HCLSoftware

HCL **iAutomate**

Self-Service Ticket Analysis User Guide

Version 6.4.2

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Document Revision History

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

This table provides the revision history of this Self-Service Ticket Analysis User Guide.

Version Date	Description
October, 2019	HCL iAutomate v4.0 Self-Service Ticket Analysis Guide
May, 2020	HCL iAutomate v5.0 Self-Service Ticket Analysis Guide
September, 2020	HCL iAutomate v6.0 Self-Service Ticket Analysis Guide
November, 2020	HCL iAutomate v6.0.1 Self-Service Ticket Analysis Guide
January, 2021	HCL iAutomate v6.0.2 Self-Service Ticket Analysis Guide
April, 2021	HCL iAutomate v6.0.3 Self-Service Ticket Analysis Guide
October, 2021	HCL iAutomate v6.1 Self-Service Ticket Analysis Guide
March, 2022	HCL iAutomate v6.1.1 Self-Service Ticket Analysis Guide
August, 2022	HCL iAutomate v6.2 Self-Service Ticket Analysis Guide
November, 2022	HCL iAutomate v6.2.1 Self-Service Ticket Analysis Guide
October, 2023	HCL iAutomate v6.3 Self-Service Ticket Analysis Guide
December, 2023	HCL iAutomate v6.3.2 Self-Service Ticket Analysis Guide
June, 2024	HCL iAutomate v6.4 Self-Service Ticket Analysis Guide
August, 2024	HCL iAutomate v6.4.1 Self-Service Ticket Analysis Guide
November, 2024	HCL iAutomate v6.4.2 Self-Service Ticket Analysis Guide

1   Preface

This section provides information about the HCL iAutomate – Self-Service Ticket Analysis User Guide and includes the following topics-

- Intended Audience
- About This Guide
- Related Documents
- Conventions

1.1   Intended Audience

This guide is intended for the users interested in analyzing the automation potential via iAutomate.

1.2   About this Guide

This guide introduces you to the key concepts of self-service driven ticket analysis via iAutomate and describes the stepwise process use the product. It provides an overview of the end-user interface and instructions to perform different tasks.

This document includes the following topics:

- iAutomate Overview
- System Requirements
- Using iAutomate
- Support

1.3   Related Documents

The following documents can be referenced in addition to this guide for further information on the iAutomate platform.

- HCL iAutomate Introduction Guide

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
Bulleted lists	Indicates a list of items that is not necessarily meant to be followed in a sequence

2   iAutomate Overview

iAutomate is an Intelligent Runbook Automation product which is equipped with Artificial Intelligence, Machine Learning and Natural Language Processing capabilities for simplifying and automating the IT Operations issues resolution lifecycle including incidents, service request tasks, change request tasks and events. It leverages its NLP capabilities for analyzing and understanding the context of a specific issue, recommends the most relevant solution and even triggers the execution, thereby enabling Zero Touch Automated Remediation. It also provides AI-driven Knowledge Recommendation by suggesting relevant knowledge articles from various repositories, both internal and external, as and when required by human agents.

When no runbook is available for automated remediation, it searches & downloads relevant executable codes and scripts for subject matter expert to validate, customize, approve and publish for future use.

Additionally, iAutomate also enables users to identify potential automation candidates by leveraging the ticket data from the IT Service Management system. All the users are required to do is to extract the ticket dump from the ITSM tool and upload the same into iAutomate which then processes the information using various algorithms and provides the analysis in the form of dashboards and reports.
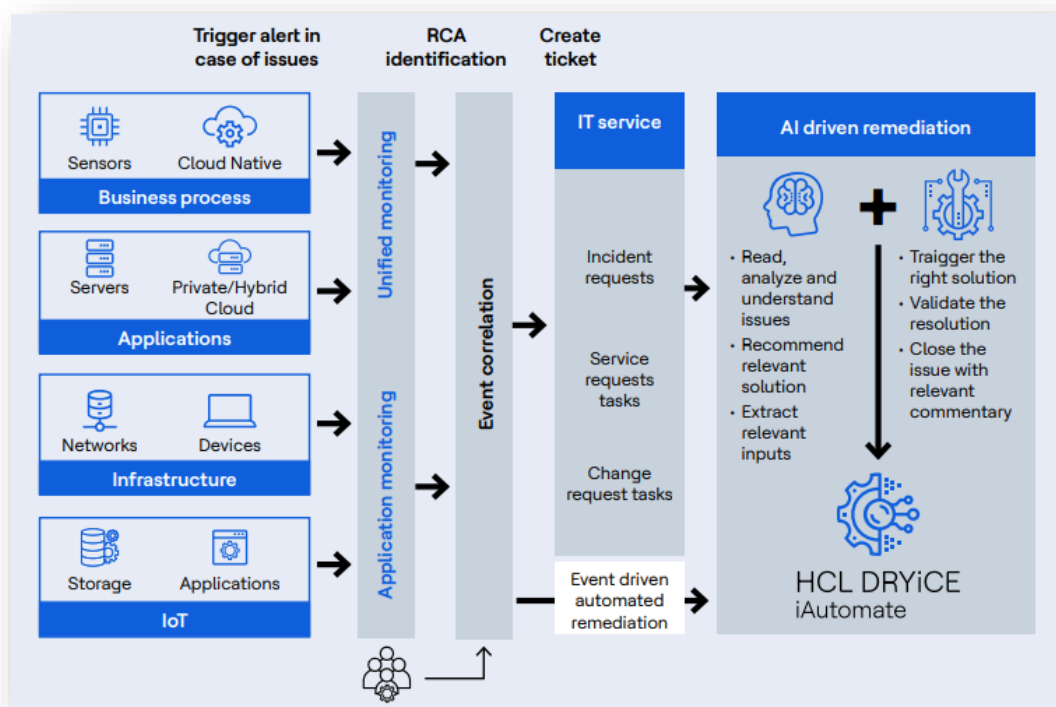

Figure 1 - iAutomate Workflow

Intelligent automation powered by iAutomate can make a tremendous impact in an enterprise adjusting to the new normal, such as

- Reduce Costs
  - Achieve up to 30% reduction in service desk related costs
  - Quick and High ROI
- Mitigate Risks

Self-Service Ticket Analysis

- Avoid operational risks and ensure compliance by avoiding critical outages

- Reduce escalations and improve SLA compliance by up to 20%

- Achieve up to 85% reduction in MTTR

– Drive Efficiency

- Automate redundant tasks and let employees focus on more creative activities

- Reduce manual effort by 30% to 60%

- Improve customer satisfaction by up to 50% by providing faster incident and service request resolutions.

