Skylar Advisor

Version 2.6.0

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1

Getting Started with Skylar Advisor

Overview

Skylar Advisor is an AI-powered application within the Skylar AI ecosystem that provides proactive, tailored guidance based on real-time data sent from your Skylar One system to Skylar AI. You can interact with Skylar Advisor by reviewing and following its proactive suggestions, called "Advisories." Additionally, you can query Skylar Advisor for advice and use it to perform deeper investigations of the issues and events in your environment.

For an overview of Skylar AI, see *Introduction to Skylar AI*.

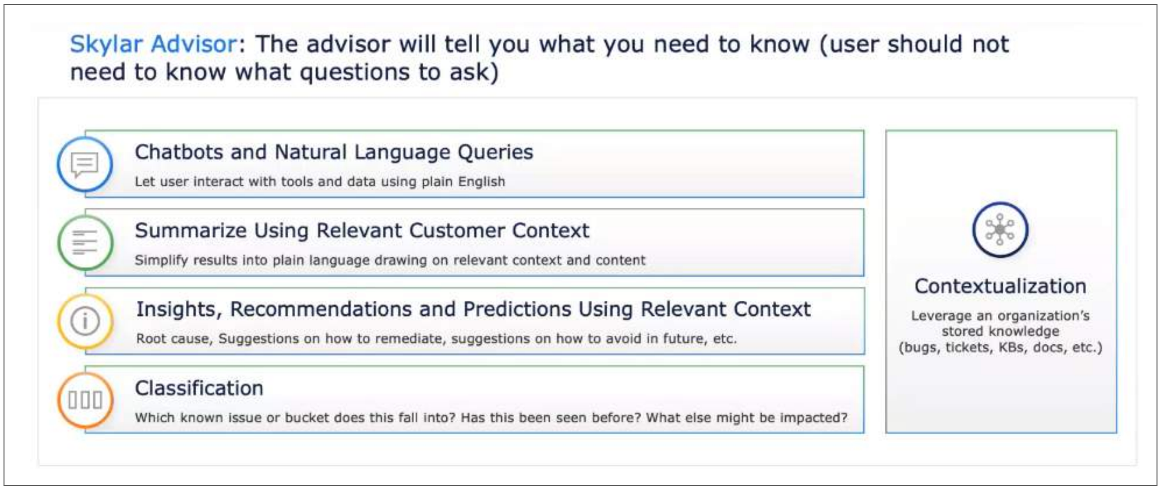
To view the latest release notes, see the *Skylar AI Release Notes*.

This chapter covers the following topics:

What is Skylar Advisor?

Skylar Advisor is an AI-powered application that offers tailored guidance based on real-time data sent to Skylar AI from Skylar One, which lets you make informed decisions quickly and efficiently.

What Skylar Advisor is *not* is a "chatbot" or "assistant" that you have to query to get answers. Skylar Advisor uses its gathered knowledge to give you the potential answers before you get around to typing a question. Skylar Advisor can also forecast for issues that might occur, and create requests for upgrades.



Similar to large-language models (LLMs) like ChatGPT or Microsoft Copilot, you can also use the Ask Skylar feature in Skylar Advisor to start a conversion with Skylar AI to get more information.

Logging In to the Skylar AI User Interface

If you know the URL of your Skylar AI system, you can go directly to that location. You can also access Skylar AI components from a link in Skylar One.

> **NOTE:** The login process might vary slightly, depending on the versions of Skylar AI, Skylar One, and the Skylar One AP2 user interface currently running in your environment.

To log in to Skylar AI from Skylar One:

1. From Skylar One, go to the **Skylar AI** page ( ) and click the **[Visit]** button for the Skylar AI component you want to use, such as Skylar Analytics or Skylar Advisor. If you are not currently logged in to Skylar AI, the Skylar AI sign-in page appears.
2. If you need to log in to Skylar AI, type your email address and password and click **[Continue]**. The Skylar AI landing page appears.

3. If your Skylar AI site requires multi-factor authentication, but you have not set it up, you will need to scan the QR code that displays or enter the "secret key". This is a one-time-only step.
4. Click the name of the Skylar AI component you want to use, such as ***Advisor***, ***Analytics***, or ***Skylar Settings***.

The Skylar Advisor User Interface

The Skylar Advisor user interface includes the following main pages and features:

- The **Dashboards** page is the default page that displays when you open Skylar Advisor. This page contains a list of your work and all of your interactions with Skylar Advisor. This page also lets you work with events imported from Skylar One, organized by business service, device group, issue type, or organization. For more information, see *Managing Activities on the Dashboards Page*.
- The **Corpus** page lets you upload your own documents to train Skylar Advisor on your company's specific workflows, policies, and processes. You can also track how Skylar Advisor and other users are using your uploaded documents. For more information, see *Managing Documents and Data on the Knowledge Page*.
- The **Data Lens** page lets you view details about the Skylar One events and event groups ("signals") that have been received by Skylar Advisor so that you can perform further investigations on them. For more information, see *Managing Signals on the Data Lens Page*.
- The **Ask Skylar** feature lets you query Skylar Advisor for customized guidance based on real-time data sent from Skylar One, which empowers you to make informed decisions quickly and efficiently. You interact with the **Ask Skylar** feature in much the same way as you would with ChatGPT, Claude, and other LLMs. For more information, see *Using the Ask Skylar Feature*.
- The **Preview Features** page (> Account Settings > Preview Features) lets users toggle on and experiment with new features. For more information, see *Experimenting with New Features on the Preview Features Page*.

