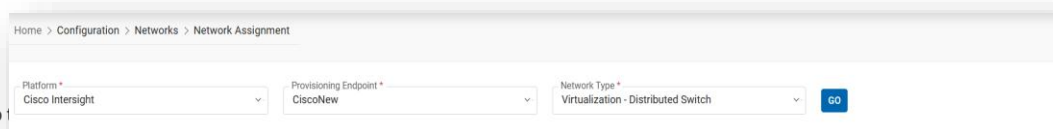


Figure 136 – Organization Network Assignment (Cont.)

Table 22 – Organization Network Assignment

| Field                 | Description                                                           |
|-----------------------|-----------------------------------------------------------------------|
| Organization          | name of the organization (Business units/ divisions in organizations) |
| Platform              | The name of the cloud service providers from the drop down            |
| Provisioning Endpoint | The cloud endpoints that have been created in HCL BigFix CLM          |
| Cluster               | Select the cluster accordingly                                        |

| Field        | Description                                                                                                                |
|--------------|----------------------------------------------------------------------------------------------------------------------------|
| Network Type | It is the Network type applicable for Cisco Intersight, possible values could be Distributed Switch or Distributed Network |

4. Select Organization and Platform.

5. Select Provisioning Endpoint.

6. Select **Cluster**.

7. Click **Go**.

8. All the available

Home > Configuration > Networks > Network Assignment

Platform \*  
Compute on Demand-vCenter

Provisioning Endpoint \*  
vCenterEndpoint

Cluster \*  
SB-Compute-Cluster

GO

| Network Name           | Entity ID                                | Available IP | Assign IP | Allocated IP | Action                                                                                                                                                                  |
|------------------------|------------------------------------------|--------------|-----------|--------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| sbc-vpg210-commycl     | NTW-1CEBFD77-8E61-415B-92B8-C0E68EFE6406 | 14           | 6         | 0            |   |
| uvc-nsg230-myc-web-dmz | NTW-44FD56F6-730C-4FF6-B9ED-83053B2930ED | 10           | 0         | 0            |                                                                                      |
| sbc-vpg301-mgtedge     | NTW-4BDFEB7A-0667-49D6-9C00-30AD0B14B72C | 10           | 0         | 0            |                                                                                      |

Rows per page 10 1 - 3 of 3

SUBMIT

Figure 137 – Organization Network Assignment (Cont.)

All fields marked with asterisk (\*) are mandatory.

9. Click **Save**.

Platform \*  
Compute on Demand-vCenter

Provisioning Endpoint \*  
vCenterEndpoint

Cluster \*  
SB-Compute-Cluster

GO

| Network Name           | Entity ID                                | Available IP | Assign IP | Allocated IP | Action                                                                                                                                                                      |
|------------------------|------------------------------------------|--------------|-----------|--------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| sbc-vpg210-commycl     | NTW-1CEBFD77-8E61-415B-92B8-C0E68EFE6406 | 14           | 6         | 0            |   |
| uvc-nsg230-myc-web-dmz | NTW-44FD56F6-730C-4FF6-B9ED-83053B2930ED | 10           | 0         | 0            |                                                                                        |
| sbc-vpg301-mgtedge     | NTW-4BDFEB7A-0667-49D6-9C00-30AD0B14B72C | 10           | 0         | 0            |                                                                                        |

Rows per page 10 1 - 3 of 3

SUBMIT

10. Refer to

Figure 138 – Organization Network Assignment (Cont.)

| Field        | Description                |
|--------------|----------------------------|
| Network name | Name of network            |
| EntityId     | EntityId of Network/Subnet |

| Field        | Description                                                                  |
|--------------|------------------------------------------------------------------------------|
| Available Ip | No of available Ips assigned to provider through provider network enablement |
| Assigned Ip  | No Ips assigned to selected organization                                     |
| Allocate Ip  | Allocated Ips to selected organization                                       |

11. A success message appears.

Figure 139 – Organization Network Assignment Confirmation (Cont.)

To delete the assigned IP(s), follow these steps:



1. Click on Delete Assigned IP icon ( ) under the Action column.
2. A confirm

3. Click **OK**. The following success message box appears:

Figure 140 – Organization Network Assignment (Cont.)

4. To unassign the assigned IP(s), click on Unassigned IP icon ( ) under the Action column.
5. The list of Assigned IPs is displayed as shown in the following image:

Figure 141 – Organization Network Assignment (Cont.)



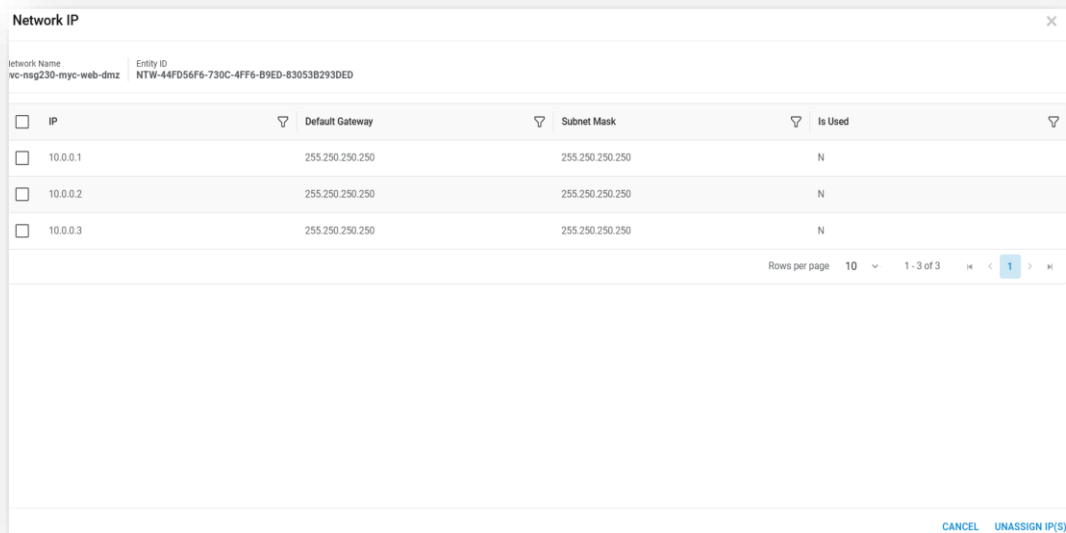
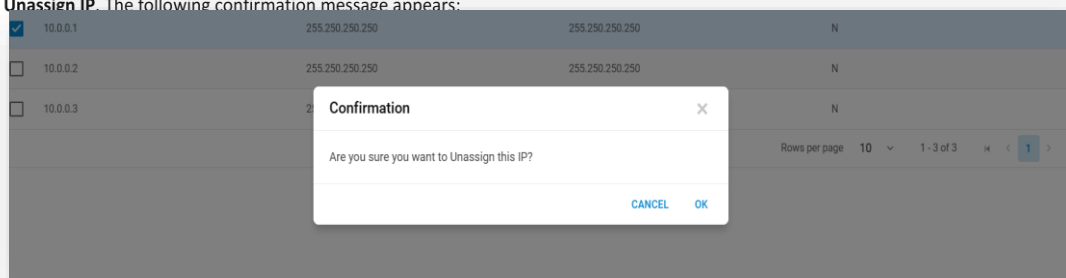


