

BigFix Runbook AI
User Guide
Version 6.3



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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
June,2023	BigFix Runbook AI v6.3 User Guide

1 Preface

This section provides information about the **BigFix Runbook AI 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 BigFix Runbook AI end-users working towards resolution of IT support tickets.

1.2 About this Guide

This guide introduces you to the key concepts of BigFix Runbook AI 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:

- [BigFix Runbook AI Overview](#)
- [System Requirements](#)
- [Using BigFix Runbook AI](#)
- [Support](#)

1.3 Related Documents

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

- Introduction to BigFix Runbook AI 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
<u>Underlined blue</u>	Indicates cross-reference and links
<i>Italic</i>	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 BigFix Runbook AI Overview

BigFix Runbook AI 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.

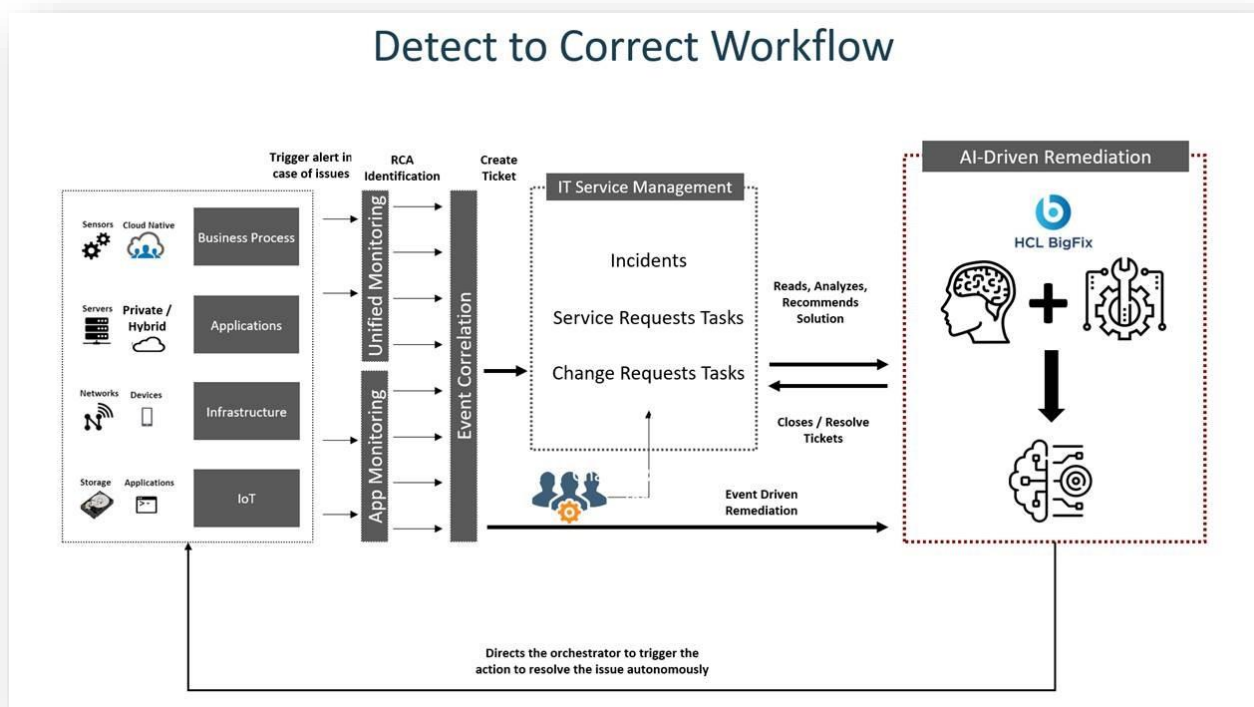


Figure 1 - BigFix Runbook AI Workflow

Intelligent automation powered by BigFix Runbook AI can make a tremendous impact in an enterprise adjusting to the New Normal:

- **Reduce Costs**
 - Achieve up to 30% reduction in 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 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 300+ 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 BigFix Runbook AI, a user need:

- A compatible internet browser excluding Internet Explorer
- A monitor with a resolution of at least 1024 x 768 pixels per inch

4 Using BigFix Runbook AI

BigFix Runbook AI 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	<ul style="list-style-type: none"> – All privileges for the administrative features in BigFix Runbook AI – Add, remove, and set access rights and privileges of other administrative roles <ul style="list-style-type: none"> – Full operational and management control over all accounts
Organization Administrator	<ul style="list-style-type: none"> – All privileges for the administrative features in BigFix Runbook AI at an organizational level – Add, remove, and set access rights and privileges of other users, roles, and domains in their organization
Operations User	<ul style="list-style-type: none"> – Access and view all resources in an BigFix Runbook AI account but cannot make any changes <ul style="list-style-type: none"> – Operational control over tickets, ticket logs, and the dashboard
Operations Admin	<ul style="list-style-type: none"> – Access ticket and runbook for analysis and can view all analysis.
SME Users	<ul style="list-style-type: none"> – Access ticket and runbook for analysis
Knowledge User	<ul style="list-style-type: none"> – Operational and management control over Knowledge Analysis and Search Module

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

4.1 Logging on to BigFix Runbook AI

To begin using BigFix Runbook AI, log on to the BigFix Runbook AI user console using the user account credentials.

After the user receives the login credentials, perform the following steps to access the BigFix Runbook AI platform:

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

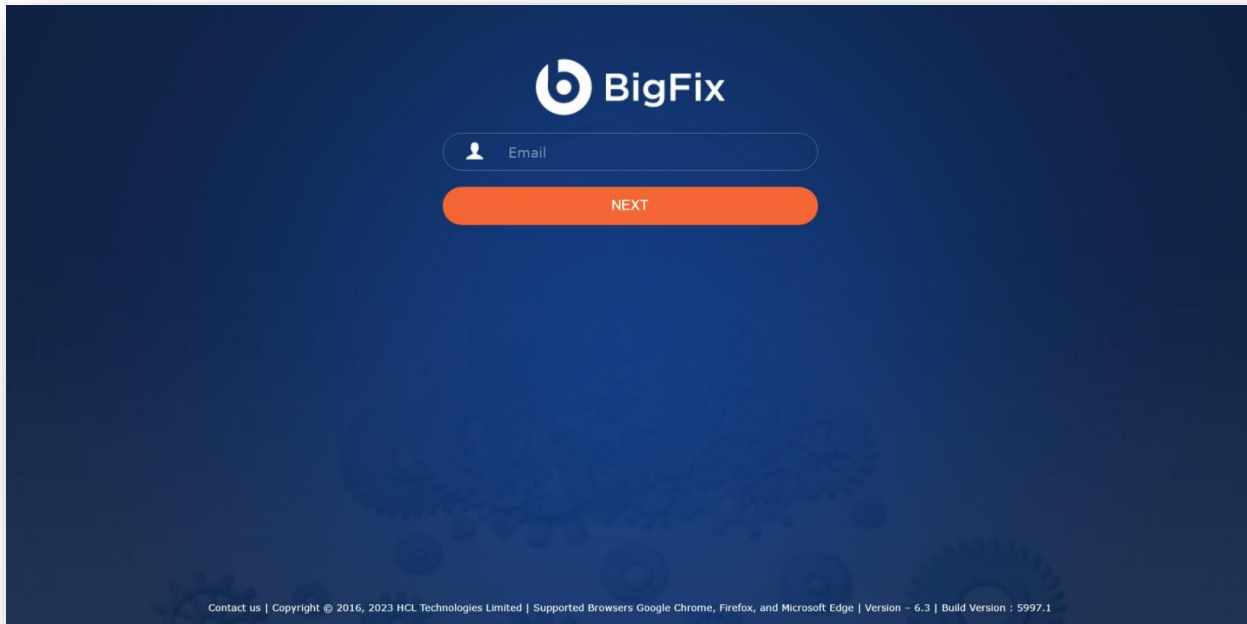


Figure 2 - BigFix Runbook AI Login page

3. Click **Next**.
4. Type the **Password**. If you are logging for the first time, enter your default password, the system prompts you to change your password.

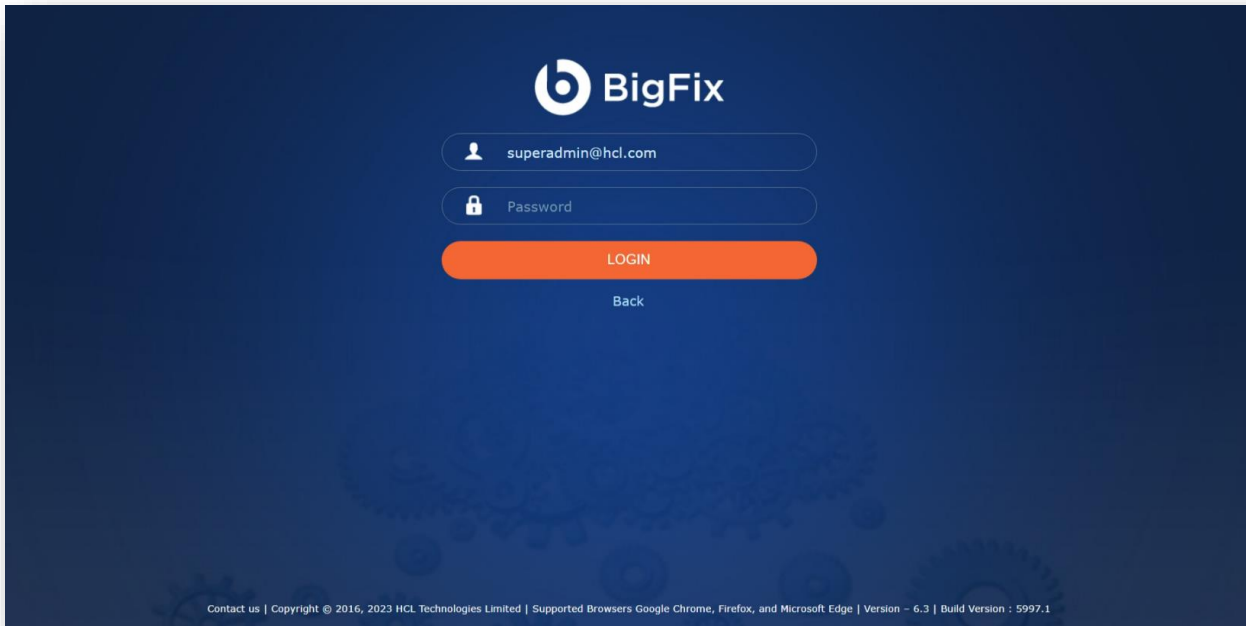


Figure 3 - BigFix Runbook AI: Enter Password

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

Change Password

User Email	<input type="text" value="user1@hcl.com"/>
Old Password	<input type="password" value="Old Password"/>
New Password	<input type="password" value="New Password"/>
Confirm New Password	<input type="password" value="Confirm New Password"/>

Note:

- Password must contain at least 1 capital letter, 1 small letter, 1 number and 1 special character and 8-15 characters length. Space not allowed.
- Only !, @, #, \$, % Special characters are allowed.