– Rapid Time to Value

- Quick implementation in 6 to 8 weeks*

- Leverage 3000+ reusable and configurable runbooks out of the box

- Achieve zero-touch automation state in 4 to 5 months*

*Conditions Apply

3   System Requirements

To use iAutomate, a user needs:

- A compatible internet browser excluding Internet Explorer

- A monitor with a resolution of at least 1024 x 768 pixels per inch

4   Using Self-Service Ticket Analysis

iAutomate offers users the capability to perform the ticket analysis to identify the potential automation candidates, on their own, via the SaaS based Ticket Analysis module.

4.1   User Registration

As a first step, the user has to self-register through the iAutomate portal. To do that, perform the following steps:

1. Launch the web browser and provide the HCL iAutomate Web Portal URL.

    DRYiCE Labs instance URL - https://demo-iautomate-analysis.dryicelabs.com/
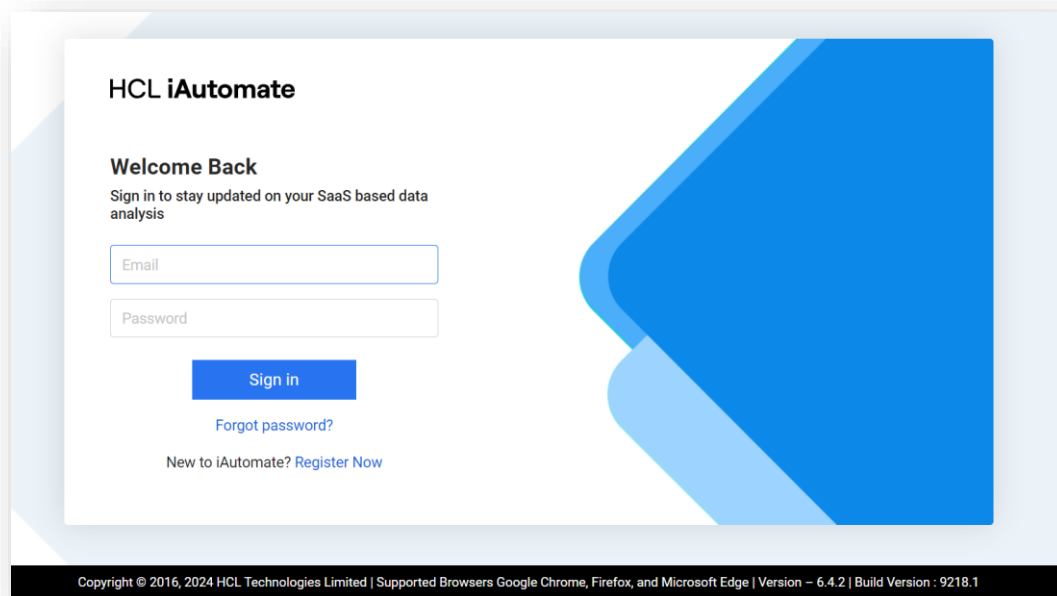
Figure 2 – SaaS based Ticket Analysis – Sign in Page

2. If you are a new user, click on **Register Now** to proceed with the registration process.

Figure 3 – SaaS based Ticket Analysis – User Registration

3. Enter **Name**, **Official Email Id**, & **Organization** details.

4. Enter Password and Confirm Password details.

5. After providing all the inputs, click **Register**. A confirmation message will appear and an email notification, containing the activation link, will be sent to your email id.

Figure 4 – SaaS based Ticket Analysis – Registration Confirmation

6. Click on the Activation Link received in the mail, and you will be redirected to the screen confirming the user registration.
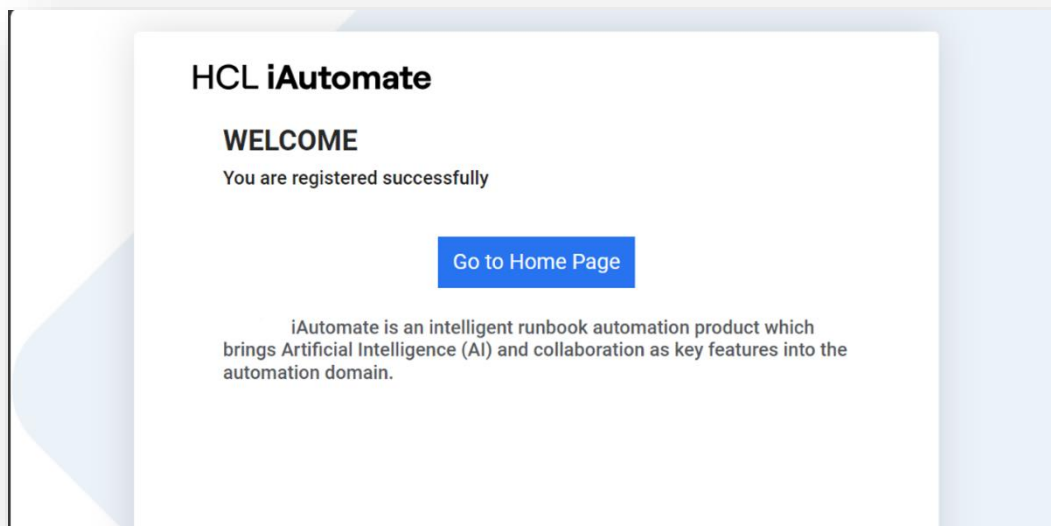
7. Click **Go to Home Page** and it will redirect you to the **Sign in** page.
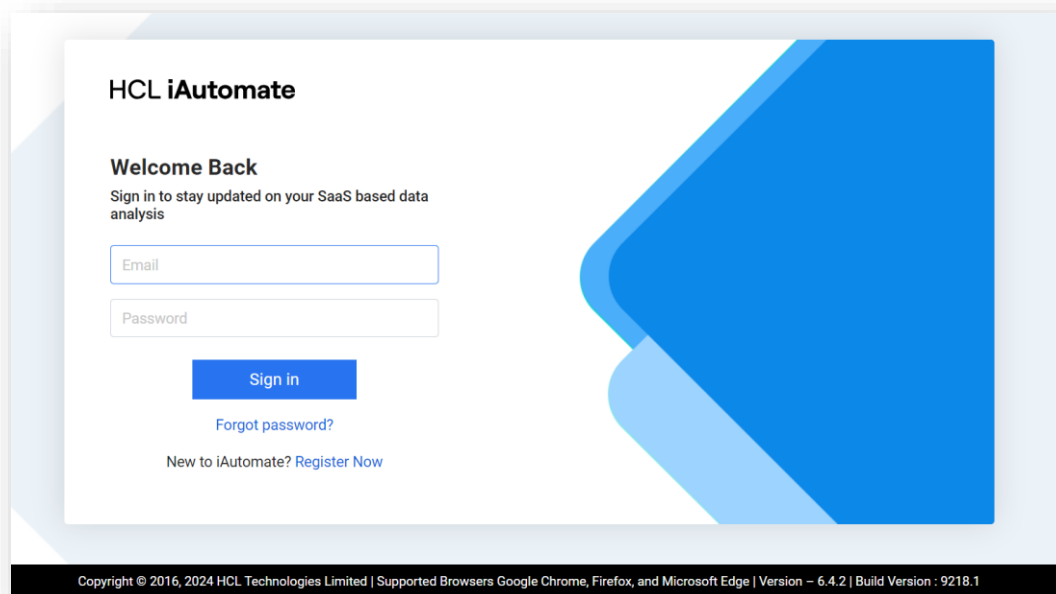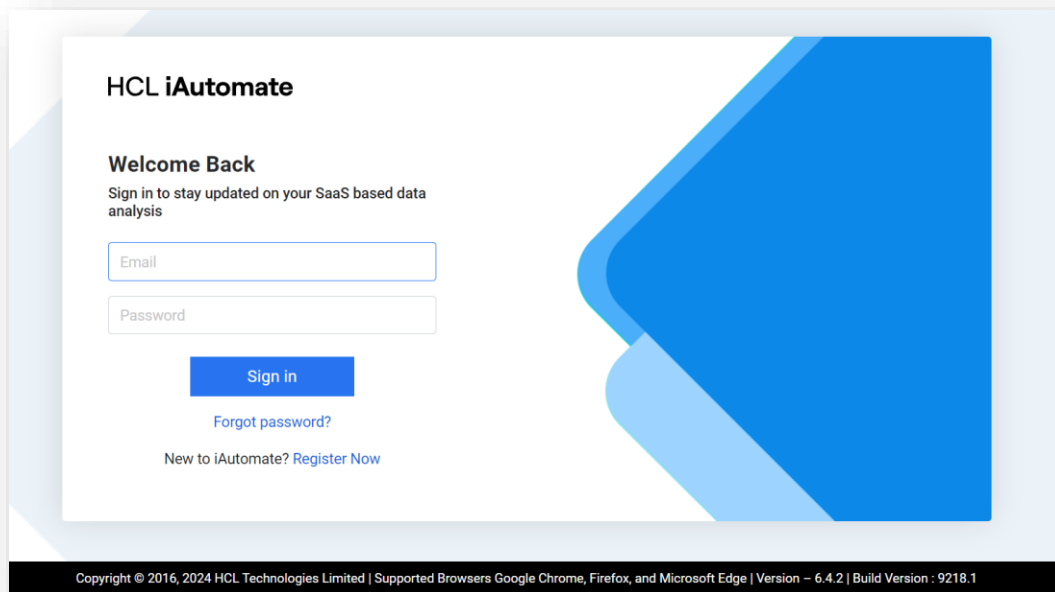
4.2   Perform Ticket Analysis

