HCLSoftware

HCL iAutomate

Introduction Guide

Version 6.5

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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 Introduction Guide.

Version Date	Description
October, 2019	HCL iAutomate v4.0 Introduction Guide
May, 2020	HCL iAutomate v5.0 Introduction Guide
September, 2020	HCL iAutomate v6.0 Introduction Guide
November, 2020	HCL iAutomate v6.0.1 Introduction Guide
January, 2021	HCL iAutomate v6.0.2 Introduction Guide
April, 2021	HCL iAutomate v6.0.3 Introduction Guide
October, 2021	HCL iAutomate v6.1 Introduction Guide
March, 2022	HCL iAutomate v6.1.1 Introduction Guide
October, 2022	HCL iAutomate v6.2 Introduction Guide
November, 2022	HCL iAutomate v6.2.1 Introduction Guide
October, 2023	HCL iAutomate v6.3 Introduction Guide
December, 2023	HCL iAutomate v6.3.2 Introduction Guide
June, 2024	HCL iAutomate v6.4 Introduction Guide
August, 2024	HCL iAutomate v6.4.1 Introduction Guide
November, 2024	HCL iAutomate v6.4.2 Introduction Guide
January, 2025	HCL iAutomate v6.5 Introduction Guide

1   Preface

This section provides information about the HCL iAutomate Introduction Guide and includes the following topics:

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

1.1   Intended Audience

This guide is intended for the iAutomate administrators and end users working towards resolution of IT support tickets. It serves as a primer for the product.

1.2   About this Guide

This guide provides you with an overview of automate and its features and benefits. It also provides an architectural overview and talks about various configuration and end user activities in brief.

This document includes the following topics:

- Overview of automate
- Features of automate
- Functional Architecture
- User Roles
- End User View
- Benefits of Automation
- Support

1.3   Related Documents

The following documents can be referred to this guide for further information on the automate.

- iAutomate User Guide
- iAutomate Configuration 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 face	Indicates cross-reference and links
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 Overview of iAutomate

iAutomate is an Intelligent Runbook Automation product which is equipped with Artificial Intelligence, Machine Learning and Natural Language Processing (NLP) 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 (SME) to validate, customize, approve, and publish for future use.
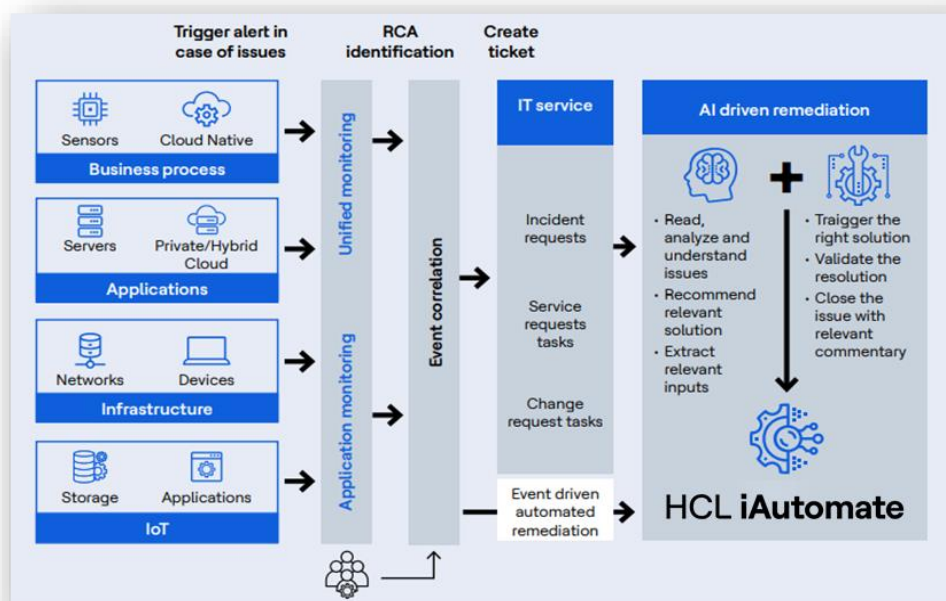

Figure 1 - iAutomate Workflow

3   Features of iAutomate

iAutomate comes along with a host of features which are growing with every release. The current version comes packaged with the following features –

- **Self-service driven Identification of Automation Candidates**

    Intelligently analyze ticket data from IT Service Management Platform to identify potential automation candidates.

- **Machine Learning and NLP Enabled**

    Leverages Natural Language Processing to understand & analyze the context of the issue, recommends the most relevant solution from its repository, and triggers it automatically for remediation.