Figure 4 - BigFix Runbook AI Change Password Page

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

8. Click **Login** as shown in [Figure 3 - BigFix Runbook AI: Enter Password](#).

The BigFix Runbook AI home page appears.

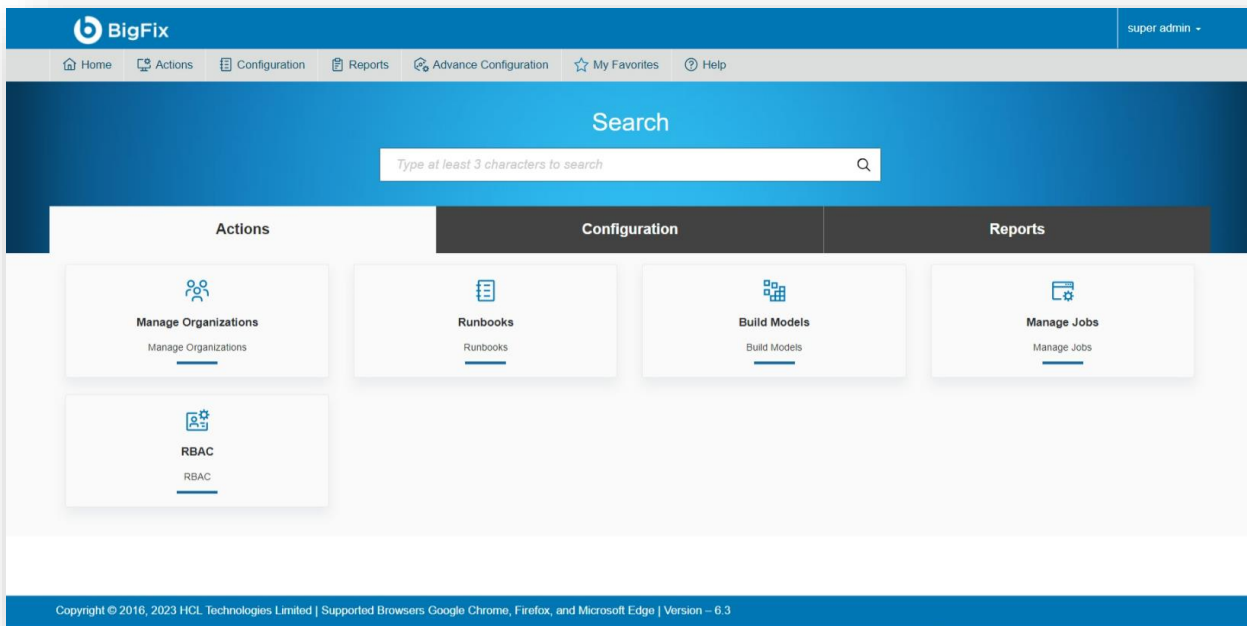


Figure 5 - BigFix Runbook AI Home Page

BigFix Runbook AI 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

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

The user interface comprises of four main menus:

- [Tickets](#)
- [Ticket Logs](#)
- [Dashboard](#)

- [Knowledge](#)

4.2.1 Tickets

This section describes the recommended steps to view or manage a ticket. On 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, go to main menu bar and click **Actions->Tickets**. A drop-down menu appears with the following options:

- [Actionable Tickets](#)
- [Auto Execution View](#)
- [Ticket Logs](#)

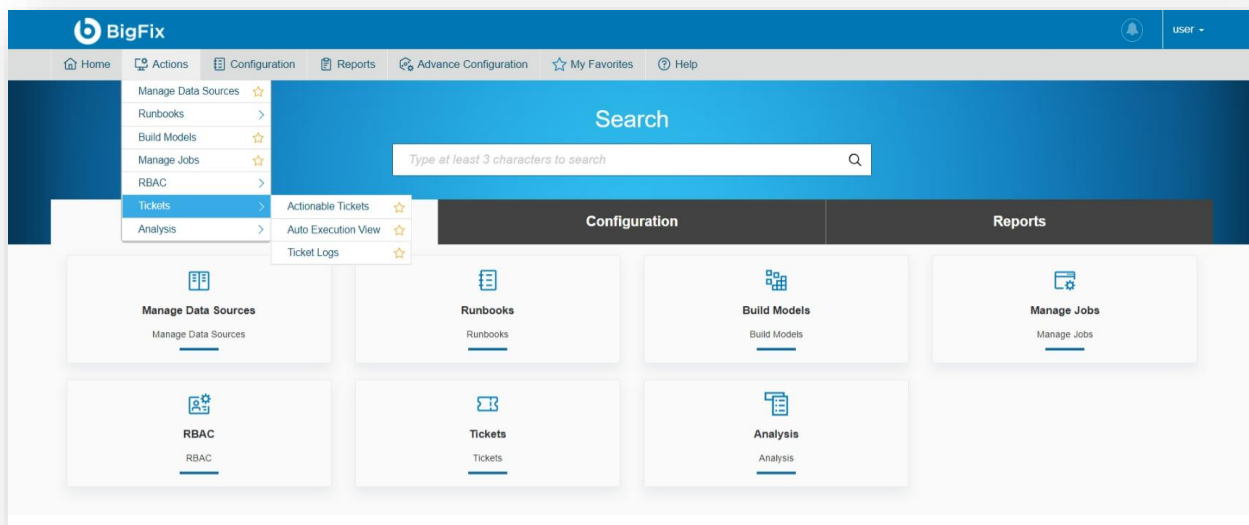


Figure 6 - Manage Tickets

4.2.2 Actionable Tickets

This section describes how unresolved open tickets in BigFix Runbook AI are executed in either **Auto** or **Manual** mode.

To view or manage actionable tickets,

1. Click **Actions->Tickets** on the main menu bar, and then click **Actionable Tickets**.

The **Actionable 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:

- [All Tickets](#): Lists the organization’s tickets, both assigned and unassigned.
- [My Tickets](#): Lists only the tickets assigned to the current user, including in process or failed tickets.

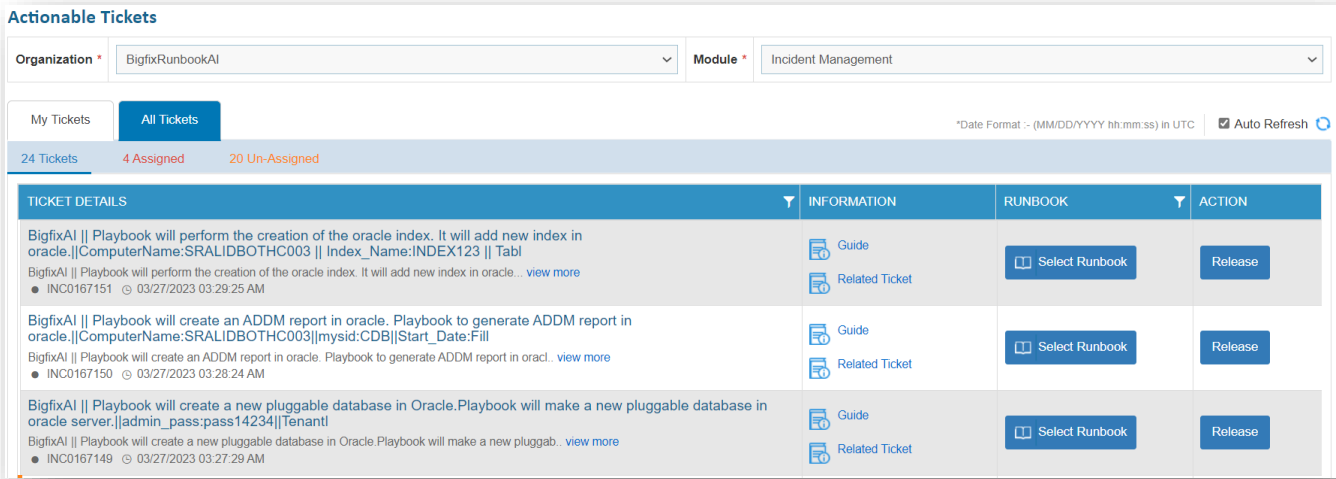


Figure 7 - Actionable Tickets

4.2.2.1 All Tickets

This section describes the organization-specific tickets available in BigFix Runbook AI and how to manage them.

To view and use the **All Tickets** tab, perform the following steps:

1. Select an **Organization** and then select a **Module**.
2. The specific tickets for the selected organization and module appear in a tabular view.

The **All Tickets** tab is categorized into the following tabs:

Table 3 - All Tickets Sub-sections

Tab	Description
Tickets	<p>Lists the tickets that are a part of the BigFix Runbook AI queue and must be executed by BigFix Runbook AI</p> <p>Lists the consolidated tickets from the Assigned and Unassigned tabs</p>

Tab	Description
Assigned	<p>A subset of the Tickets tab; lists the tickets allotted for either automated or manual execution</p> <p>Shows the allocation status of a ticket and the runbook initiated for it</p>
Unassigned	<p>A subset of the Tickets tab; lists the tickets pending for allocation</p> <p>Enables the current user to self-assign any ticket by selecting the most relevant runbook suggested and then initiating execution</p>

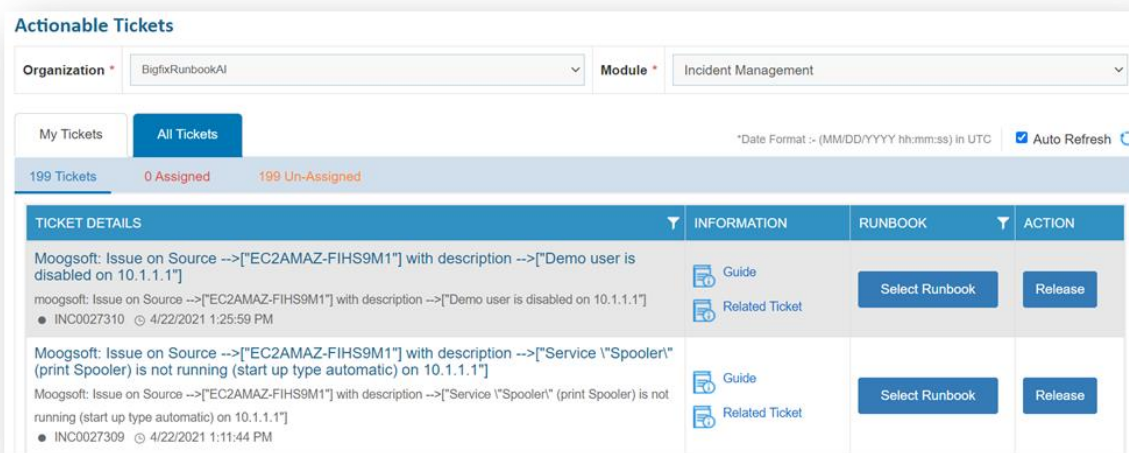


Figure 8 - All Tickets

3. 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
 - **Information:** Includes Guide and Related Tickets links
 - **Runbook:** Auto fills details based on the selected tab:
 - a. **In case of Assigned Ticket,** the user and the runbook operating on the ticket are displayed.
 - b. **In case of Unassigned Ticket,** if runbooks with a confidence score above the threshold are available for a ticket, then the Select Runbook button appears in the same column. This enables the user to select the desired runbook and acknowledge the ticket. For runbook execution details, see [Runbook Execution](#).

