

**BigFix**  
**Self-Service Application Device Owners Guide**



## Special notice

Before using this information and the product it supports, read the information in Notices.

## Edition notice

This edition applies to version 10.0 of BigFix and to all subsequent releases and modifications until otherwise indicated in new editions.

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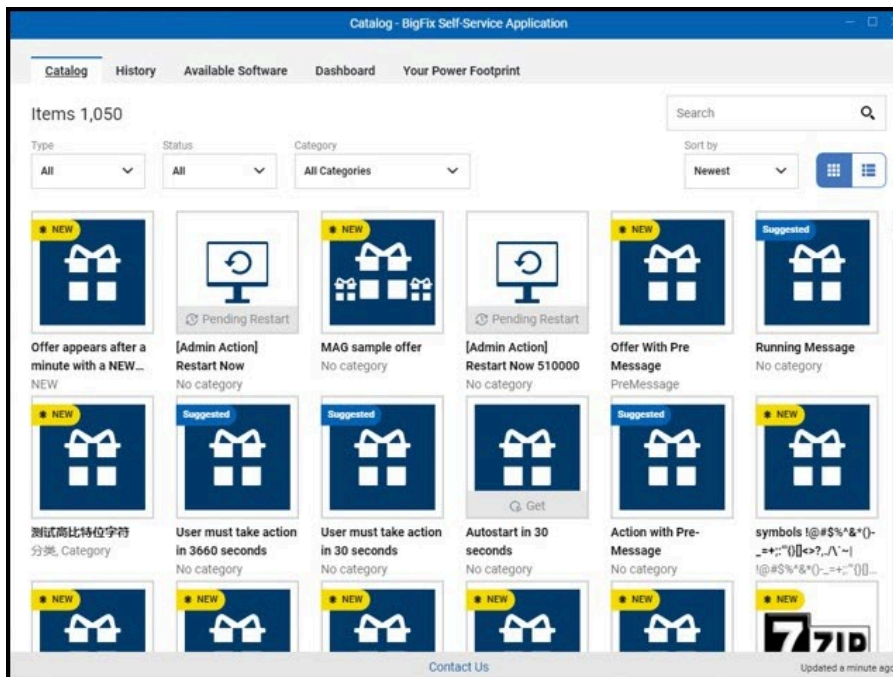
# Chapter 1. Managing BigFix Offers on Your Device

Use the BigFix Self-Service Application to manage software installations and other BigFix actions on your device. Install software, patches, updates, and other actions. Click the Self-Service icon in your system tray or menu bar to open the application. (The application name or icon on your system might be different than the ones displayed here.)



## Catalog Tab

The **Catalog** tab provides a list of available offers. Click an offer to review its details. Click **Get** or **Install** to accept an offer, and review its progress through the installation process. Completed installations are flagged with a green-circled check; failed installations are flagged with a red-circled "X." A "Pending Reboot" flag indicates that a device restart is required.



## History Tab

Click the **History** tab to see a summary of offers over time, and the status of accepted offers. Filter the list with the **All Status**, **Completed**, and **Failed** buttons.

When enabled by your administrator, the **Admin Action** control allows you to show (or hide) actions taken by a BigFix administrator. Hover the mouse over the status icon to see when an action completed. In a group action, more than one task is performed in a single update. Click the group action name to reveal (or hide) its components.

If your administrator has included BigFix Client UI dashboards in the Self-Service Application, they appear as tabs at the top of the screen, next to **Catalog** and **History**. An example of the **Device Report dashboard** is shown here.

The screenshot displays the 'Computer Health Monitoring' section of the Endpoint Security Platform. It includes a navigation bar with 'Catalog', 'History', 'Technician', 'Device Report', and 'Your Power Footprint'. The main content area is divided into two sections: 'Computer Information' and 'Core Protection Module: Version Information'. A 'Refresh' button is located above the 'Computer Information' table.

Computer Information	
Computer Name	JYW2016-01
Operating System	Microsoft Windows Server 2016 Standard
CPU	Intel(R) Xeon(R) CPU L7555 @ 1.87GHz
Memory	8192 MB
Hard Disks	C: 53160 MB (10 percent free) E: 59052 MB (53 percent free)
IP Address	9.39.155.186

Core Protection Module: Version Information	
Anti-rootkit Driver	N/A
Core Protection Module Version	
Core Protection Module Build	
Core Protection Module Hotfix	
Core Protection Module Patch	
Core Protection Module Language	
IntelliTrap Exception Pattern	Unknown

Updated a minute ago

## SSA Notifications

For more details about the Self-Service Application notifications on your device, see the following SSA Scenarios:

[Scenario 1: Managing a software package as a new offer with target restart \(on page 8\)](#)