- **Automation Diversity**

    Supports different types of automations such as Incidents, Service Requests Tasks, Change Requests Tasks, Scheduled Executions, Ad-Hoc Executions, Event driven remediation.

- **OOB Runbook Repository**
    - 3000+ reusable and configurable runbooks available out of the box
    - Customizable based on client's existing processes and other requirements
    - Create non-existent automated workflows on the fly.

- **Knowledge Assistance**
    - Aggregates knowledge from multiple enterprise sources (both internal and external) and builds a unified knowledge base.
    - Proactive Knowledge Assistance to human agents for faster resolutions

- **Real-Time Updates**
    - Track the actions performed by automations on target end points on a real-time basis.
    - Leverages the data for auditing and governance and for future knowledge recommendation.
    - Proactive mail notifications to detect the stopped / paused jobs for better visibility and troubleshooting.

- **Dashboard**

    Captures metrics for your automation and tracks the performance of the automation platform.

- **Enterprise Grade Security**

    Ensures security of your closed loop automations through various mechanisms

    - Data Encryption
    - Token-based authentications for integrations.
    - SAML based authentications.
    - Key Rotation mechanism to avoid eavesdropping.
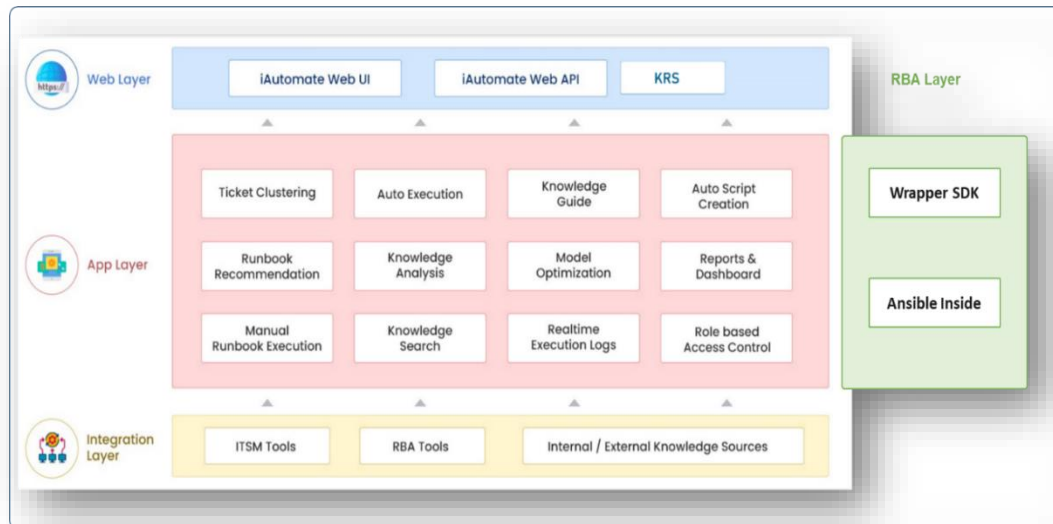
– **Functional Architecture**

Figure 2 - iAutomate Functional Architecture

4   User Roles

iAutomate provides built-in system roles that can be modified, renamed, or removed. A role is a named collection of privileges determining the tasks the user can perform. Pairing a user or group with a role grants the user or groups certain rights to the system.

The following table outlines the predefined system roles.

Table 2 – User Roles

Role	Description
Super Administrator	− All privileges for the administrative features in iAutomate − Add, remove, and set access rights and privileges of other administrative roles. − Full operational and management control over all accounts
Organization Administrator	− All privileges for the administrative features in iAutomate at an organizational level − Add, remove, and set access rights and privileges of other users, roles, and domains in their organization
Operations User	− Access and view all resources in an iAutomate account but cannot make any changes. − Operational control over tickets, ticket logs, and the dashboard
SME Users	− Access ticket and runbook for analysis
Knowledge User	− Operational and management control over Knowledge Analysis and Search Module
Netbot Admin	− All privileges for the administrative features in iAutomate at an organizational level related to Netbot functionality − Add, remove, and set access rights and privileges of other users
Netbot Approver	− Approve controls for Patching inventory, logs, the dashboard
Netbot user	− Operational control over Netbot patching, logs, the dashboard

5   End User View

iAutomate allows users to trigger runbooks for unresolved/open tickets based on system driven recommendations and can even take actions on its own via supervised learning driven confidence scoring mechanism. It also keeps a log of the archived tickets resolved by iAutomate for governance and auditing purposes. For evaluating its own performance, it also provides a dashboard to let users view key performance indicators and metrics briefly.