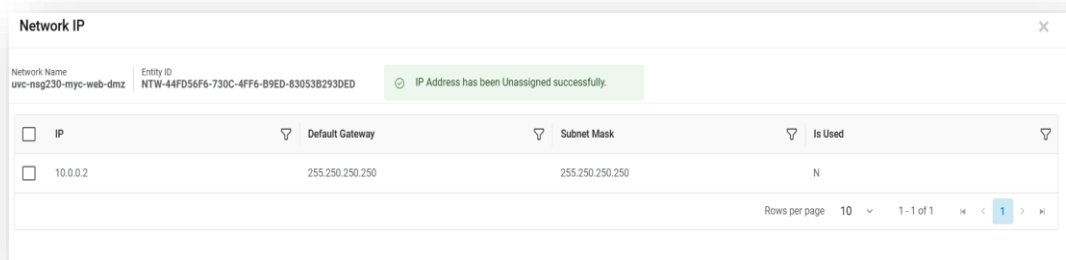
Figure 142 – Organization Network Assignment (Cont.)

6. Select the Ipaddress(es) to be unassigned.
7. Click on **Unassign IP**. The following confirmation message appears:



8. Click **Ok**. A success message appears:

Figure 143 – Organization Network Assignment (Cont.)



1. On the Network pane, select IP addresses that provider wants to delete, and click Delete ( ).

Figure 144 – Organization Network Assignment (Cont.)

### 3.9.9.3.1 Delete Assign Network

To un-assign IP addresses, provider user needs to follow the following steps:



| Network Name           | Entity ID                                | Available IP | Assign IP | Allocated IP | Action |
|------------------------|------------------------------------------|--------------|-----------|--------------|--------|
| sbv-vpg210-commycl     | NTW-1CEBFD77-8E61-415B-92B8-CDE6BEF6406  | 20           | 0         | 0            |        |
| uvc-nsg230-myc-web-dmz | NTW-44FD56F6-730C-4FF6-89ED-83053B293DED | 9            | 1         | 0            |        |
| sbv-vpg301-mgtedge     | NTW-680FEB7A-0667-49D6-9C00-3DAD0B14B72C | 10           | 0         | 0            |        |

Rows per page 10 1 - 3 of 3 < 1 >

Figure 145 – Delete Assigned Network from Organization

2. The follow

Home > Configuration > Networks > Network Assignment

Assigned IP(s) has been deleted successfully.

Platform \*  
Compute on Demand-vCenter

Provisioning Endpoint \*  
vCenterEndpoint

Cluster \*  
SB-Compute-Cluster

GO

Figure 146 – Confirmation Message

3. On the Network pane, select IP addresses that provider wants to delete, and click Unassigned IP. All the available IPs get listed down in a tabular view.

| IP                                | Default Gateway | Subnet Mask     | Is Used |
|-----------------------------------|-----------------|-----------------|---------|
| <input type="checkbox"/> 10.0.0.1 | 255.250.250.250 | 255.250.250.250 | N       |
| <input type="checkbox"/> 10.0.0.2 | 255.250.250.250 | 255.250.250.250 | N       |
| <input type="checkbox"/> 10.0.0.3 | 255.250.250.250 | 255.250.250.250 | N       |

Rows per page 10 1 - 3 of 3 < 1 >

CANCEL UNASSIGN IP(S)

4. Select IP
5. Click Unassigned IP
6. A success message box appears.

Figure 147 – Delete Assign Network from Organization

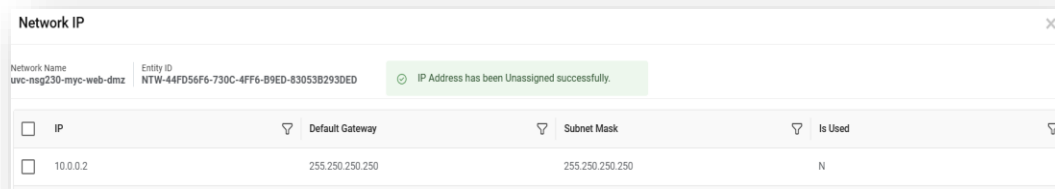


Figure 148 – Delete Network Confirmation Message

### 3.9.10 Workflow Management

This section explains the steps to create or manage custom images of public cloud (AWS and ARM) and Cisco Intersight to deploy IaaS and PaaS resources. Custom templates can be AWS CloudFormation Templates or ARM Templates or marketplace images that are created by technical leads/architects. For Private Cloud, providers can create a custom Template to provision various objects.

#### 3.9.10.1.1 Manage Template

1. On the main menu bar, click Workflow Management and then go to Manage Cloud Templates.
2. A screen appears where the provider sees the following panes.
  - Manage Template
  - Create Template

#### 3.9.10.1.2 Add Template

To create a custom image template, Provider needs ARM template or cloud formation template or AWS/Azure marketplace images.

1. On the Manage Cloud Template screen, click **Create Template**.
2. The **Add Template** pane appears as below.

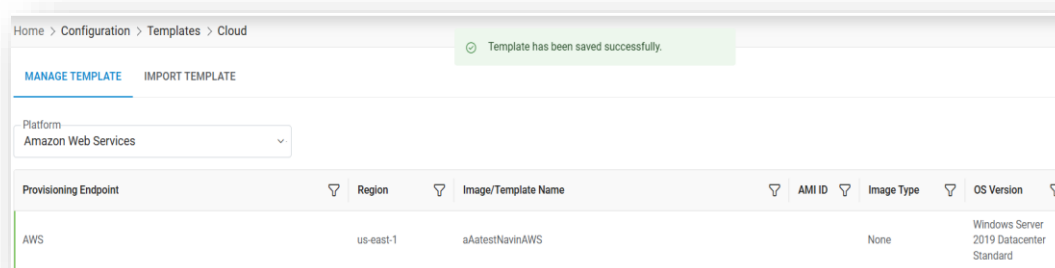
Figure 149 – Add Cloud Templates

Table 23 – Cloud Templates

| Field                 | Description                                                  |
|-----------------------|--------------------------------------------------------------|
| Provisioning Endpoint | The Cloud Endpoints that have been created in HCL BigFix CLM |
| Platform              | Name of the cloud service providers                          |
| OS Name               | Name of OS (Operating system)                                |
| OS Version            | Version of OS (Operating system)                             |
| Template Type         | Type of the template (Provisioning or other)                 |
| Template Name         | Name of the template                                         |
| Content Library Name  | Name of the Content Library                                  |
| Password              | Local admin account/ machine password is required            |
| Description           | Describe the templates or images                             |
| Username              | Local admin account/ machine username is required            |

Fields in the screen vary as per the selected platform.

