HCLSoftware

HCL iAutomate

User Guide

Version 6.5

HCL has more than 200 offices worldwide. Addresses, phone numbers, and fax numbers are listed on the HCL website at www.hcltechsw.com.

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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 User Guide.

Version No.	Version Date
October, 2019	HCL iAutomate v4.0 User Guide
May, 2020	HCL iAutomate v5.0 User Guide
September, 2020	HCL iAutomate v6.0 User Guide
November, 2020	HCL iAutomate v6.0.1 User Guide
January, 2021	HCL iAutomate v6.0.2 User Guide
April, 2021	HCL iAutomate v6.0.3 User Guide
October, 2021	HCL iAutomate v6.1 User Guide
March, 2022	HCL iAutomate v6.1.1 User Guide
October, 2022	HCL iAutomate v6.2 User Guide
January, 2023	HCL iAutomate v6.2.1 User Guide
March, 2023	HCL iAutomate v6.3 User Guide
July, 2023	HCL iAutomate v6.3 User Guide
December, 2023	HCL iAutomate v6.3.2 User Guide
June, 2024	HCL iAutomate v6.4 User Guide
August, 2024	HCL_iAutomate_v6.4.1_User Guide
November, 2024	HCL_iAutomate_v6.4.2_User Guide
February, 2025	HCL_iAutomate_v6.5_User Guide

1 Preface

This section provides information about the HCL iAutomate 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 iAutomate end-users working towards resolution of IT support tickets.

1.2 About this Guide

This guide introduces you to the key concepts of iAutomate and describes how to 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.

- Introduction to HCL iAutomate 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 experts to validate, customize, approve and publish for future use.

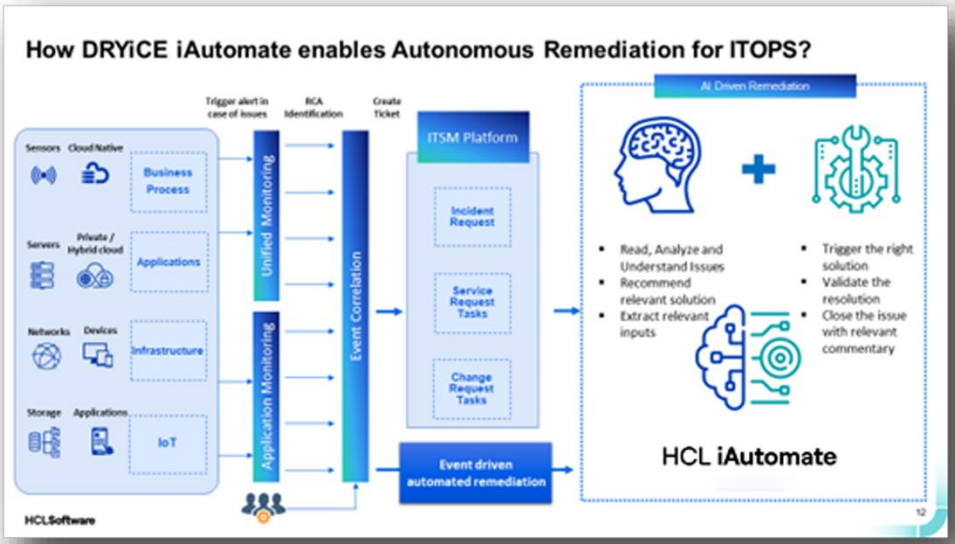


Figure 1 - iAutomate Workflow

Intelligent automation powered by HCL iAutomate can make a tremendous impact in an enterprise adjusting to the New Normal:

- **Reduce Costs**
  - Achieve up to 30% reduction on service desk related costs.
  - Quick and High ROI
- **Mitigate Risks**
  - 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 MTTTR.
- **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 iAutomate

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 - System 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
Operations Admin	– Access ticket and runbook for analysis and can view all analysis.
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 another user
Netbot Approver	– Approval controls for Patching inventory, logs, the dashboard
Netbot User	– Operational control over Netbot patching, logs, the dashboard

The required user and groups are created during the configuration. See the iAutomate Installation and Configuration Guide for more information.

4.1 Logging on to iAutomate

To begin using iAutomate, log on to the iAutomate user console using the user account credentials.

After the user receives the login credentials, perform the following steps to access the iAutomate platform:

1. Launch a web browser and provide the HCL iAutomate Web Portal URL.
2. On the **iAutomate Login** page, type your email ID in the **Email** field.

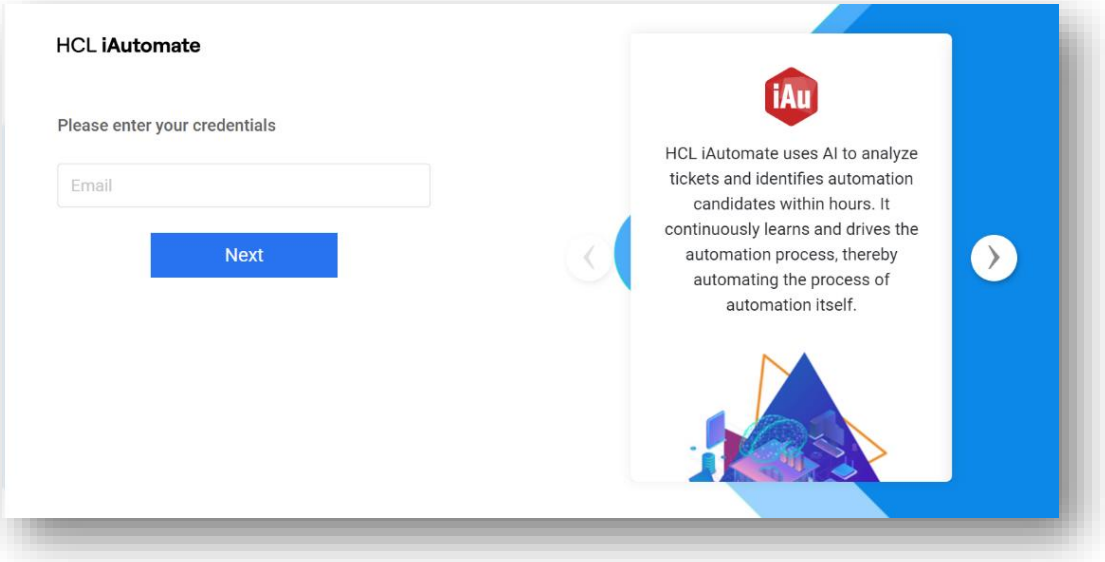


Figure 2 - iAutomate Login Page

3. Click **Next**.
4. Enter the **Old Password** in the **Old Password** field.

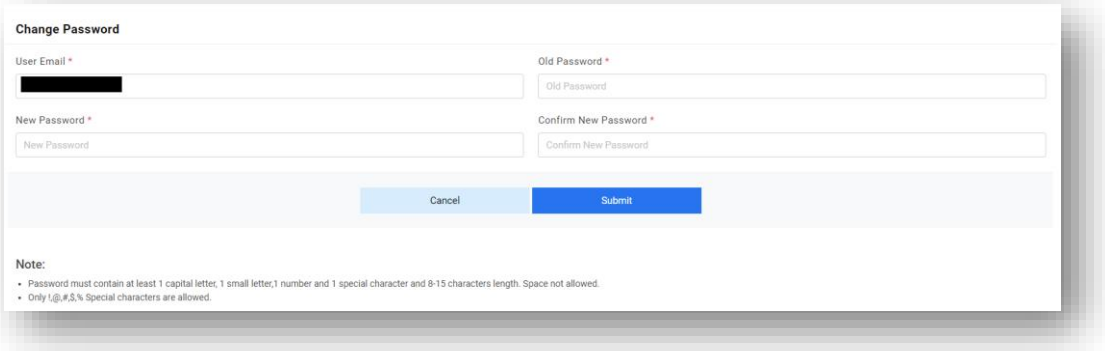


Figure 3 – iAutomate Change Password Page

5. Enter the new password in the **New Password** field and re-enter the same password in the **Confirm Password** field.
6. Click **Submit** to save the details or click **Cancel** to stop the password change procedure.

Contact the administrator if the user does not have log on credentials. **Authentication Type** information is specific to the environment and defined while creating the organization.

7. Click **Login** as shown in Figure 2 - iAutomate Login Page. The iAutomate Home Page appears on the screen:

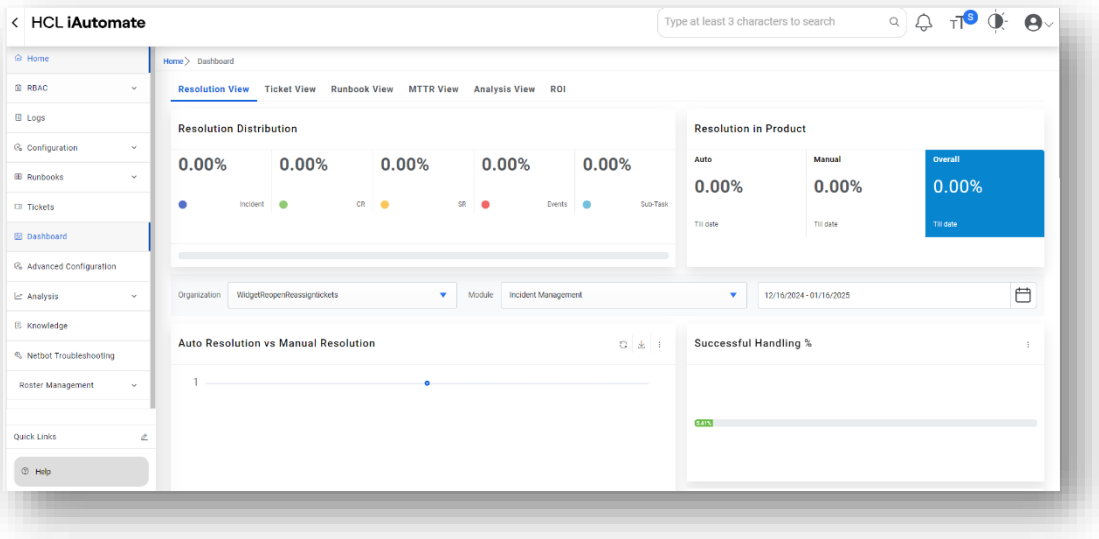


Figure 4 - iAutomate Home Page

iAutomate lets users manage and respond to open tickets, access near real-time ticket logs, search knowledge articles. It also keeps track of all the updates in user-friendly dashboards.

4.2 User Interface Overview

iAutomate allows users to respond to unresolved open tickets, keep a log of the archived tickets closed by iAutomate, and automatically update the dashboard to let users view key performance indicators and metrics at a glance.

The user interface comprises of the following main menus:

- Tickets
- Ticket Logs
- Dashboard
- Knowledge

4.2.1 Tickets

This section describes the recommended steps to view or manage a ticket. On the occurrence of an incident or if an IT product or service is required, the user submits a ticket that is considered as the incident documentation or the service request.

To manage tickets, click on **Tickets.** In Ticket page following tab will be shown.

- Open Tickets
- My Tickets
- Assigned Tickets
- Released Tickets

4.2.2 Open Tickets

This section describes how total open tickets in iAutomate are executed in either **Auto** or **Manual** mode.

To view Open tickets follow the below-mentioned steps:

1. Click **Tickets** on the main menu bar, and then click tab **Open Tickets**.

2. The **Open Tickets** screen appears, displaying the summary and status of all tickets. It also lists the in-progress or failed tickets, either auto-executed or manually executed, in the following tabs:
   - Open Tickets: Lists of all the tickets that are unassigned.
   - My Tickets: Lists only the tickets assigned to the current user, including in process or failed tickets.
   - Assigned Tickets: Lists all the tickets that are assigned to the users.
   - Released Tickets: Lists of all the tickets that are released.

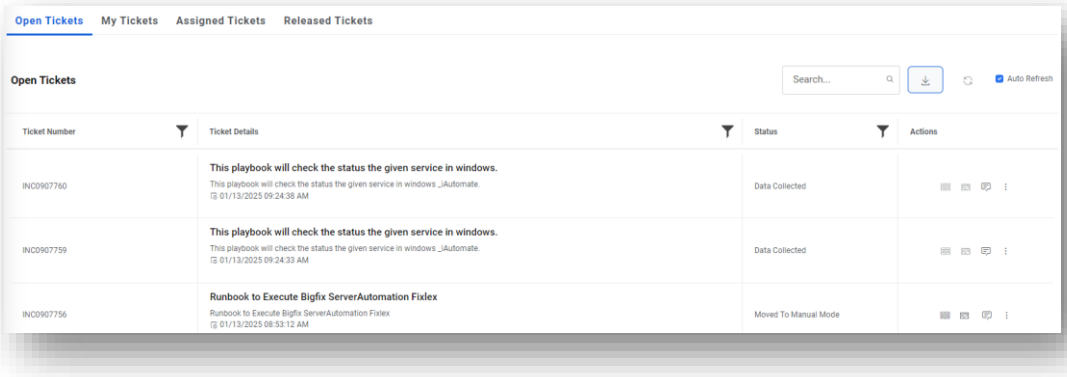


Figure 5 – Open Tickets

3. **Ticket Details**: Provides information about a request, including the ticket description, summary, identification number, and creation date.
4. **Action Details**:

   Select Runbook: Show recommended runbook
5. **Release Ticket**:

   It enables the **Release** button in specific circumstances:
   a. If the execution criteria for a ticket, as detailed in the Runbook Execution, are not met, a **Release** button appears next to the ticket so the user can release the ticket from the iAutomate queue.
   b. For manual execution, the Release button is always active. Click **Release** to follow the steps as configured in the environment. See Runbook Execution for detailed information.
6. **Chat with us**: It is an interactive chat option that enables users to see the summarized display of the ticket, view the related tickets and related articles for the ticket, generate knowledge article for that ticket and publish the same on ITSM.

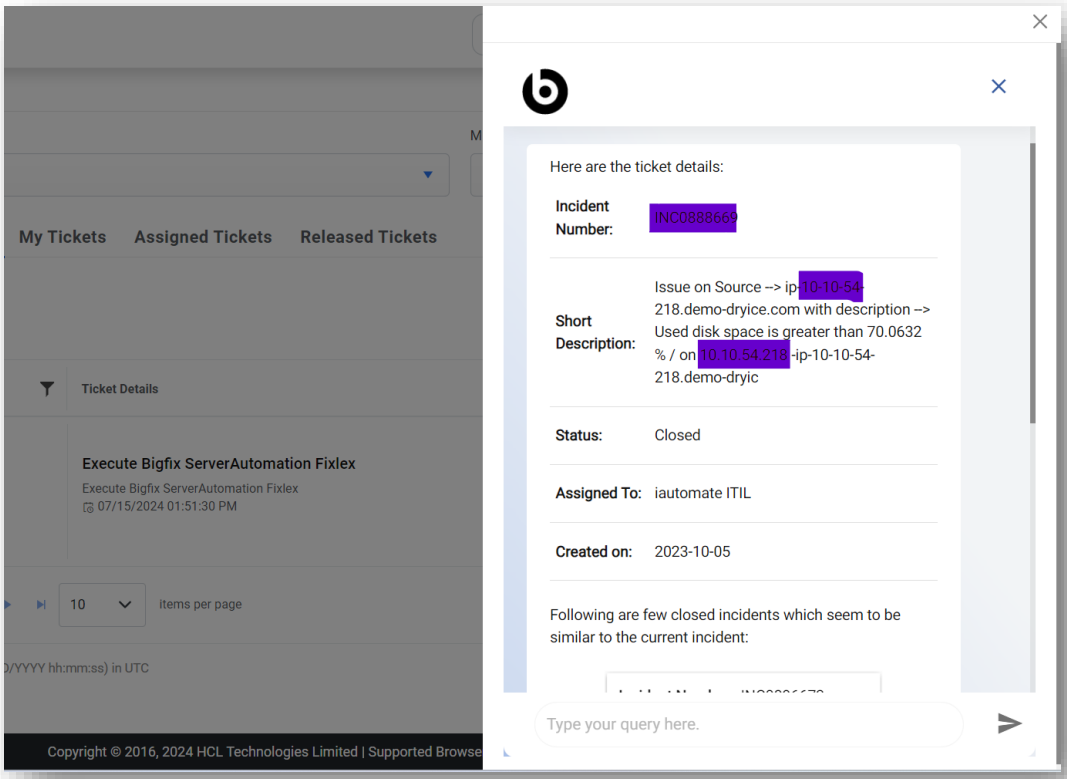


Figure 6 – Ticket details

7. **View more Dropdown**:
   a. Knowledge Guide: Show related guide
   b. Logs: Show Logs related to tickets
   c. Related Tickets: Show related runbooks
   d. Knowledge Graph: User can see the details of a particular Ticket and related Tickets corresponding to that Ticket.