Actionable Tickets

Organization: BigfixRunbookAI | Module: Incident Management

My Tickets | **All Tickets** | *Date Format: (MM/DD/YYYY hh:mm:ss) in UTC | Auto Refresh

24 Tickets | 0 Assigned | 24 Un-Assigned

TICKET DETAILS	INFORMATION	RUNBOOK	ACTION
BigfixAI Playbook will perform the creation of the oracle index. It will add new index in oracle. ComputerName:SRALIDBOTH003 Index_Name:INDEX123 Tabl BigfixAI Playbook will perform the creation of the oracle index. It will add new index in oracle. view more ● INC0167151 @ 03/27/2023 03:29:25 AM	Guide Related Ticket	Select Runbook	Release
BigfixAI Playbook will create an ADDM report in oracle. Playbook to generate ADDM report in oracle. ComputerName:SRALIDBOTH003 mysid:CDB Start_Date:Fill BigfixAI Playbook will create an ADDM report in oracle. Playbook to generate ADDM report in oracl. view more ● INC0167150 @ 03/27/2023 03:28:24 AM	Guide Related Ticket	Select Runbook	Release
BigfixAI Playbook will create a new pluggable database in Oracle.Playbook will make a new pluggable database in oracle server. admin_pass:pass14234 Tenant! BigfixAI Playbook will create a new pluggable database in Oracle.Playbook will make a new pluggab. view more ● INC0167149 @ 03/27/2023 03:27:29 AM	Guide Related Ticket	Select Runbook	Release
BigfixAI Playbook will start the oracle database using the startup command in oracle database instance.Playbook to start the oracle database using the startup BigfixAI Playbook will start the oracle database using the startup command in oracle database inst. view more ● INC0167148 @ 03/27/2023 03:26:26 AM	Guide Related Ticket	Select Runbook	Release

Figure 9 - Un-Assigned Tickets

- **Action:** 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 BigFix Runbook AI 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.

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

Actionable Tickets

Organization: BigfixRunbookAI | Module: Incident Management

My Tickets | **All Tickets** | *Date Format: (MM/DD/YYYY hh:mm:ss) in UTC | Auto Refresh

24 Tickets | 2 Assigned | 22 Un-Assigned

TICKET DETAILS	INFORMATION	RUNBOOK	ACTION
BigfixAI Playbook will start the oracle database using the startup command in oracle database instance.Playbook to start the oracle database using the startup BigfixAI Playbook will start the oracle database using the startup command in oracle database inst. view more ● INC0167148 @ 03/27/2023 03:26:26 AM	Guide Related Ticket	Oracle_Start_DB owned by TestUser	Release
BigfixAI Playbook takes Transaction log backup on a given MS SQL instance. It will perform the transaction log backup of MS SQL instance. ComputerName: SRV BigfixAI Playbook takes Transaction log backup on a given MS SQL instance. It will perform the tr. view more ● INC0166987 @ 03/22/2023 11:53:34 PM	Guide Related Ticket	MSSQL_Backup_Transaction_Log owned by TestUser	Release

Figure 10 - Ticket Details

4.2.2.1.1 Runbook Execution

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

1. On the **All 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.

To initiate ticket execution in the BigFix Runbook AI 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	BigFix Runbook AI recommends the relevant runbook.
Move to Parsing	On successful recommendation, the system moves the ticket to parsing.
Picked for Parsing	System starts parsing the ticket and extracts the required parameters for the runbook.
Picked for InProgress	This status indicates that BigFix Runbook AI has started working on the ticket.
Move to Assignment Decision	The ticket moves for assignment 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 BigFix Runbook AI has marked in progress and started working on the ticket.
Execution Successful and Marked for Closure	This status indicates that BigFix Runbook AI has completed working on the ticket and has marked it for closure.
Marked for Release	This status means that BigFix Runbook AI has completed working on the ticket.

TICKET DETAILS	INFORMATION	RUNBOOK	ACTION
BigfixAI Playbook will start the oracle database using the startup command in oracle database instance. Playbook to start the oracle database using the startup BigfixAI Playbook will start the oracle database using the startup command in oracle database inst. view more ● INC0167148 @ 03/27/2023 03:26:26 AM	Guide Related Ticket	Data Collected	Release
BigfixAI Playbook will create a restore point for the oracle database. A restore point will be created by this playbook in oracle. TenantId: ActionSite db_r BigfixAI Playbook will create a restore point for the oracle database. A restore point will be cre. view more ● INC0167147 @ 03/27/2023 03:25:48 AM	Guide Related Ticket	Picked For Recommendation	Release
BigfixAI Playbook takes Transaction log backup on a given MS SQL instance. It will perform the transaction log backup of MS SQL instance. ComputerName: SRV BigfixAI Playbook takes Transaction log backup on a given MS SQL instance. It will perform the tr. view more ● INC0166987 @ 03/22/2023 11:53:34 PM	Guide Related Ticket	Move to Parsing	Release
BigfixAI Playbook will check the oracle database performance in terms of CPU usage, memory and wait events along with status of the database specified. Playbo BigfixAI Playbook will check the oracle database performance in terms of CPU usage, memory and wa. view more ● INC0167090 @ 03/23/2023 06:51:50 AM	Guide Related Ticket	Move to Assignment Decision	Release

Figure 11 - All Tickets

- 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 BigFix Runbook AI queue.
- Click Select Runbook.

Actionable Tickets

Organization: BigfixRunbookAI | Module: Incident Management

My Tickets | **All Tickets** | *Date Format: (MM/DD/YYYY hh:mm:ss) in UTC | Auto Refresh

TICKET DETAILS	INFORMATION	RUNBOOK	ACTION
BigfixAI Playbook will perform the creation of the oracle index. It will add new index in oracle. ComputerName: SRALIDBOTH003 Index_Name: INDEX123 Tabl BigfixAI Playbook will perform the creation of the oracle index. It will add new index in oracle. view more ● INC0167151 @ 03/27/2023 03:29:25 AM	Guide Related Ticket	Select Runbook	Release
BigfixAI Playbook will create an ADDM report in oracle. Playbook to generate ADDM report in oracle. ComputerName: SRALIDBOTH003 mysid: CDB Start_Date: Fill BigfixAI Playbook will create an ADDM report in oracle. Playbook to generate ADDM report in oracle. view more ● INC0167150 @ 03/27/2023 03:28:24 AM	Guide Related Ticket	Select Runbook	Release

Figure 12 - Select Runbook and Release Options

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

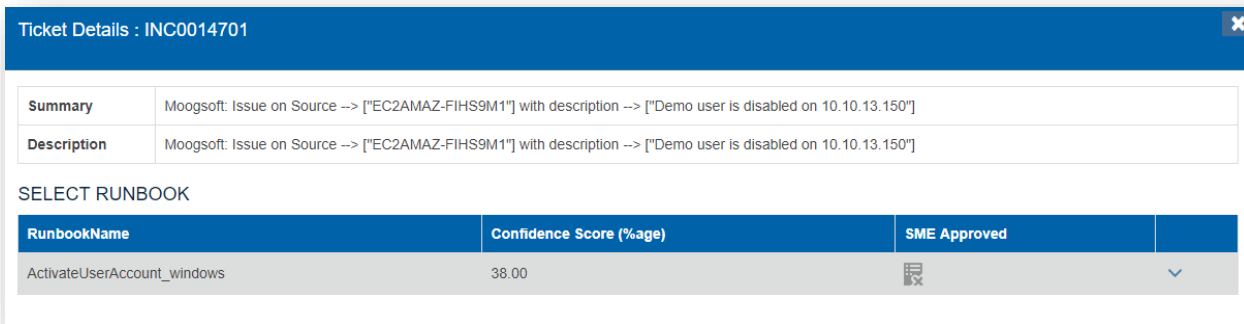


Figure 13 - Summary and Description Options

- 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.
- After the runbook is identified, click **Runbook Name** to expand the selected row.

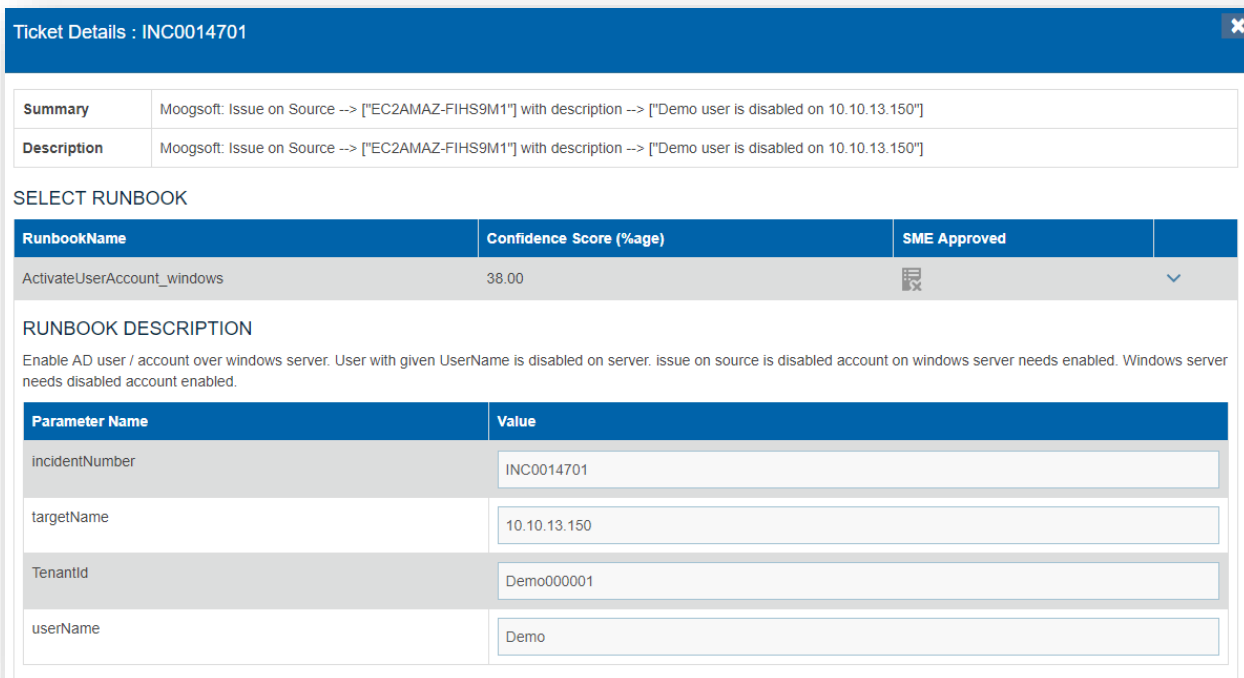


Figure 14 - Select Runbook

- 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.