Use the following buttons and icons to help you navigate the Skylar Advisor user interface:

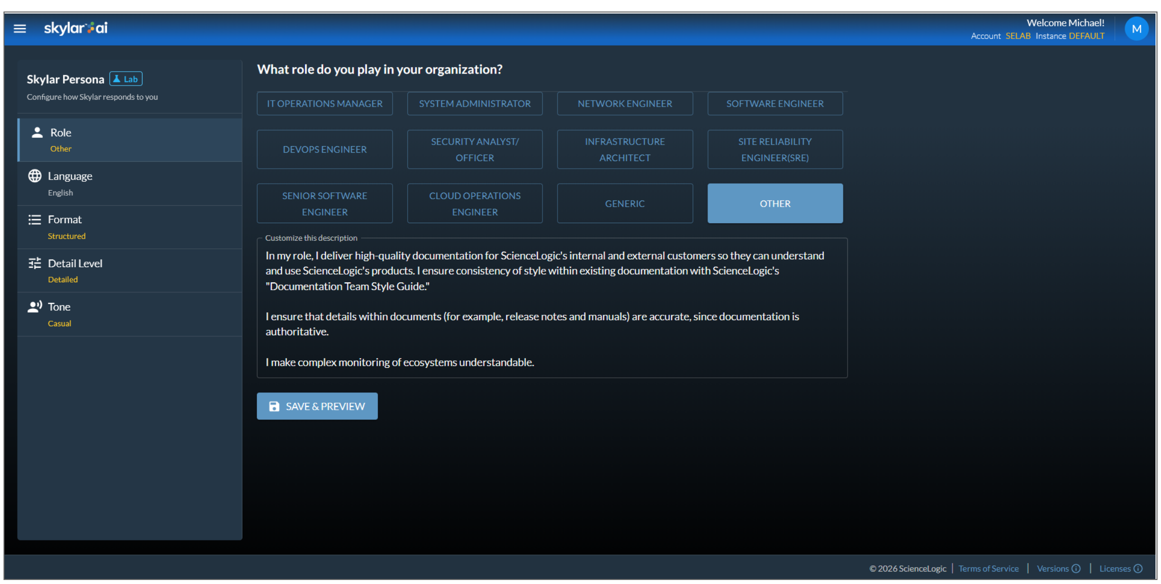
- The Skylar AI menu () at top left gives you access to all of the Skylar Advisor pages, along with **User Settings** (your user information), **Account Settings** (information specific to this account), and the **Persona** page. The **User Settings** link takes you to the same **Profile** page that displays when you select ***Skylar Settings*** from the login page.
- Click the "Skylar" product icon at top left to return to the Skylar AI landing page, where you can switch between Skylar AI applications as needed.
- If you have multiple instances of Skylar Advisor running, you can switch between those instances by clicking the drop-down next to ***Instance*** at the top right.
- The user icon () at top right displays the email address and role for the current user in the user interface. You can click the **[Sign Out]** button to sign out of this session.

- Most Skylar Advisor pages and tabs have a **[Help Ctr]** button at top right or a Help Center icon ( ) in the small navigation bar on the left. The **Help Center** pane contains links to short videos that explain the latest features for this version of Skylar Advisor, and it also has a link to the Skylar AI product documentation site. The **Help Center** pane displays a yellow **[Updated]** button for new content, and the smaller **Help Center** icon on the left also displays a small yellow circle for new content.
- If a page contains a list, the enter selection mode icon ( ) adds check boxes to items in the list so that you can perform bulk actions to multiple items at once, such as bookmarking or archiving an item. Click the icon again to hide the check boxes.
- The notifications icon ( ) at the bottom left of the window lets you view all your recent notifications related to activities and warnings for that page. You can click **[Clear All]** to delete all past reminders. When you move to another page or tab, the list of notifications is updated for the new page.
- The **Versions** link in the footer of any page displays the version numbers for Skylar Advisor and other applications. From the footer, you can also click links to view the Terms of Service and to view information about licenses and open-source packages.

Defining Your Persona Information

One of the first tasks you should work on when you get started with Skylar Advisor is to set up your Persona information on the **Skylar Persona** page (> Persona).

Your persona information lets Skylar Advisor know what your role is in your company, the language you will use for interacting with Skylar Advisor, and how you want Skylar Advisor to structure your feedback, including the level of detail and the tone of the feedback.