[Scenario 2: Managing an action with customized pre-message \(on page 13\)](#)

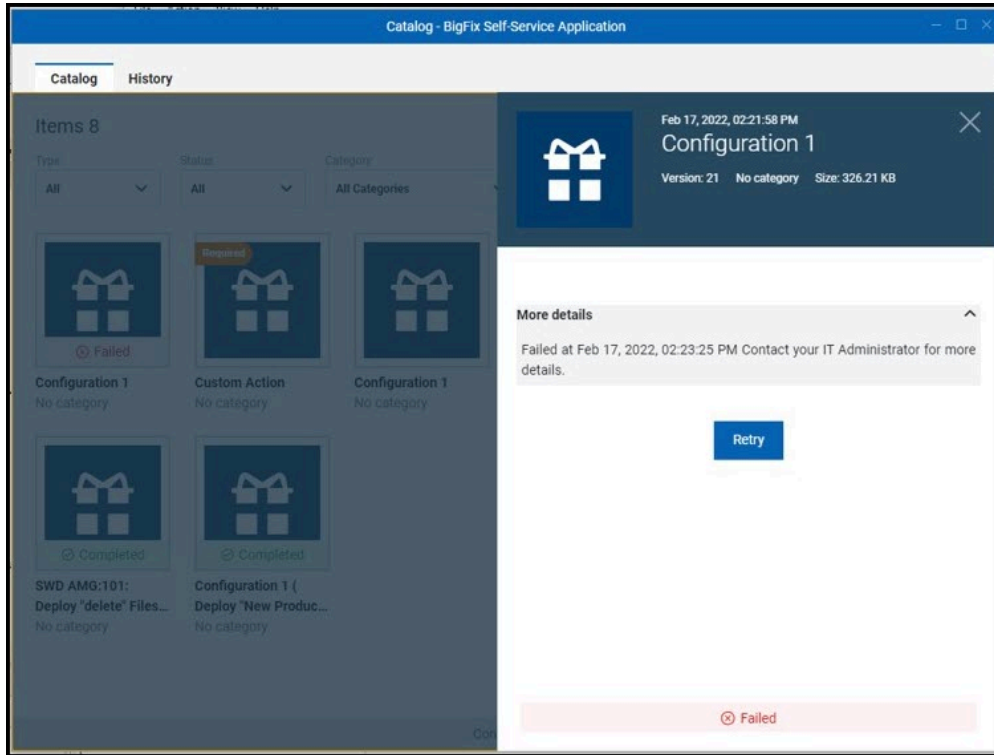
[Scenario 3: Managing a post action with customized post message \(on page 17\)](#)

## When an Action Fails

If a software package installation which is NOT an offer fails, contact your BigFix administrator, who will be able to help you diagnose the problem.

## When an Offer Fails

If a software package installation AS an offer fails, you can view additional information displayed by the SSA panel and you can use the **RETRY** function.



## Chapter 2. Self-Service Application main scenarios

Use the BigFix Self-Service Application (SSA) to run the following scenarios enhanced in Version 3.0.0.

As a prerequisite to run entirely these scenarios, ensure that you have installed BigFix Client Version 9.5.11.

### Scenario 1: Managing a software package as a new offer with target restart

This scenario describes how you can manage in the BigFix Self-Service Application (SSA) the deployment of a new offer that requires a final restart of your target computer. It will be also described how you can postpone the activity, and within the defined activity deadline be ensured that the required restart action is performed.

#### **Prerequisites for this scenario:**

The software package operator creates a software package either in the BigFix WebUI or in the BigFix console.

Two correlated Fixlets will be created to deploy and to uninstall the software package.

**Part 1:** The BigFix Console operator selects the Fixlet to deploy the software package to the target computer. In the **Take action** panel of the Fixlet, the Console operator defines the following information:

- **Target tab:** Which target computer will receive the offer.
- **Messages tab:** Enable the message which is displayed on the target computer while running the action and the completed message.
- **Offer tab:** Selecting the check box named **Make this action an offer**, the software package will be sent as an offer to the SSA Catalog.



**Take Action**

Name:  Create in domain:

Preset:   Show only personal presets

Target Execution Users Messages **Offer** Post-Action Applicability Success Criteria Action Script

An action that is made into an 'Offer' becomes available in the list of offers in the client UI on applicable machines. Users can browse through the list of available offers and apply those that they are interested in. Offers will only be visible to users selected on the 'Users' tab and on machines where the client Offer UI is enabled.