8. Click **Execute** to start runbook execution for the selected ticket.

On successful initialization of the execution, a confirmation dialogue box appears.

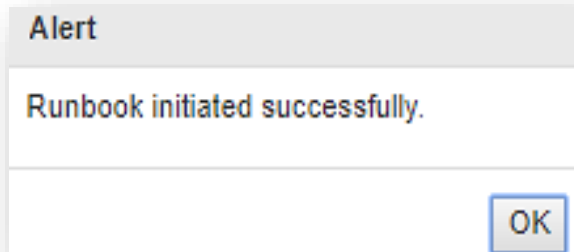


Figure 15 - Runbook Initiation Confirmation

9. 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 **All Tickets** tab, then the same ticket is added in the **Tickets** and **In-Process** tabs under the **My Tickets** tab.

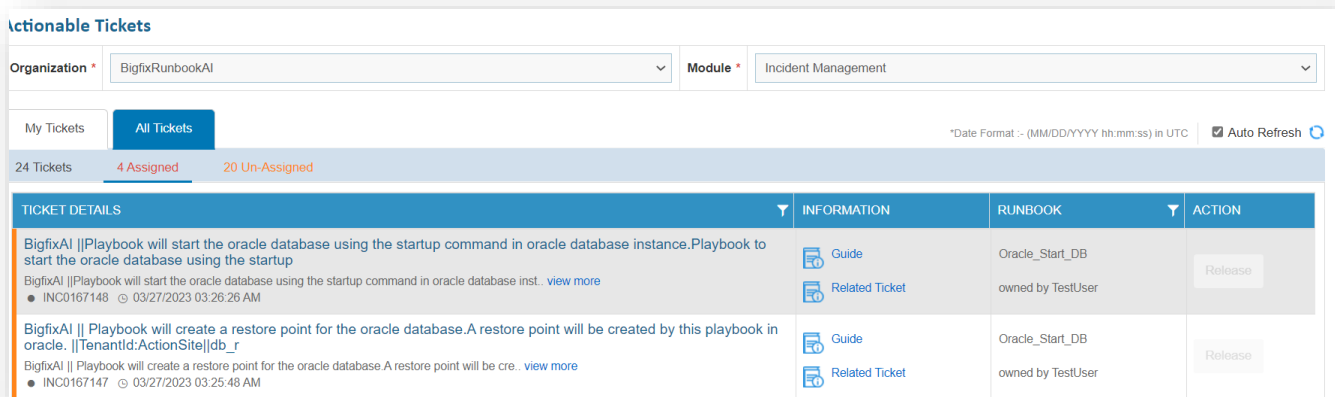


Figure 16 - Runbook Execution

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

Logs *Date Format :- (MM/DD/YYYY hh:mm:ss) in UTC Auto Refresh

NUMBER	INTERACTION ID	RUNBOOK NAME	LOG DATE TIME	RUNBOOK STATUS	STATUS REASON
INC0032144	4165869	CPU_Utilization	5/6/2021 6:22:03 AM	Interaction ID Generated (Runbook In Progress)	
INC0032144	0	CPU_Utilization	5/6/2021 6:22:01 AM	Initiate Interaction	Picked for Initiatio.. view more
INC0032144	0		5/5/2021 12:31:12 PM	Marked for Execution	Set Ticket Status to.. view more
INC0032144	0		5/5/2021 12:31:09 PM	Picked for InProgress	Picked for InProgress.. view more
INC0032144	0	CPU_Utilization	5/5/2021 12:31:01 PM	Initiated Manual Mode	Initiated in Manual .. view more

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 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 from where this information will be retrieved depend on the configuration in your environment.

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

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

Actionable Tickets

Organization * BigfixRunbookAI | Module * Incident Management

My Tickets | **All Tickets** *Date Format :- (MM/DD/YYYY hh:mm:ss) in UTC Auto Refresh

24 Tickets | 4 Assigned | 20 Un-Assigned

TICKET DETAILS	INFORMATION	RUNBOOK	ACTION
BigfixAI Playbook will perform the creation of the oracle index. It will add new index in oracle. ComputerName:SRALIDBOTH003 Index_Name:INDEX123 Tabl BigfixAI Playbook will perform the creation of the oracle index. It will add new index in oracle... view more ● INC0167151 @ 03/27/2023 03:29:25 AM	Guide Related Ticket	<input type="button" value="Select Runbook"/>	<input type="button" value="Release"/>
BigfixAI Playbook will create an ADDM report in oracle. Playbook to generate ADDM report in oracle. ComputerName:SRALIDBOTH003 mysid:CDB Start_Date:Fill BigfixAI Playbook will create an ADDM report in oracle. Playbook to generate ADDM report in oracl... view more ● INC0167150 @ 03/27/2023 03:28:24 AM	Guide Related Ticket	<input type="button" value="Select Runbook"/>	<input type="button" value="Release"/>

Figure 18 – Guide

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

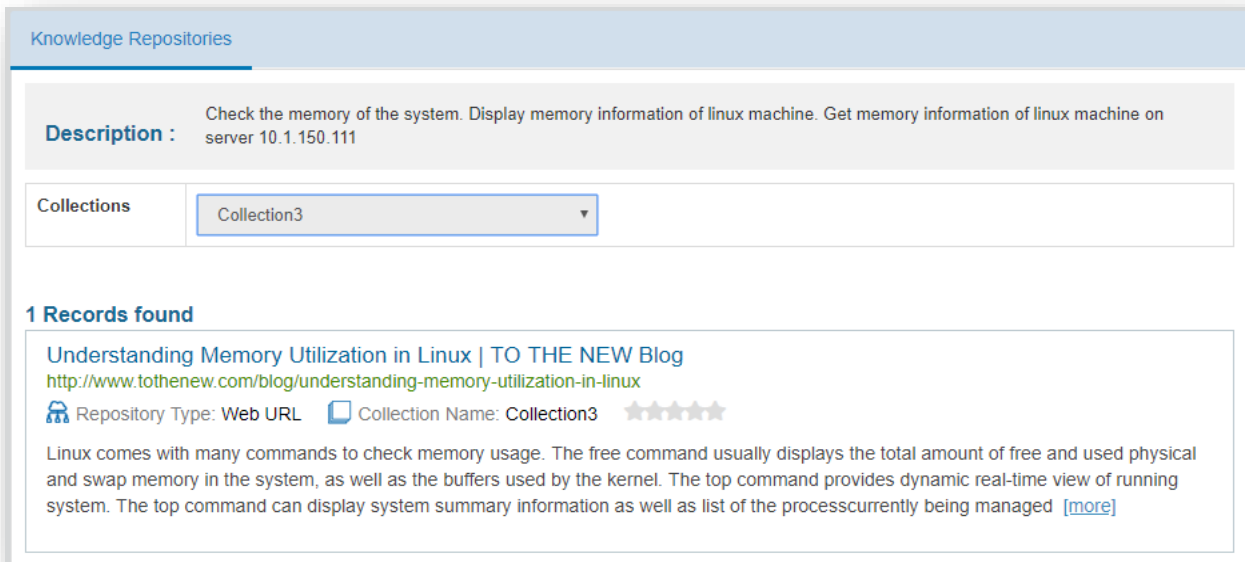


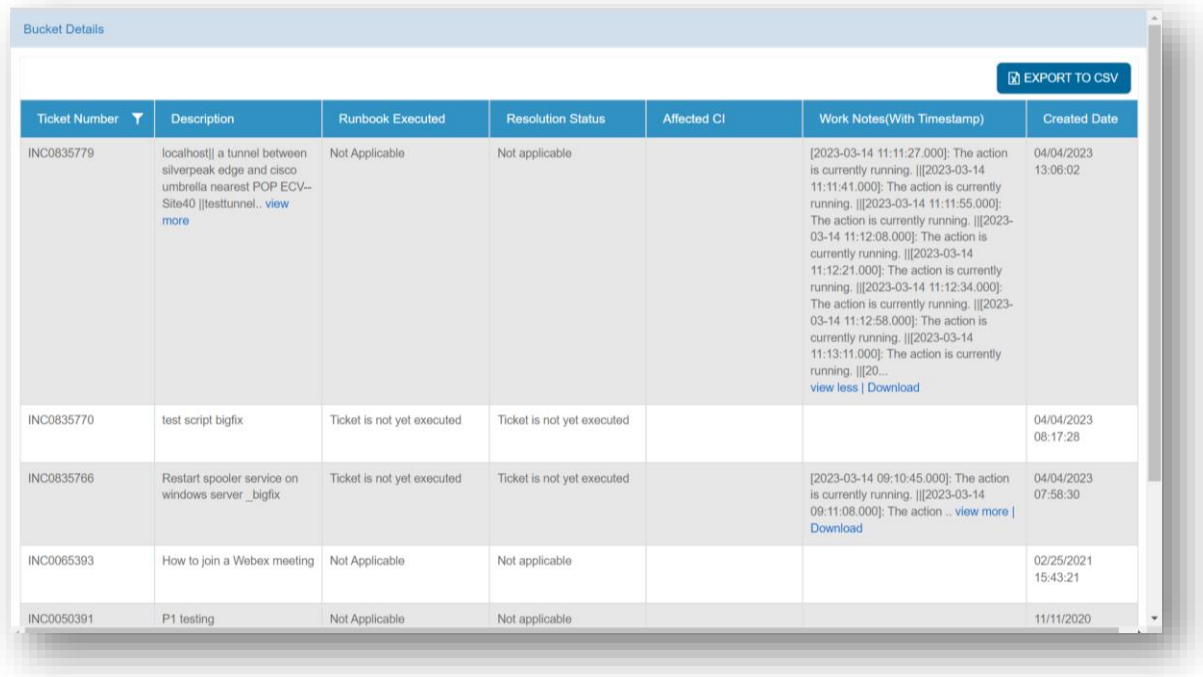
Figure 19 - Knowledge Repositories

- BigFix Runbook AI can fetch data from the **Collections** of an organization, and if the data is not available in **Collections**, then it retrieves results from **Google**.

4.2.2.1.3 Related Tickets

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

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



Ticket Number	Description	Runbook Executed	Resolution Status	Affected CI	Work Notes(With Timestamp)	Created Date
INC0835779	localhost a tunnel between silverpeak edge and cisco umbrella nearest POP ECV-- Site40 testunnel.. view more	Not Applicable	Not applicable		[2023-03-14 11:11:27.000]: The action is currently running. [2023-03-14 11:11:41.000]: The action is currently running. [2023-03-14 11:11:55.000]: The action is currently running. [2023-03-14 11:12:08.000]: The action is currently running. [2023-03-14 11:12:21.000]: The action is currently running. [2023-03-14 11:12:34.000]: The action is currently running. [2023-03-14 11:12:58.000]: The action is currently running. [2023-03-14 11:13:11.000]: The action is currently running. [20... view less Download	04/04/2023 13:06:02
INC0835770	test script bigfix	Ticket is not yet executed	Ticket is not yet executed			04/04/2023 08:17:28
INC0835766	Restart spooler service on windows server _bigfix	Ticket is not yet executed	Ticket is not yet executed		[2023-03-14 09:10:45.000]: The action is currently running. [2023-03-14 09:11:08.000]: The action .. view more Download	04/04/2023 07:58:30
INC0065393	How to join a Webex meeting	Not Applicable	Not applicable			02/25/2021 15:43:21
INC0050391	P1 testing	Not Applicable	Not applicable			11/11/2020

Figure 20 – Related Tickets

2. User can view all the tickets available in the selected bucket, including their description and the associated runbook details.
3. Click **EXPORT TO CSV** to download the bucket details.