4. Select the **Platform**.
5. Select the Provisioning Endpoint.
6. Select **OS name** and **OS Version**, if applicable.
7. Select the **Region**.
8. Enter Image/ Template **URL** and **Image**.
9. Enter Description.
10. Click **Add**.
11. A Success Message appears.



12. Click Edit ( ) against the template that needs to be edited.

All fields marked with asterisk (\*) are mandatory.

### 3.9.10.1.3 Edit Image Template



| Provisioning Endpoint | Region         | Template Name           | Is Imported | OS Version                              | Actions |
|-----------------------|----------------|-------------------------|-------------|-----------------------------------------|---------|
| vCenterEndpoint       | Region         | ~l@#%&*()_+@!<>?/\: ~=' | NO          |                                         |         |
| vCenterEndpoint       | Region         | clientvm                | NO          | Windows Server 2019 Datacenter Standard |         |
| vCenterEndpoint       | Region         | Delete Testing Template | NO          | Windows Server 2016 Datacenter Edition  |         |
| vCenterEndpoint       | Region         | ITSMTestcatalog         | NO          |                                         |         |
| SCALTest125           | RegionP8I21660 | mcd-img-co83            | YES         | CentOS 7.3                              |         |
| SCALTest125           | RegionP8I21660 | mcd-img-w-2k19          | YES         | Windows Server 2016 Essentials Edition  |         |

Figure 151 – Manage Cloud Templates

13. Modify the

**Update Template**

**Basic Information**  
Please provide basic details to define Public and Private cloud templates. These will be used at the time of catalog creation.

Platform \*  
Compute on Demand-vCenter

Provisioning Endpoint \*  
vCenterEndpoint

Template Type \*  
Content Library Template

Template Name\* ⓘ  
test123

Content Library Name\*  
test123

OS Profile\*  
test123

OS Name ⓘ  
Windows

OS Version ⓘ  
-Select-

User Name\* ⓘ  
testing

Password \* ⓘ  
a(azurekeyvault)

Description  
description

CANCEL UPDATE

14. Refer to the table below to understand the fields mentioned in the above figure:

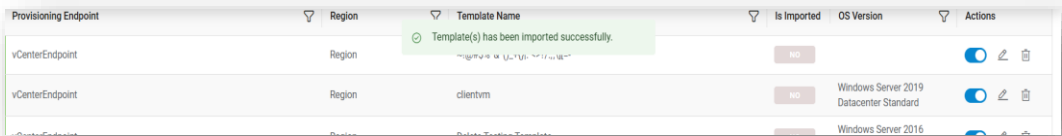
Figure 152 – Edit Cloud Template

Table 24 – Edit Cloud Template

| Field                 | Description                                                  |
|-----------------------|--------------------------------------------------------------|
| Provisioning Endpoint | The Cloud Endpoints that have been created in HCL BigFix CLM |
| Platform              | Name of the cloud service providers                          |
| OS Name               | Name of OS (Operating system)                                |
| OS Version            | Version of OS (Operating system)                             |
| Template Type         | Type of the template (Provisioning or other)                 |
| Template Name         | Name of the template                                         |
| Content Library Name  | Name of the Content Library                                  |
| Password              | Local admin account/ machine password is required            |
| Description           | Describe the templates or images                             |
| Username              | Local admin account/ machine username is required            |

- All fields marked with asterisk (\*) are mandatory.

- Fields in the screen vary as per the selected platform.



- 15. When prompted to confirm, click OK.
- 16. A success message appears.

Figure 153 – Edit Cloud Template (Cont.)

3.9.10.1.4 Delete Cloud Templates

To delete cloud templates, Provider needs to follow the below steps:



- 1. On the Edit Cloud Template screen,

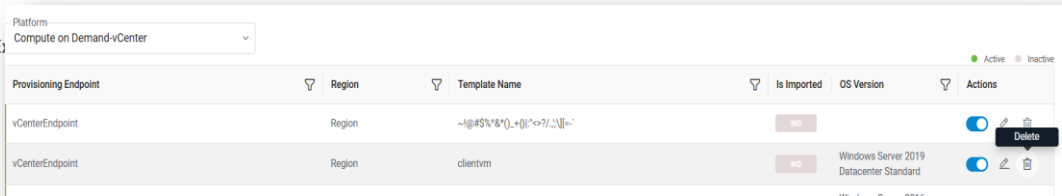
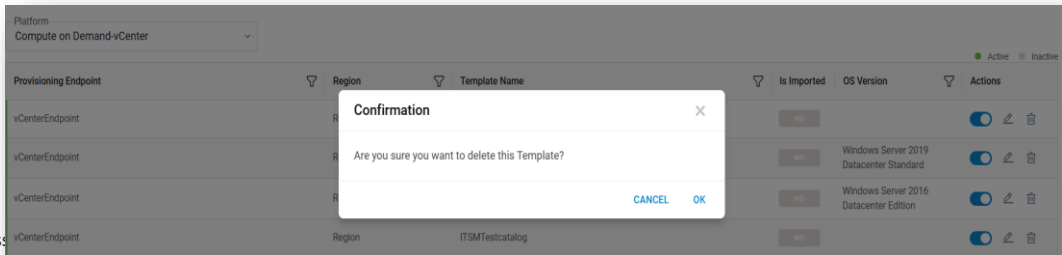


Figure 154 – Delete Cloud Template

Deletion of cloud template that is mapped to a catalog is not possible at Provider’s level.

- 2. When prompted to confirm, click OK.



- 3. A success message appears.

Figure 155 – Delete Cloud Template (Cont.)

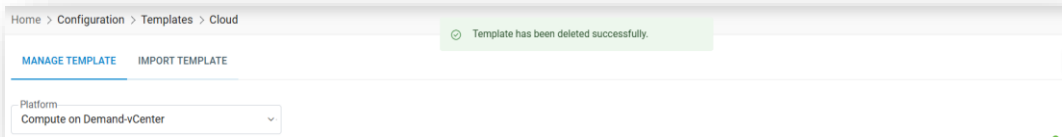


Figure 156 – Delete Cloud Template (Cont.)

3.9.10.1.5 Change Status of Template



- 1. Click Change Status
- 2. A popup



Figure 157 – Change Status of Template (Cont.)

- 3. Click **OK** to save the changes.
  - 4. Click **Cancel** to discard the changes.
- 3.9.10.2 success message box appears if the user selects OK.