Make this action an offer  
 Notify users of offer availability

Title:   
Category:

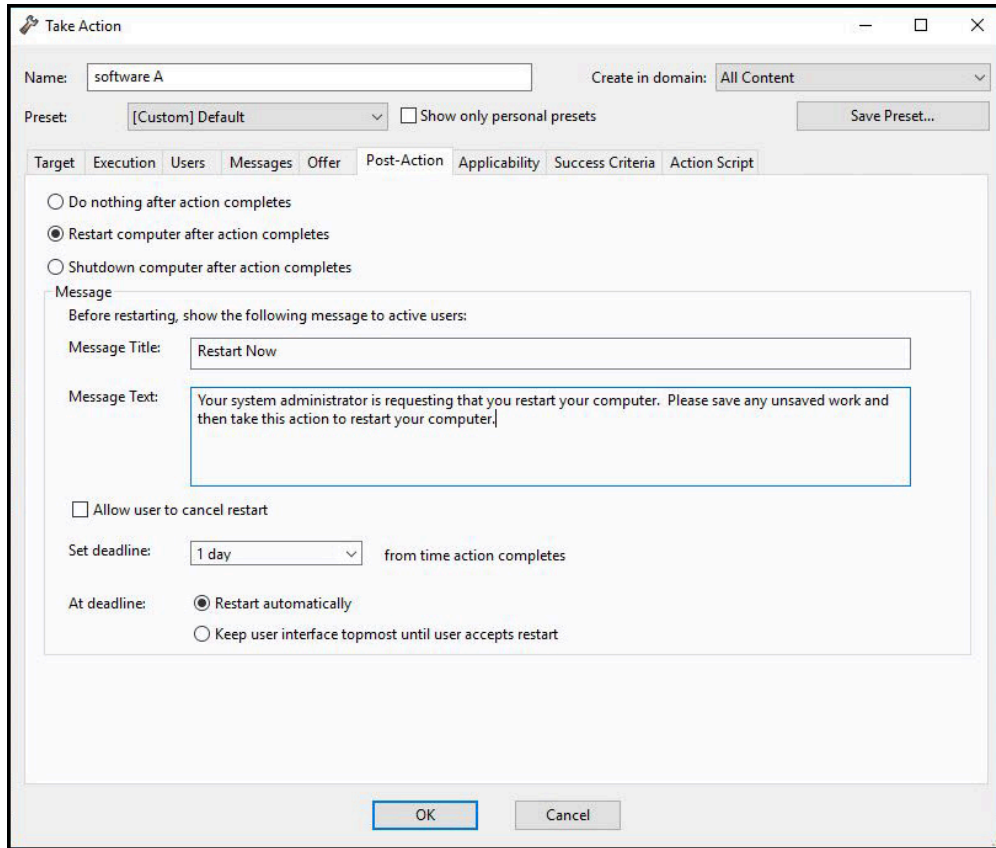
**software package A**  
Category 1

Description

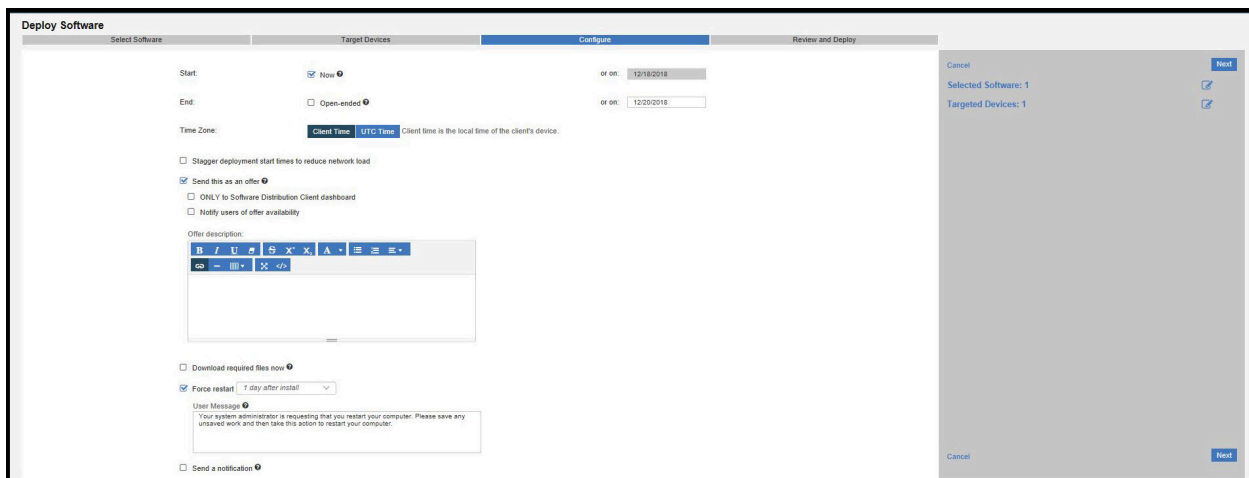
[Click here](#) to accept this offer.