4.2.2.2 My Ticket

This section describes how to manage the tickets assigned to the current user and available in the BigFix Runbook AI queue.

To view and use the **My Ticket** tab, perform the following steps:

1. Select an **Organization** from the drop-down list and then select a **Module**.

The organization and module-specific ticket assigned to the current user appears in a tabular view.

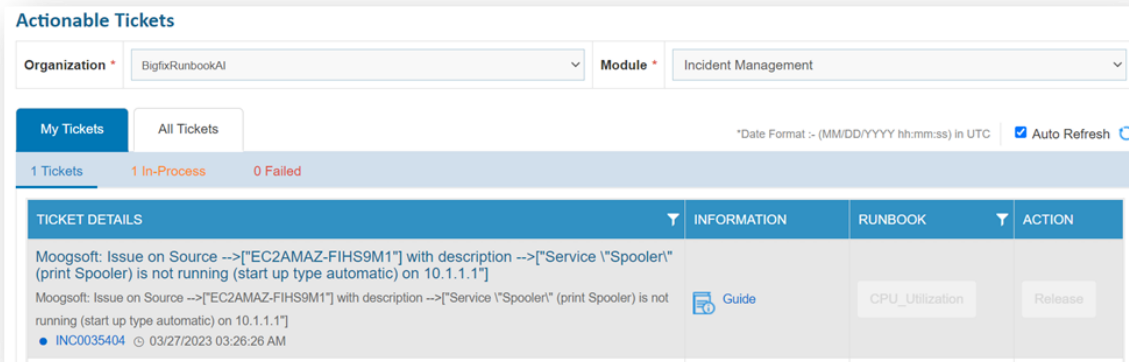


Figure 21 - My Tickets

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

Table 5 - My Tickets Sub-Sections

Tab	Description
Tickets	<ul style="list-style-type: none"> Lists the tickets that are a part of the BigFix Runbook AI queue and assigned to the current user for execution Lists the consolidated tickets from the In-Process and Failed tabs
In-Process	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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 BigFix Runbook AI.

After successful execution, tickets are automatically moved from the BigFix Runbook AI 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.
- **Information:** 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](#).

- **Action:** This column is available in the **Tickets** and **Failed** tabs. The **Release** button is displayed for the tickets with Failed execution, allowing the user to release the tickets from the queue.

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

The colored bar on the left of the **Tickets** tab displays the current ticket execution status. An orange bar indicates an In-Process execution and a red bar indicates a Failed execution.

Clicking **Release** either releases the ticket to the **All Tickets** queue (keeping it in the BigFix Runbook AI 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.

3. 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

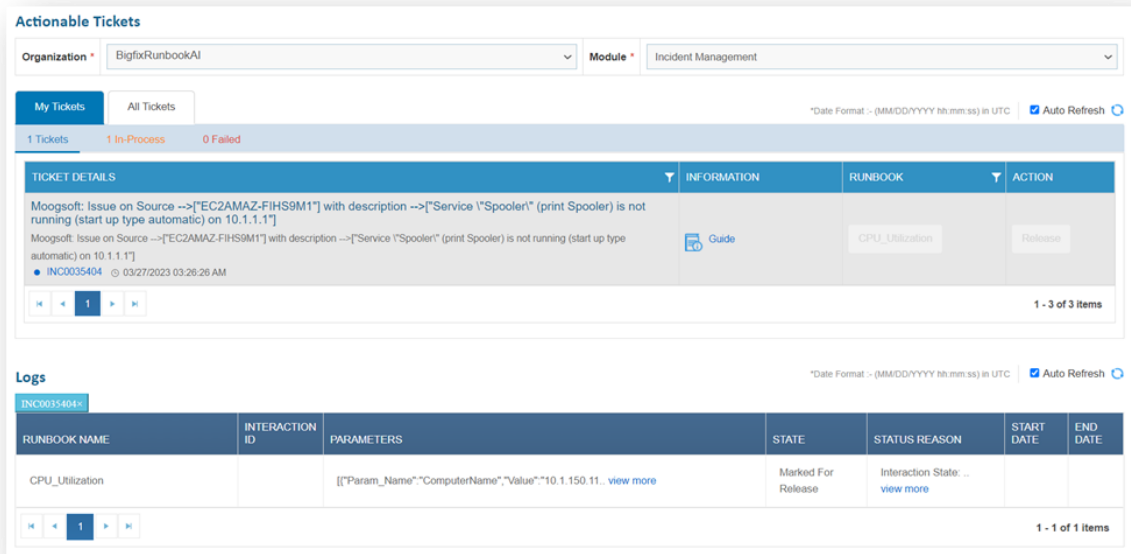


Figure 22 - My Tickets

The logs displayed are ordered by date and time. The most recent update appears on the top of the grid.

4.2.2.3 Logs

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

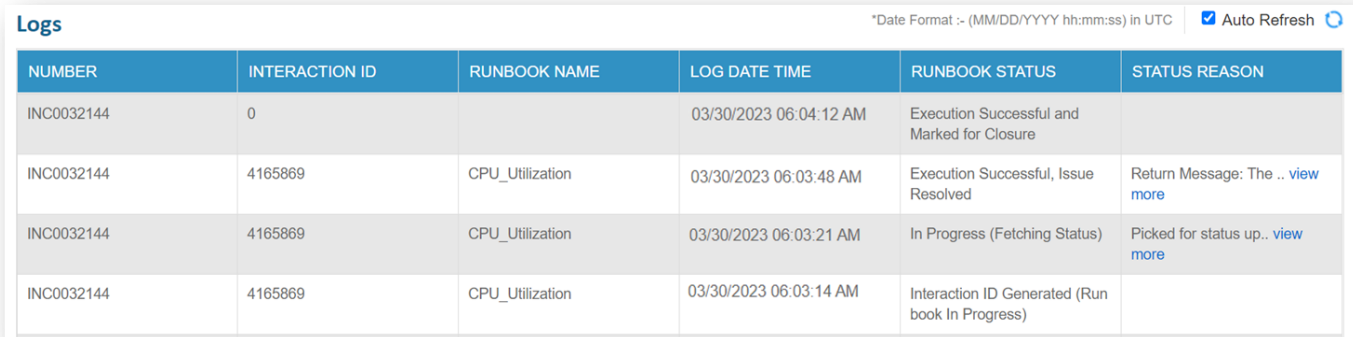
To view a ticket log, navigate to the Log tab appearing below the **All Tickets** and **My Tickets** tabs. This displays the activity log for all tickets being executed with the following details:

Table 6 - 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.

Attachment	Displays any relevant attachment for the ticket.
------------	--

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



NUMBER	INTERACTION ID	RUNBOOK NAME	LOG DATE TIME	RUNBOOK STATUS	STATUS REASON
INC0032144	0		03/30/2023 06:04:12 AM	Execution Successful and Marked for Closure	
INC0032144	4165869	CPU_Utilization	03/30/2023 06:03:48 AM	Execution Successful, Issue Resolved	Return Message: The .. view more
INC0032144	4165869	CPU_Utilization	03/30/2023 06:03:21 AM	In Progress (Fetching Status)	Picked for status up.. view more
INC0032144	4165869	CPU_Utilization	03/30/2023 06:03:14 AM	Interaction ID Generated (Runbook In Progress)	

Figure 23 - Logs view

4.2.3 Auto Execution View

This section describes the auto-execution process for unresolved, open tickets in the BigFix Runbook AI queue. It displays the summary and status of all automatically executed tickets including in process or failed tickets.

To view tickets in auto-execution view, perform the following steps:

1. On the main menu bar, click **Actions->Tickets**, and then click **Auto Execution View**.
2. Select an **Organization** from the drop-down list and then select the Module for organization and module-specific tickets.

The **Auto Execution View** screen is displayed listing the selected organization and module-specific tickets under the **My Tickets** tab.

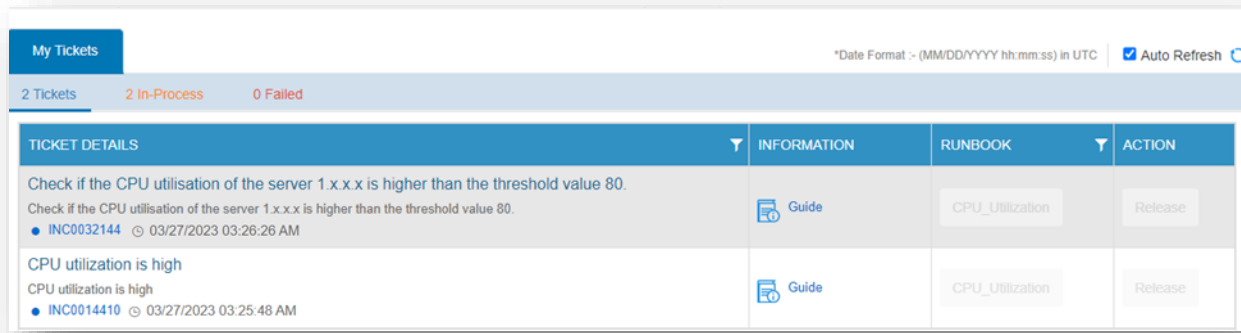


Figure 24 - Auto Execution View: My Tickets

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

Table 7 - My Ticket Subsections

Tab	Description
Tickets	<ul style="list-style-type: none"> Lists all tickets available for auto-execution in the BigFix Runbook AI queue Displays a consolidated list of tickets from the In-Process and Failed tabs
In-Process	<ul style="list-style-type: none"> A subset of the Tickets tab Lists the tickets available for auto-execution Shows the allocation status of a ticket in the queue and the runbook being initiated for it
Failed	<ul style="list-style-type: none"> A subset of the Tickets tab Lists all the auto executed tickets with failed execution that can be moved out of the BigFix Runbook AI queue using the Release button

4.2.4 Ticket Log

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 BigFix Runbook AI.

To view the ticket logs, perform the following steps:

1. On the main menu bar, click **Actions->Tickets** and then click **Ticket Logs**.
2. The **Ticket Logs** screen appears.