iAutomate helps in identifying the automation candidates by ingesting, processing and analyzing the nature of tickets generated in the IT Service Management tool. To perform the analysis, it is imperative that the user has access to the ticket dataset which needs to be uploaded in the system. To do that, perform the following steps:

1. Launch the web browser and provide the **HCL iAutomate Web Portal URL**.
   DRYiCE Labs instance URL - https://demo-iautomate-analysis.dryicelabs.com/**.**

Self-Service Ticket Analysis
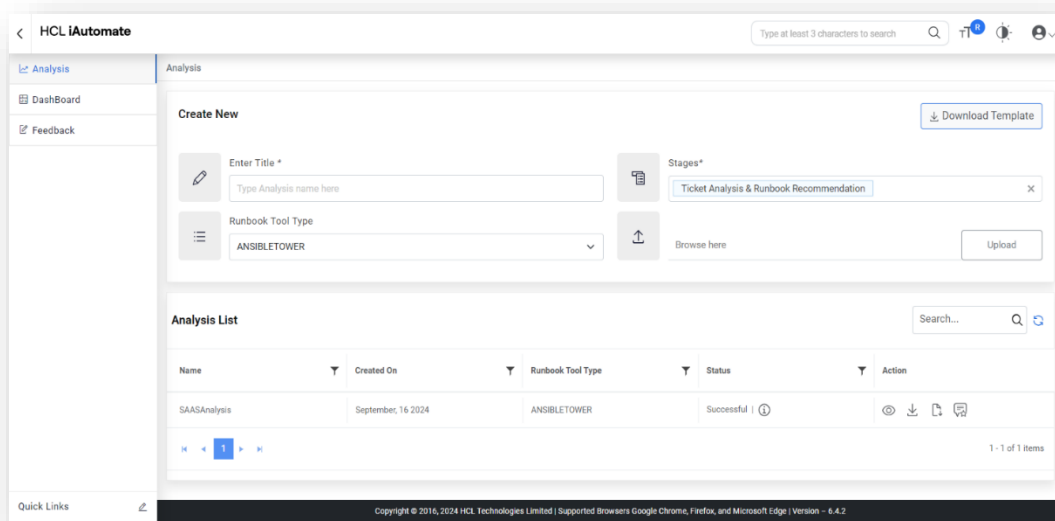
Figure 7 - SaaS based Ticket Analysis – Sign in Page

2. Enter the registered **Email Id** and **Password** and click **Sign In.** The following screen appears:
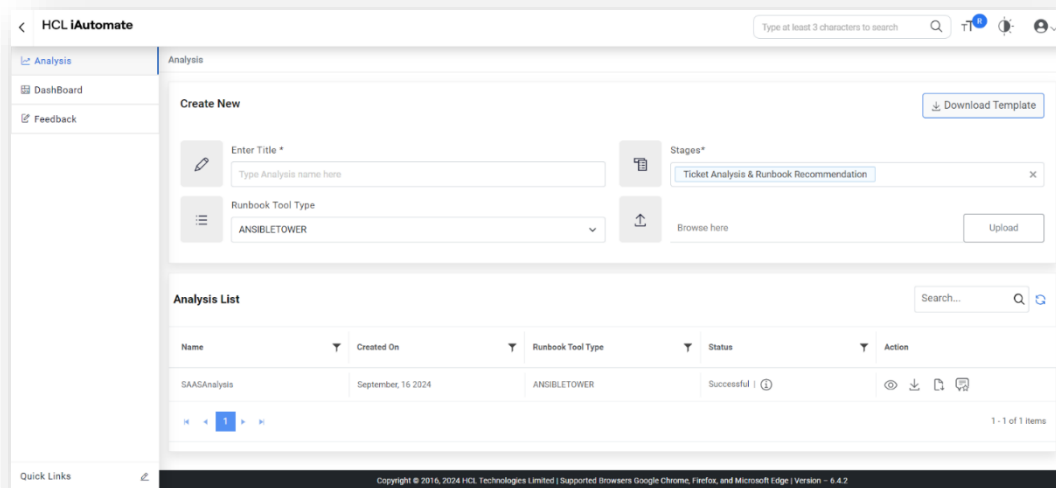

Figure 8 - SaaS based Ticket Analysis – Analysis Page (SAAS-Analysis User View)

3. Under the **Analysis** tab, the user has two options-

- Create Analysis
- Analysis List

Create New - Create a new analysis:

1. To create a new analysis, enter **Title.**

2. Select Runbook Tool type.

3. Click **Download Template**, to download the template in which the data needs to be provided to the system. Ensure that the ticket data from the IT Service Management tool is extracted in the same format.