The chat option is only enabled if the configured ITSM tool is ServiceNow or KB generation is enabled under the GenAI Studio Details menu.

This chatbot may collect personal information that you voluntarily provide, such as your name, email address, or any other information you choose to share.

4.2.2.1 My Tickets

This section describes the user-specific tickets available in iAutomate and how to manage them. Here less important things have been placed inside the three dots drop down on the right side under Action column. To view and use the **My Tickets** tab, perform the following steps:

1. Select an **organization** and then select a **Module**. The specific tickets for the selected organization and module will appear. The **My Tickets** tab is categorized into the following tabs:

Table 3 – All Tickets Sub-sections

Tab	Description
Tickets	– Lists the tickets that are a part of the iAutomate queue and assigned to the current user for execution. – Lists the consolidated tickets from the In-Process and Failed tabs
In-Process	– A subset of the Tickets tab; lists the tickets assigned to the current user for which execution is in process. – Displays the allocation status of a ticket and the runbook being initiated for it
Failed	– A subset of the Tickets tab lists all the tickets assigned to the current user that have failed execution. – Enables the current user to release the failed tickets from iAutomate.

After successful execution, tickets are automatically moved from the iAutomate queue. The tickets are marked either as resolved or assigned to another group in the ITSM tool based on how the runbook workflow execution is configured in your environment.

2. Each tab includes columns with the following values:
   - **Ticket Details**: Provides information about a request, including the ticket description, summary, identification number, and the creation date. Selecting a ticket's Incident ID displays the ticket detail in the Logs tab.
   - If the ticket execution is In-Process, the Runbook button is disabled.
   - For Failed ticket execution, the Runbook button is enabled. Clicking the **Release** button displays a window and lists all the relevant runbooks by their confidence score. Users can perform any of the following steps:
     - View the last executed runbook with the parameters and run the same runbook again.
     - Select a new runbook to execute.

     For more details, see Runbook Execution.
3. **Action**: Consist of new option view more. Upon clicking on this User can see Knowledge Guide, Logs, Related Tickets, Knowledge Graph, Change status, Reassign Tickets. .

The **Action** column remains unavailable in the Released **Tickets** tab.

Clicking **Release** either releases the ticket to the **All-Tickets** queue (keeping it in the iAutomate queue but removing the allocation of the current user) or to some other group in the ITSM tool based on configured rules. In either case, the allocation of the current user will be removed.

4. In the **Ticket** or **In-Process** tabs, clicking an incident number displays the ticket-specific log in the Logs tab, which provides a runtime update for the selected ticket with the following details:

– Parameter used for execution
– Start date of execution
– End date of execution
– Execution status

– Interaction ID provided by the underlying RBA tool

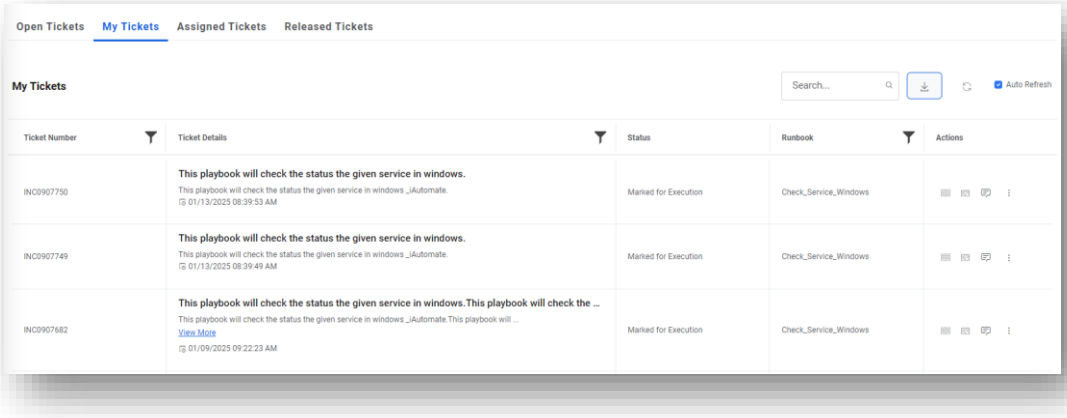


Figure 7 – My Tickets

5. Each tab includes columns with the following values:
   - **Ticket Details:** Provides information about a request, including the ticket description, summary, identification number, and creation date.
   - **Action:** It includes Select Runbook, Release, Chat with us, and View more.

Change Status:

In this under Action column Change status has been added. purpose of this is to change the status by writing notes and agent name to Resolved the ticket which depicts that the agent does not want to execute the ticket, or agent simply wants to Resolve the ticket.

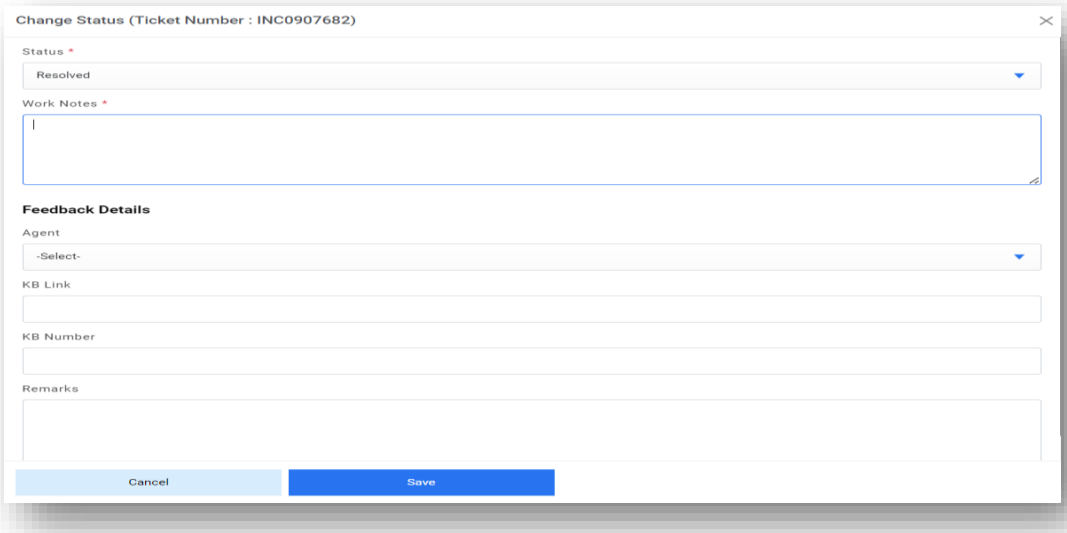


Figure 8 – Change Status

Reassign Tickets:

If the user clicks on the Reassign button a pop-up appears and if user clicks on the Save button. Comment gets saved successfully and a message for Successfully saved appears.

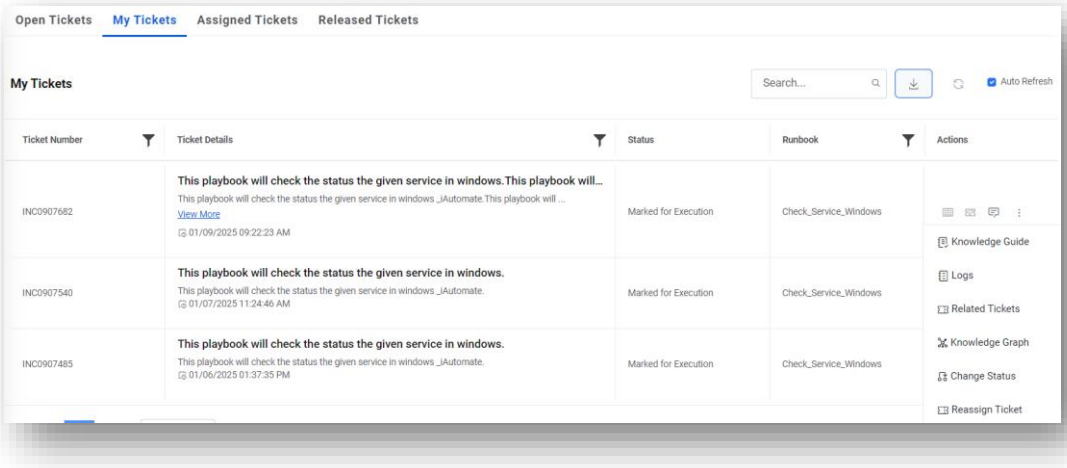


Figure 9 – Reassign Ticket

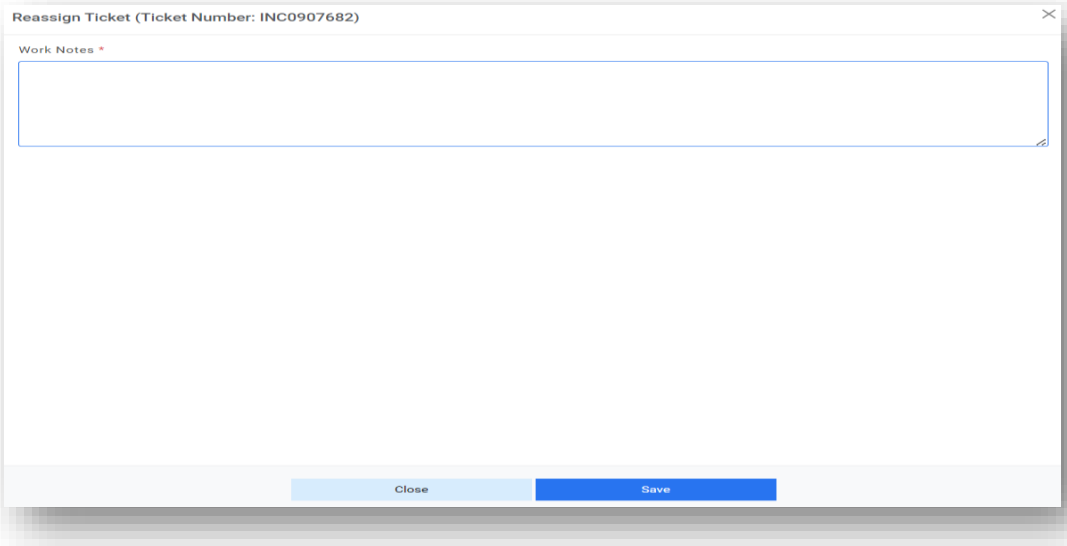


Figure 10 – Reassign Tickets(contd.)

4.2.2.1.1 Runbook Execution

To execute the runbook for a ticket, perform the following steps:

1. On the **Open Tickets** tab, click the **Un-Assigned** tab to filter tickets based on user allocation or identify the ticket to be executed from the Tickets tab.
2. To initiate ticket execution in the iAutomate queue, first, collect the necessary ticket data from the IT Service Management (ITSM) tool. The following table describes the execution status for each activity:

Table 4 - Ticket Execution Status

Runbook Execution Status	Description
Data Collected	The data is collected from the ITSM tool.
Picked for Recommendation	iAutomate recommends the relevant runbook.
Move to Parsing	On successful recommendation, the system moves the ticket to parsing.
Picked for Parsing	The system starts parsing the ticket and extracts the required parameters for the runbook.

Picked for InProgress	This status indicates that iAutomate has started working on the ticket.
Move to Assignation Decision	The ticket moves for assignments in either auto or manual mode. If auto-mode is enabled for the selected ticket and the confidence score of the runbook is above the threshold, then the ticket is executed automatically. If auto mode is disabled, then the ticket moves for execution manually.
Marked for Execution	This status indicates that iAutomate has marked in progress and started working on the ticket.
Execution Successful and Marked for Closure	This status indicates that iAutomate has completed working on the ticket and has marked it for closure.
Marked for Release	This status means that iAutomate has completed working on the ticket.

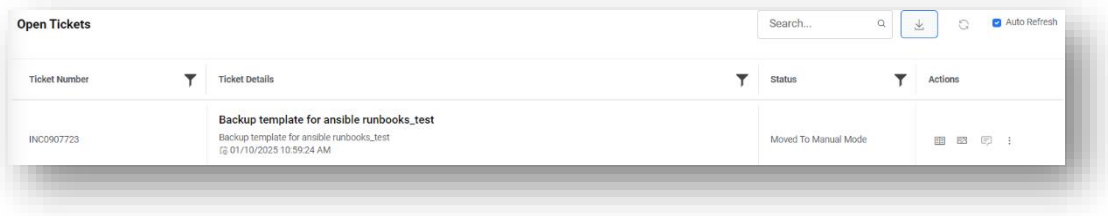


Figure 11 – Open Tickets

3. For a condition where multiple runbooks above a defined threshold are available against a ticket, a **Select Runbook** button appears in the **Runbook** column. However, if the appropriate runbook is not configured, the **Release** button is enabled so the ticket can be released from the iAutomate queue.
4. Click Select **Runbook**.

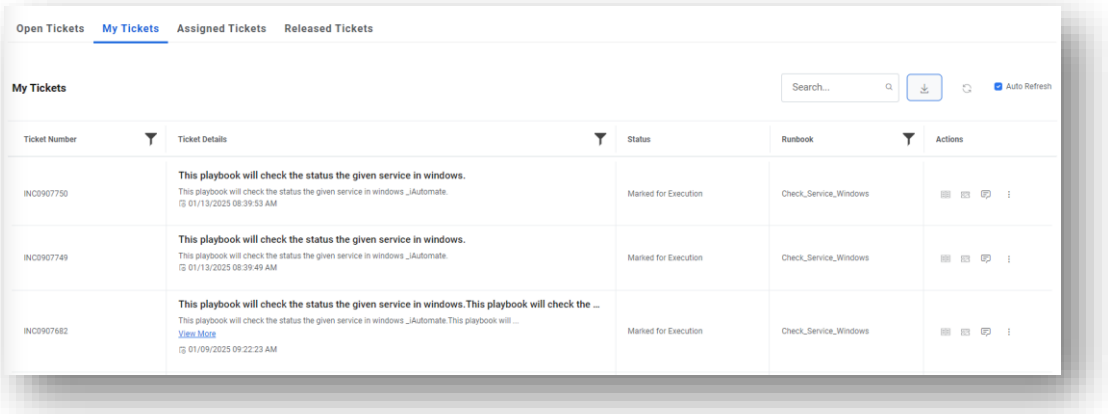


Figure 12 – Select Runbook and Release Options

5. A pop-up window displays the summary and description of the tickets and the list of runbooks in descending order of confidence score.

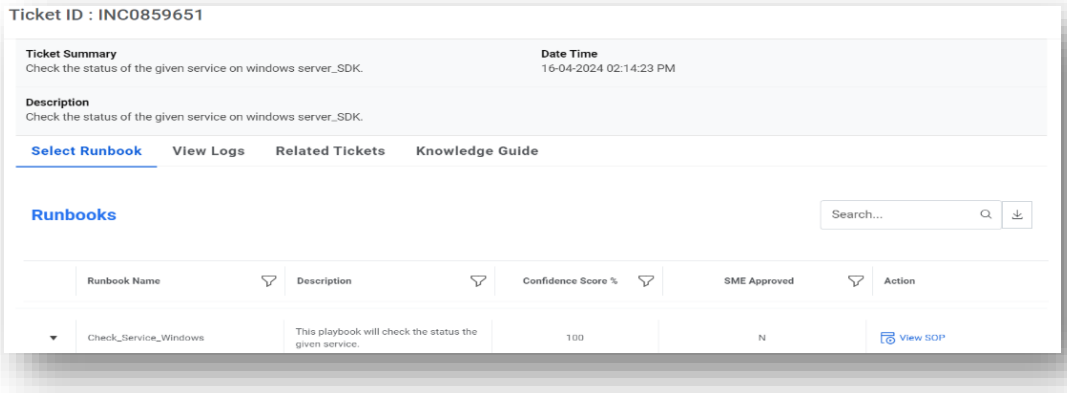


Figure 13 – Summary and Description Options

6. In addition to the confidence score, the SME Approved column displays the result of SME validation against the runbooks. Both parameters help the user to identify the runbook for execution.
7. After the runbook is identified, click **Runbook Name** to expand the selected row.