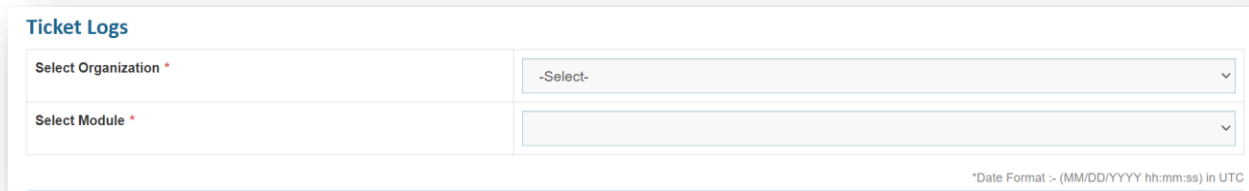


Figure 25 - Ticket Logs

3. Select an **Organization** from the drop-down list and then select the **Module**.

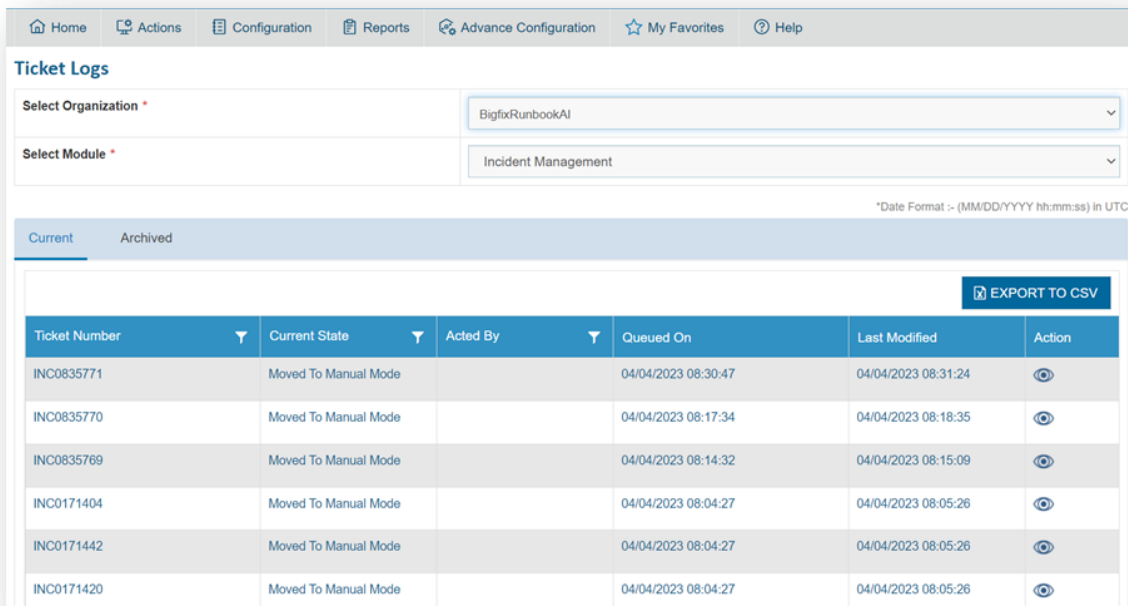


Figure 26 - Organization and Module

This lists the ticket log for organization and module-specific tickets in the following tabs.

- **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.
- 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.

Detailed Information : INC0164806 ✕

*Date Format :- (MM/DD/YYYY hh:mm:ss) in UTC

[EXPORT TO CSV](#)

Logged On	Logged By	Action	Reason	Remarks
01/27/2023 07:33:10	Auto	Moved To Manual Mode	Confidence score is less than the Auto threshold	
01/27/2023 07:33:10	Auto	Picked for Assignment Decision	Picked for Auto Execution	
01/27/2023 06:57:22	Parser	Move to Assignment Decision	Parsing Completed	
01/27/2023 06:57:22	Parser	Picked For Parsing	Picked for parsing	
01/27/2023 06:57:11	Recommender	Move to Parsing	Recommendation Completed	Summary:Runbooks recommended: RunbookId;RBAUniquel.. view more
01/27/2023 06:57:10	Recommender	Picked For Recommendation	Picked for recommendation	Summary:Text used for getting recommendation:10.1... view more
01/27/2023 06:57:10	Recommender	Picked For Recommendation	Picked for recommendation	Summary:Fields used for recommendation are Summary

Figure 27 - Ticket Logs

- **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.
 - 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
4. 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.

4.2.5 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.

4.2.5.1 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 Advance Configuration->Knowledge, and then click Knowledge Search. The **Knowledge Search** screen appears.

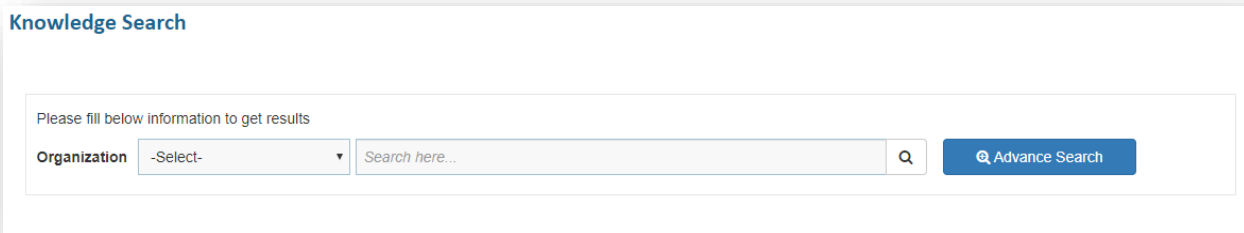


Figure 28 - Knowledge Search

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

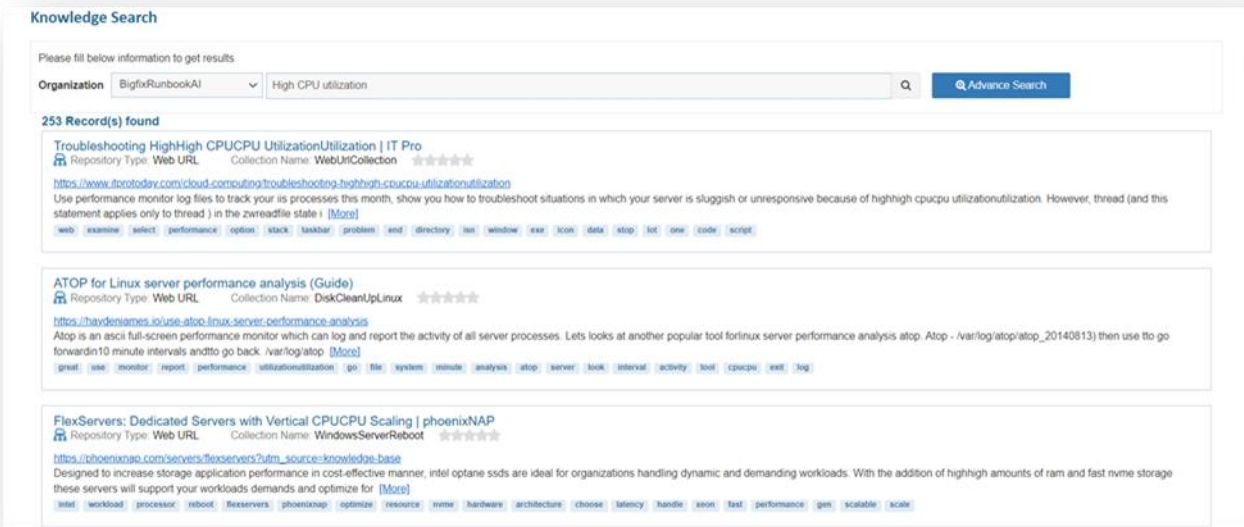


Figure 29 – Search

3. For more advanced search, instead of clicking , click the **Advance Search** button.

An **Advance Search** window is displayed for users to fill in the information and retrieve results.

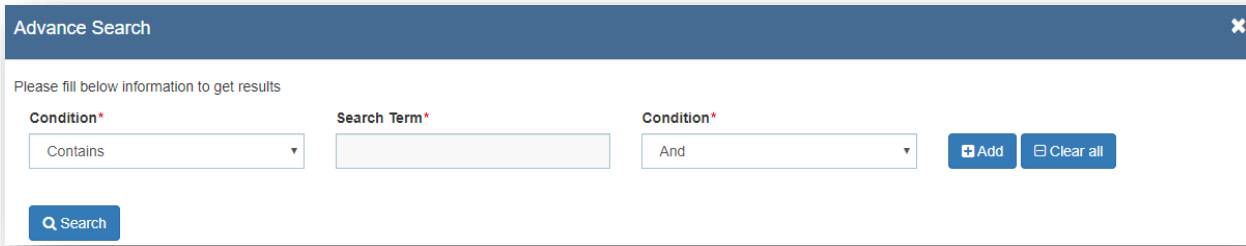



Figure 30 - Advance Search

- Advance Search** allows users to restrict search results by applying conditional filters or define the order of the search results.
User can add any number of custom conditions to refine their search for more relevant results.
- Click  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.

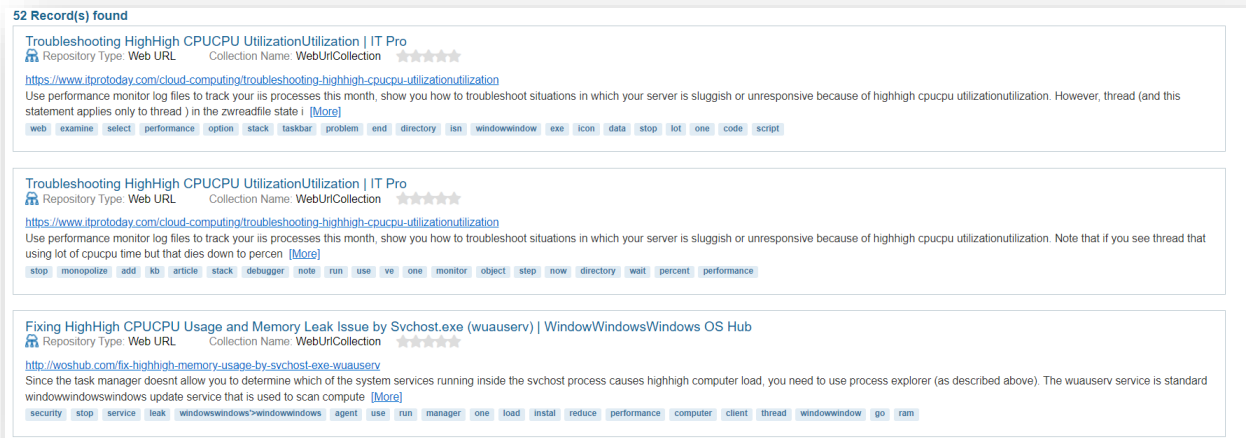


Figure 31 - Advance Search Results

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

4.2.6 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 **Reports->Dashboard**. The **Dashboard** screen appears.