- **Post-action tab:** Which action is required by the end user after the software package installation completes and which message is displayed on the target computer before the post action occurs. In this example:
  - The end user must perform a restart of the target computer after the action completes (software package installation).
  - After completing the action, the deadline for the target computer restart will be 1 day.

- When the deadline is reached (1 day after the software package installation), the target computer is automatically restarted, if not previously restarted by the end user.

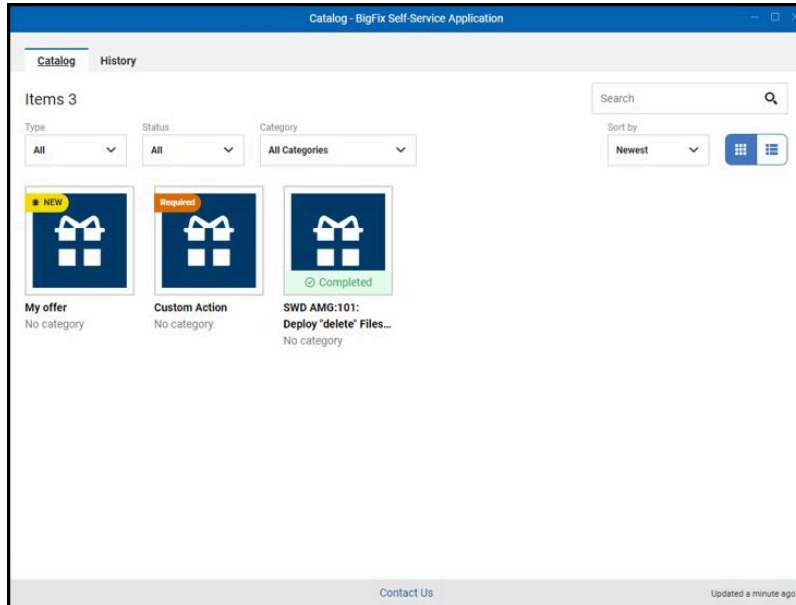


**Note:** The same information can be defined also using the BigFix WebUI. When using the WebUI, at deadline, only the **Restart automatically** option is available, not the **Keep user interface topmost until user accepts restart** option.



**Part 2 (on the BigFix Self-Service Application):** The end user, which is the user logged on to the target computer, receives the new offer in the SSA Catalog even if SSA was not opened by the user.

The end user sees the offer icon marked by a **New** badge until he opens the offer for the first time.



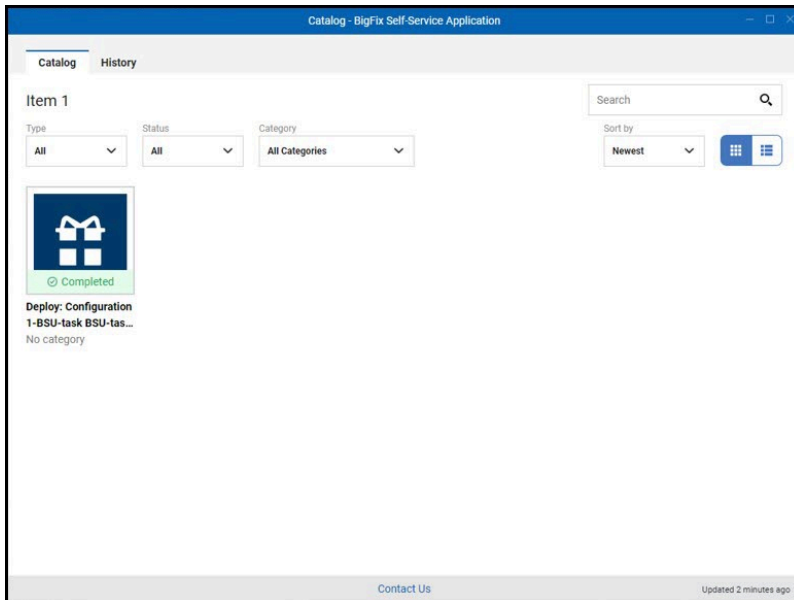
The new offer icon is displayed on the catalog. The end user clicks the icon to open the offer details and description. The offer details panel shows if there is a target pending restart.

After opening the offer, the end user can decide to:

- Install the new software immediately by clicking **Install**.
- During the installation, a Running message is displayed, later on a Completed message will be displayed to keep informed the end user.
- The offer icon is marked by a Pending restart badge. In the lower right corner of the screen, the end user will see the BigFix notifications **Restart Now** or **Later** to snooze the action. The end user restarts immediately or snoozes the action.

After restarting the target computer, the end user:

- Sees in the SSA catalog the completion of the installation (marked by a green check).



- When clicking the offer entry in the SSA catalog, he gets another option to uninstall the software package using **Remove**.