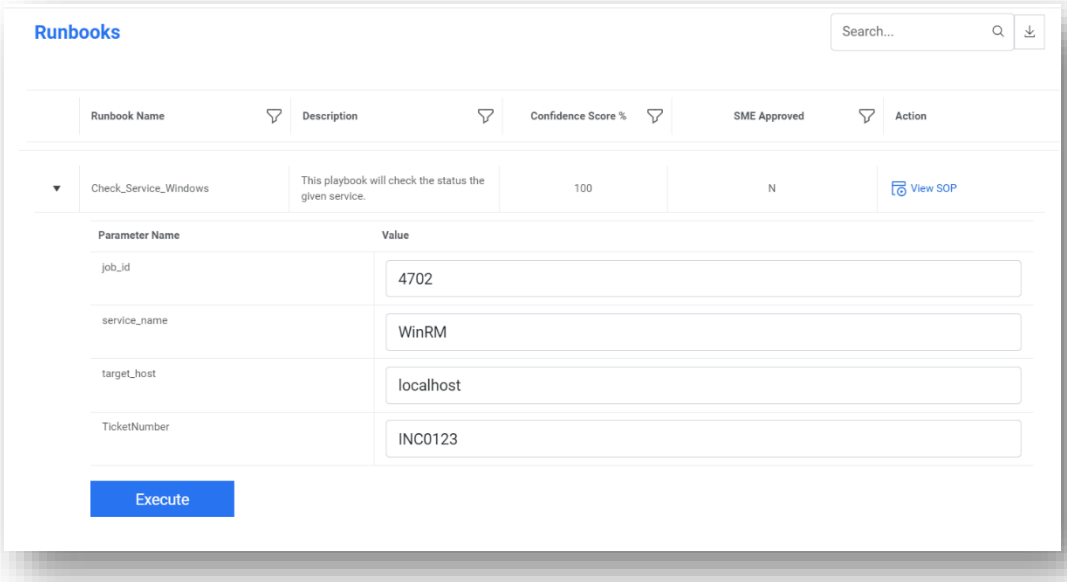


Figure 14 – Select Runbook

8. This displays the runbook description and parameters for the selected runbook. These parameter values are retrieved from the ticket. The user may select the runbook with the highest confidence score or the one recommended by the SME.

If the values are available, then they are referenced from the ticket description, or the default values are provided. The user can either retain these values or change them.

9. Click **Execute** to start runbook execution for the selected ticket.
10. On successful initialization of the execution, a confirmation dialogue box appears.

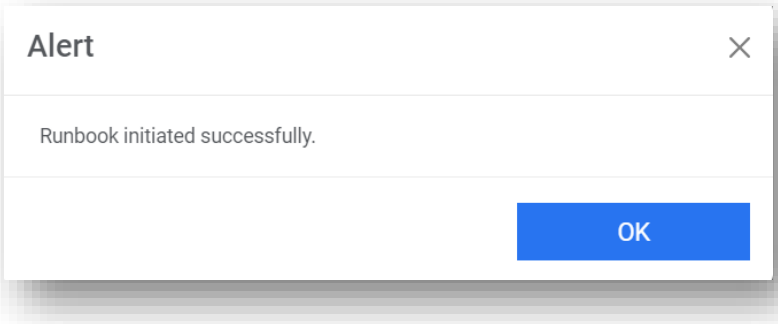


Figure 15 – Runbook Initiation Confirmation

11. Simultaneously, the following updates happen in the **All-Tickets** tab:
    - In the **Tickets** and **Assigned** tabs, the ticket is marked as **Owned By**, replacing the **Select Runbook** button with text specifying the runbook that is being initiated for execution. The username appears next to **Owned by** under the tab.
    - If the user selects **Assigned** in the Open-**Tickets** tab, then the same ticket is added in the **Tickets** and **In-Process** tabs under the **My Tickets** tab.

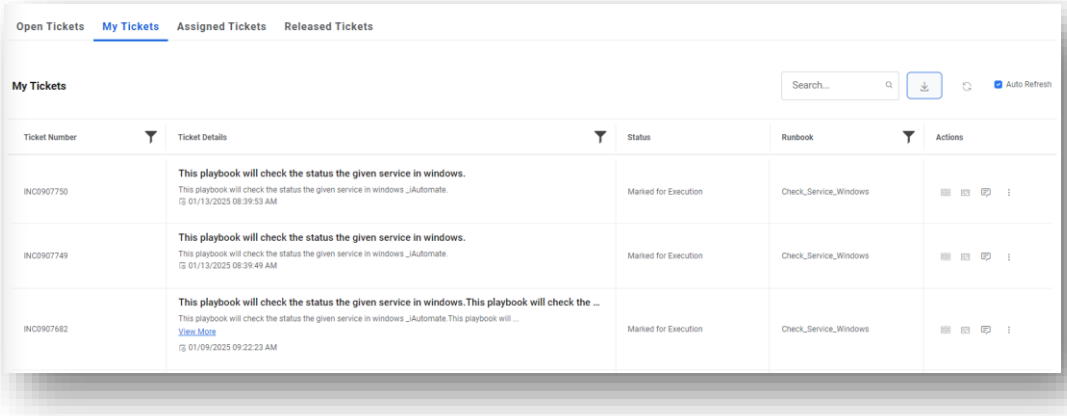


Figure 16 – Runbook Execution

- The **Logs** grid displays the ticket status as **Initiated**.

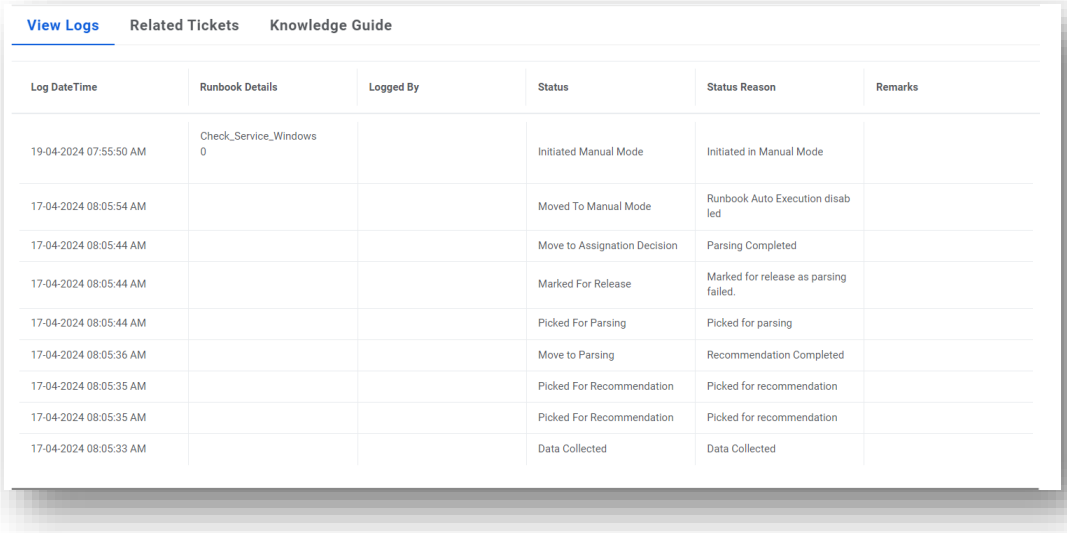


Figure 17 – Runbook Execution

- The **Assigned Ticket** remains unavailable for allocation by another user unless the **Owned by** user releases the ticket from their queue.

4.2.2.1.2 Knowledge Guide

This section describes how to retrieve the relevant knowledge for a ticket, from different sources, for a user in a single view. The sources of where this information will be retrieved depend on the configuration in your environment.

To use the **Knowledge Guide**, perform the following steps:

1. Click **Knowledge Guide** for the ticket for which you want to view the information.

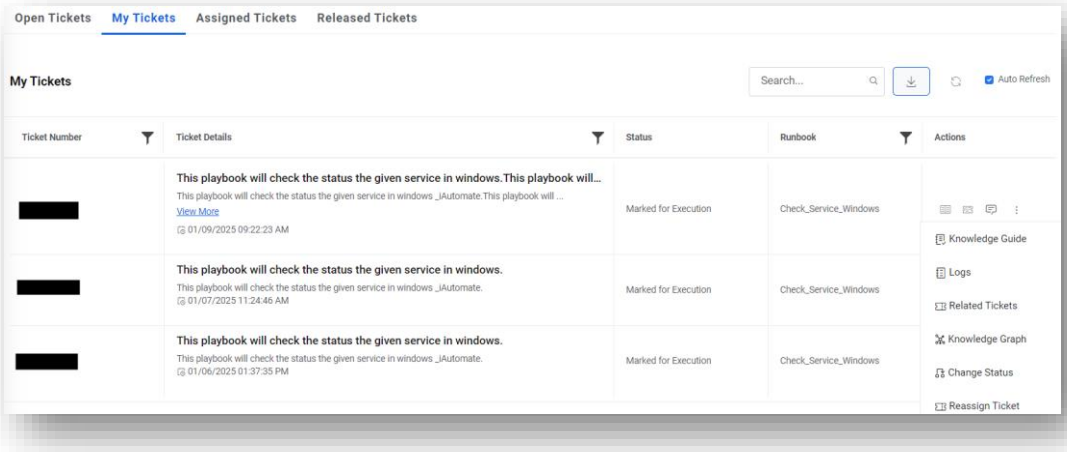


Figure 18 – Guide

2. The **Knowledge Repositories** screen appears with the most relevant information specific to the ticket from across the configured sources.

If Related Knowledge Articles option is enabled under the GenAI Studio Details menu, then the guide data populated from GenAI Studio else it populated data from product's internal APIs.

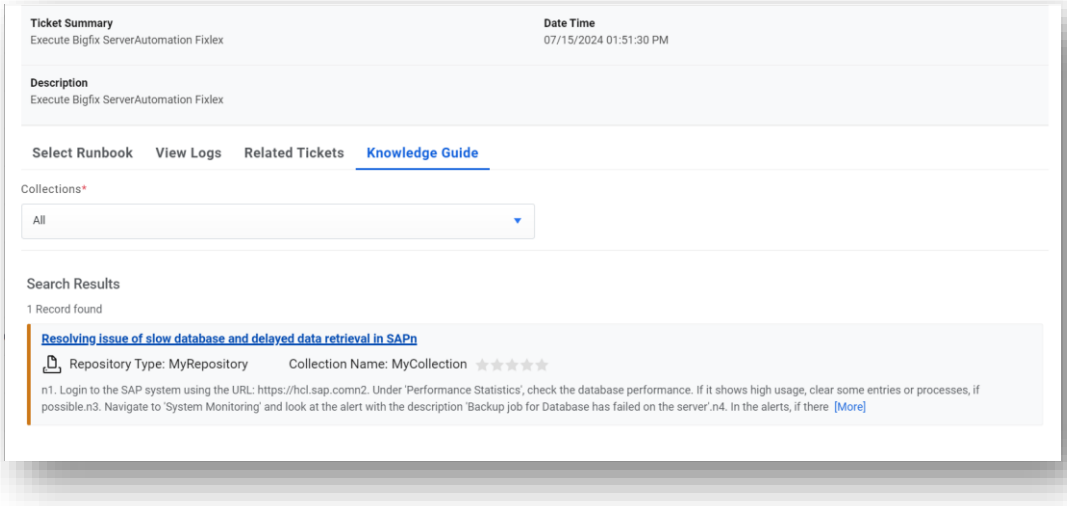


Figure 19 – Knowledge Guide response from Internal API

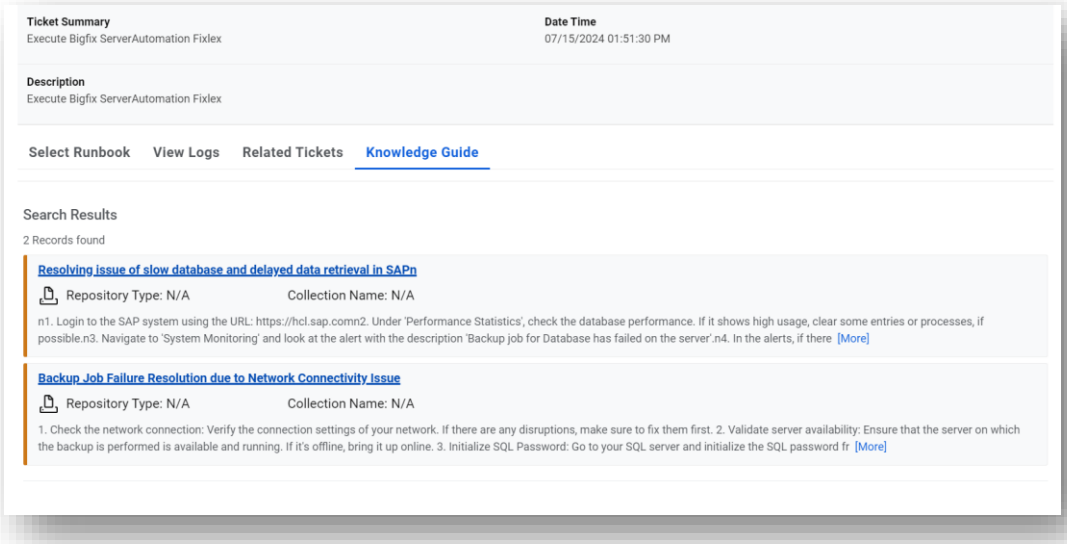


Figure 20 – Knowledge Guide response from GenAI Studio

4.2.2.1.3 Related Tickets

This section describes the bucket in which the ticket resides and lists all tickets in that bucket.

1. Click **Related Tickets** for the ticket for which user wants to view the related tickets.
2. The **Bucket Details** window appears.

If the Related Tickets option is enabled under the GenAI Studio Details menu, then the related tickets populated from GenAI Studio else it populated data from product's internal APIs.