4. Upload the ticket dataset in form of a .csv file.

5. Select the stages from the **Stages** dropdown. **Ticket Analysis and Runbook Recommendation** is selected by default.
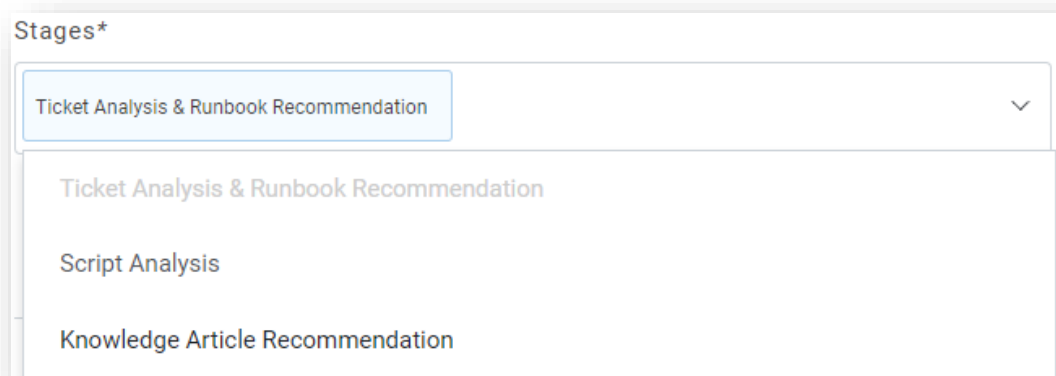
Figure 11 – SaaS based Ticket Analysis – Create New Analysis

6. Click **Upload** to start the analysis. A message appears confirming the same.

Analysis List - View the ongoing and previous analysis details.

1. The status of the ongoing analysis and outcomes of the previous analysis are available under the **Analysis List** section.

Figure 12 – SaaS based Ticket Analysis – Create New Analysis (cont.) (SAAS-Analysis User View)

2. Click $\mathcal{Q}$ icon to filter out the analysis based on name.

3. Click ⓘ under **Status**, to view the real-time stage-wise progress status of the analysis.
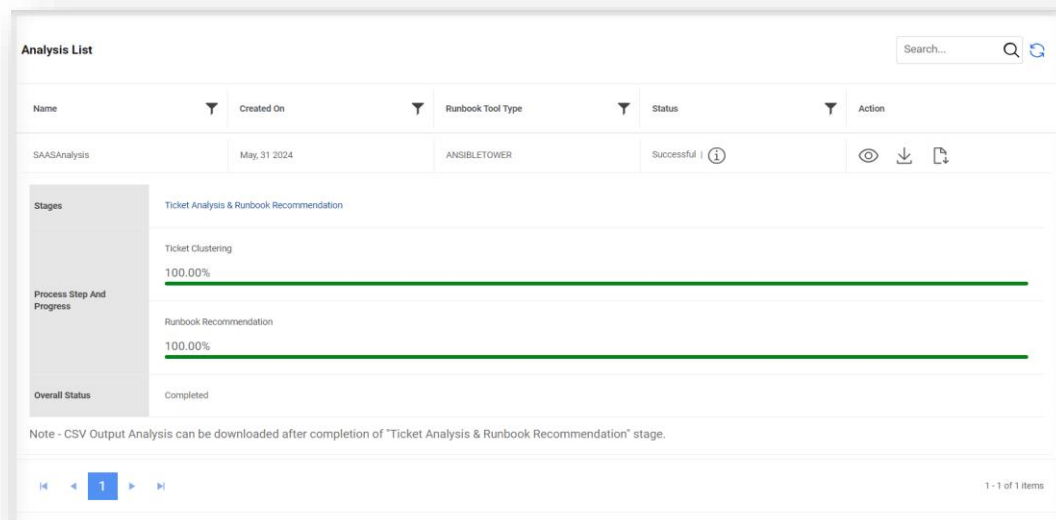
Figure 13 – SaaS based Ticket Analysis – Status

4. Click ⦿ to view the details. It takes the user to the **Dashboard** page.

5. Click ⤓ to download the ticket data that was used to perform the analysis.

6. Click 📝 to download the CSV report. The icon appears only when the Ticket Analysis and Runbook Recommendation stage is completed.

7. If the logged in user is a SAAS SME, then there's one more option for the user to provide feedback. Click on ✎ to provide feedback to the recommendations on the corresponding analysis.

8. To view the analysis report, click **View Report**. The user is available with different set of widgets namely-

Summary View – Provides a high-level summary of the analysis

1. **Ticket Types (Unique Clusters)** – Distinct number of ticket categories identified based on the nature of tickets from the overall ticket dataset uploaded.

2. **Runbooks Available** – Ticket categories for which the runbooks are available based on system driven recommendations.

3. **Knowledge Base Available** – Number of Knowledge Articles, sourced from various web-based datasets, available for reference by end users.

4. **Scripts Available** – Number of scripts available for use, to create automation, which are not available in the out-of-the box runbook repository.

5. **No Content Available** – Number of ticket categories for which no runbooks, KB articles or scripts are available.