This section explains the steps to manage templates of private cloud (VMware and SCVMM) by following the following steps:

- 1. On the main menu bar, click **Workflow Management** and then click **Manage Template**.
- 2. The following options will appear:
  - Import Templates
  - Edit Templates

3.9.10.2.1 Import Templates

- 1. On the Template screen, click Import Templates.
- 2. To fetch templates from the Data Centre to HCL BigFix CLM, the provider needs to follow the following steps:

- 3. Select Platform

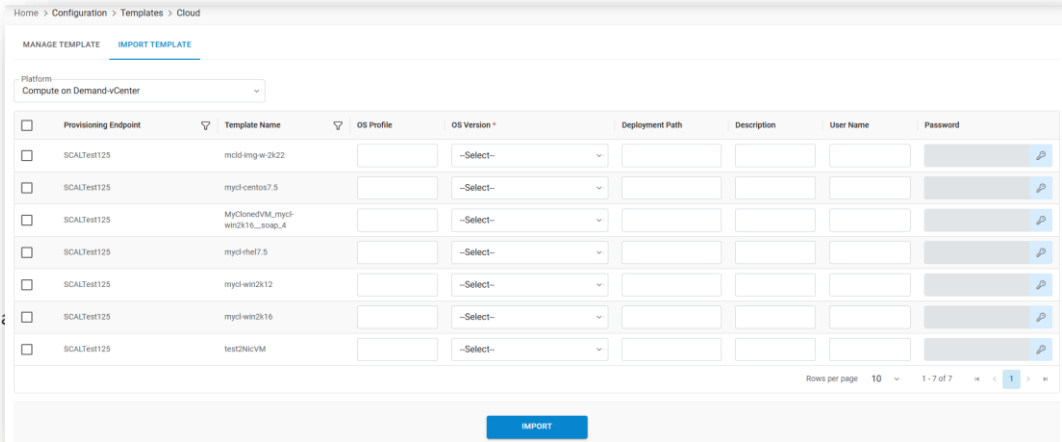


Figure 158 – Import Templates

4. The available credentials

|                          | Provisioning Endpoint | Template Name                  | OS Profile | OS Version * | Deployment Path | Description | User Name | Password |
|--------------------------|-----------------------|--------------------------------|------------|--------------|-----------------|-------------|-----------|----------|
| <input type="checkbox"/> | SCALTest125           | mcl-dimg-w-2k22                |            | --Select--   |                 |             |           |          |
| <input type="checkbox"/> | SCALTest125           | mycl-centos7.5                 |            | --Select--   |                 |             |           |          |
| <input type="checkbox"/> | SCALTest125           | MyClonedVM_mycl-win2k16_soap_4 |            | --Select--   |                 |             |           |          |
| <input type="checkbox"/> | SCALTest125           | mycl-rhel7.5                   |            | --Select--   |                 |             |           |          |

Figure 159 – Import Template (Cont.)

Single Template or multiple Templates are fetched, which is based on Provider's discretion.

5. Click **Import** on the template screen.  
6. A success message appears

|                          | Provisioning Endpoint | Template Name  | OS Profile | OS Version * | Deployment Path | Description | User Name | Password |
|--------------------------|-----------------------|----------------|------------|--------------|-----------------|-------------|-----------|----------|
| <input type="checkbox"/> | SCALTest125           | mycl-centos7.5 |            | --Select--   |                 |             |           |          |

Figure 160 – Import Template (Cont.)

### 3.9.10.3 Approval Groups

Approval group is a set of users that a Provider configures to act on tasks related to workflow approval at the approval level.

On the main menu bar, click Administration→ Approvals→Approval Group.

The following options are available:

- Add Group
- Group Details

1. Select Organization.
2. Enter the Group Name and Group Description.
3. The associated static groups appear in the Static Groups form.

### 3.9.10.3.1 Create Group

To add approval groups in an organization, Provider needs to follow the below steps:

**Add Group**

**Basic Information**  
Please provide the basic information for creation of approval group.

Organization\*  
HCLOrganization

Group Name\*

Group Description

**Approval Groups**  
Please select the appropriate approval group, There are three types of available approval groups which can be selected basis the requirement.

Approval Groups\*  
--Select--

CANCEL ADD

Figure 161 – Add Approval Group

Table 25 – Approval Group

4. Refer to the table below to understand the fields mentioned in the above figure:

| Field             | Description                                                                                                                                                                                                                                                                                                                           |
|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Organization      | Name of the organization (Business units/ divisions in organizations)                                                                                                                                                                                                                                                                 |
| Group Name        | Name the group                                                                                                                                                                                                                                                                                                                        |
| Group Description | Details regarding the group (audience type, usage, exceptions and many more)                                                                                                                                                                                                                                                          |
| Approval Groups   | <p>HCL BigFix CLM has default System RBAC groups. user mapped with RBAC group gets automatically mapped with Approval group</p> <ul style="list-style-type: none"> <li>AD users are mapped with Approval group</li> <li>In case of dynamic decision (based on request), this type of group gets mapped with approval group</li> </ul> |

5. Select a **Static Group** from where the provider should be able to add the approver.

6. Enter **User** and click **Search** to scale down the search for a particular user.

7. Enter the **Dynamic Group** that allows Provider to search the users based on predefined DB script.

8. Click **Add**.

**Add Group**

**Basic Information**  
Please provide the basic information for creation of approval group.

Organization\*  
HCLOrganization

Group Name\*  
test1

Group Description  
test123

**Approval Groups**  
Please select the appropriate approval group. There are three types of available approval groups which can be selected basis the requirement.

Approval Groups\*  
Dynamic Groups

Dynamic Groups\* ⓘ  
Dynamic Group RBAC

CANCEL ADD

Figure 162 – Add Approval Group (Cont.)

It is necessary to add at least a static group or User to the approval Group. All fields marked with asterisk (\*) are mandatory.

9. A success message box appears.

Home > Administration > Approvals > Approval Groups

Approval Group has been inserted successfully.

+ GROUP

| Group Name | Group Description | Actions |
|------------|-------------------|---------|
| test1      | test123           |         |

10. The approval group is created and appears in the list of approval groups.

Figure 163 – Add Approval Group (Cont.)

### 3.9.10.3.2 Group Details

This section lists out all the Approval groups that have been created by Provider User.

Home > Administration > Approvals > Approval Groups

| Group Name        | Group Description | Actions |
|-------------------|-------------------|---------|
| test1             | test123           |         |
| IT Admin          | IT Admin          |         |
| Business Approver | Business Approver |         |

Figure 164 – View Approval Group

It also comprises of the following actions:

- **Edit** (): To modify the details of existing groups.
- **Delete** (): To delete the groups.

3.9.10.3.3 Edit Approval Group

To Edit/ Modify the approval group of an organization, Provider user needs to follow the below steps:



- 1. On the A
- 2. Modify t

Edit Group

Basic Information

Please provide the basic information for creation of approval group.

Organization\*

HCLOrganization

Group Name\*

test1

Group Description

test123

Approval Groups

Please select the appropriate approval group. There are three types of available approval groups which can be selected basis the requirement.

Approval Groups \*

Dynamic Groups

Dynamic Groups \* 1

Dynamic Group RBAC

CANCEL

UPDATE

Figure 165 – Edit Approval Group (Cont.)

All fields marked with asterisk (\*) are mandatory.

- 3. A success message appears.

Home > Administration > Approvals > Approval Groups

Approval Group has been updated successfully.

| Group Name | Group Description | Actions |
|------------|-------------------|---------|
| test1      | test123           |         |

Figure 166 – Edit Approval Group (Cont.)

- 1. On the Existing Group pane, click Delete ( ).