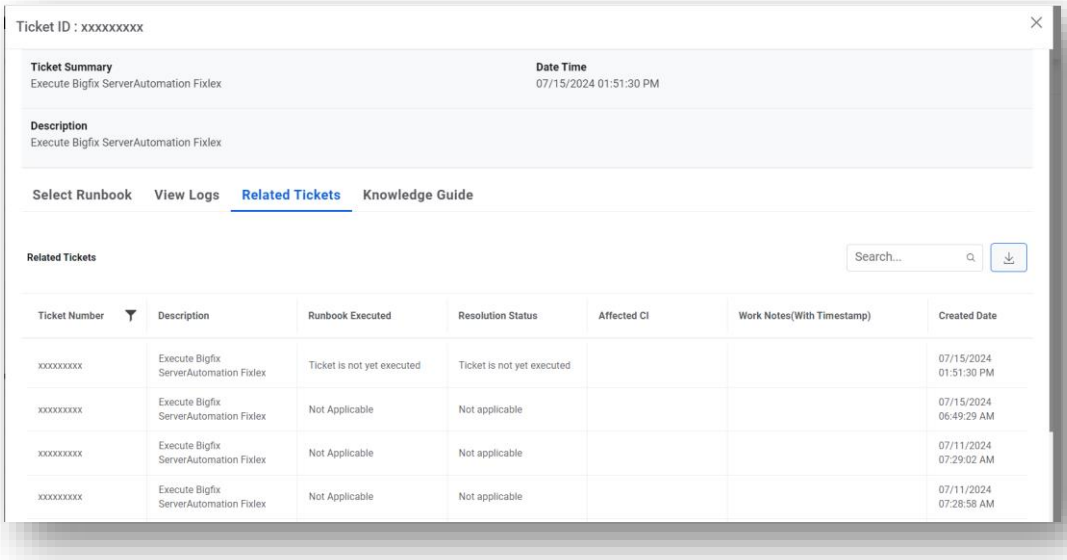


Figure 21 – Related tickets response from Internal API

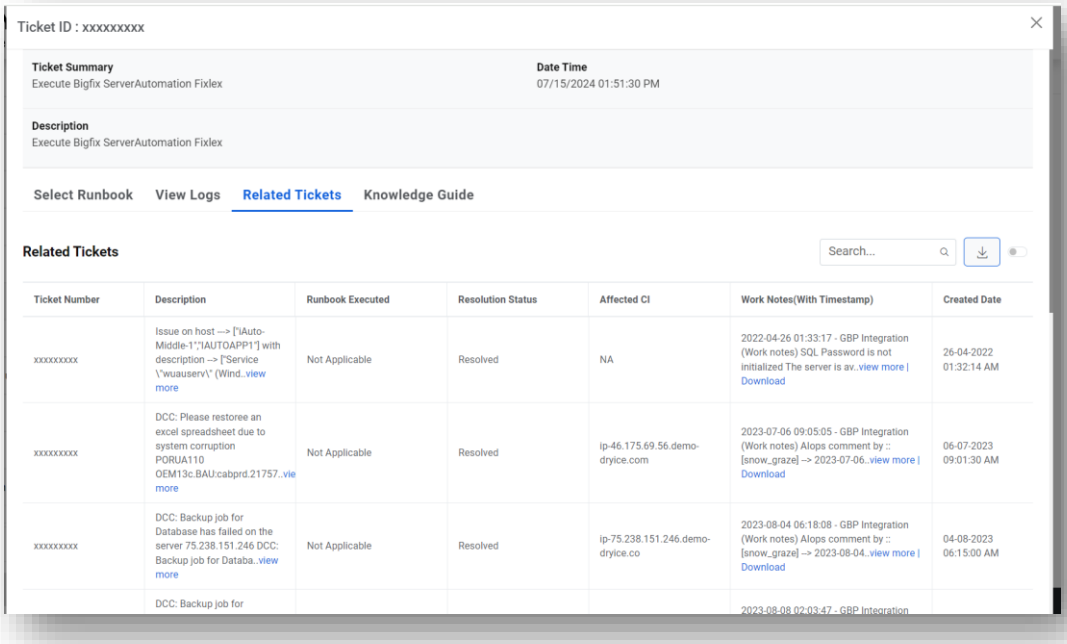


Figure 22 – Related tickets response from GenAI Studio

3. For the response generated from GenAI Studio, users can view the top 10 tickets in graphical display.

4. For this click on on the popup and below display appears on the screen:

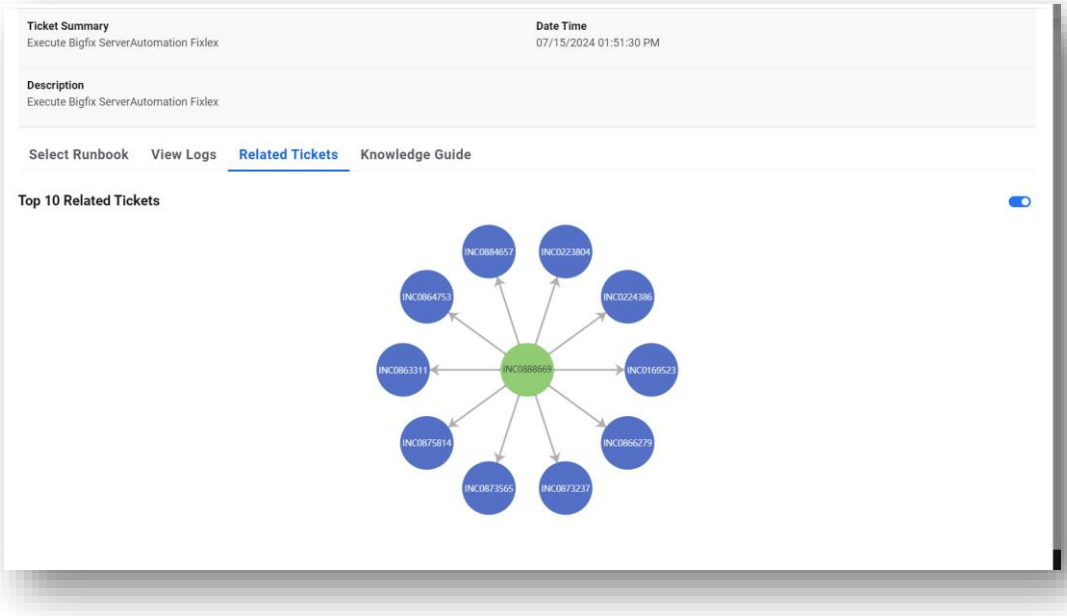


Figure 23 – Related tickets response from GenAI Studio in graphical mode

5. Users can view the info of any ticket in the grid below this graph by clicking on the ticket node.

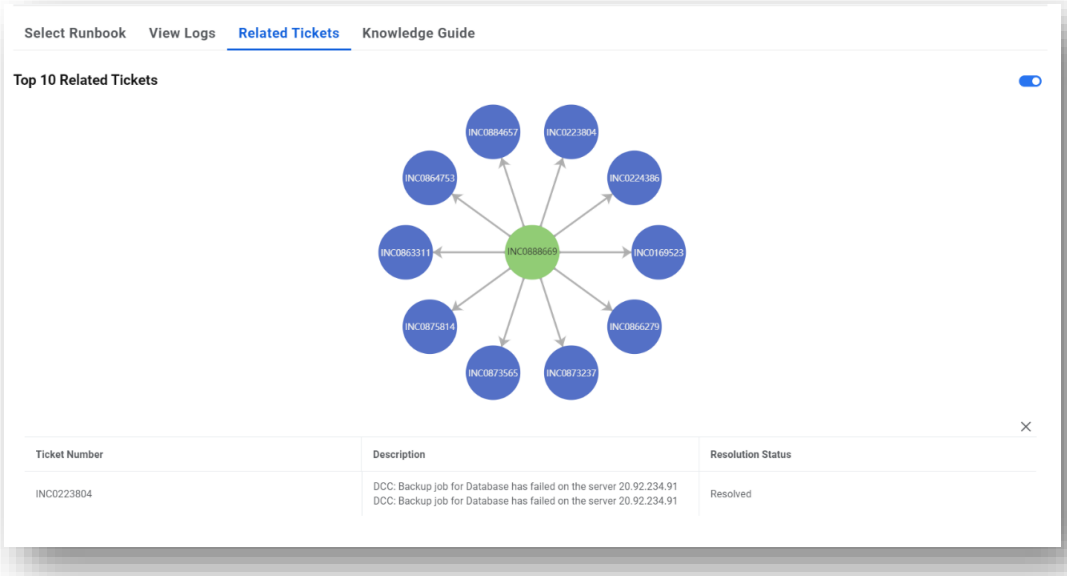


Figure 24 - Related tickets response from GenAI Studio in graphical mode- Drilldown

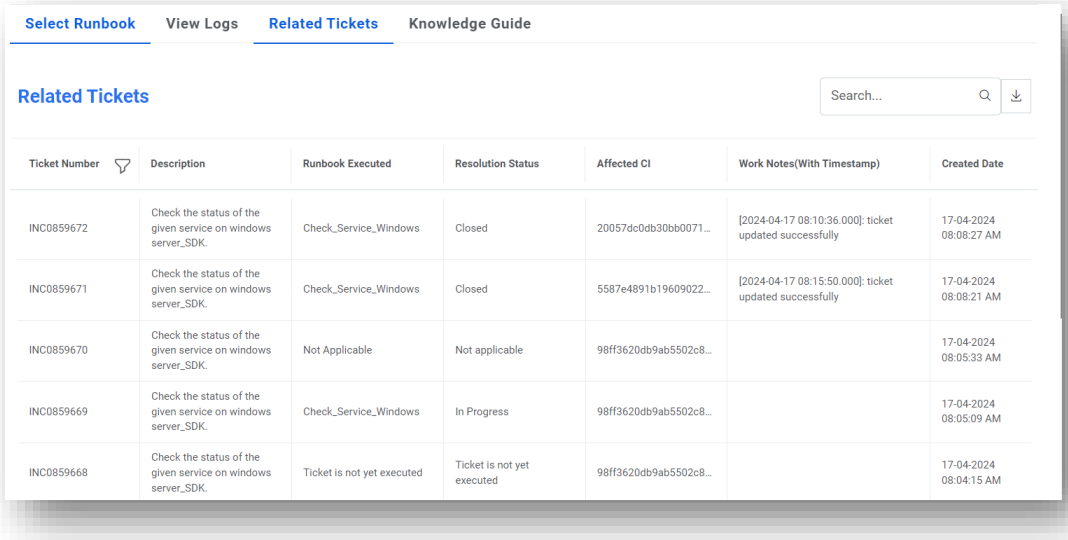


Figure 25 – Related Tickets

6. Users can view all the tickets available in the selected bucket, including their description and the associated runbook details.
7. Click **EXPORT** to download the bucket details.

My Ticket

8. This section describes how to manage the tickets assigned to the current user and available in the iAutomate queue.
9. To view and use the **My Ticket** tab, perform the following steps:
10. Select an **organization** from the drop-down list and then select a **Module**.
11. The organization and module-specific ticket assigned to the current user appears in a tabular view.

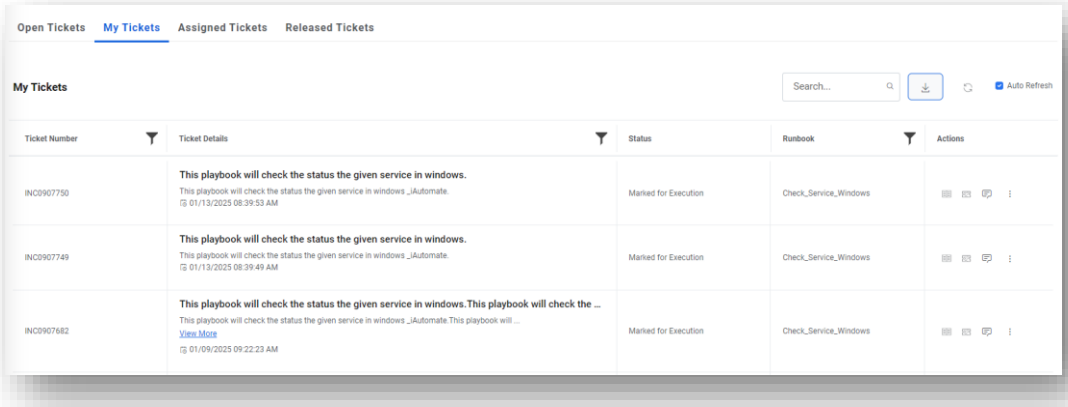


Figure 26 – My Tickets

12. The **My Tickets** tab is categorized into the following tabs:

My Tickets Sub-Sections

- **Ticket Details:** Provides information about a request, including the ticket description, summary, identification number, and the creation date. Selecting a ticket's Incident ID displays the ticket detail in the Logs tab.
- **Action**: Includes a Guide link that retrieves the most relevant knowledge for a ticket from across different sources in a single view, enabling you to resolve the ticket.

- **Runbook:** Displays the runbook being selected and executed.
- If the ticket execution is In-Process, the Runbook button is disabled.
- For Failed ticket execution, the Runbook button is enabled. Clicking the Release button displays a window and lists all the relevant runbooks by their confidence score. Users can perform any of the following steps:
  - View the last executed runbook with the parameters and run the same runbook again.
  - Select a new runbook to execute.
  - For more details, see Runbook Execution

4.2.2.2 Logs

This section describes near real-time status updates of ticket execution initiated by the user.

To view a ticket log, navigate to the Log tab appearing below the Open **Tickets** and **My Tickets** tabs. This displays the activity log for all tickets being executed with the following details:

Table 5 – Log Fields

Name of the log values	Description of the log values
Incident Number	This is a unique, auto-generated number for the incident ticket. It is preceded with an INC prefix (e.g.INC0000001) of the logged ticket.
Interaction ID	Unique ID generated by the underlying RBA tool.
Runbook Name	Name of the runbook executed for the logged ticket.
Log Date Time	Date and time of the logged ticket.
Runbook Status	Status of the runbook selected for the ticket.
Status Reason	Displays the ticket specific logs including the field values. Value wrapped to multiple lines within the column. To access the related record, click View More.

The logs displayed are listed by their date and time. The most recent update is available on the top of the grid.

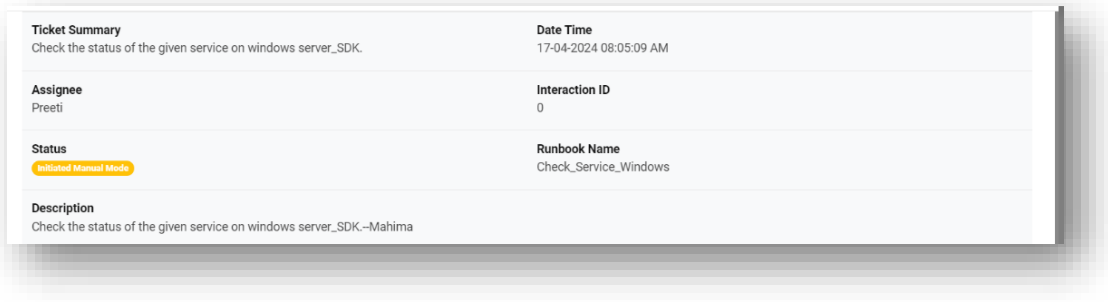
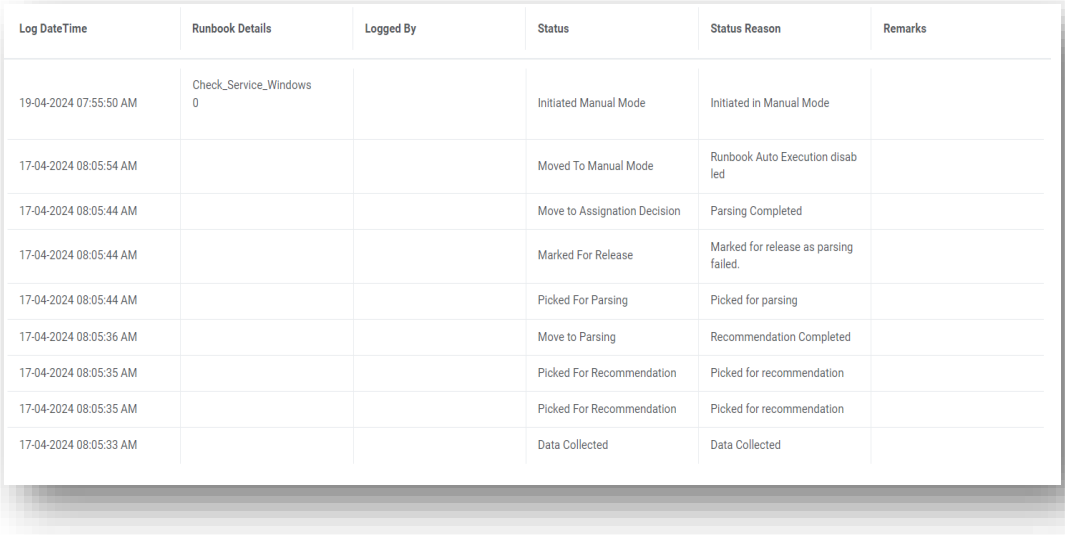


Figure 27 – Logs View



Log DateTime	Runbook Details	Logged By	Status	Status Reason	Remarks
19-04-2024 07:55:50 AM	Check_Service_Windows 0		Initiated Manual Mode	Initiated in Manual Mode	
17-04-2024 08:05:54 AM			Moved To Manual Mode	Runbook Auto Execution disab led	
17-04-2024 08:05:44 AM			Move to Assignation Decision	Parsing Completed	
17-04-2024 08:05:44 AM			Marked For Release	Marked for release as parsing failed.	
17-04-2024 08:05:44 AM			Picked For Parsing	Picked for parsing	
17-04-2024 08:05:36 AM			Move to Parsing	Recommendation Completed	
17-04-2024 08:05:35 AM			Picked For Recommendation	Picked for recommendation	
17-04-2024 08:05:35 AM			Picked For Recommendation	Picked for recommendation	
17-04-2024 08:05:33 AM			Data Collected	Data Collected	

Figure 28 - Logs View (Contd.)

4.2.3 Ticket Logs

Users can view the comprehensive log of all the activities for a ticket, including updates and notifications, whether it is by a user or by iAutomate.

To view the ticket logs, perform the following steps:

1. On the main menu, click **Logs** and then click **Ticket Logs**.
2. The **Ticket Logs** screen appears.

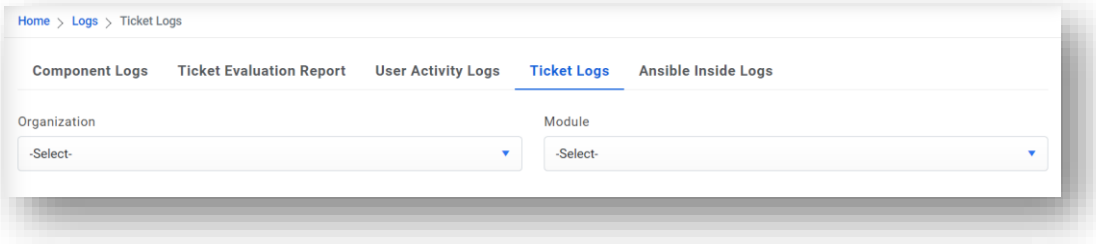


Figure 29 – Ticket Logs

3. Select an **organization** from the drop-down list and then select the **Module** (ex: My Company).

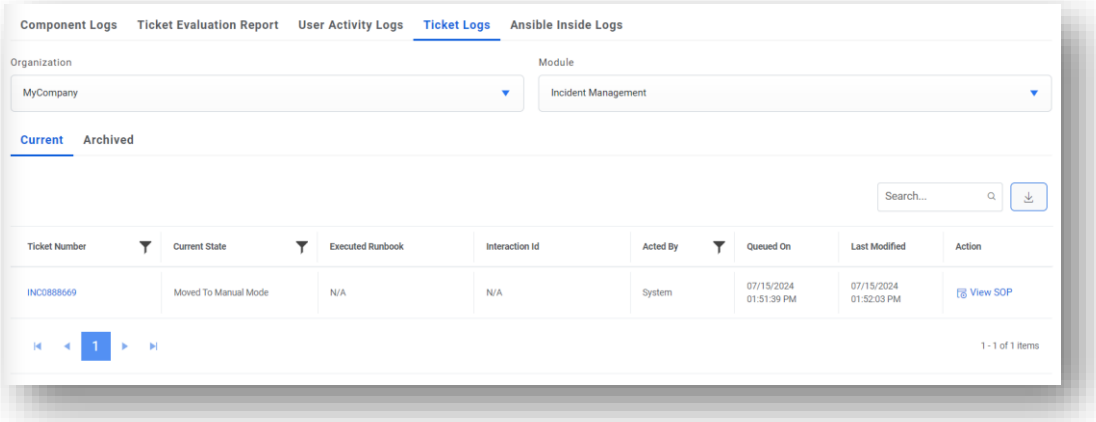


Figure 30 – Organization and Module

This lists the ticket log for organization and module-specific tickets in the following tab:

4. **Current:** Lists the log details of the tickets available for execution in the selected organization, including the ticket number, current state, acted by, queued on, and last modified information.
5. Selecting a **Ticket Number** displays the detailed log information including logged on and logged by details, action was taken on the ticket, the reason for the action taken, and remarks.