Additionally, it also provides a self-service driven mechanism to help users in identifying the automation potential, by ingesting and analyzing the ticket data from the ITSM system.

The user interface comprises of four main menus:

— **Tickets**: Enables the users to view unresolved tickets and act. Based on confidence score levels, iAutomate can also trigger the executions automatically without any manual intervention.
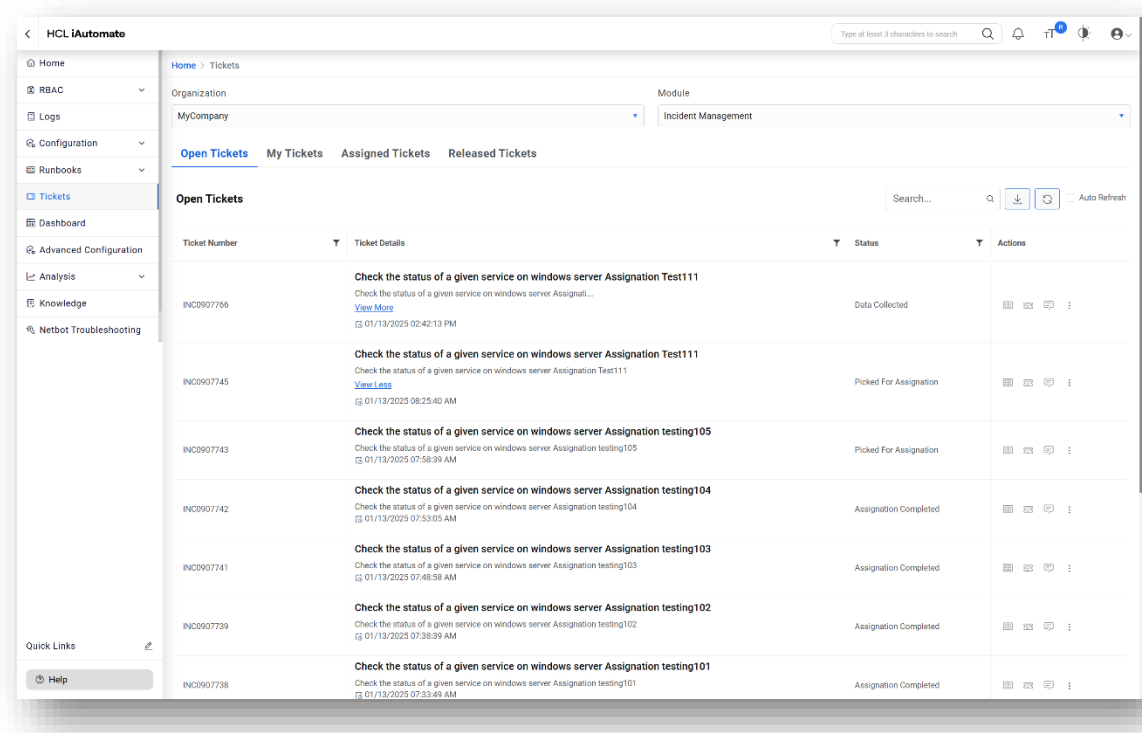
Figure 3 – Actionable Tickets

— **Ticket Logs**: Provides users with a comprehensive log of all the activities for a ticket, including updates and notifications.

Figure 4 – Ticket Logs

– **Knowledge**: Enables users to search across the organization's internal repositories such as SNOW and external domains such as Stack Overflow and Ubuntu.org. Users can also perform an advanced search by applying conditions followed by the search term and Boolean condition (OR, AND, and so on) for more refined results.
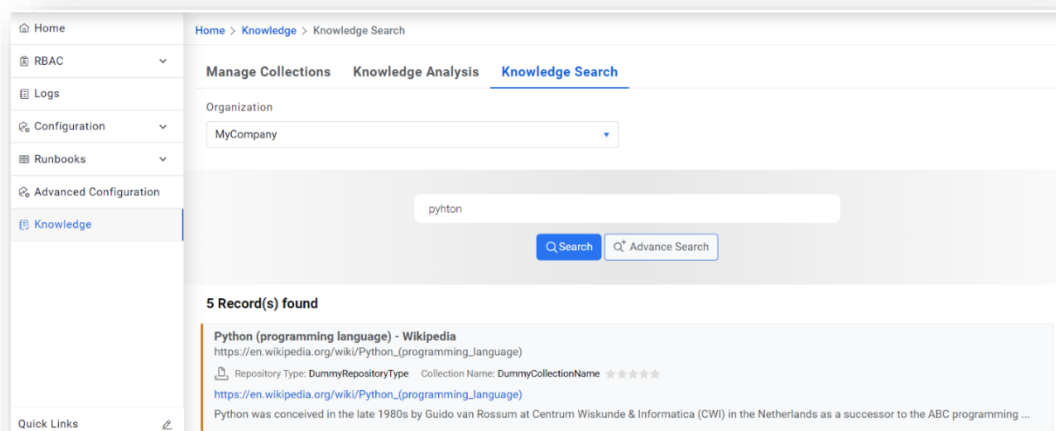