3.9.10.3.4 Delete Approval Group

To delete an approval group, Provider needs to follow the below steps:



Home > Administration > Approvals > Approval Groups

| Group Name | Group Description | Actions |
|------------|-------------------|---------|
| test1      | test123           |         |
| IT Admin   | IT Admin          |         |

Figure 167 – Delete Approval Group

Deletion of an Approval Group that is mapped to a template is not possible at the Provider's level.

2. When pr

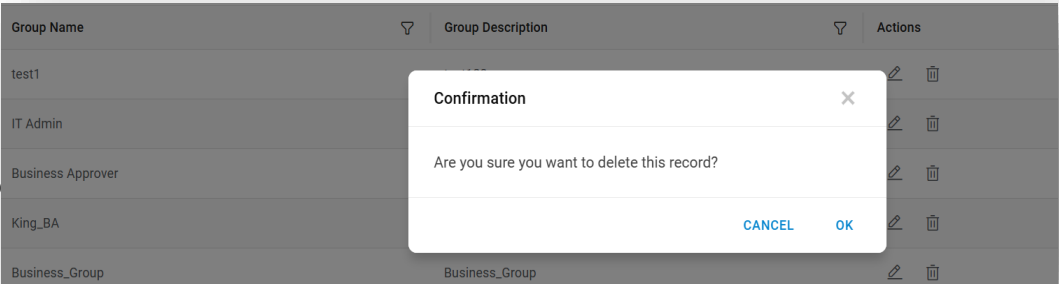


Figure 168 – Delete Approval Group (Cont.)

3. A succe

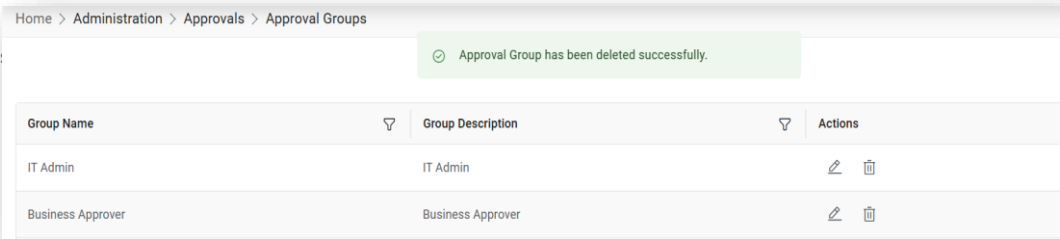


Figure 169 – Delete Approval Group (Cont.)

O

3.9.10.4 Approval Workflow

This module of HCL BigFix CLM defines the policies that are applied on approval workflows, stages of each workflow, and approver of each stage like Business, Finance, IT, and mail template.

Provider user creates an approval workflow template for each activity like placing a request for IaaS/PaaS services, decommissioning, lease extension, customization of resources and others, those are further used in process workflow

- 1. On the main menu bar, click Workflow Management and then click Approval Workflow Management.
- 2. This section has the following options:

- Add Template
- View Template

- 1. On the Manage Approval Workflow screen, click Add Template.

3.9.10.4.1 Add Template

To create workflow template for an organization, Provider user needs to follow the below steps:

Figure 170 – Manage Template

2. The **Approval Template** pane is further divided into the following sub-sections:
  - **Select Organization.**
3. **Manage Approval Workflow Template:** It is used to create the template.
  - Enter Template Name.

4. **Approval Stage:** It defines the approval stage for created template.

Figure 171 – Manage Approval Workflow Template

- Enter Stage Name.
- Select Approval Type and Approval Group.
- Select Approval method.

Approval again is categorized into three categories:

- **ANY**, where any member of an approval group approves the selected stage.
- **ALL**, where all members of an approval group need to approve the selected stage.
- **MAJORITY**, where more than 50% of members of approval group need to approve the selected stage.

5. **Mail Template:** It specifies the details for sending mail related to the created template.

Figure 172 – Approval Stages

- Select a **Mail Template** for each event.
- Click View Email Template... link to view the Mail Template.
- Select the users from the dropdown (**CC to requester**) to add in CC.
- Select to whom a user wants to send a mail (**CC group**) whenever a particular event occurs.
- To add stage to a template, click **Add Stage** button.

The provider adds multiple stages to a template by using the Add Stage button. All fields marked with asterisk (\*) are mandatory.

| Event            | Mail Template | View                                | CC To Requester          | CC Group |
|------------------|---------------|-------------------------------------|--------------------------|----------|
| Submit           | Select        | <a href="#">VIEW EMAIL TEMPLATE</a> |                          | Select   |
| Pending Approval | Select        | <a href="#">VIEW EMAIL TEMPLATE</a> | <input type="checkbox"/> | Select   |
| Approved         | Select        | <a href="#">VIEW EMAIL TEMPLATE</a> |                          | Select   |
| ReferBack        | Select        | <a href="#">VIEW EMAIL TEMPLATE</a> | <input type="checkbox"/> | Select   |
| Rejected         | Select        | <a href="#">VIEW EMAIL TEMPLATE</a> | <input type="checkbox"/> | Select   |
| User Cancelled   | Select        | <a href="#">VIEW EMAIL TEMPLATE</a> | <input type="checkbox"/> | Select   |

Figure 173 – Mail Template

6. Click **Add**.
7. A success message box appears.

Home > Configuration > Templates > Approval Workflow

Template has been created successfully.

All dates are in mm/dd/yyyy format

+ TEMPLATE

Active Inactive

| Template         | Last Updated On | Actions                                                                              |
|------------------|-----------------|--------------------------------------------------------------------------------------|
| test23(Versio 1) | 06/22/2025      | <a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Add</a> <a href="#">Delete</a> |
| 2(Versio 1)      | 05/13/2025      | <a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Add</a> <a href="#">Delete</a> |

8. The new

Figure 174 – Success Message

#### 3.9.10.4.2 View Template

This section lists out all the workflow templates that have been created by Provider user.

All dates are in mm/dd/yyyy format

Active Inactive

| Template                                            | Last Updated On | Actions                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-----------------------------------------------------|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| test23\Version 1)                                   | 06/22/2025      |      |
| 2\Version 1)                                        | 05/13/2025      |      |
| @\Version 1)                                        | 05/13/2025      |      |
| Firewall All Approval Except Destination\Version 1) | 04/30/2025      |      |
| Firewall All Approval Except Source\Version 1)      | 04/30/2025      |      |

Figure 175 – View Template

It also comprises of the following actions:

- **Change Status** (  ): Change the status of existing template
- **Edit** (  ): Modify the details of existing template
- **Delete** (  ): Delete the template
- **Copy Template** (  ): Copy the template
- **New Version** (  ): New Version of existing template

#### 3.9.10.4.3 Edit Template

To edit/ modify workflow template, Provider user needs to follow the steps below:

1. On the Manage Approval Workflow screen, click View Template.
2. Click Edit (  ) against template to be edited. The pre-populated details are displayed in **Add Template** tab.
3. Modify the details as desired and click **Update**. Click **Cancel** to discard all changes.