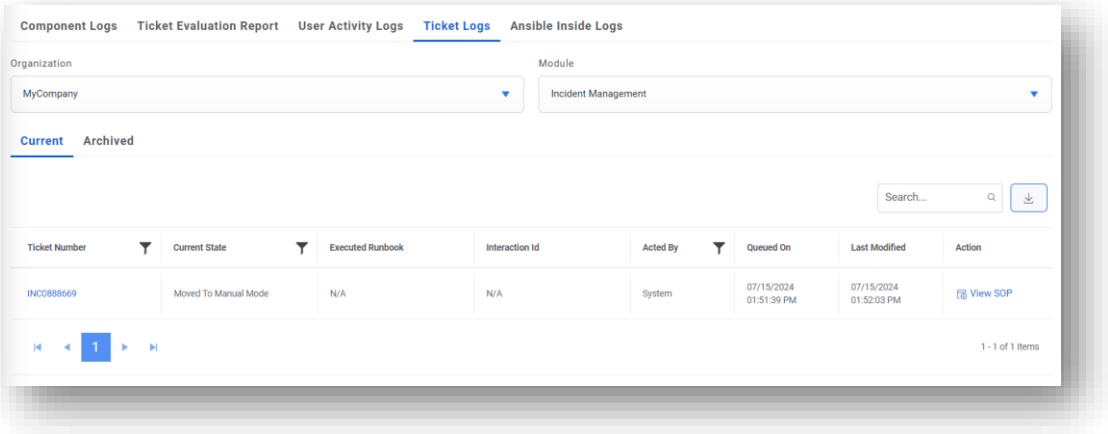


Figure 31 – Ticket Logs

6. **Archived**: Lists the log details of the ticket that are marked as closed in the selected organization, including the ticket number, current state, acted by, queued on, and last modified information.
7. Selecting a **Ticket Number** displays the detailed log information including logged on and logged by details, action that was taken on the ticket, the reason for the action taken, and remarks
8. Users can export the log details using the **Export to Excel** button above the Log Details view.

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

4.2.4 Knowledge

This module allows users to search across the organization's internal repositories such as SNOW and external domains such as **Stack Overflow** and Ubuntu.org. You 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.

4.2.4.1 Knowledge Search

This section describes how to use the advanced, organization-specific configuration to retrieve results from the knowledge repository.

To use Knowledge Search, perform the following steps:

1. On the main menu bar, click on Knowledge, and then click Knowledge Search tab.
2. The **Knowledge Search** screen appears.

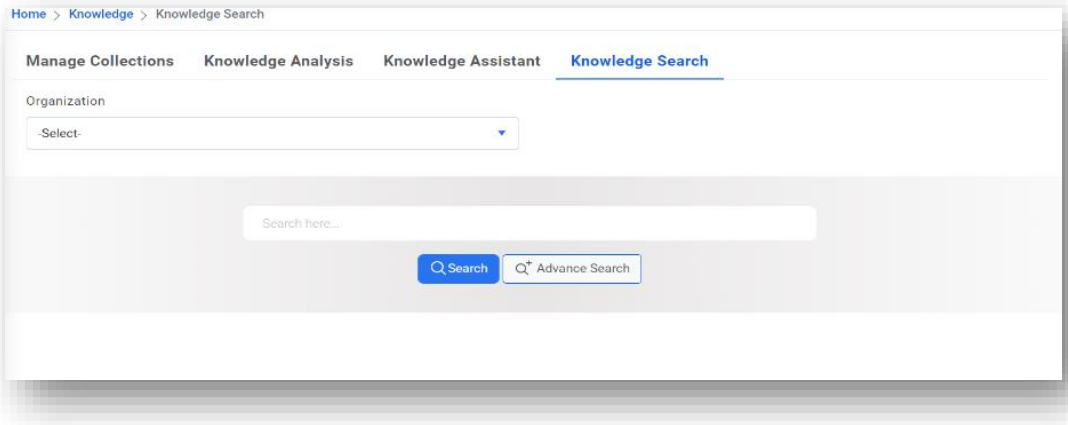


Figure 32 - Knowledge Search

3. Select the **Organization** from the drop-down list, then type the search string in the **Search** box, and then click **Search**. The search results are displayed in the grid below.

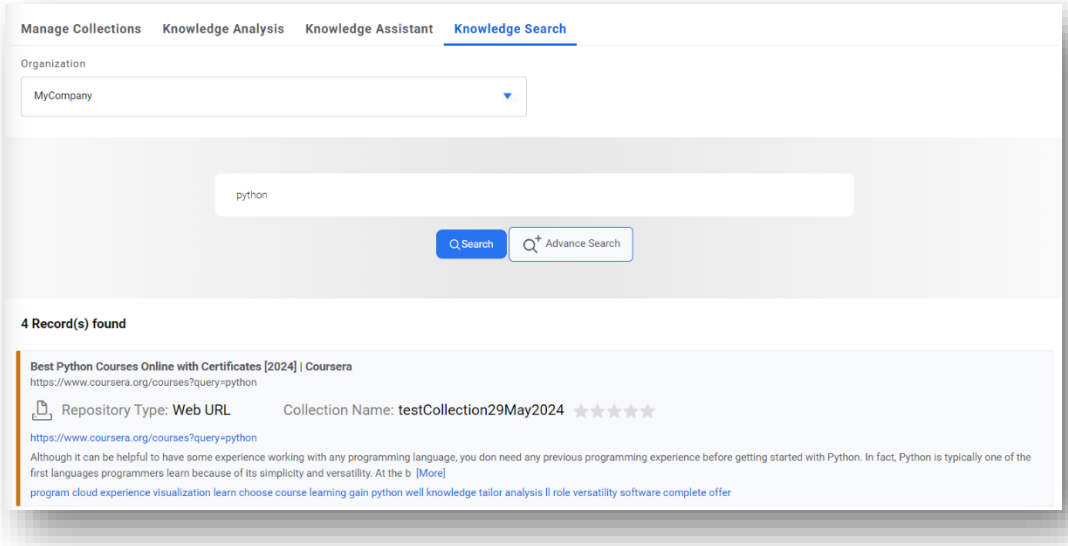


Figure 33 - Search

4. For more advanced search, instead of clicking , click the **Advance Search** button.
5. An **Advance Search** window is displayed for users to fill in the information and retrieve results.

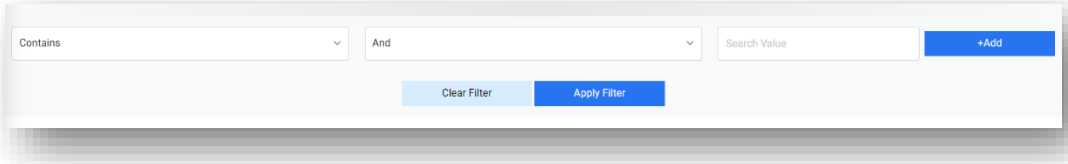


Figure 34 – Advance Search

6. **Advance Search** allows users to restrict search results by applying conditional filters or defining the order of the search results.
7. Users can add any number of custom conditions to refine their search for more relevant results.

8. Click Advance Search to start a search. After the search filter is applied, any results that appear will align with the conditions specified in the **Advance Search** box.

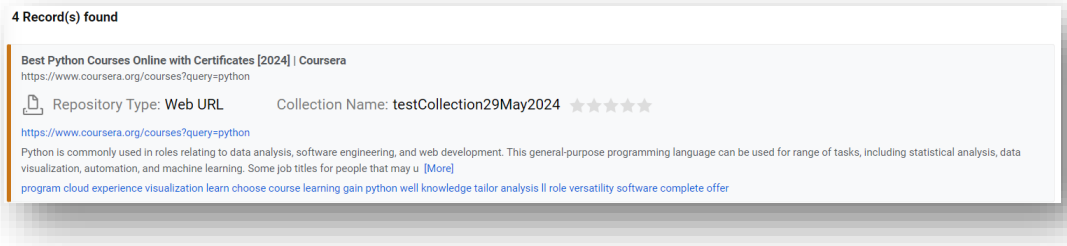


Figure 35 – Advance Search Results

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

4.2.5 Dashboard

The dashboard provides a complete view of the system in your 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.

To manage the dashboard, perform the following steps:

1. On the main menu bar, click **Dashboard.** The Dashboard screen appears.

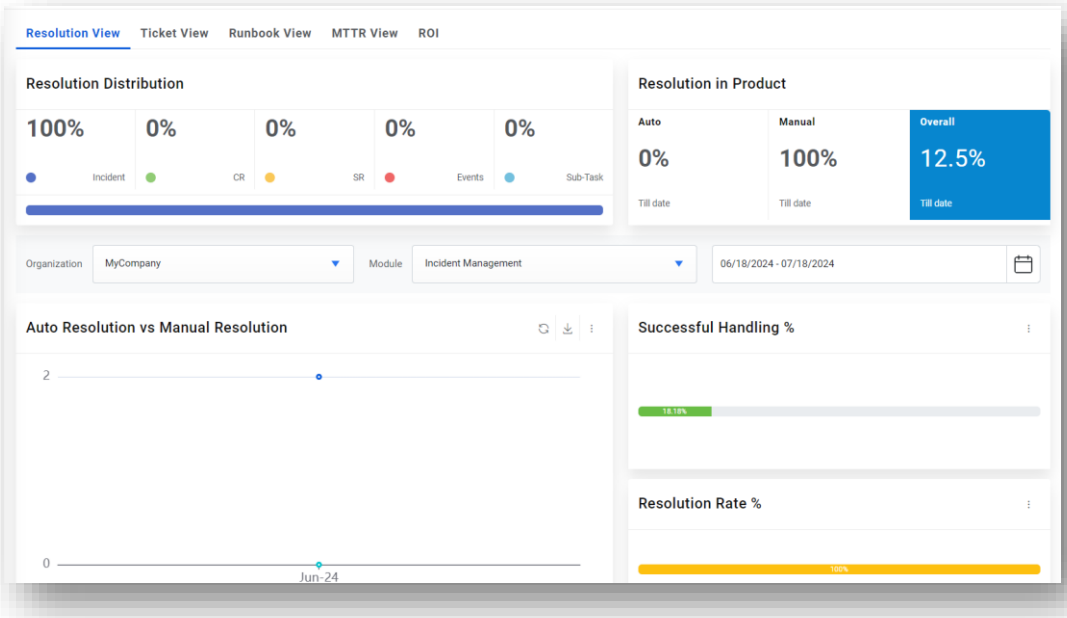


Figure 36 - Dashboard

2. **Dashboard** filters allow users to narrow the range of one or more reports on the active Dashboard tab. This filter lets you select a specific time frame, such as last month, this month, last quarter, or a range of dates.
3. To configure a specific report, select the **Organization** from the drop-down list, select the **Module** then select the time frame from the **Calendar**, and then select the date range in the **From Date** and **To Date** fields.

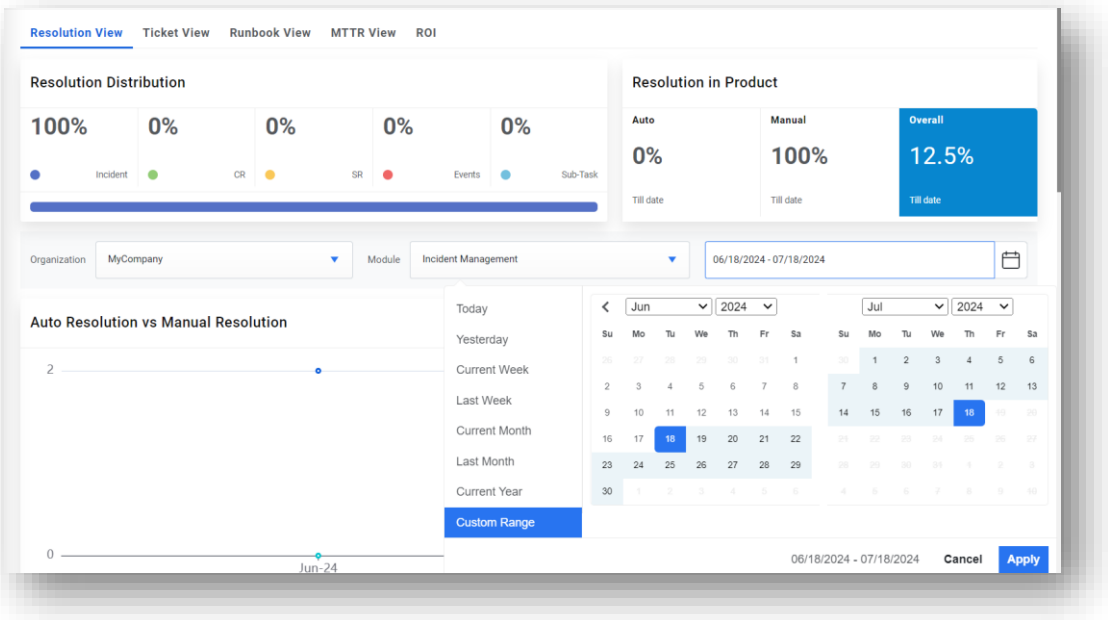


Figure 37 - Period

4. Click **Apply**.
5. These selections will recompile the data that appears in any report that is associated with the date filter. All data beyond the selected range is excluded.

Figure 38 - Widget

6. You can use predefined widgets under the Dashboard Filters tab to add new widgets and modify or remove existing widgets from the organization.

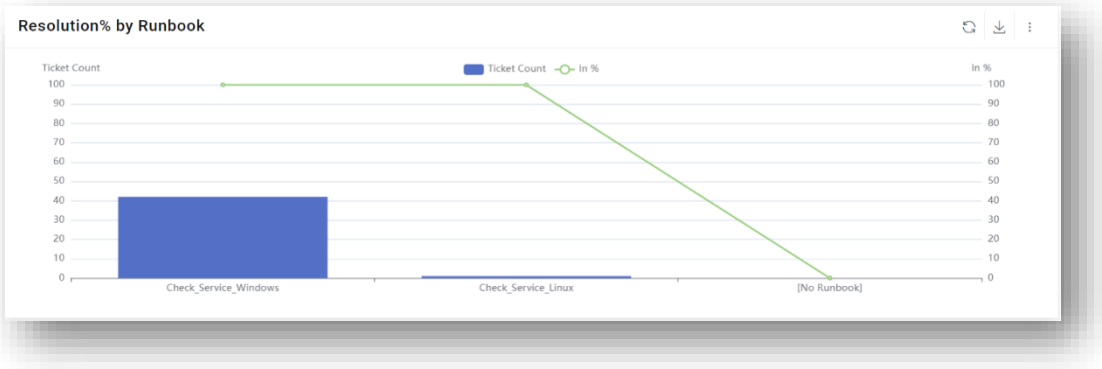


Figure 39 - Dashboard Filter

4.2.6 Help

This page helps the user to locate the necessary documents for better understanding of the tool as well as get the details of the components being run in iAutomate.