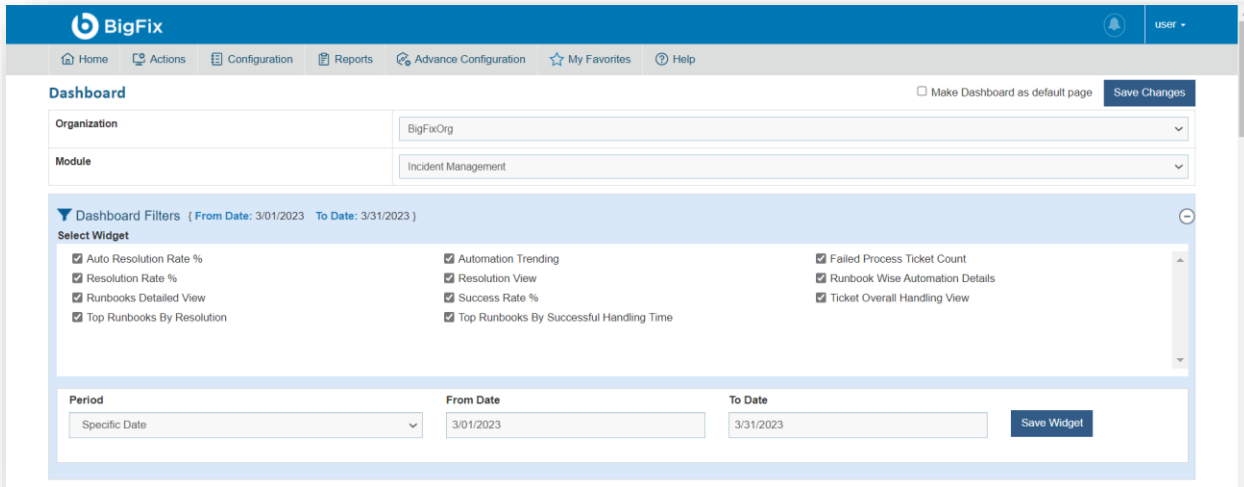


Figure 32 – Dashboard

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, then select the time frame from the drop-down list of the **Period**, and then select the date range in the **From Date** and **To Date** fields.

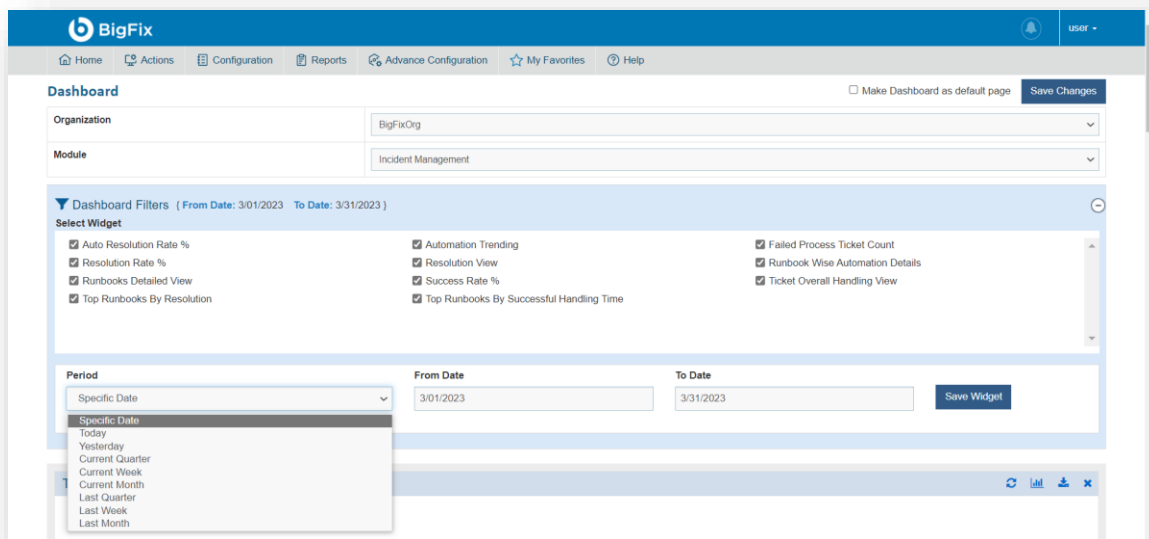


Figure 33 – Period

- Click **Save Widget**. 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.

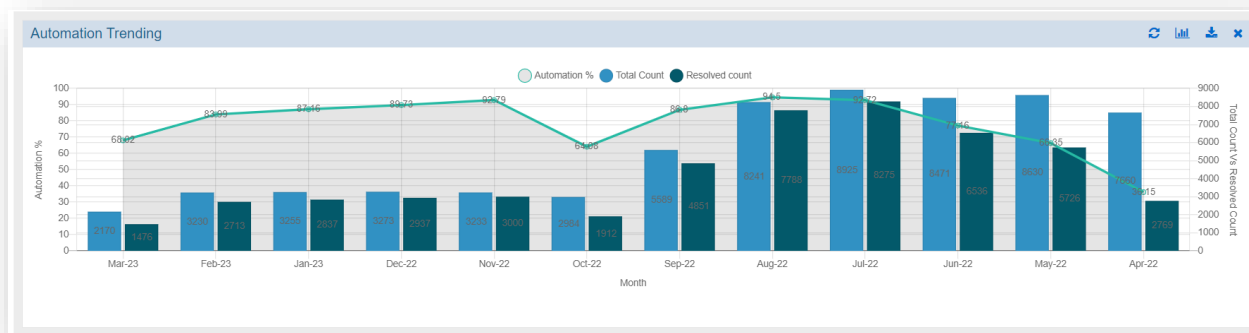


Figure 34 – Widget

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

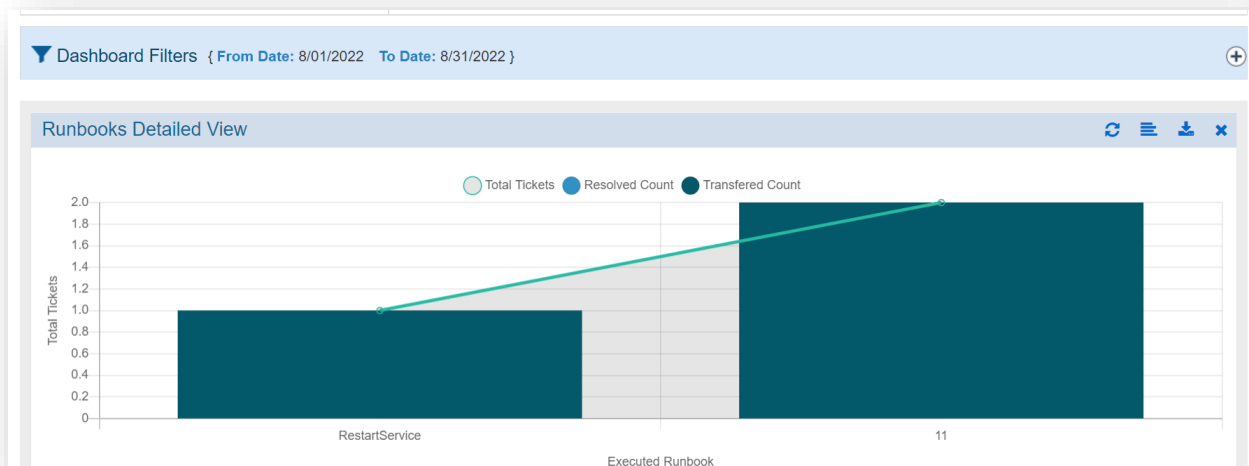


Figure 35 - Dashboard Filters

4.2.6.1 Configure Widgets

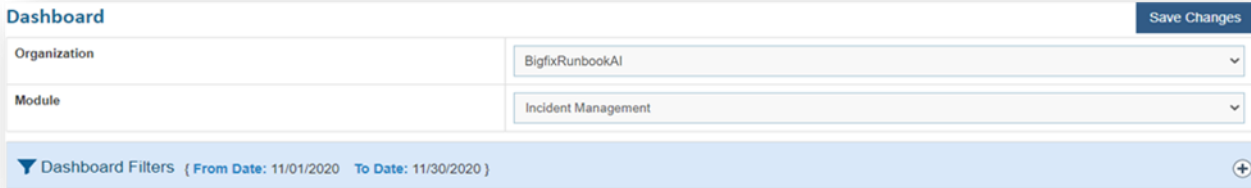
Dashboard customization is available for users with the appropriate privileges, such as Organization Admin. The dashboard customization can be configured for different user roles as required by the administrator. To add more reports or data in a dashboard, you can define multiple widgets for a selected organization.

To add a widget to an organization, perform the following steps:

1. On the **Dashboard** screen, select an **Organization** from the drop-down list.

If there are any configured widgets in the selected organization, it appears below the Dashboard Filters tab.

2. Click  on the **Dashboard Filters** tab to list the predefined widgets.

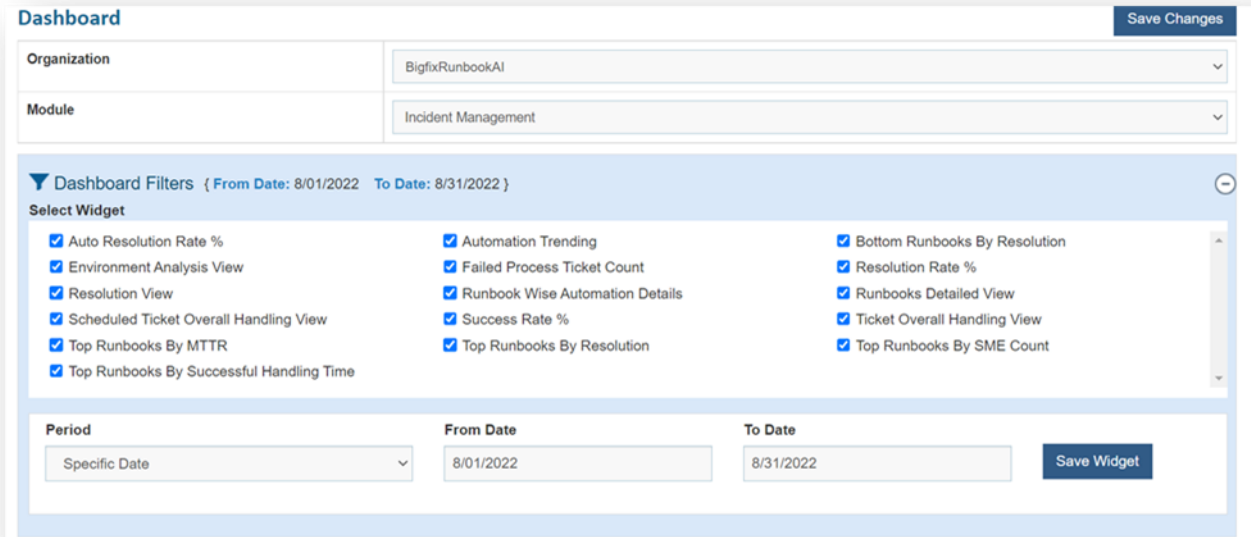


The screenshot shows the 'Dashboard' configuration interface. At the top right is a 'Save Changes' button. Below it are two dropdown menus: 'Organization' set to 'BigfixRunbookAI' and 'Module' set to 'Incident Management'. At the bottom, there is a 'Dashboard Filters' section with a dropdown arrow, a date range '(From Date: 11/01/2020 To Date: 11/30/2020)', and a plus icon on the right.