UpdateTemplate

**Basic Information:** Please provide details to create the template.

Organization: HCLOrganization

Template Name\*: test23

**Organization:** Non-editable field which pre-populates the organization name under which the template needs to be created.

**Template Name:** Mandatory field to input the name of the template.

**Stages**

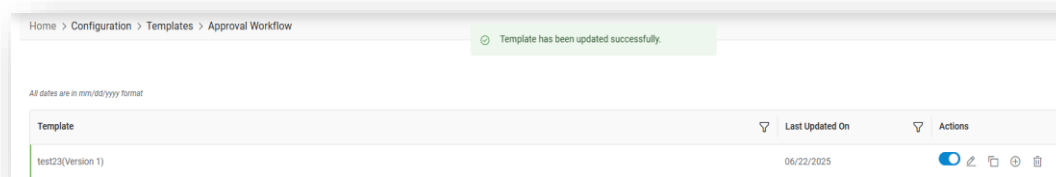
| #1 | Stage Name * | Approval Type * | Approval Groups * | Approval Method                                                                               |
|----|--------------|-----------------|-------------------|-----------------------------------------------------------------------------------------------|
|    | tyuu         | FINANCE         | BA                | <input checked="" type="radio"/> Any <input type="radio"/> All <input type="radio"/> Majority |

| Event            | Mail Template                 | View                                | CC To Requester          | CC Group |
|------------------|-------------------------------|-------------------------------------|--------------------------|----------|
| Submit           | Approval_HCL Tech-New Request | <a href="#">VIEW EMAIL TEMPLATE</a> | <input type="checkbox"/> | Select   |
| Pending Approval | Select                        | <a href="#">VIEW EMAIL TEMPLATE</a> | <input type="checkbox"/> | Select   |
| Approved         | Select                        | <a href="#">VIEW EMAIL TEMPLATE</a> | <input type="checkbox"/> | Select   |
| ReferBack        | Select                        | <a href="#">VIEW EMAIL TEMPLATE</a> | <input type="checkbox"/> | Select   |

CANCEL SUBMIT

Figure 176 – Edit Manage Template (Cont.)

All fields marked with asterisk (\*) are mandatory.



4. A success message box appears.

Figure 177 – Confirmation Message

#### 3.9.10.4.4 Delete Template

To delete a template, Provider user needs to follow the below steps:



1. On the V

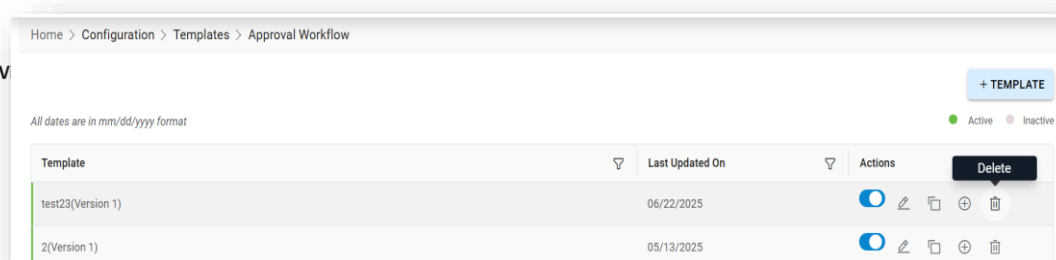
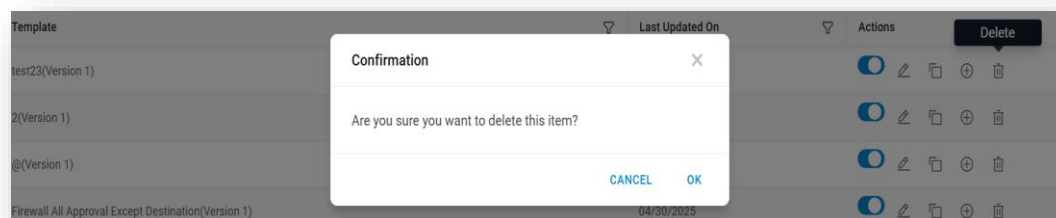


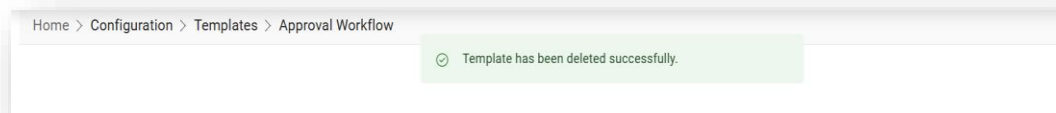
Figure 178 – Approval Workflow Delete Template

2. When prompted to confirm, click **OK**.



3. A success message box appears.

Figure 179 – Delete Template (Cont.)



1. On the main menu bar, click Workflow Management and then click Manage Approval Rules Configuration.

Figure 180 – Delete Template (Cont.)

#### 3.9.10.5 Rules Configuration

Provider users can configure rules for Dynamic and Workflow approvals. In case we have multiple approvals in place and based on certain scenarios, Provider user can create rules and apply them using this template.

- View Rule
- Add Rule

2. This section

| Rule Name                      | Rule Description                                                      | Actions |
|--------------------------------|-----------------------------------------------------------------------|---------|
| Firewall Dynamic Approval Rule | Firewall Dynamic Approval Rule                                        |         |
| DynamicApprover                | Approval on the basis of AD group and In... <a href="#">Show More</a> |         |
| Test                           | sdsd                                                                  |         |
| DynamicApprovRule              | DynamicApprovRule                                                     |         |

Figure 181 – Rules Configuration

In HCL BigFix CLM, Provider User can create Dynamic as well as Static Approval through Approval Workflow screens.

### 3.9.10.5.1 Add Rule

Provider User can create Rules to manage the Approval Workflow cycle in HCL BigFix CLM.

**Add Rule**

**Basic Information**

Please provide the basic information to create a new approval rule.

Organization\*  
HCLOrganization

Name\*

Description\*

1. Select Organization.
2. Enter Rule Name, Rule Description.
3. Click **Add**.

Figure 182 – Add Rule

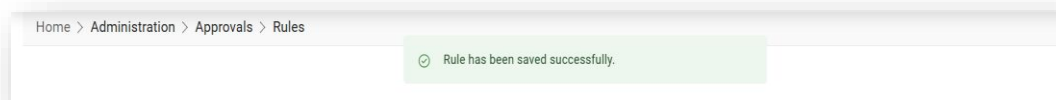


Figure 183 – Add Rule (Cont.)

### 3.9.10.5.2 View Rule

Provider User can View the Rule details in this screen.

| Rule Name                      | Rule Description                                                      | Actions                                                                                                                                                                                                                                                     |
|--------------------------------|-----------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| test12                         | test                                                                  |    |
| Firewall Dynamic Approval Rule | Firewall Dynamic Approval Rule                                        |    |
| DynamicApprover                | Approval on the basis of AD group and In... <a href="#">Show More</a> |    |
| Test                           | sdsd                                                                  |    |
| DynamicApprovRule              | DynamicApprovRule                                                     |    |
| dummy1                         | dummy1                                                                |    |

Rows per page 10 1 - 6 of 6

Figure 184 – Rule Detail

Provider User can Manage the configured Rules through following actions.