6. **Invalid Ticket Description** – Number of ticket categories which has not enough information for system to understand for processing.
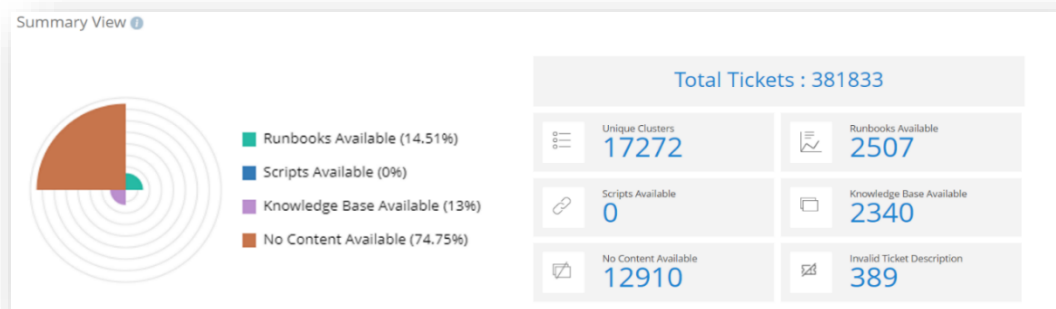
Self-Service Ticket Analysis

Figure 14 – SaaS based Ticket Analysis – Summary View

7. **Top 10 Ticket Types** - Provides a view of the top 10 unique ticket categories sorted by count and is indicative of the most voluminous issues in the environment.
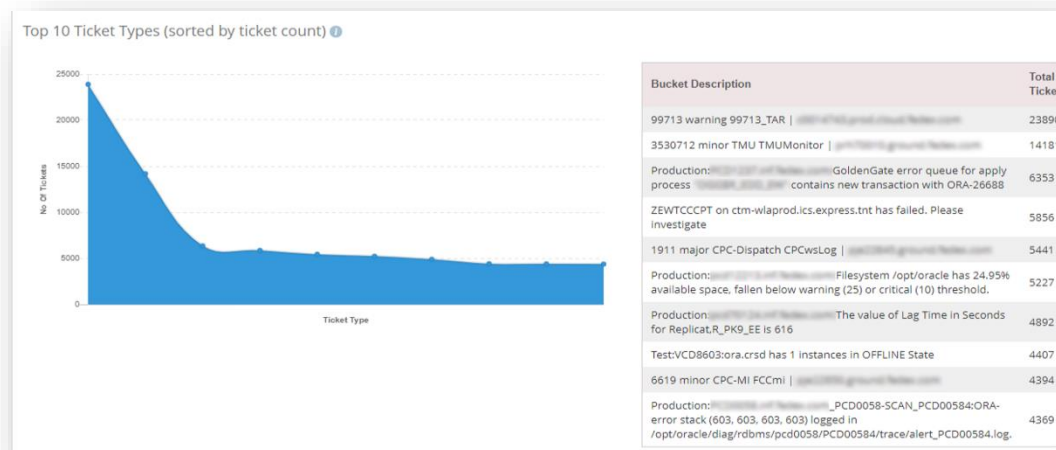

Figure 15 – SaaS based Ticket Analysis – Top 10 Ticket Types

8. **Top 10 Ticket Types with Automation Content Available (sorted by ticket count)** – Provides a view of the top 10 unique ticket categories sorted by count for which automations are available within iAutomate. It also presents a view of available runbooks, scripts, and documents / knowledge articles.

Figure 16 – SaaS based Ticket Analysis – Top 10 Ticket Types with Automation Content Available

Self-Service Ticket Analysis

9. **Top 10 Ticket Types with No Content Available (sorted by Ticket Count)** – Provides a view of the top 10 unique ticket categories sorted by count for which automations are not available within iAutomate.

Figure 17 – SaaS based Ticket Analysis – Top 10 Ticket Types with No Content Available

10. **Tiles View Dashboard** – This widget highlights the top unique tickets which are automatable in nature (considering similarity score > 60), the recommended runbook and the potential effort savings which can be achieved through their automated remediation.
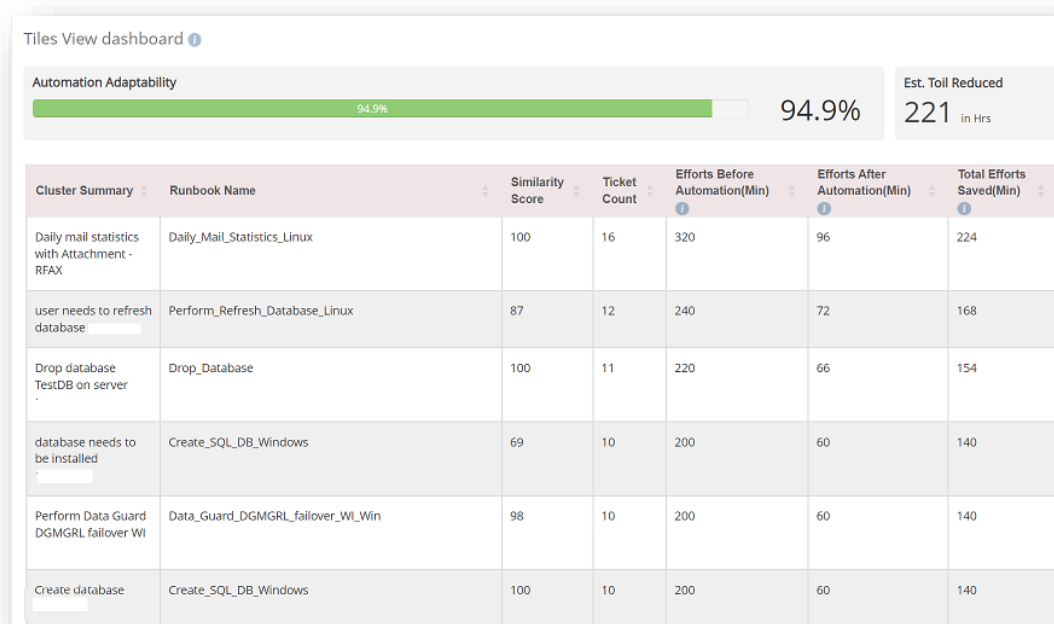
Figure 18 - Tiles View Dashboard

11. Click **Download PDF** to download the pdf report or click **Download CSV** to download the CSV file with the detailed ticket analysis which can be used to arrive at the automation percentage. Click **Download Invalid Ticket Details** to download the CSV file which has no valid description for processing.

In the CSV file, all the ticket variations with Similarity score greater than 0.6 can be considered as potential automation candidates.

Self-Service Ticket Analysis
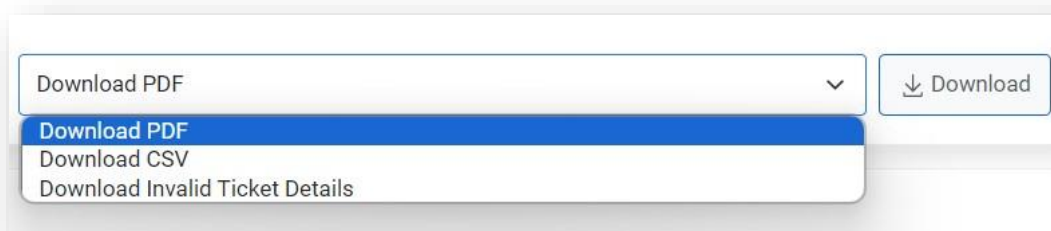
Figure 19 – SaaS based Ticket Analysis – Download Report

– Feedback

To provide the feedback on the recommendations obtained for an analysis, click on ✎ corresponding to the analysis, it will take you to Feedback Menu. The feedback feature is to enhance the recommendation results where SME can provide his feedback on whether the correct recommendation is received for a cluster and if not then he can VOTE FOR the right runbook for that cluster.