If the end user decides to close the offer without taking any action:

- The offer icon will remain in the Catalog (persistent). The icon will be displayed until the action expires.

The end user can check in the SSA History tab the status of this activity and of all his prior activities.

The screenshot shows the 'History' tab of the SSA interface. It features a search bar labeled 'Search History' and a filter for 'All Status' with sub-filters for 'Completed' and 'Failed'. The main content is a table with the following data:

Date	Item	Status
December 13, 2018	Microsoft Corporation MSI GA 1 task v3.1.3790.0000 (Uninstall: Configuration 1 ( Deploy: Orca MSI GA...	Completed at 5:13:36 PM
December 12, 2018	UNINST ORCA FROM WEBUI CORR v3.1.3790.0000 (Uninstall: Configuration 1-Orca)	Completed at 1:32:51 PM
December 12, 2018	Microsoft Corporation Orca special chars ,... \ [0-9-;+)*(&+***% v3.1.3790.0000 (Deploy: ...	Completed at 1:20:07 PM
December 12, 2018	Microsoft Corporation Orca special chars ,... \ [0-9-;+)*(&+***% v3.1.3790.0000 (Uninstall...	Completed at 1:19:57 PM
December 12, 2018	Orca FROM WEBUI CORR v3.1.3790.0000 (Deploy: Configuration 1-Orca)	Completed at 12:31:04 PM
December 6, 2018	Deploy: Orca MSI GA 1 task - custom icon	Failed at 11:42:38 AM
December 5, 2018	Uninstall: Configuration 1-Orca demo5.1	Completed at 2:23:02 PM
December 5, 2018	Deploy: Configuration 1-Orca demo5.1	Completed at 2:22:54 PM
December 4, 2018	sleep 10	Completed at 10:53:36 AM
December 4, 2018	Deploy: Configuration 1-Orca demo5.1	Completed at 10:41:22 AM
December 3, 2018	Denlay: New Configuration 1-Orca donnio nrenn	Completed at 2:10:33 PM

At the bottom right, it says 'Updated a minute ago'.

## Scenario 2: Managing an action with customized pre-message

This scenario describes how you can manage an action in BigFix Self-Service Application (SSA) for which a pre-message is customized during the deployment. The action can be a required action or a suggested action.

### Prerequisites for this scenario:

None.

**Part 1:** The BigFix Console operator selects a Fixlet or task or package to deploy onto the target computer and customizes a pre-message to notify the target computer user, if it is a required action or a suggested action.

The Console operator defines the following information:

- **Target tab:** The target computer that needs to receive the action.
- **Messages tab:** The notification message that needs to be displayed on the target computer before running the action. This notification or pre-message is customized as follows:

The screenshot shows the 'Take Action' dialog box with the 'Messages' tab selected. The configuration is as follows:


- Name:** Demo 1
- Create in domain:** All Content
- Preset:** Custom Copy Defaults
- Messages tab:**
  - Display message before running action
  - Title:** New security patch
  - Description:** For more info about the update please visit : <https://www.ferrari.com/en-EN/formula1/articles/>
  - Ask user to save work
  - Allow user to view action script
  - Allow user to cancel action
  - Set deadline:**
    - 1 day from time action is relevant
    - 25/11/2022 at 16:52:21 client local time
  - At deadline:**
    - Run action automatically
    - Keep message topmost until user accepts action
  - Show confirmation message before running action:
- Display message while running action:**
  - Title:** New security patch
  - Description:**

- Warning:** You have specified on the "Users" tab that this action should run independently of user presence. If no user is present, the message will not be displayed.

- Allow user to cancel action:
  - If this flag is not set, a notification is displayed on the target computer denoting that this action is a *Required* action, which is mandatory and the user cannot cancel.
  - If this flag is set, a notification is displayed on the target computer denoting that this action is a *Suggested* action, which the user can cancel if desired.

 **Important:** This flag is supported in SSA version 3.1.3 or later.

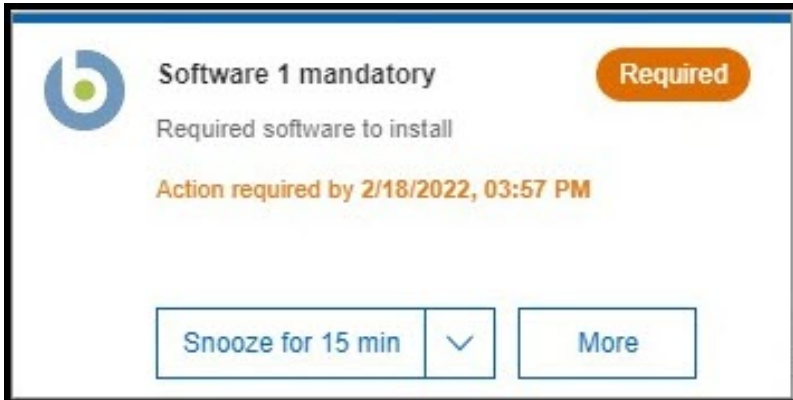
- The deadline for the required action is 3 days. The time starts since the action becomes relevant on the target computer.
- When the deadline is elapsed, until the end user accepts the required action, the message is kept topmost on the target computer.
- Rich text is now supported in the description field. This allows you to format the text in the field with the following HTML tags:
  - span
  - img
  - font
  - u
  - b
  - a