- **Edit** (  ): Edit/ modify existing rule details in an organization.
- **Delete** (  ): Delete existing rule details in an organization.
- **Filter Rule** (  ): Configure existing rule details in an organization.

### 3.9.10.5.3 Edit Rule

Through Edit Action (  ), Provider User can edit/ modify the existing rules.



1. Click Edit Action (  ).
2. The provider user will be redirected to **Add Rule** screen as shown in below figure.

Update Rule

Basic Information

Please provide the basic information to create a new approval rule.

Organization\*

HCLOrganization

Name\*

test12

Description\*

test

3. Make changes in the **Rule Description**.
4. Click **Update**.
5. A Success Message appears as below:

Figure 185 – Edit Rule Detail

Home > Administration > Approvals > Rules

 Rule has been updated successfully.

Figure 186 – Edit Rule Detail (Cont.)

3.9.10.5.4 Delete Rule



- 1. To delete
- 2. A Confirm

| Rule Name                      | Rule Description  | Actions |
|--------------------------------|-------------------|---------|
| test12                         |                   |         |
| Firewall Dynamic Approval Rule |                   |         |
| DynamicApprover                |                   |         |
| Test                           |                   |         |
| DynamicApprovRule              | DynamicApprovRule |         |

Confirmation

Are you sure you want to delete this item?

CANCEL OK

Figure 187 – Delete Rule Detail (Cont.)

- 3. Click OK

Home > Administration > Approvals > Rules

Rule has been deleted successfully.

Figure 188 – Delete Rule Detail (Cont.)

3.9.10.5.5 Filter Rule

- 1. To add any rule condition within a rule, Provider user needs to click Filter Action ( ) against a specific rule that are listed.



- 2. Enter Key
- 3. Select Op
- 4. Click Sub

Filter Rule: Firewall Dynamic Approval Rule

IF Condition

#1

Key Name \*  
hdnApprovalTempla...

Operator \*  
EQUAL

Value \*  
3

Approval Template  
Firewall All Appr...

#2

Clause \*  
ELSE

Key Name \*  
hdnApprovalTempla...

Operator \*  
EQUAL

Value \*  
3

Approval Template  
Firewall All Appr...

#3

Clause \*  
ELSE

Key Name \*  
hdnApprovalTempla...

Operator \*  
EQUAL

Value \*  
3

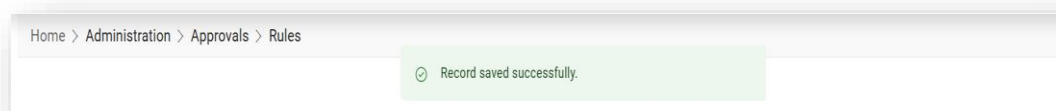
Approval Template  
Firewall All Appr...

Note: Key must be present in UI, Else should be the last rule condition.

CANCEL

SUBMIT

Figure 189 – Filter Rule Configuration



5. A Success Mes

Figure 190 – Filter Rule Configuration

### 3.9.10.6 Email Template

This section explains how provider user adds Email Template for sending notifications on different events triggered at the time of the request. By default, when a new organization is created, default Email Templates are created that gets modified by a user at any point of time.

- Add Email Template

- Email Template

1. Select **Email** under **Template** in Configuration. It shows the following options:

#### 3.9.10.6.1 Add Email Template

To add email template, Provider user needs to follow the below steps:

Figure 191 – Add Template

Figure 192 – Add Template

Refer to the table below to understand the fields mentioned in the above figure:

Table 26 – Add Template

| Field           | Description                                                           |
|-----------------|-----------------------------------------------------------------------|
| Template Name   | Name the email template                                               |
| Description     | Describe the email template and its usage                             |
| Sender Email ID | Mail id that triggers the email template                              |
| Organization    | Name of the organization (Business units/ divisions in organizations) |
| Event Type      | Type of event that will trigger the mail                              |

1. Enter Template Name & Description.
2. Enter Sender Email ID.
3. Select **Event**. The event is Pending Approval, Submit, Rejected etc.
4. All the keywords that are used in the body are listed on the left side. User selects the Subject and adds **Additional Text** in body. Text Body gets formatted.
5. User needs to add **Signature**.
6. Click **Add**.

7. Below sc

Figure 193 – Add Template (Cont.)

Figure 194 – Add Template (Cont.)

8. A success message appears

| Template Name | Template Description | Subject  | Event Type |
|---------------|----------------------|----------|------------|
| test12378     | test                 | test1256 | Submit     |
| test123       | test1234             | test     | Approved   |

9. User gets redirected to the Manage Email Template screen after creation of email template

Figure 195 – Success Message

### 3.9.10.6.2 Email Template

This section lists all the email templates that have been created by Provider User.

It also comprises of the following action:

- **Edit (  )**: To modify the details of existing email templates

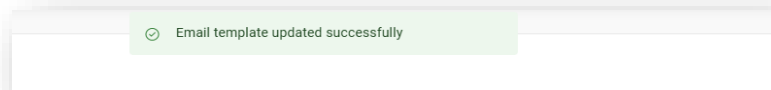
1. Click on Edit (  ) under Action.

### 3.9.10.6.3 Edit Email Template

To edit/ modify the existing Email Template, Provider User needs to follow the following steps:







3. Click **Update**.

4. A success mes

Figure 199 – Confirmation Message

### 3.9.10.7 Forms

For detailed information on **Forms**, please refer to Section 3.1 of *the HCL BigFix Developer Guide*.

### 3.9.10.8 Work Flows

This section details the steps to Work Flows, a part of HCL BigFix CLM orchestrator, and works in the backend to execute a service. Templates do use scripting tools to create individual server build that becomes the standard for HCL BigFix CLM application. These templates exist in the layer between Infrastructure as a Service (IaaS) and Platform as a Service (PaaS).

For detailed information on **Work Flows**, please refer to Section 5 of *HCL BigFix Developer Guide*.

### 3.9.10.9 Manage Catalog

This section details out the process of managing a catalog.

It has the following sections:

- Create Catalog
- View Catalog

#### 3.9.10.8.1 Create Catalog

1. On the **Manage Catalog** screen, click **Add Catalog**.

To create a catalog, Provider user needs to follow below steps:

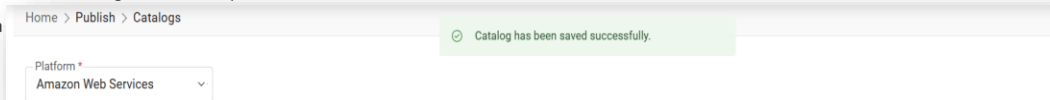
A screenshot of the "Add Catalog" form. The form has a title bar "Add Catalog" with a close button. On the left, there's a sidebar with "Basic Information" selected and a sub-header "Please enter the information to create a catalog." The main area contains several fields: "Platform" (a dropdown menu with "Amazon Web Services" selected), "Provisioning Endpoint" (a dropdown menu with "--Select--"), "Template" (a dropdown menu with "--Select--"), "Regions" (a dropdown menu with "--Select--"), "Catalog Name" (a text input field), and "Catalog Description" (a text input field). All fields have a red asterisk indicating they are required.