The feedback option is only available if the logged in user belongs to SAAS-SME group. To map USERS to SAAS-SME group, login with super admin and on Group Management page, Add User to SAAS-SME group.

The feedback page opens as below:
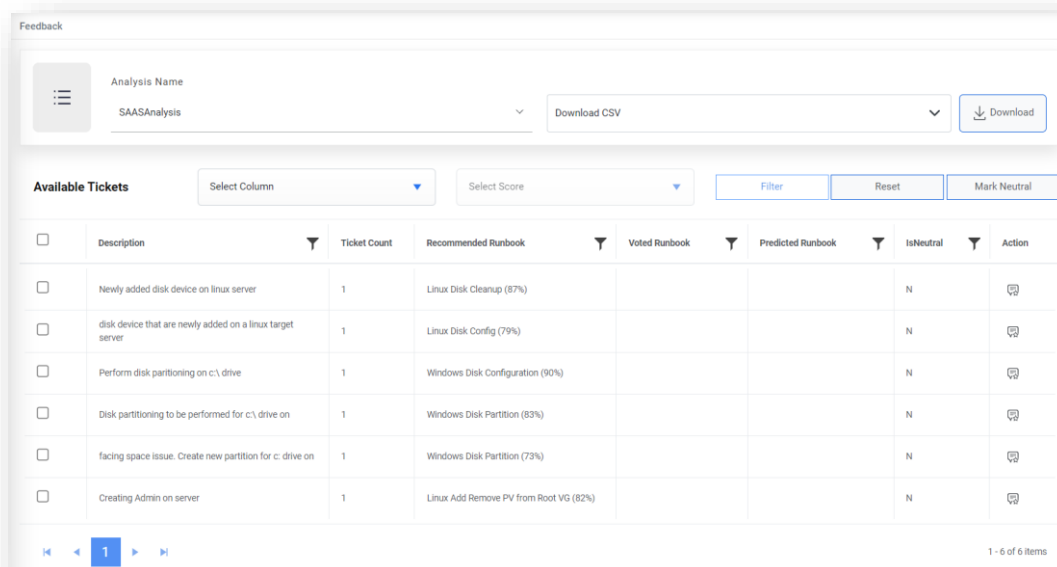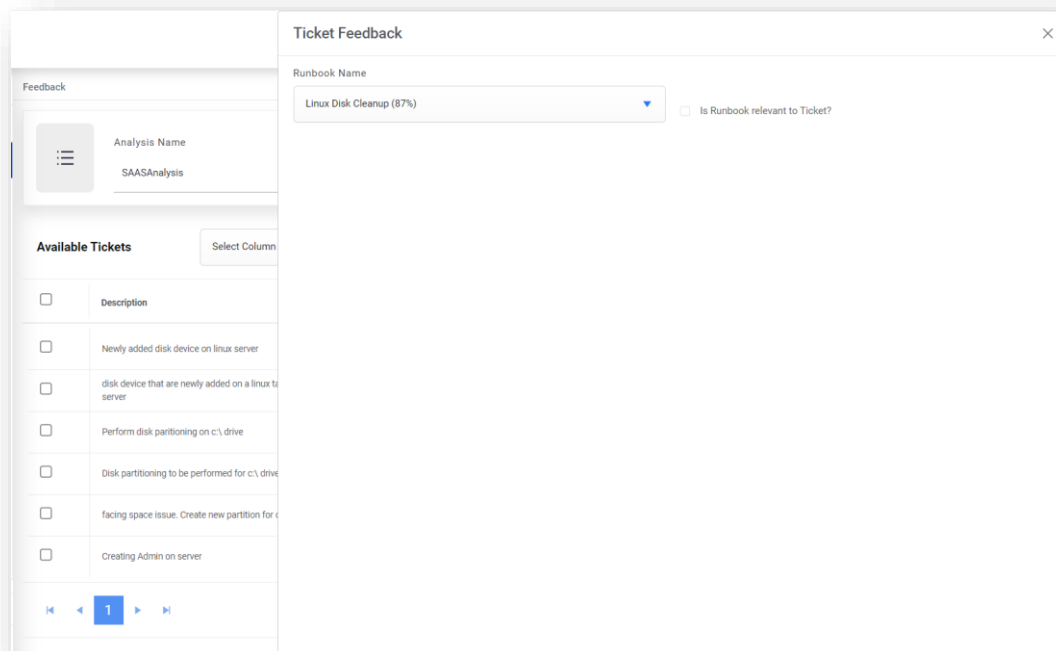
Figure 20 - SaaS based Ticket Analysis – Feedback

12. There are 3 kinds of runbook column available in the grid:
    a. **Recommended Runbook:** The runbook recommended by the recommendation engine.
    b. **Voted Runbook:** The runbook voted by SME, in case the runbook recommended by the recommendation engine is not accurate.
    c. **Predicted Runbook:** The runbook which is predicted by the feedback model out of the top recommended runbooks once the feedback model is built with sufficient data based on the votes provided by SME earlier.
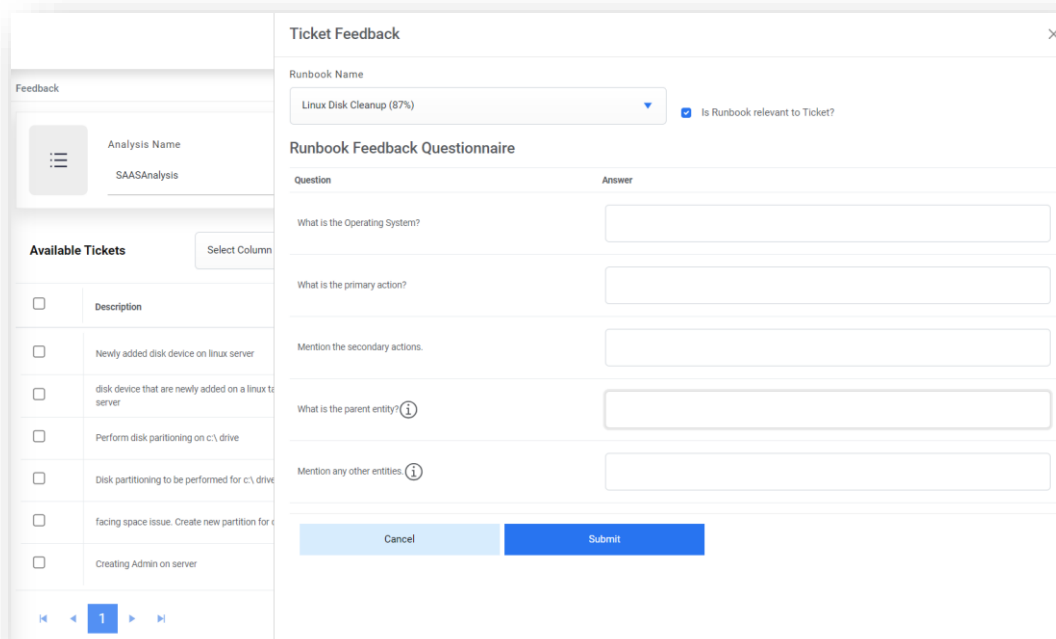
- For any description, if the recommended runbook is not accurate as per SME, then he can vote for the correct one for the same. For that, click on the corresponding to a description. The slide opens as shown below:

Figure 21 - SaaS based Ticket Analysis – Ticket Feedback

- The SME will select the runbook that he finds suitable for the description and checks **'Is Runbook relevant to Ticket?'** checkbox. It will then open a Runbook Feedback Questionnaire.