 **Note:** This feature is supported in SSA version 3.2.3 or later.

 **Important:** This information can be defined in BigFix Console only. It cannot be defined using BigFix WebUI.

**Part 2 (on BigFix SSA):** The user logged on to the target computer sees a notification at the lower right corner of the screen, even without opening SSA. The notification contains information such as if it is a required or a suggested action, the action deadline, and what occurs when the deadline is reached. The date and time of the action deadline are displayed in red. When the user clicks the notification, the correct SSA catalog entry opens and shows the action details.

- If the Console user has not set the *Allow user to cancel action* flag, the target computer user sees a BigFix notification showing the **Required** badge in red as shown in the following image:



In this case, the target computer user can decide to:

- Perform the required action immediately by clicking **Get**.
- Postpone the required action by clicking **Snooze for 15 min** button or select a snooze option from the drop-down. The end user can snooze the operation and choose to be reminded from the following options:
  - 5 minutes before deadline
  - 15 minutes before deadline
  - 5 minutes
  - 15 minutes
  - 30 minutes
  - 1 hour
  - 3 hour
  - 6 hour
  - 12 hour
  - 1 day
  - Custom value



**Note:**

- Custom value allows the user to postpone the action to the desired time and date using the date and time widget. The action cannot be postponed past the defined deadline.



**Note:**

- This option is only available in the action detail view.
- Custom snooze is supported in BigFix SSA Version 3.2.3 or later.

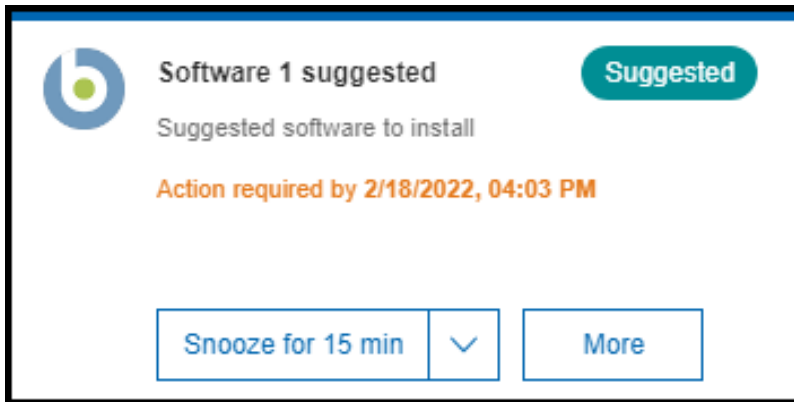
- **Examples:**



- If the deadline for the required action defined during the deployment is less than five minutes, the **Snooze for <value>** button is not displayed.
- If the deadline for the required action defined during the deployment is less than one hour, the following snooze options are displayed:
  - 5 minutes before deadline
  - 15 minutes before deadline
  - 5 minutes
  - 15 minutes
  - 30 minutes

When the deadline is elapsed, the end user can no longer close or minimize the SSA panel on the target computer. The user is forced to click **Get** to perform the required action.

- If the Console user has set the *Allow user to cancel action* flag, the target computer user sees a BigFix notification with the **Suggested** badge in blue as shown in the following image:



In this case, the target computer user can decide to:

- Perform the suggested action immediately by clicking **Get**.
- Decline the suggested action immediately by clicking **Decline**.
- Postpone the suggested action by clicking **Snooze for 15 min** button or select a snooze option from the drop-down. The end user can snooze the operation and choose to be reminded from the following options:
  - 5 minutes before deadline
  - 15 minutes before deadline
  - 5 minutes
  - 15 minutes
  - 30 minutes
  - 1 hour
  - 3 hour
  - 6 hour
  - 12 hour



- 1 day
- Custom value

**Note:**

- Custom value allows the user to postpone the action to the desired time and date using the date and time widget. The action cannot be postponed past the defined deadline.

**Note:**

- This option is only available in the action detail view.
- Custom snooze is supported in BigFix SSA Version 3.2.3 or later.