1. On the main bar, click on **Help**.

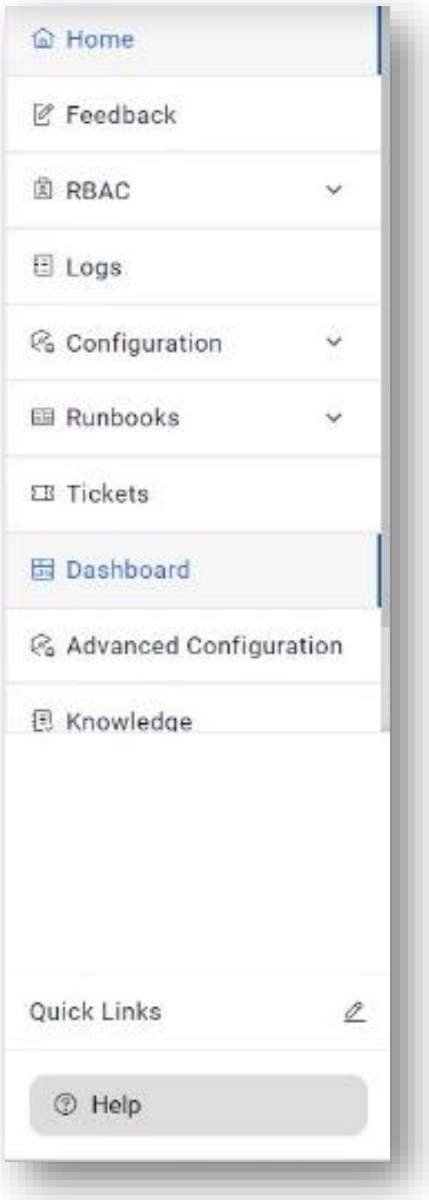


Figure 40 – Help Menu

2. The page below appears:

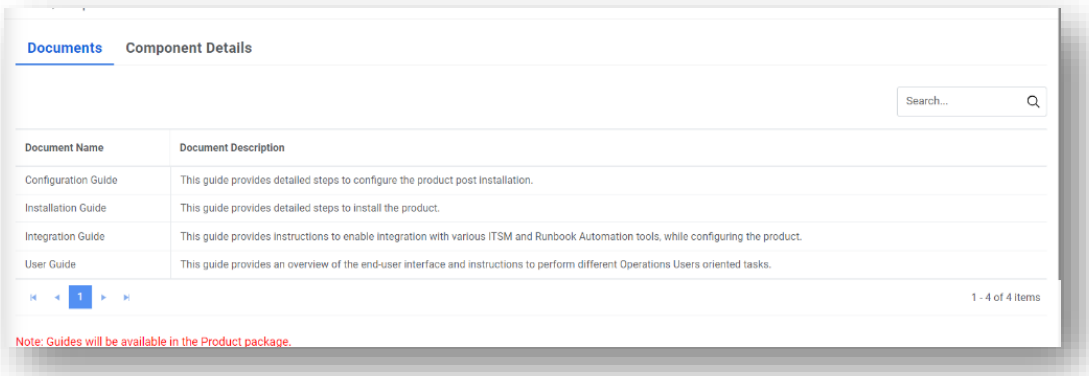


Figure 41 - Help

3. It has two tabs:

a. **Documents:** On Documents tab, it shows all the required documents needed for better understanding of iAutomate:
   - Configuration Guide
   - Installation Guide
   - Integration Guide
   - User Guide

b. **Component Details:** This tab displays all the components running on iAutomate along with the server Host/IP on which component is running, the name of the component, component code, the version of iAutomate currently running, the service name with which component is installed, the actual URL along with port on which component is running and the LB URL, if exists, for the component.

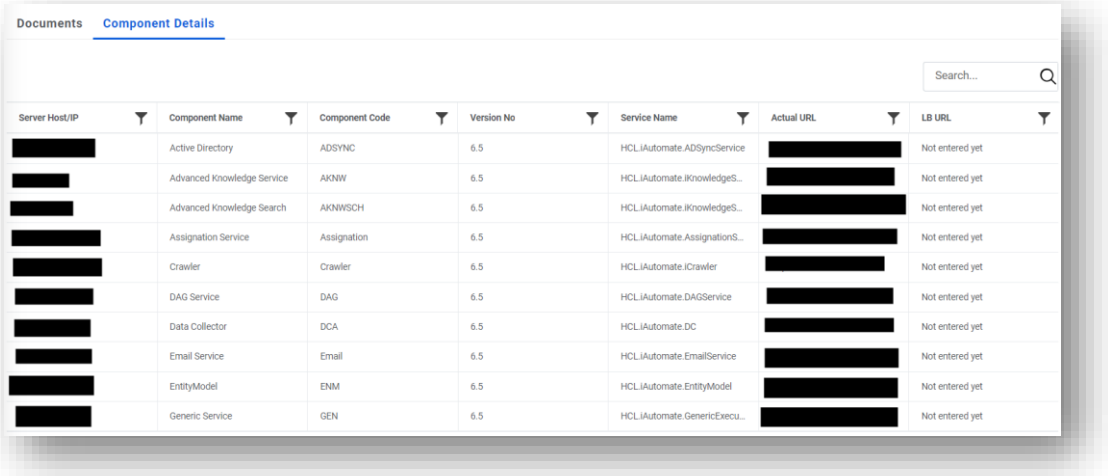


Figure 42 – Help (Cont.)

5 Using SaaS based 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.

5.1 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.**

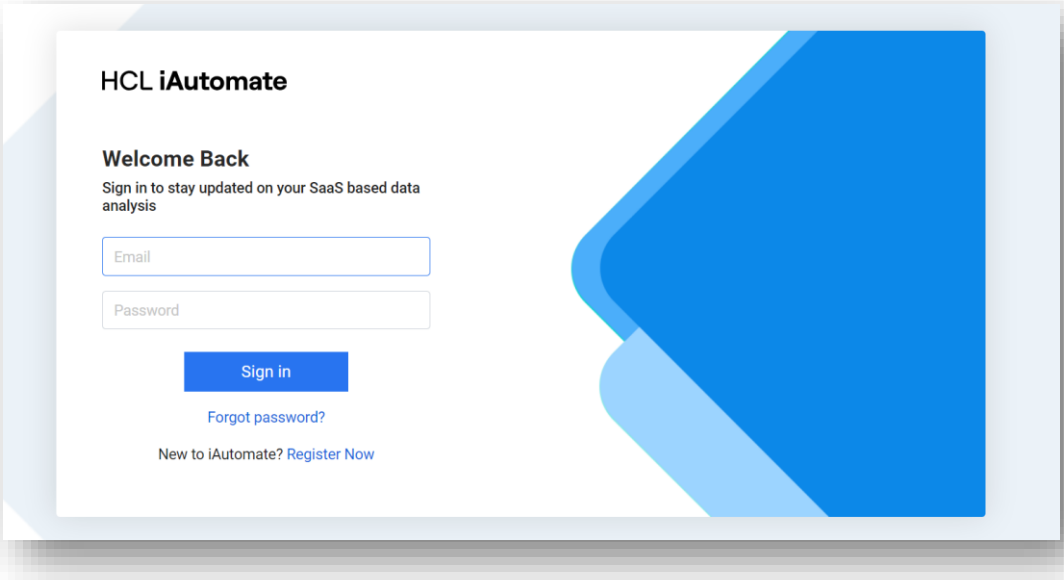


Figure 43 – SaaS based Ticket Analysis – Sign-In Page

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

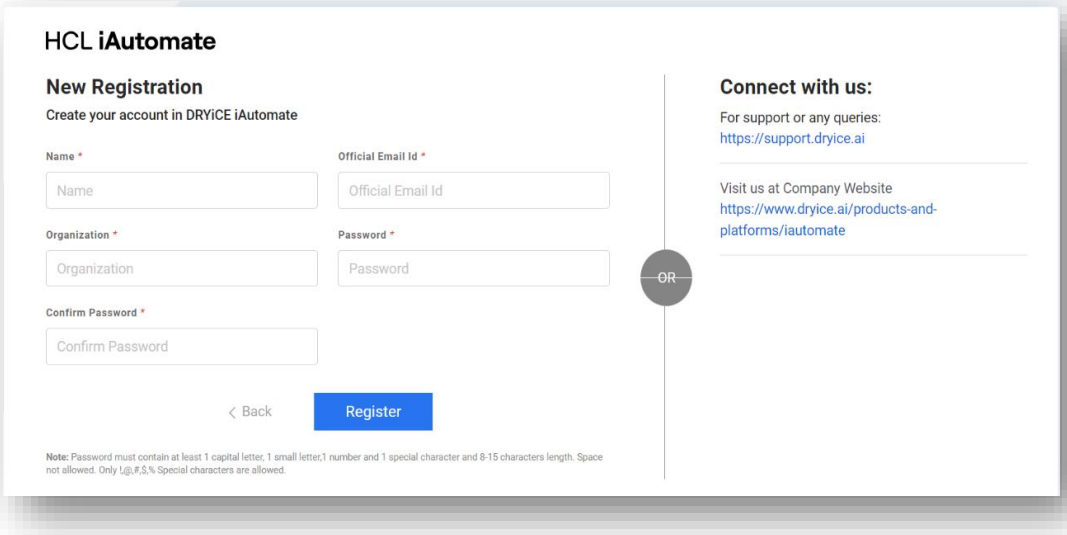


Figure 44 - SaaS based Ticket Analysis – User Registration

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 address.

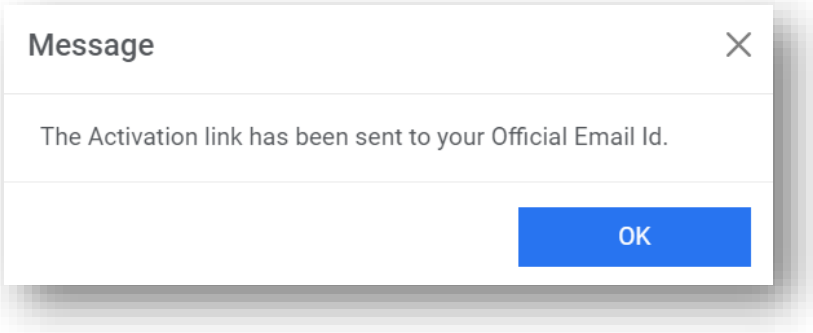


Figure 45 - SaaS based Ticket Analysis – Registration Confirmation

6. Click on the **Activation Link** received in the mail, and you will be redirected to the screen confirming the user registration.

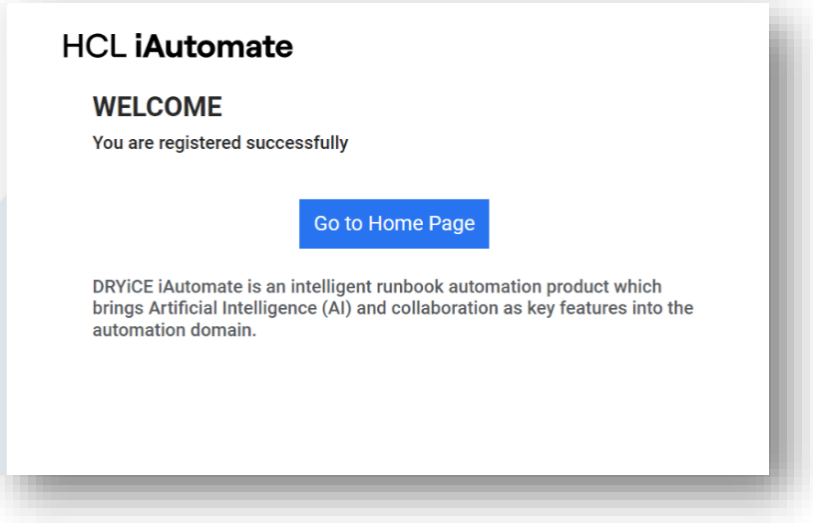


Figure 46 - SaaS based Ticket Analysis – User Activation Confirmation

7. Click **Go to Home Page** and it will redirect you to the **Sign in** page**.**

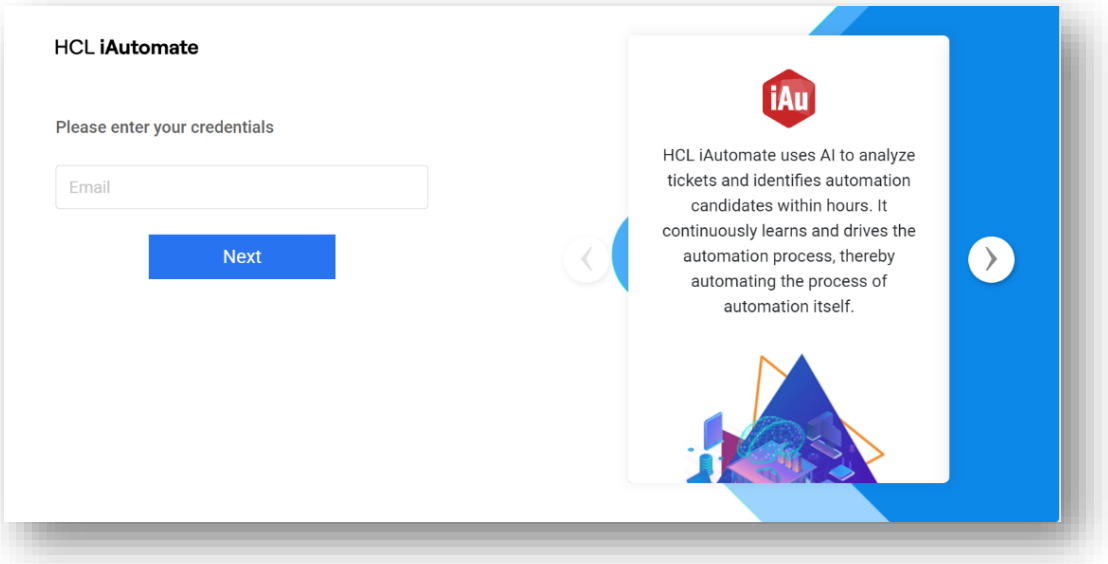


Figure 47 - SaaS based Ticket Analysis – Sign In Page

5.2 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 to the system. To do that, perform the following steps:

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

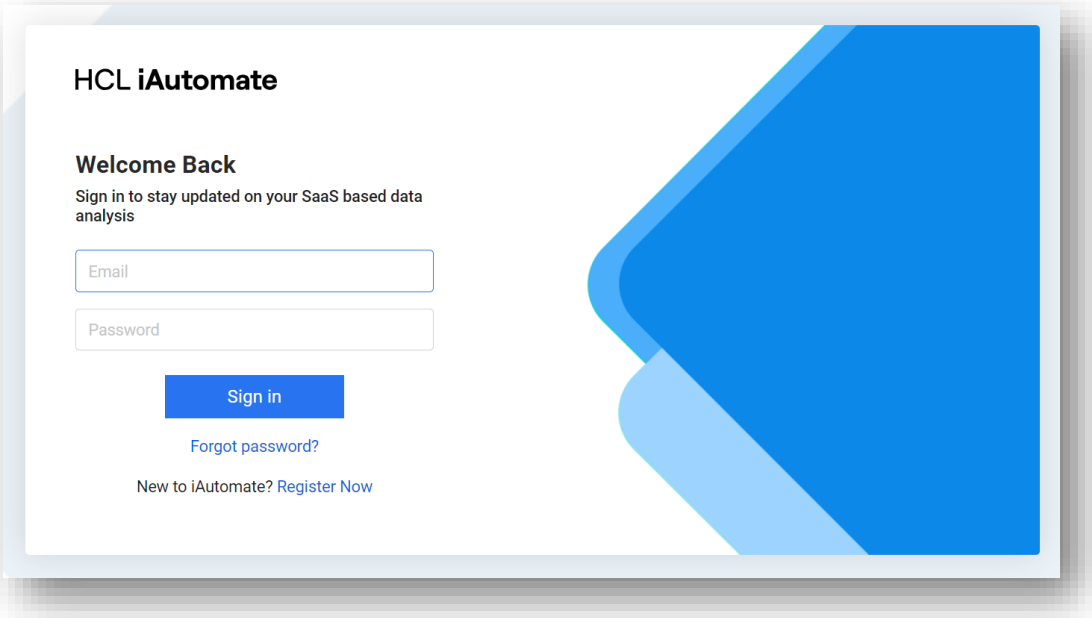


Figure 48 - SaaS based Ticket Analysis – Sign in Page

2. Enter the registered **Email Id** and **Password** and click **Sign In.** The screen below will appear**.**

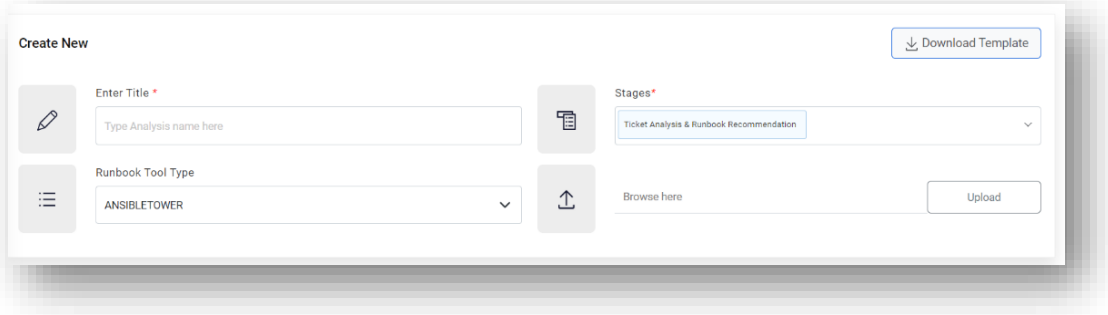


Figure 49 - SaaS based Ticket Analysis – Analysis Page

3. Under the **Analysis** tab, the user has two options.
   a. **Create New** – Allows users to create a new analysis. For details, refer to the Creating New Analysis section.
   b. **Analysis List** – Allows users to view the ongoing and previous analysis details. For details, refer to the Viewing ongoing and previous analysis details section.