Figure 36 - Select Organization

Preconfigured widgets list all the KPIs so that users can customize their view.

3. Select the checkboxes next to the widgets you want to include, then select the time frame from the drop-down list of the **Period**, and then select the date range in the **From Date** and **To Date** fields and then click **Save Widget**.



The screenshot shows the 'Dashboard' configuration interface with the 'Dashboard Filters' section expanded. It displays a 'Select Widget' list with 12 checkboxes, all of which are checked. The widgets include: Auto Resolution Rate %, Environment Analysis View, Resolution View, Scheduled Ticket Overall Handling View, Top Runbooks By MTTR, Top Runbooks By Successful Handling Time, Automation Trending, Failed Process Ticket Count, Runbook Wise Automation Details, Success Rate %, Top Runbooks By Resolution, Bottom Runbooks By Resolution, Resolution Rate %, Runbooks Detailed View, Ticket Overall Handling View, and Top Runbooks By SME Count. Below the list are three input fields: 'Period' (set to 'Specific Date'), 'From Date' (set to '8/01/2022'), and 'To Date' (set to '8/31/2022'). A 'Save Widget' button is located to the right of the 'To Date' field.

Figure 37 - Select Widgets

To delete a widget from the selected organization, clear the widget checkbox selection, and then click **Save Widget** to save the changes.

The added widgets are displayed on the dashboard.

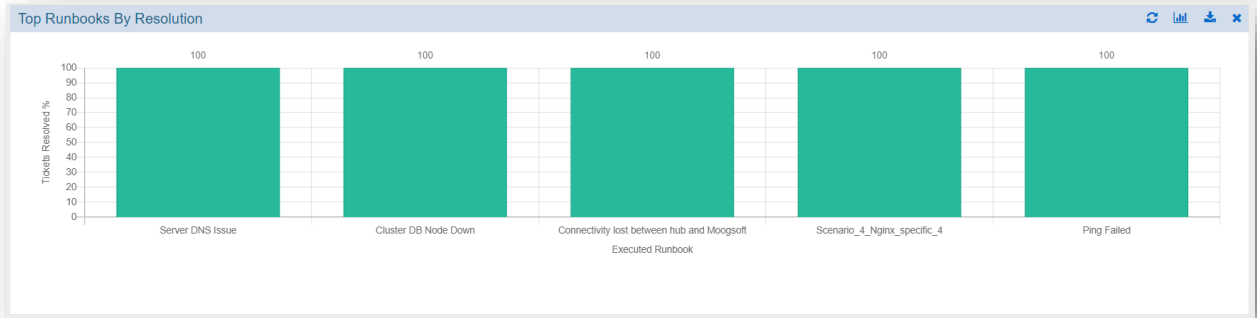


Figure 38 - Report

Users can view drill-down details of any report appearing on the widget

To view the drill-down report, perform the following steps:

1. Click any visualization to view the drill-down report.

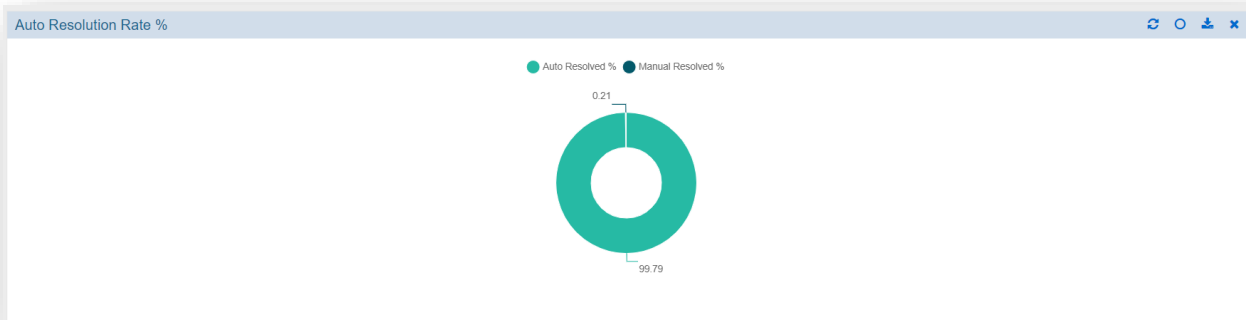


Figure 39 - Select Dataset

The detailed drill-down report is displayed.

TicketNumber	Summary	Is Recommended Runbook Executed	Max Threshold Runbook	Executed Runbook	Executed Runbook Details	Is Runbook SME Approved	QueuedOn	CompletedOn
INC0167134	BigFixAI Playbook will perform the enablement of streaming replication between two servers of PostgreSQL database. The playbook will run in RHEL operating sy	Y	PostGres_Perform_Vaccum	PostGres_Perform_Vaccum	Runbook Name: PostGres_Perform_Vaccum; Recommendation Threshold: 82.00	N	2023-03-24 10:07:36	2023-03-24 10:45:27
INC0167122	BigFixAI Playbook will move data file to different location. Playbook to relocate the datafile to a new location in oracle. From_file_loc:/u02/CDB/data02.dbf	Y	Oracle_Datafile_Move_Diff_Location	Oracle_Datafile_Move_Diff_Location	Runbook Name: Oracle_Datafile_Move_Diff_Location; Recommendation Threshold: 67.00	N	2023-03-24 07:24:47	2023-03-24 12:59:59
INC0167120	BigFixAI Playbook will perform the enablement of streaming replication between two servers of PostgreSQL database. The playbook will run in RHEL operating sy	Y	PostGres_Perform_Vaccum	PostGres_Perform_Vaccum	Runbook Name: PostGres_Perform_Vaccum; Recommendation Threshold: 82.00	N	2023-03-24 07:03:36	2023-03-24 07:42:32
INC0167118	BigFixAI Playbook will perform the enablement of streaming replicat	Y	PostGres_Perform_Vaccum	PostGres_Perform_Vaccum	Runbook Name: PostGres_Perform_Vaccum; Recommendation Threshold: 82.00	N	2023-03-24 06:49:08	2023-03-24 07:28:05

Figure 40 - Drill Down Report

Each widget can be resized using the following steps:

- Point at any corner of the selected tab with the mouse pointer. When the pointer changes into a double-headed arrow, hold down the primary mouse button and drag the corner in or out to resize the window. Release the mouse button to stop resizing the window.
- Click **Save Changes** to save the changes.

Each widget can be moved using the following steps:

- Click a blank portion on the navigation bar of the selected tab.
- Hold down the primary mouse button and then drag the mouse pointer to the place on the screen where you want the tab. After you move the mouse pointer to the position on your screen where you want the taskbar, release the mouse button.
- Click **Save Changes** to save the changes.

The navigation bar on each widget contains the following menus.

Table 8 - Navigation Bar Functions

Tabs	Name and Function
/ / /	Change the view of widget to bar/grid/pie/doughnut.
	Refresh the data in a widget.
	Remove a widget from the selected organization’s dashboard.
	Export the data in a widget to PDF or CSV format.

4.2.7 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 running in BigFix Runbook AI.

1. On main menu bar, click on **Help**. The below page appears:

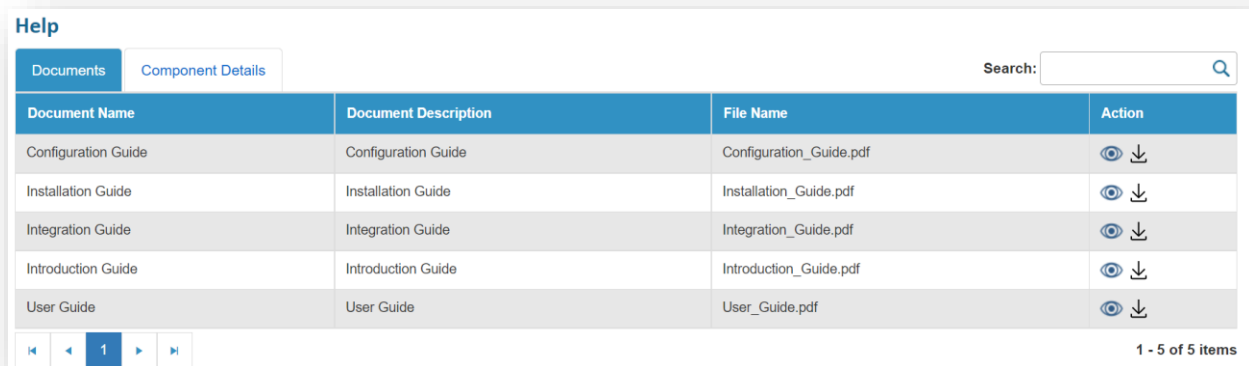


Figure 41 - Help

It has two tabs:

a. Documents

On **Documents** tab, it shows all the required documents needed for better understanding of BigFix Runbook AI:

- Configuration Guide
- Installation Guide
- Integration Guide
- Introduction Guide
- User Guide

To view any document, click on icon . It will open the document in new tab.

To download any document, click on icon .

b. Component Details

This tab displays all the components running on BigFix Runbook AI along with the server Host/IP on which component is running, the name of the component, component code, the version of BigFix Runbook AI 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.

Help

Documents **Component Details** Search:

Server Host/IP	Component Name	Component Code	Version No	Service Name	Actual URL	LB URL
localhost	Active Directory	ADSYNC	6.3	HCL.IAutomate.ADSyncService	http://localhost:9022	Not entered yet
localhost	Advanced Knowledge Service	AKNW	6.3	HCL.IAutomate.IKnowledgeScreen	https://localhost:9013	Not entered yet
localhost	Advanced Knowledge Search	AKNWSCH	6.3	HCL.IAutomate.IKnowledgeSearch	https://localhost:9016	Not entered yet
localhost	Crawler	Crawler	6.3	HCL.IAutomate.ICrawler	https://localhost:9019	Not entered yet
localhost	Data Collector	DCA	6.3	HCL.IAutomate.DC	http://localhost:8012	Not entered yet
localhost	Email Service	Email	6.3	HCL.IAutomate.EmailService	http://localhost:9025	Not entered yet
localhost	EntityModel	ENM	6.3	HCL.IAutomate.EntityModel	https://localhost:9003	Not entered yet
localhost	Generic Service	GEN	6.3	HCL.IAutomate.GenericExecutor	http://localhost:8015	Not entered yet
localhost	Indexer	Indexer	6.3	HCL.IAutomate.IKnowledgeIndexer	https://localhost:9009	Not entered yet
localhost	Knowledge Service	KNW	6.3	HCL.IAutomate.IKnowledge	https://localhost:8024	Not entered yet

1 - 10 of 20 items

Figure 42 – Help (Cont.)