2. Select Pla

Figure 200 - Create Catalog

Click Cancel to discard changes and all the fields marked with asterisk (\*) are mandatory.

4. Select **Region**.
5. Enter Catalog Name and Catalog Description.
6. To activate new Catalog in a selected platform, select **Active**.
7. To add a



8. A success message box appears.

Figure 201 - Create Catalog Confirmation Message

All fields marked with asterisk (\*) are mandatory.

9. The new catalog is created and appears in the list of catalogs.

### 3.9.10.9.2 View Catalog

This section lists all the catalogs that have been created by Provider users.

| Status                                 | Catalog Name | Description | Provisioning Endpoint | Associated Template | Created By   | Action                              |
|----------------------------------------|--------------|-------------|-----------------------|---------------------|--------------|-------------------------------------|
| > <span style="color: green;">●</span> | test12345    | aSS         | AWS                   | aAatestNavinAWS     | HCL Provider | <span style="color: blue;">●</span> |

Figure 202 - View Catalog

It also comprises of the following actions:

- **Edit** ( ): To modify the details of existing Catalog.
- **Delete** ( ): To delete the Catalog.

1. On the Catalog screen, the available catalogs are listed in a tabular view.

### 3.9.20. Click Edit corresponding to a specific catalog ( ).

3. Modify the details as desired and click **Update**.

To Edit/ Modify an information of an existing catalog, Provider user needs to follow the below steps:



**Update Catalog**

**Basic Information**  
Please enter the information to create a catalog.

Platform \*  
Amazon Web Services

Template \*  
aAatestNavinAWS

Catalog Name \*  
test12345

Provisioning Endpoint \*  
AWS

Regions \*  
US East (N. Virginia)

Catalog Description \*  
aSS

CANCEL UPDATE

Figure 203 - Edit Catalog (Cont.)

4. A success

Home > Publish > Catalogs

Catalog has been updated successfully.

Platform \*  
Amazon Web Services

Figure 204 - Edit Catalog Confirmation Message

### 3.9.10.9.4 Delete Catalog

To delete a catalog from the platform, Provider user needs to follow the below steps:

1. On the Catalog pane, click Delete ( ).



| Status | Catalog Name           | Description            | Provisioning Endpoint | Associated Template    | Created By   | Action               |
|--------|------------------------|------------------------|-----------------------|------------------------|--------------|----------------------|
| Active | test12345              | aSS                    | AWS                   | aAatestNavinAWS        | HCL Provider | Toggle, Edit, Delete |
| Active | TestAWSTemplate        | TestAWSTemplate        | AWS                   | AWS New Account        | HCL Provider | Toggle, Edit, Delete |
| Active | ITSMStatustrackingtest | ITSMStatustrackingtest | AWS                   | ITSMStatustrackingtest | HCL Provider | Toggle, Edit, Delete |

2. When prompted to confirm, click OK.

Figure 205 - Delete Catalog

3. A success

| Status | Catalog Name           | Description            | Provisioning Endpoint | Associated Template            | Created By   | Action               |
|--------|------------------------|------------------------|-----------------------|--------------------------------|--------------|----------------------|
| Active | test12345              | aSS                    | AWS                   | aAatestNavinAWS                | HCL Provider | Toggle, Edit, Delete |
| Active | TestAWSTemplate        | TestAWSTemplate        | AWS                   | AWS New Account                | HCL Provider | Toggle, Edit, Delete |
| Active | ITSMStatustrackingtest | ITSMStatustrackingtest | AWS                   | ITSMStatustrackingtest         | HCL Provider | Toggle, Edit, Delete |
| Active | AWS New Account        | AWS New Account        | AWS                   | Manage Cloud Template - Window | HCL Provider | Toggle, Edit, Delete |
| Active | AWS_King               | AWS_King               | AWS                   | Manage Cloud Template - Window | HCL Provider | Toggle, Edit, Delete |

**Confirmation**

Are you sure you want to delete this item?

CANCEL OK

Figure 206 - Delete Catalog (Cont.)

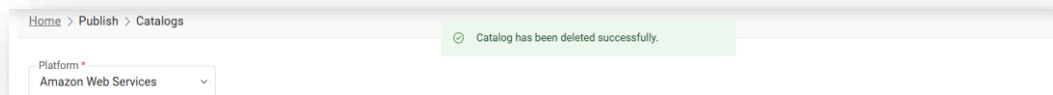


Figure 207 - Delete Catalog Confirmation Message

### 3.9.10.9.5 Change Status of Catalog



1. Click Change Status
2. A popup

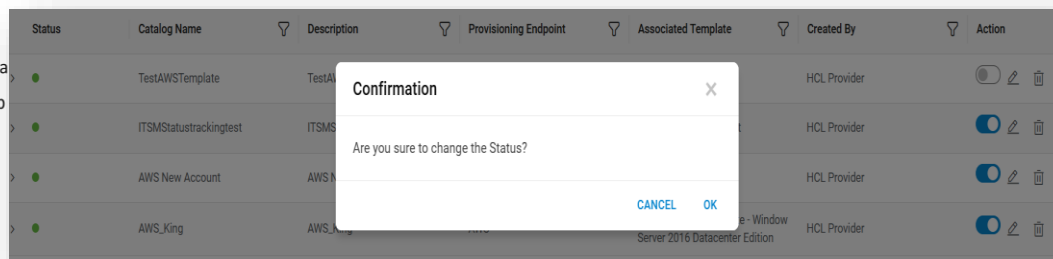


Figure 208 – View Catalog (Cont.)

3. Click **OK** to save the changes.
4. Click **Cancel** to discard the changes.
5. A success message box appears if the user selects OK.

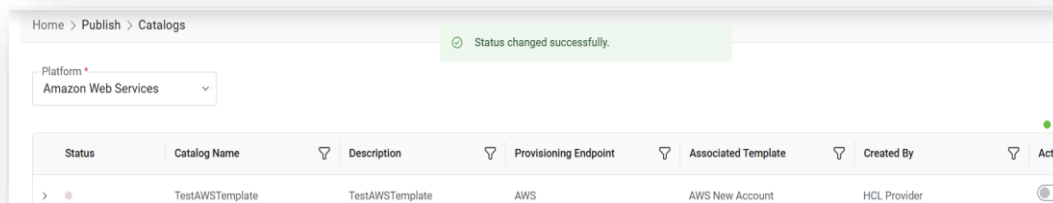


Figure 209 – Confirmation Message

## 4 Support

To get support for this product, drop a mail to [bigfixclm-prodsupport-team@hcl-software.com](mailto:bigfixclm-prodsupport-team@hcl-software.com).

# HCLSoftware

[hcltechsw.com](https://hcltechsw.com)