Figure 5 – Knowledge Search

– **Dashboard**: Provides a complete view of the environment and helps spot trends in real-time. Each Dashboard User Interface (UI) element can instantly provide additional data insights, including a platform to create reports using the preconfigured widgets available on the dashboard.
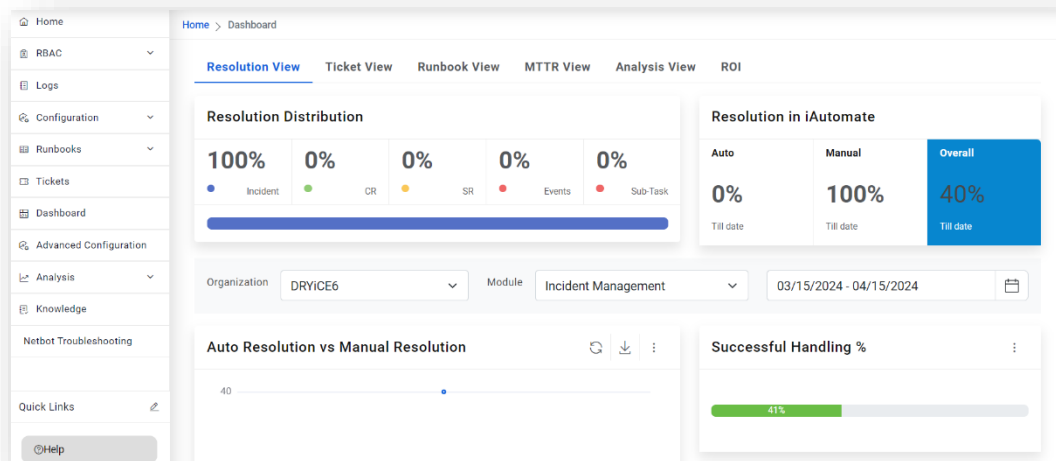
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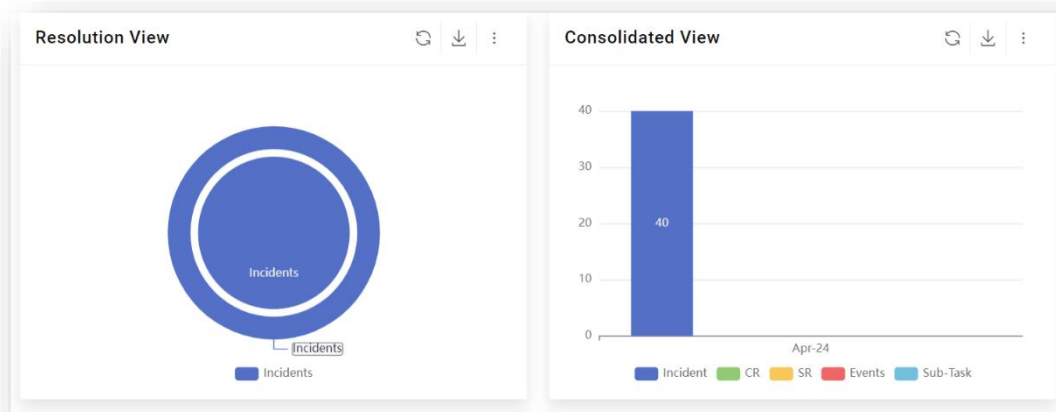
Figure 6 – Dashboard

Figure 7 – Dashboard (Cont.)

Additionally, end users also have access to a separate SaaS based, self-service driven Ticket Analysis module which can help them in identifying the automation potential. It comprises of two main menus:

− **Analysis**: Enables user to create a new analysis and upload the ticket related data in the predefined format. Also, all the analysis done in the past is available for reference via this menu.