5.2.1 Creating New Analysis

1. To create a new analysis, enter **Title.**
2. 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.
3. Upload the ticket dataset in the form of a .csv file.

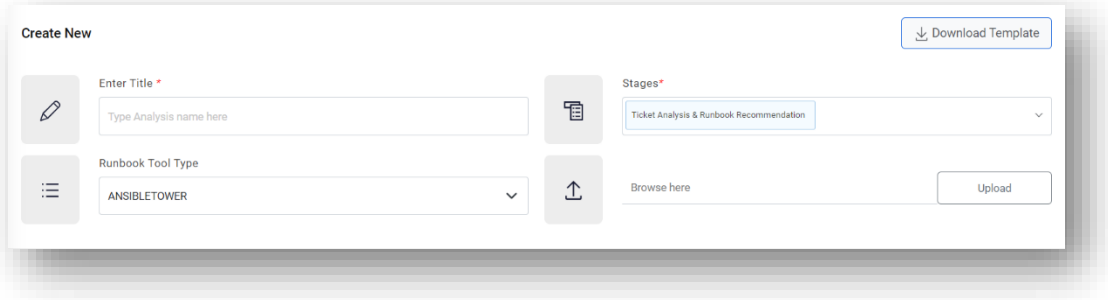


Figure 50 - SaaS based Ticket Analysis – Create New Analysis

4. Click **Upload** to start the analysis.

5.2.2 Viewing 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.

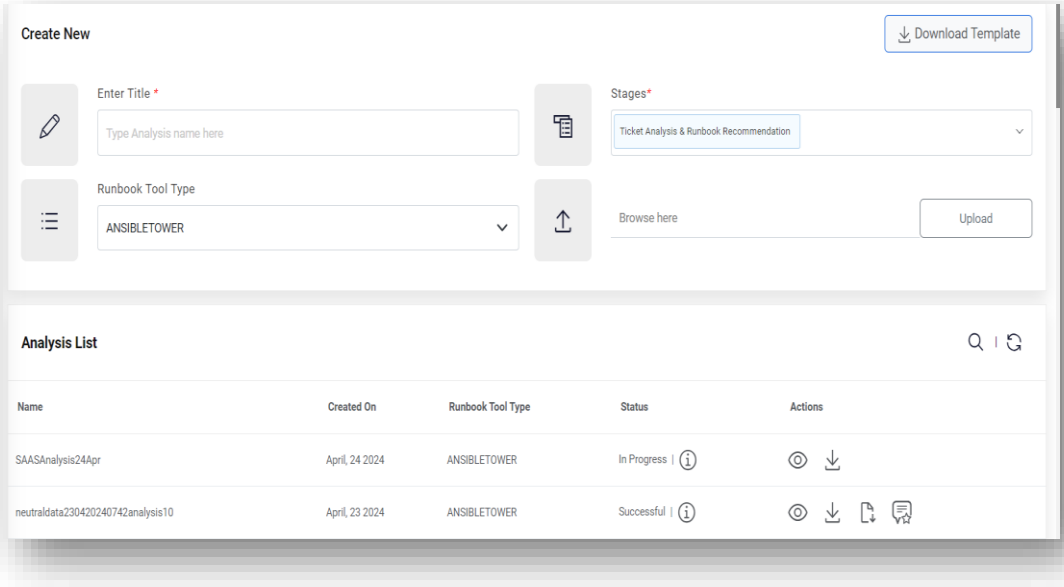


Figure 51 - SaaS based Ticket Analysis – Create New Analysis (Cont.)

2. Click icon to filter out the analysis based on name.

Figure 52 - SaaS based Ticket Analysis – Search Analysis

3. Click under **Status**, to view the real-time stage-wise progress status of the analysis.

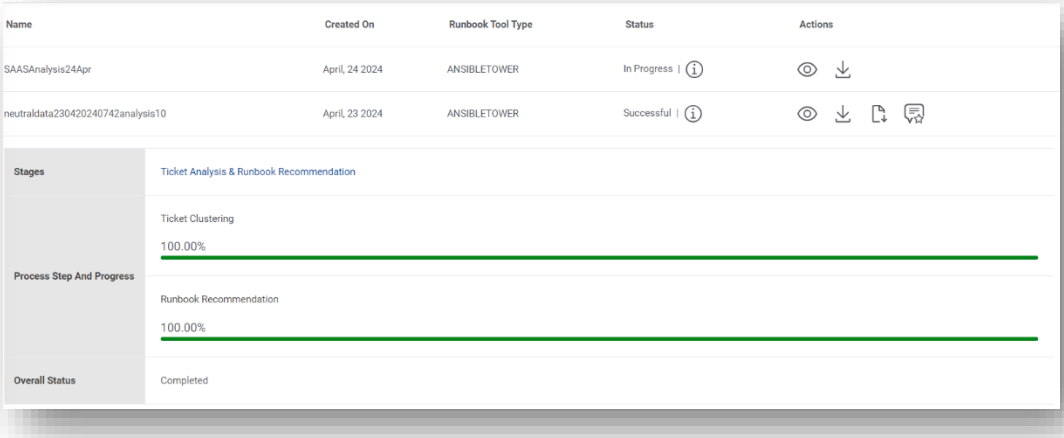


Figure 53 - SaaS based Ticket Analysis – Status

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 one more icon will be visible corresponding to the analysis.

8. Click to provide feedback on the recommendations given on the uploaded data.

For more information on feedback module, kindly refer **HCL iAutomate 6.4.2Self-Service Ticket Analysis - User Guide**.

5.2.3 Viewing Analysis Report

1. To view the analysis report, click **View Report**. The user is available with different set of widgets namely –
   a. **Summary View** – Provides a high-level summary of the analysis.
   b. **Ticket Types (Unique Clusters)** – Distinct number of ticket categories identified based on the nature of tickets from the overall ticket dataset uploaded.
   c. **Runbooks Available** – Ticket categories for which the runbooks are available based on system driven recommendations.
   d. **KB Available** – Number of Knowledge Articles, sourced from various web-based datasets, available for reference by end users.
   e. **Scripts Available** – Number of scripts available for use, to create automations which is not available in the out-of-the box runbook repository.
   f. **Nothing Available** – Number of ticket categories for which no KB articles / scripts are available.
   g. **Invalid Ticket Description** – Number of ticket categories which has not enough information for system to understand for processing.

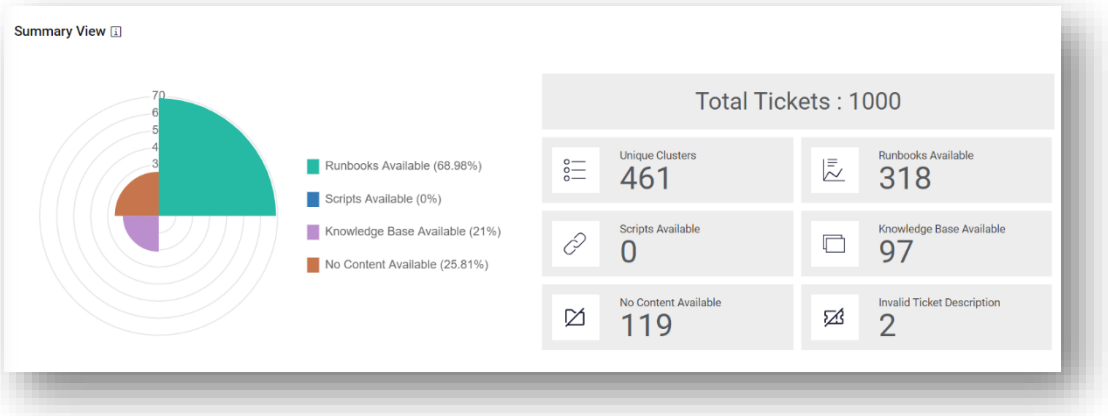


Figure 54 - SaaS based Ticket Analysis – Summary View

   h. **Top 10 Ticket Types (Unique Clusters)**– Provides a view of the top 10 unique ticket categories sorted by count and is indicative of the most voluminous issues in the environment.

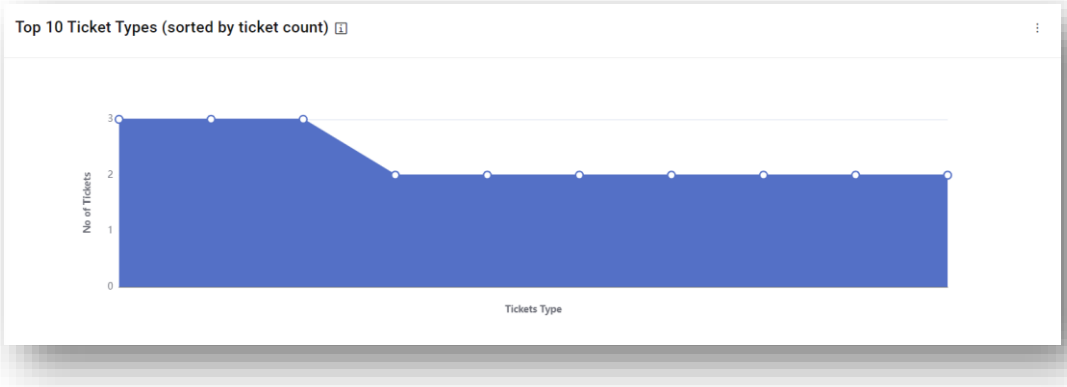
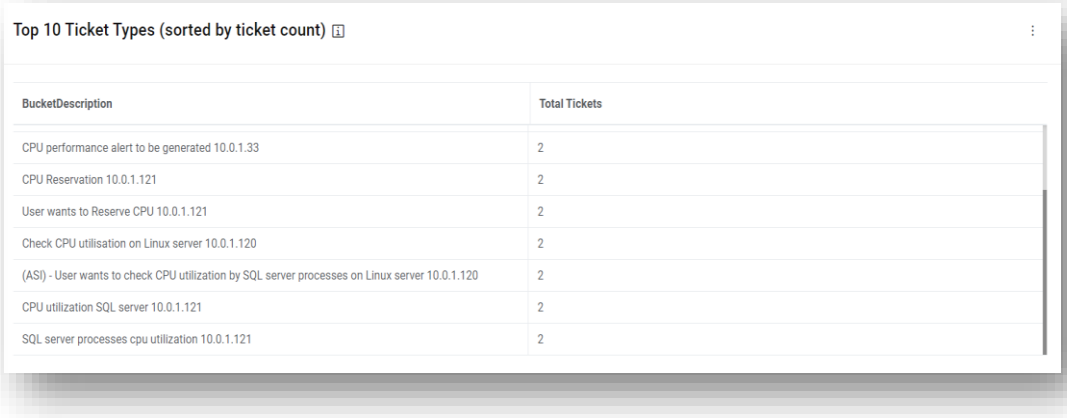


Figure 55 - SaaS based Ticket Analysis – Chart View of Top 10 Ticket Types (Unique Clusters)



BucketDescription	Total Tickets
CPU performance alert to be generated 10.0.1.33	2
CPU Reservation 10.0.1.121	2
User wants to Reserve CPU 10.0.1.121	2
Check CPU utilisation on Linux server 10.0.1.120	2
(ASI) - User wants to check CPU utilization by SQL server processes on Linux server 10.0.1.120	2
CPU utilization SQL server 10.0.1.121	2
SQL server processes cpu utilization 10.0.1.121	2

Figure 55 - SaaS based Ticket Analysis – Tabular View of Top 10 Ticket Types (Unique Clusters)

i. **Top 10 Ticket Types (No Automation Possible)** – Provides a view of the top 10 unique ticket categories sorted by count for which automations are not available within iAutomate.

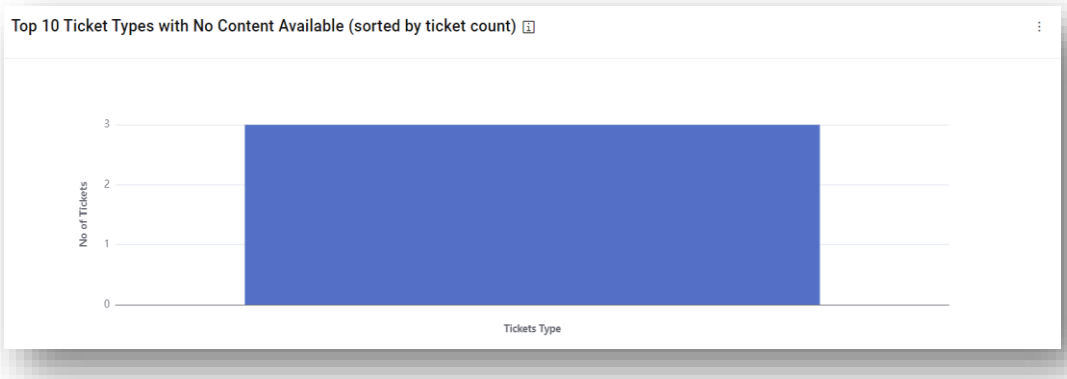


Figure 56 - SaaS based Ticket Analysis – Top 10 Ticket Types (Unique Clusters) with No Automation Possible (Chart View)

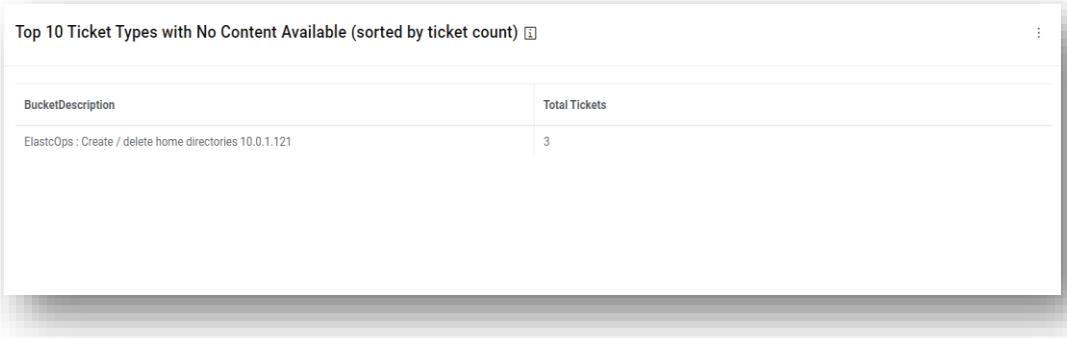


Figure 57 - SaaS based Ticket Analysis – Top 10 Ticket Types (Unique Clusters) with No Automation Possible (Tabular View)

j. **Top 10 Ticket Types (Automation Possible)** – 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.

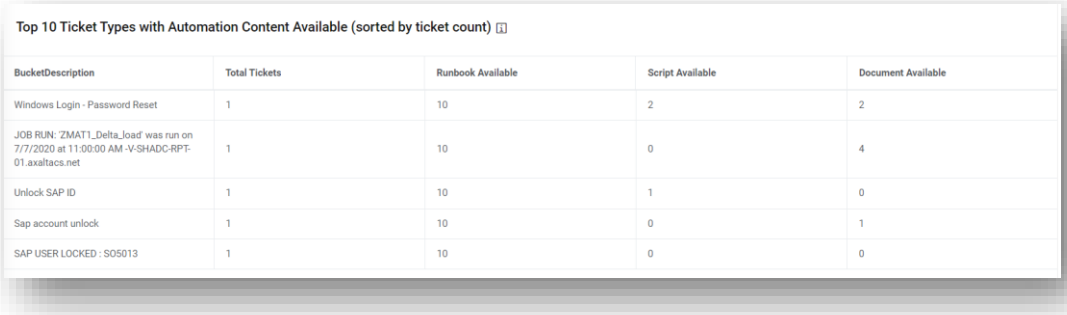
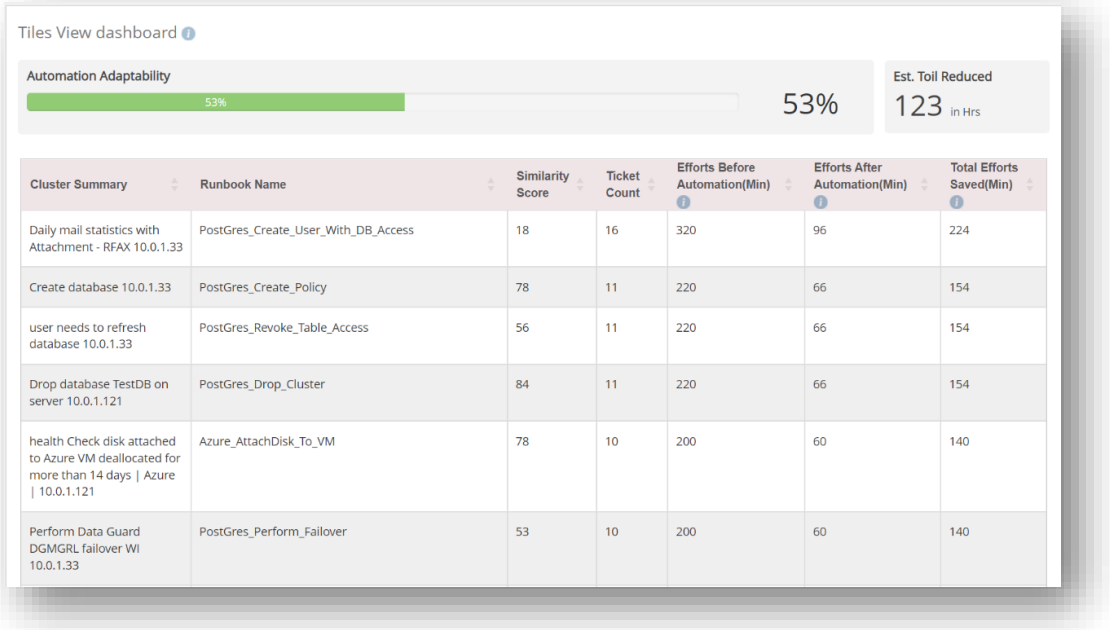


Figure 58 - SaaS based Ticket Analysis – Top 10 Ticket Types (Unique Clusters) with Possible Automation

k. **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.