Figure 22 – SaaS based Ticket Analysis – Runbook Feedback Questionnaire

Self-Service Ticket Analysis

– The SME will provide answers to this questionnaire and click **Submit.**

Figure 23 – SaaS based Ticket Analysis – Runbook Feedback Questionnaire Submitted

– The runbook voted by SME will now be visible under **'Voted Runbook'** column in the grid.

Figure 24 – SaaS based Ticket Analysis – List of Voted Runbook

Once sufficient feedback is received, the user can login with super admin credentials and navigate to build models screen and build the Feedback Model to obtain values under 'Predicted Runbook' column.

Once the feedback model is built successfully with sufficient data, then user can see the data under predicted runbook. The predicted runbook is the outcome of feedback model where SME has given sufficient feedback in the environment and based on that feedback the model has predicted a runbook.

Self-Service Ticket Analysis

For all those descriptions which are not valid and the recommendations on those tickets are invalid as well and we don't have the valid recommendation for such descriptions in our system, we can mark those descriptions as Neutral.

− To mark one or more descriptions as neutral, check all those descriptions and click on **'Mark Neutral'**. An alert will be generated:
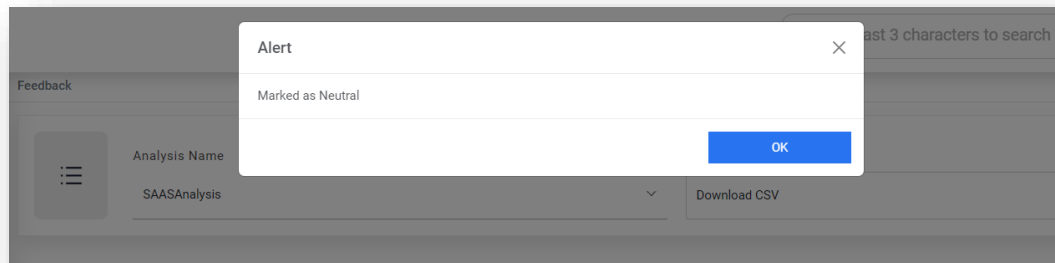

Figure 25 - Alert Message

− For the description(s) that has been marked as neutral, the voted and predicted runbook columns become NA and IsNeutral column will now display Y.

Figure 26 - SaaS based Ticket Analysis – Marked Neutral

− If, in future, if the SME feels that either the description has been wrongly marked as neutral or we might now have valid recommendation in our system later, we can again provide feedback on such descriptions.

To provide feedback on the descriptions that have been marked as neutral, click on corresponding to that description and perform the steps to provide feedback. The description will now be marked **IsNeutral** as 'N' and now **Voted Runbook** will be visible corresponding to this.

Figure 27 - SaaS based Ticket Analysis – Feedback on Neutral Marked Descriptions

The data on the feedback screen can also be filtered based on **'Recommended Runbook'**, **'Voted Runbook'** or **'Predicted Runbook'**. Select any of these from **'Select Column'** dropdown. Then apply filter on **'Select Score'** dropdown and click filter. It will filter the data in the grid based on the chosen filters.

Figure 28 – SaaS based Ticket Analysis – Filter

To get the detailed report of the data on feedback screen, Download CSV for any analysis. The downloaded CSV will contain the description, Runbook Name which has been recommended with the similarity score, the runbook voted by SME with the score, no. of tickets under the cluster, Efforts Before Automation (Min), Efforts After Automation (Min) and Total Efforts Saved (Min).
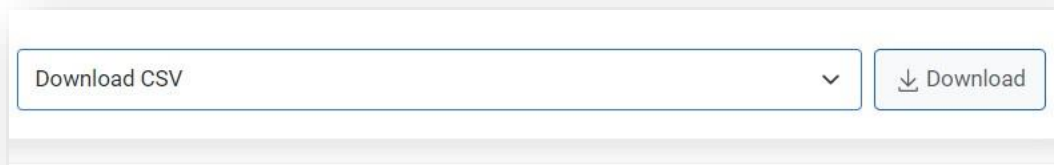
Self-Service Ticket Analysis

4.3   Forgot Password

In case you forget the password, please perform the following steps to receive a temporary password -

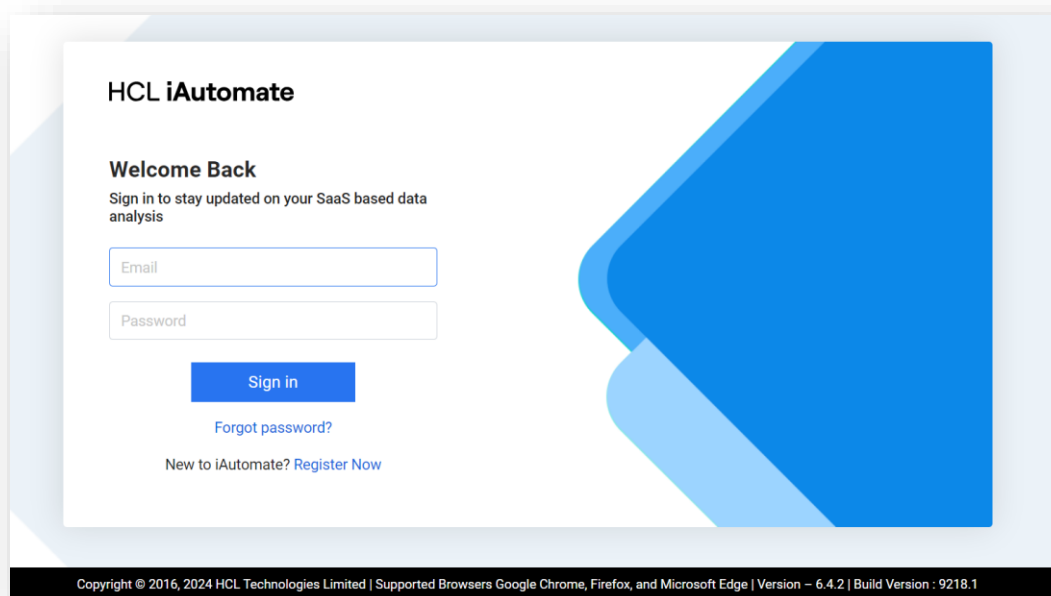1. Launch the web browser and provide the iAutomate Web Portal URL.