- **Examples:**

- If the deadline for the required action defined during the deployment is less than five minutes, the **Snooze for <value>** button is not displayed.
- If the deadline for the required action defined during the deployment is less than one hour, the following snooze options are displayed:
  - 5 minutes before deadline
  - 15 minutes before deadline
  - 5 minutes
  - 15 minutes
  - 30 minutes



**Note:** Setting *Allow user to cancel action* flag is supported in BigFix SSA version 3.1.3 or later.

On the lower-right corner of the screen, the status message (such as running or completed) of the current action is displayed.

In the SSA History tab, users can see the status of the current action and all other previous actions.

## Scenario 3: Managing a post action with customized post message

This scenario describes how you can manage in the BigFix Self-Service Application (SSA) a post action showing a customized post message.

### Prerequisites for this scenario:

None.

**Part 1:** The BigFix Console operator selects a Fixlet or task or package to deploy the post action to the target computer. In the **Take action** screen, the Console operator customizes the post message as follows:

The screenshot shows the 'Take Action' dialog box with the 'Post-Action' tab selected. The 'Name' field contains 'sleep 10' and 'Create in domain' is set to 'All Content'. The 'Preset' is '[Custom] Default'. The 'Post-Action' tab is active, showing three radio button options: 'Do nothing after action completes', 'Restart computer after action completes' (selected), and 'Shutdown computer after action completes'. Below this is a 'Message' section with a text area for 'Message Title' containing 'Restart Now' and a larger text area for 'Message Text' containing 'Your system administrator is requesting that you restart your computer. Please save any unsaved work and then take this action to restart your computer.' There is a checkbox for 'Allow user to cancel restart' which is unchecked. The 'Set deadline' is set to '1 day' and 'At deadline' has two radio button options: 'Restart automatically' (unchecked) and 'Keep user interface topmost until user accepts restart' (selected). 'OK' and 'Cancel' buttons are at the bottom.

- Post-action tab:

- Post action - The target computer user must perform a restart after the action completes (software package installation).
- Message title and message text that needs to be displayed on the target computer for the post action
- Allow user to cancel restart - If this flag is set, a notification is displayed on the target computer denoting that this action is a *Suggested* action, which the user can cancel if desired.


 **Important:** This flag is supported in SSA version 3.1.3 or later.

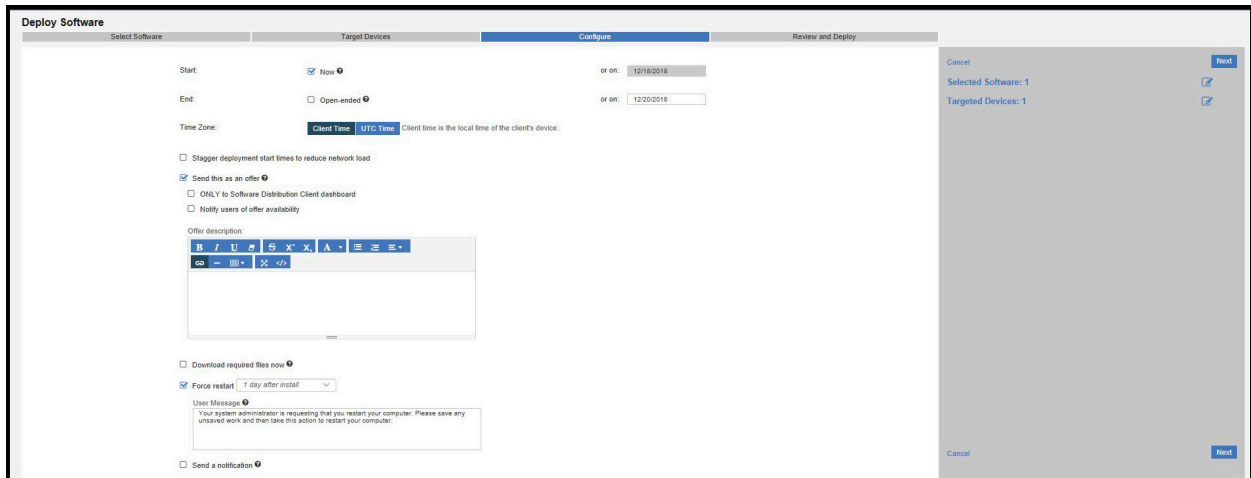
- After completing the action, the deadline for the target computer restart is 1 day.
- When the deadline is elapsed, the message is kept topmost on the target computer.
- Rich text is now supported in the description field. This allows you to format the text in the field with the following HTML tags:

- span
- img
- font
- u

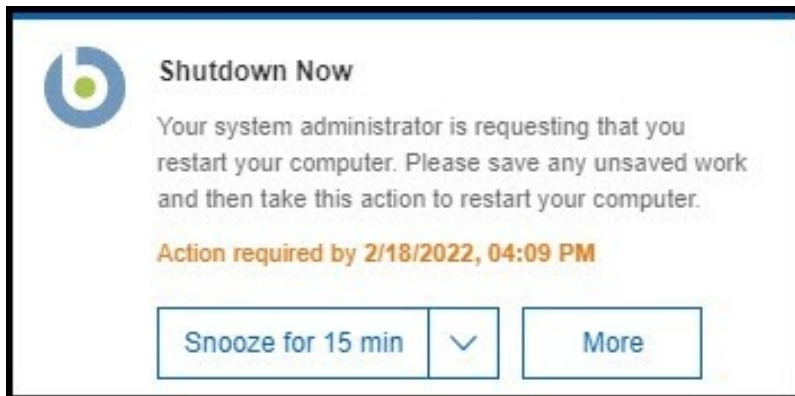
- b
- a

 **Note:** This feature is supported in SSA version 3.2.3 or later.

 **Note:** The same information can be defined also using the BigFix WebUI. When using WebUI, at deadline, only the **Restart automatically** option is available. The **Keep user interface topmost until user accepts restart** option is not available.



**Part 2 (on BigFix SSA):** The user logs on to the target computer and does not receive any offer, any required action, or any suggested action. This means that the action is already performed (for example, the software package was already installed) when the user receives a **Restart Now** or **Later** BigFix notification.



- If the user clicks **Snooze for...**, the user can decide to postpone the target computer restart. The user can snooze the operation and choose to be reminded from the following options:
  - 5 minutes before deadline
  - 15 minutes before deadline
  - 5 minutes

- 15 minutes
- 30 minutes
- 1 hour
- 3 hour
- 6 hour
- 12 hour
- 1 day
- Custom value



**Note:**

- Custom value allows the user to postpone the action to the desired time and date using the date and time widget. The action cannot be postponed past the defined deadline.



**Note:**

- This option is only available in the action detail view.
- Custom snooze is supported in BigFix SSA Version 3.2.3 or later.

- **Examples:**

- If the deadline for the required action defined during the deployment is less than five minutes, the **Snooze for <value>** button is not displayed.
- If the deadline for the required action defined during the deployment is less than one hour, the following snooze options are displayed:
  - 5 minutes before deadline
  - 15 minutes before deadline
  - 5 minutes
  - 15 minutes
  - 30 minutes

- If the user clicks the BigFix notification, the following options are available within BigFix SSA:

- Decline - Available only for suggested actions
- Later - The user can decide to postpone the target computer restart. The user can snooze the operation and choose to be reminded in an hour or on the following day



**Note:**

- If the deadline for the required action or the suggested action defined during the deployment is less than an hour, the **Later** button is not displayed.
- If the deadline for the required action or the suggested action defined during the deployment is less than one day (24 hours), the **Later** option displays only **In an hour**.

After the target computer restart takes place, this action is not persistent in SSA. It is not recorded in the SSA History tab.

## Scenario 4: Managing messages

This scenario describes how in the BigFix Self-Service Application (SSA) you can manage the messages sent by the BigFix WebUI Administrator.

### Prerequisites for this scenario:

- SSA 3.1.0. must be installed in the target device.
- Messages tab must be enabled through BigFix WebUI Configure Self-Service Application.

**Part 1:** The BigFix WebUI Administrator sends a notification message to a target device.

**Part 2 (on the BigFix Self-Service Application):** The end user (the user logged on to the target device) receives the message, views and manages it through the Message tab in the SSA application.

Catalog	History	Messages			
Message	Date received	Sender	Action		
✓ An important message Content of the <i>message</i>	5/29/2019, 12:33:4...	Kevin			
> Another important message	5/29/2019, 12:32:2...	Admin			

As a device user, you can:

- See a pop-up to indicate you have received a message.
- Differentiate new messages (shown in white background) and already read messages (shown in gray background).
- Sort the list by Message, Date received, or Sender
- View the content of the message by clicking on a message.
- View information about the message such as the date received and the sender against the relevant message.
- Delete a message: To delete:

1. Select a message.
2. Click the delete icon.
3. Click **Yes** to confirm deleting the message.

You can also **Undo** to restore the deleted message.



**Note:** Messages are automatically deleted from the message tab after the expiration days, which is set through WebUI Server Setting.

- Postpone a message to read it at a later point in time: To postpone:

1. Click the clock icon of a new message
2. Select an option to be reminded in an hour or on the following day.

You can see an hourglass icon against the messages that are postponed. You can see a reminder pop-up in an hour or on the following day as per the option you have selected.

# Appendix A. Support

For more information about this product, see the following resources:

- [BigFix Support Portal](#)
- [BigFix Developer](#)
- [BigFix Playlist on YouTube](#)
- [BigFix Tech Advisors channel on YouTube](#)
- [BigFix Forum](#)

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