Figure 8 – Analysis

− **Dashboard**: Provides a complete view of the ticket analysis including Top 10 use cases, Runbook Available, Knowledge Articles available, Scripts Available, Ticket Categories (Buckets), and many more.
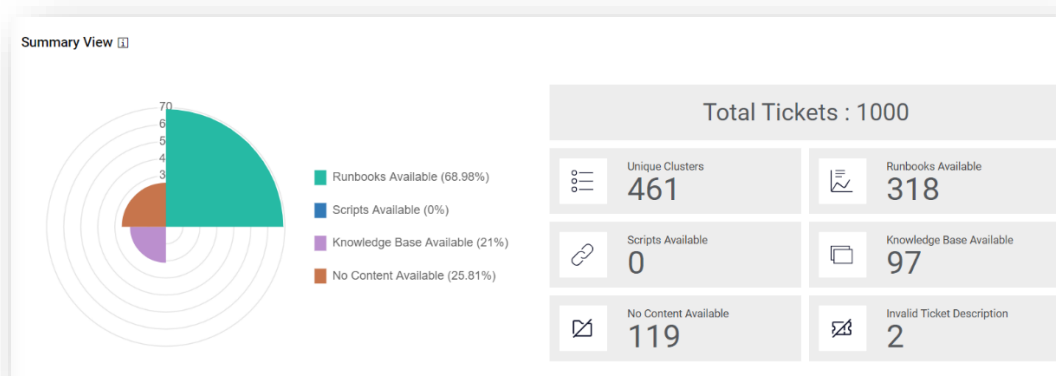
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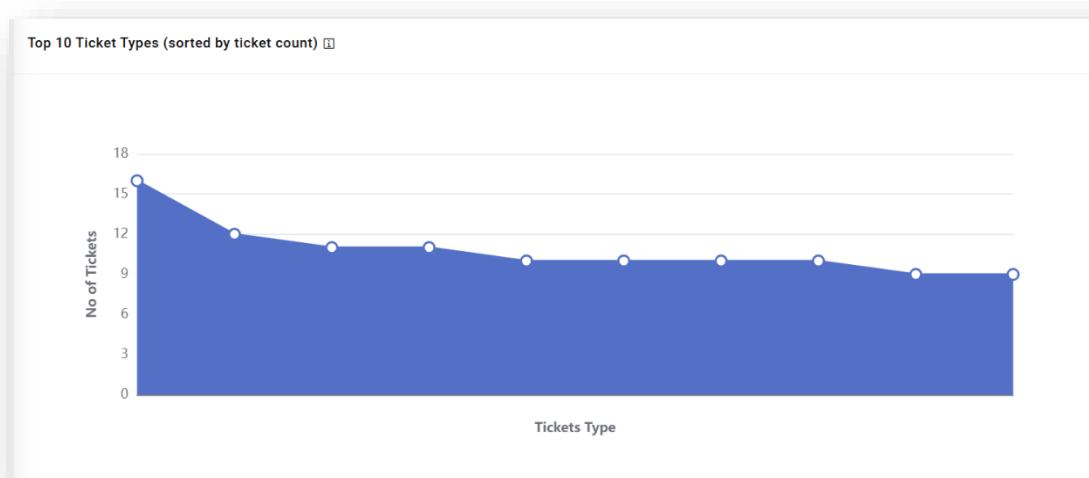Figure 9 – Analysis Dashboard

Figure 10 – Analysis Dashboard (cont.)

6 Benefits of iAutomate

As an Intelligent Runbook Automation product, iAutomate helps in simplifying and automating Incidents, Service requests tasks and change requests tasks. Intelligent automation powered by HCL iAutomate can make a tremendous impact in an enterprise adjusting to the New Normal:

- **Reduce Costs**
  - Achieves up to 30% reduction in service desk-related costs.
  - Quick and High ROI
- **Mitigate Risks**
  - Avoids operational risks and ensures compliance by avoiding critical outages.
  - Reduces escalations and improves SLA compliance by up to 20%.
  - Achieves up to 85% reduction in MTTR.
- **Drive Efficiency**
  - Automates redundant tasks and lets employees focus on more creative activities.
  - Reduces manual effort by 30% to 60%.
  - Improves 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*
  - Leverages 3000+ reusable and configurable runbooks out of the box
  - Achieves zero-touch automation state in 4 to 5 months*

*Conditions Apply

7   Support

For any additional queries, please reach out to us at aiops-pmg-team@hcl-software.com.

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