Figure 30 – SaaS based Ticket Analysis – Sign in Page

2. Click on **Forgot Password** link.

3. Enter the **Email ID** on which the temporary password needs to be sent.
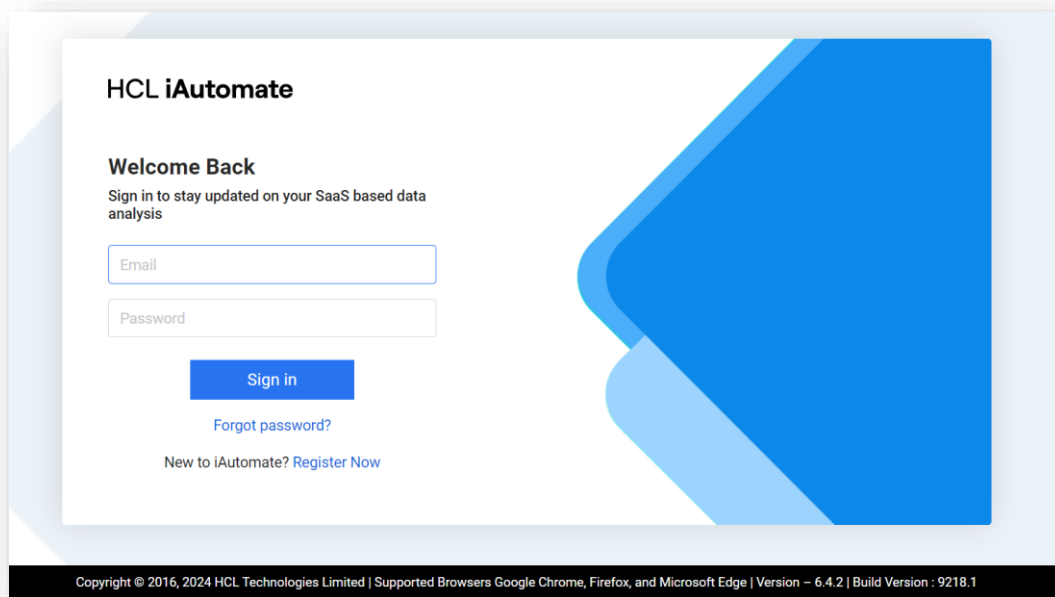
4. Click **Submit**.

5. A temporary password will be sent to the registered email id.

6. Please use that password to login into iAutomate.

4.4   Change Password

To reset the password, perform the following steps -

1. Launch the web browser and provide the iAutomate Web Portal URL.

Self-Service Ticket Analysis
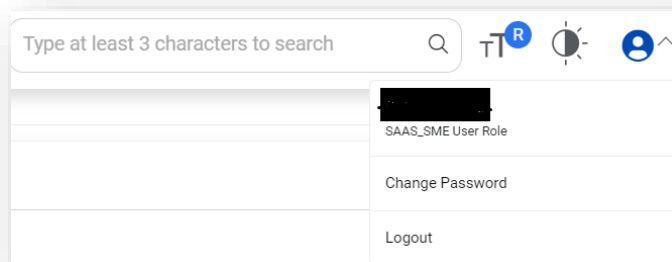
Figure 33 – SaaS based Ticket Analysis – Sign in Page

2. Enter the **Email Id** and **Password** and click **Sign in**to login.
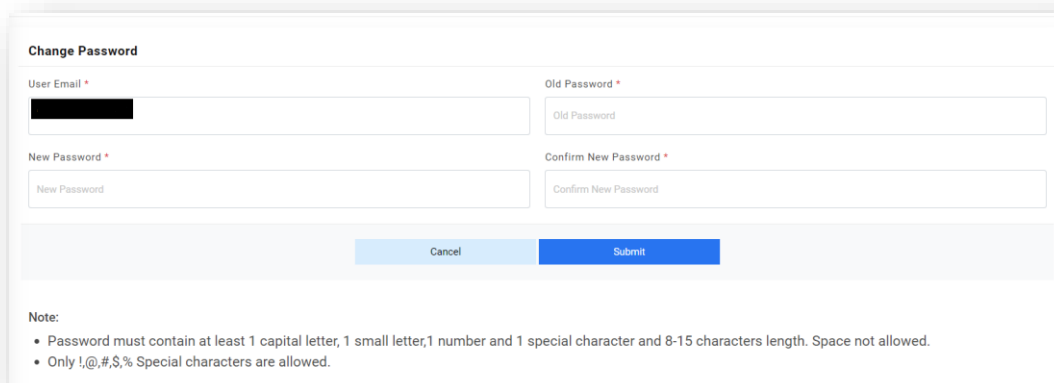
3. Expand the panel on the top right corner and click on **Change Password**.

Figure 34 – SaaS based Ticket Analysis – Reset Password

4. Enter the **User Email**, **Old Password**, **New Password** and **Confirm** Password details.

Figure 35 – SaaS based Ticket Analysis – Reset Password (Cont.)

5. Click **Submit**. A confirmation message is displayed.
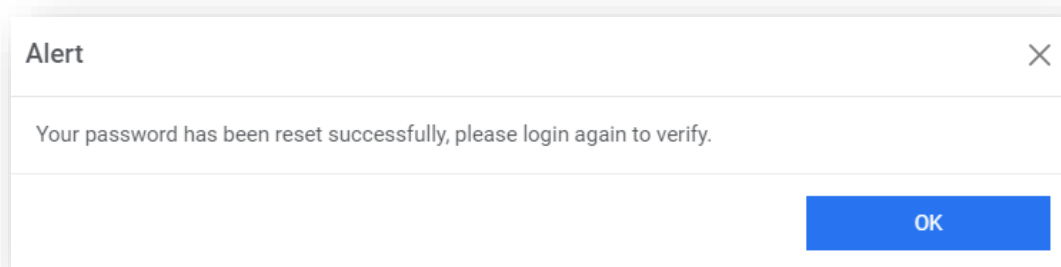
Self-Service Ticket Analysis

Figure 36 – SaaS based Ticket Analysis – Reset Password (cont.)

6. Click **OK** and the user will be redirected to the **Sign in** page.

5   Support

For any additional queries, please reach out to us at iAuto-Product-Supp@hcl.com.

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