Cluster Summary	Runbook Name	Similarity Score	Ticket Count	Efforts Before Automation(Min)	Efforts After Automation(Min)	Total Efforts Saved(Min)
Daily mail statistics with Attachment - RFAX 10.0.1.33	PostGres_Create_User_With_DB_Access	18	16	320	96	224
Create database 10.0.1.33	PostGres_Create_Policy	78	11	220	66	154
user needs to refresh database 10.0.1.33	PostGres_Revoke_Table_Access	56	11	220	66	154
Drop database TestDB on server 10.0.1.121	PostGres_Drop_Cluster	84	11	220	66	154
health Check disk attached to Azure VM deallocated for more than 14 days | Azure | 10.0.1.121	Azure_AttachDisk_To_VM	78	10	200	60	140
Perform Data Guard DGMGRL failover WI 10.0.1.33	PostGres_Perform_Failover	53	10	200	60	140

Figure 59 – Tiles View Dashboard

Users can also download the analysis report with the detailed ticket analysis which can be used to arrive at the automation percentage.

2. Click **Download PDF** to download the pdf report or click **Download CSV** to download the CSV file. Click **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.

5.3 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 **HCL iAutomate Web Portal URL**.

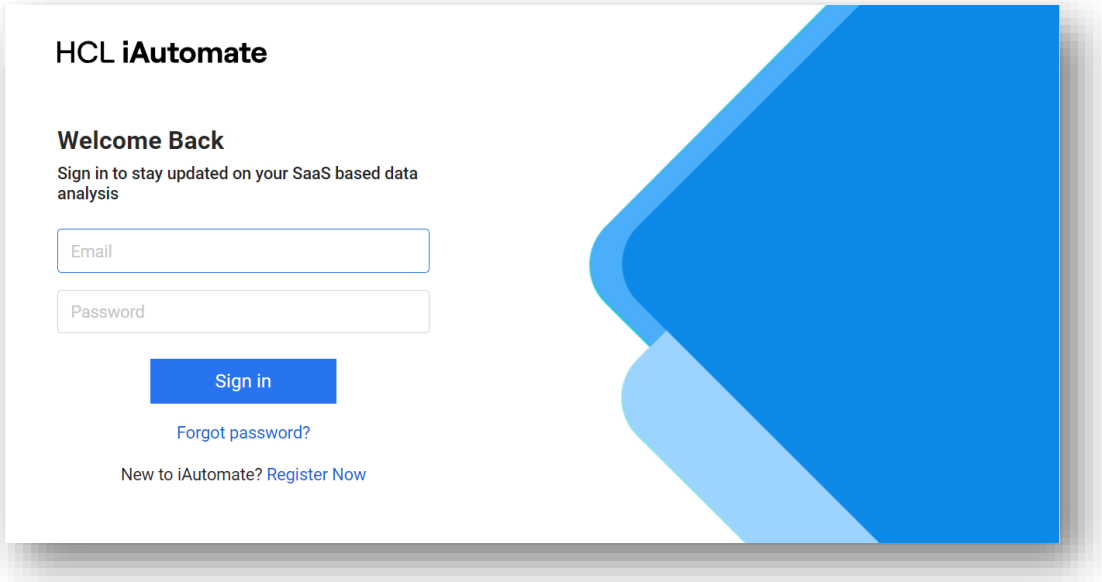


Figure 60 - SaaS based Ticket Analysis – Sign In Page

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

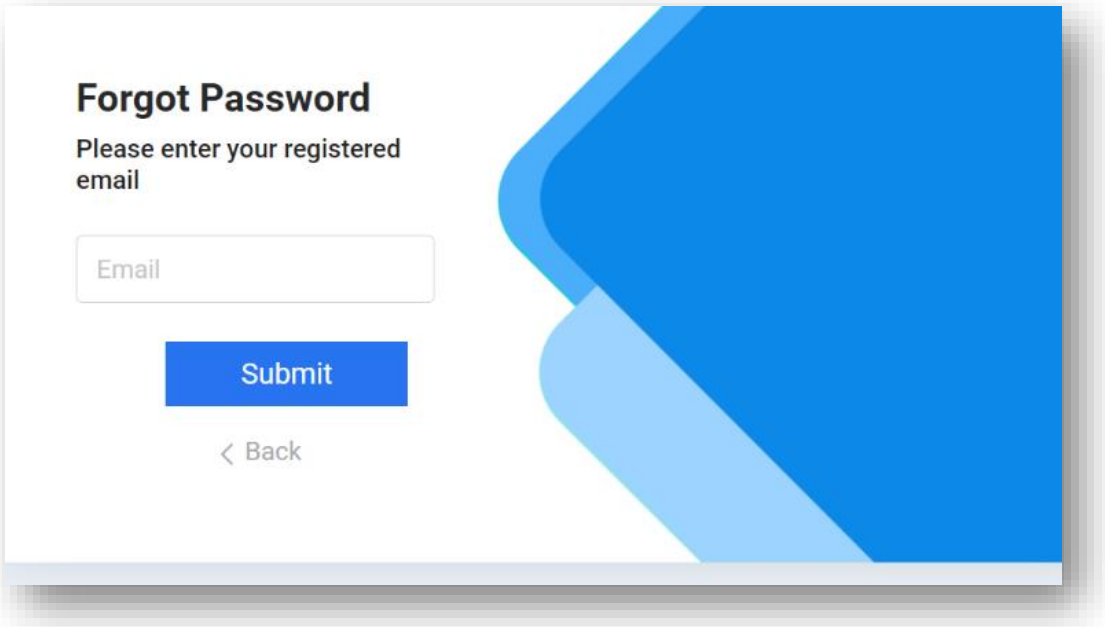


Figure 61 - SaaS based Ticket Analysis – Forgot Password

3. Enter the registered **Email ID** on which the temporary password will be sent.

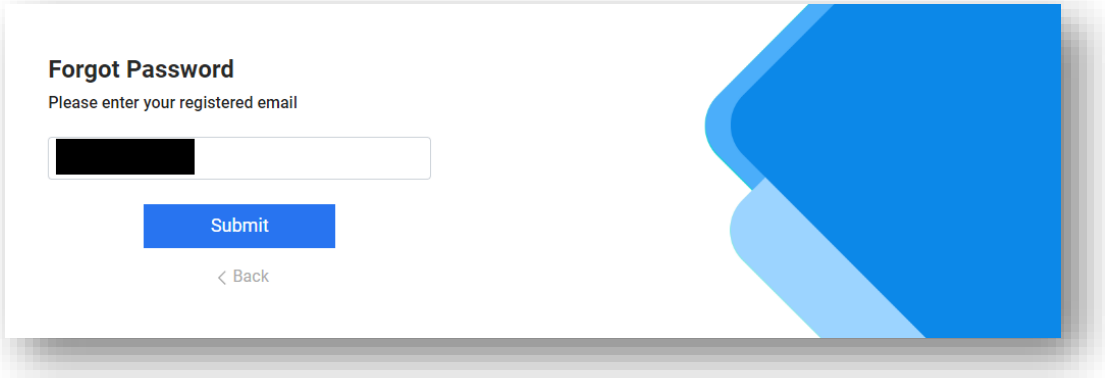


Figure 62 - SaaS based Ticket Analysis – Forgot Password (Cont.)

4. Click **Submit**.
5. A temporary password will be sent to the registered mail id. Please use that password to login into iAutomate.

5.4 Change Password

To change the password, perform the following steps -

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

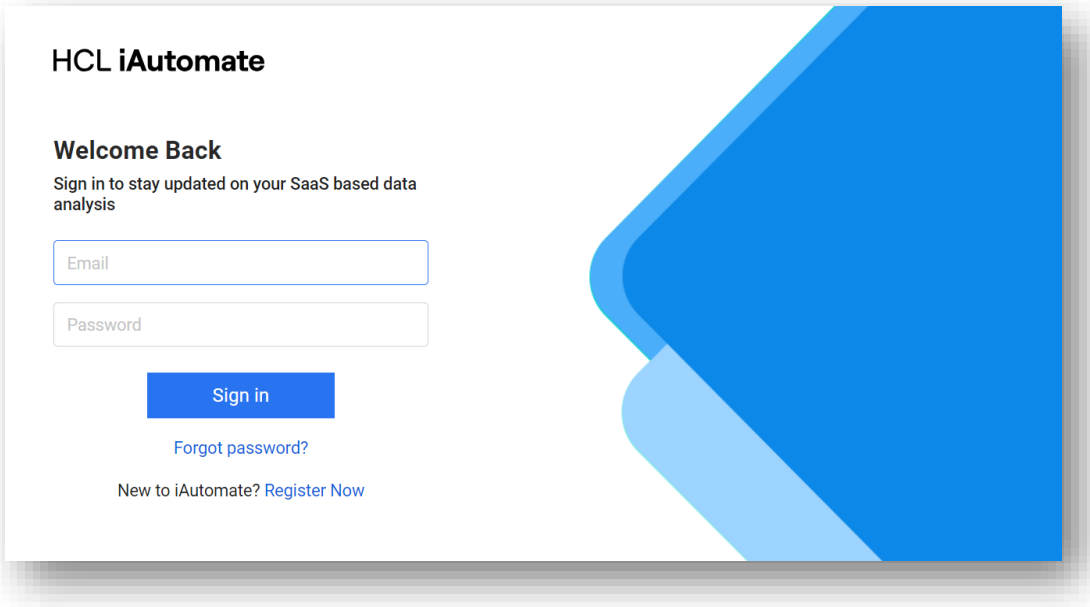


Figure 63 - SaaS based Ticket Analysis – Sign-In Page

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**.

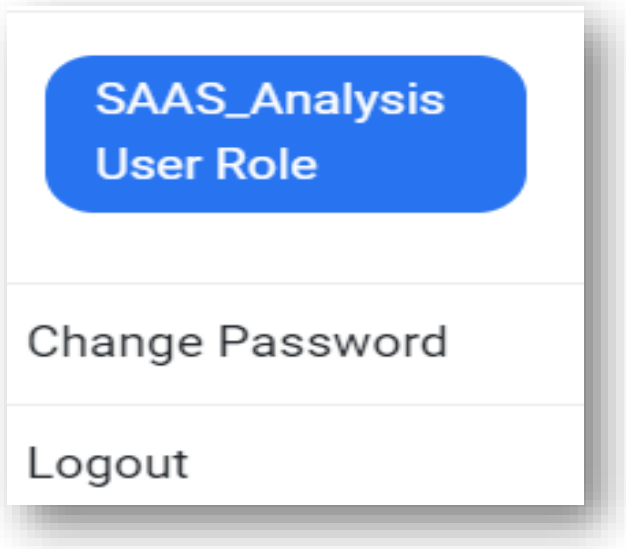


Figure 64 - SaaS based Ticket Analysis – Change Password

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

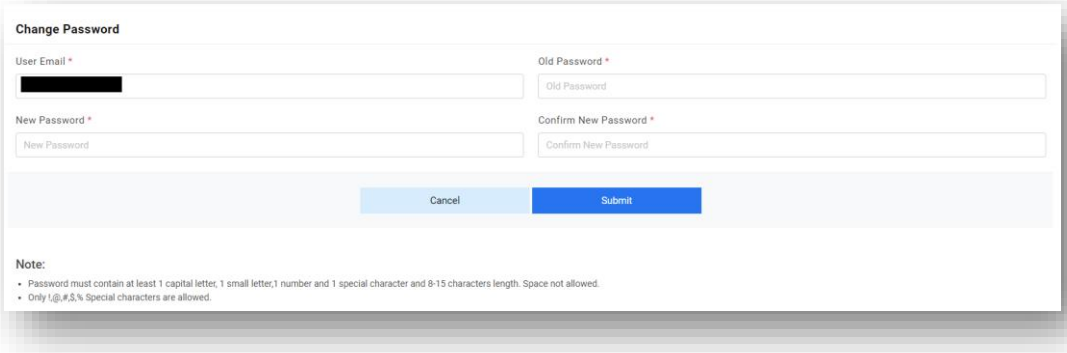


Figure 65 - SaaS based Ticket Analysis – Change Password (Cont.)

5. Click **Submit**. A confirmation message is displayed.

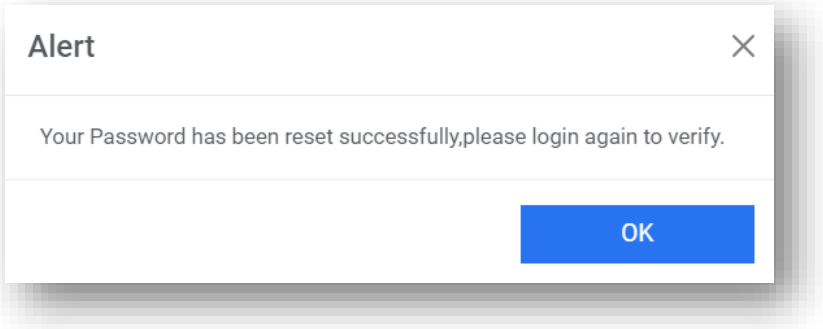


Figure 66 - SaaS based Ticket Analysis – Change Password (Cont.)

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

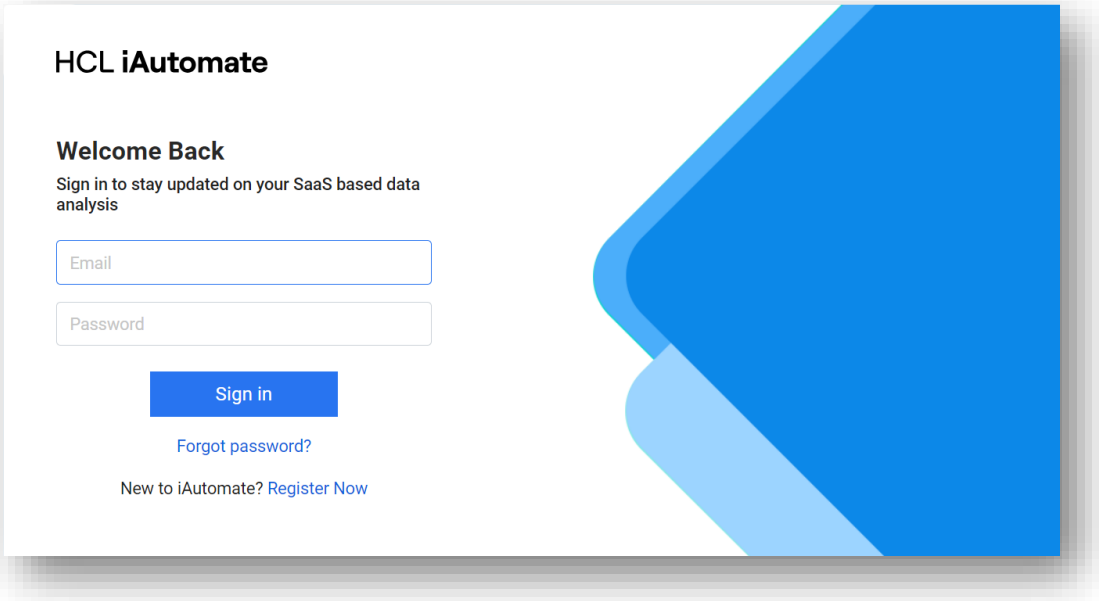


Figure 67 - SaaS based Ticket Analysis – Sign in Page

6 Support

To get support for this product, go to https://support.hcl-software.com/csm.

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

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