To define your Skylar Persona:

1. Log in to Skylar Advisor and click the Skylar AI menu ().
2. Click the **[Persona]** button at bottom right. The **Skylar Persona** page appears:
3. On the **[Role]** tab, select a role that best matches what you do. A basic description of your role appears in the ***Customize this description*** text box, which you can edit to better fit your role. If you do not find a good match, click **[Other]**.
4. You can add more information about your role or edit the existing description in the ***Customize this description*** text box.
5. Click **[Save & Preview]**. Based on your feedback on this tab, Skylar Advisor displays a sample response using your current settings. You can toggle between the**[Generic]** and **[Personalized]** tabs to see the difference.
6. On the **[Language]** tab, select a language for your responses from Skylar Advisor, and if needed, add more language information to the ***Customize Language Preference*** text box. Click **[Save & Preview]** to see a sample response based on your choice.
7. On the **[Format]** tab, select how you want Skylar Advisor to format your responses. You can let Skylar Advisor choose the format for you, or have Skylar Advisor format responses in paragraph format or in a structured format like bulleted or numbered lists. Click **[Save & Preview]** to see a sample response based on your choice.
8. On the **[Detail Level]** tab, select the depth of detail you want for your responses. You can let Skylar Advisor choose the depth or granularity, or have Skylar Advisor give either detailed or brief responses. Click **[Save & Preview]** to see a sample response based on your choice.
9. On the **[Tone]** tab, select the tone, or how formal you want the responses to be. You can let Skylar Advisor choose the tone, or have Skylar Advisor give either more formal or casual responses. Click **[Save & Preview]** to see a sample response based on your choice.
10. To return to the Skylar Advisor user interface, click the Skylar AI menu () and select the page you want from the **Advisor** section.

TIP: You can return to this page at any time to update your persona information if you are not satisfied with the responses you are currently getting from Skylar Advisor.

Viewing User Activity on the Customer Insights Page

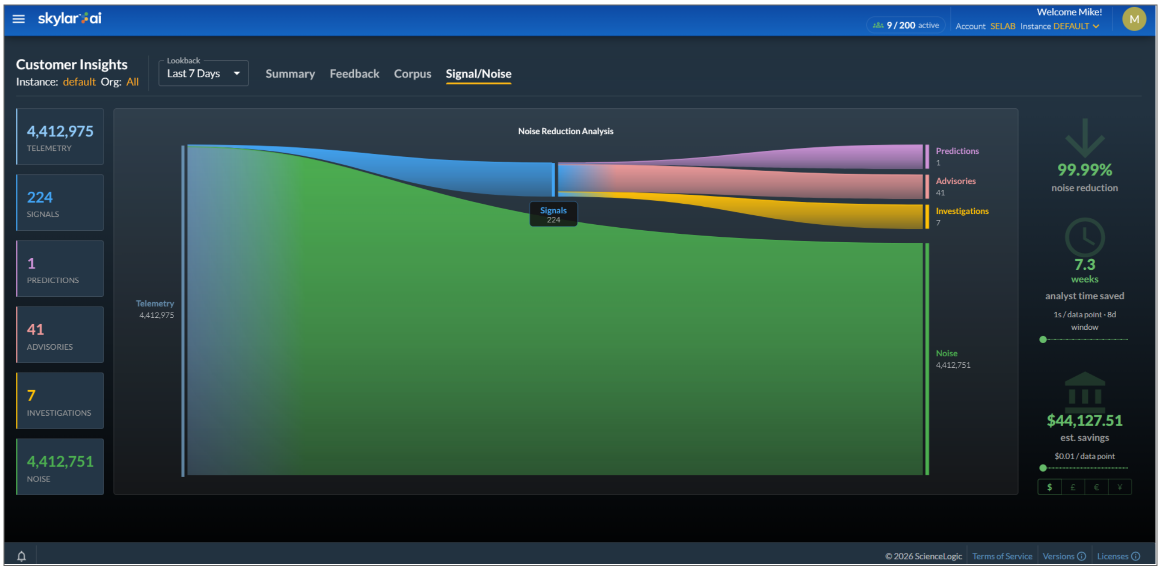
In the Skylar Advisor user interface, the **Customer Insights** page (> Advisor > Customer Insights) is an interactive, read-only page that displays data about the activities of all users on that system and instance.

NOTE: Currently, this page displays up to 50 users at a time.

The following tabs on the **Team Analytics** page let you view how all users are interacting with Skylar Advisor:

- **[Summary]**. In the **Engagement** section, displays the number of conversations, question-and-answer turns, and comments by users, as well as AI-generated content like Advisories, Investigations, and Quick Takes, and the number of thumbs-up and thumbs-down votes. The right panel lists the most active users, along with the number of conversations each user had.
- **[Feedback]**. Displays the specific feedback users added when they clicked the thumbs-up and thumbs-down votes.
- **[Corpus]**. Displays the number of active, queued, and failed documents on the **Corpus** page in various time frames, with line graphs to show trends.

- **[Signal/Noise]**. Displays a variety of data about the "signal" (useful data) and the "noise" (unhelpful data) generated in this account by Skylar Advisor. The middle of the page includes a visual Sankey chart that displays the useful signal versus the noise generated. You can also track the estimated savings as a result of the noise reduction in Skylar Advisor.

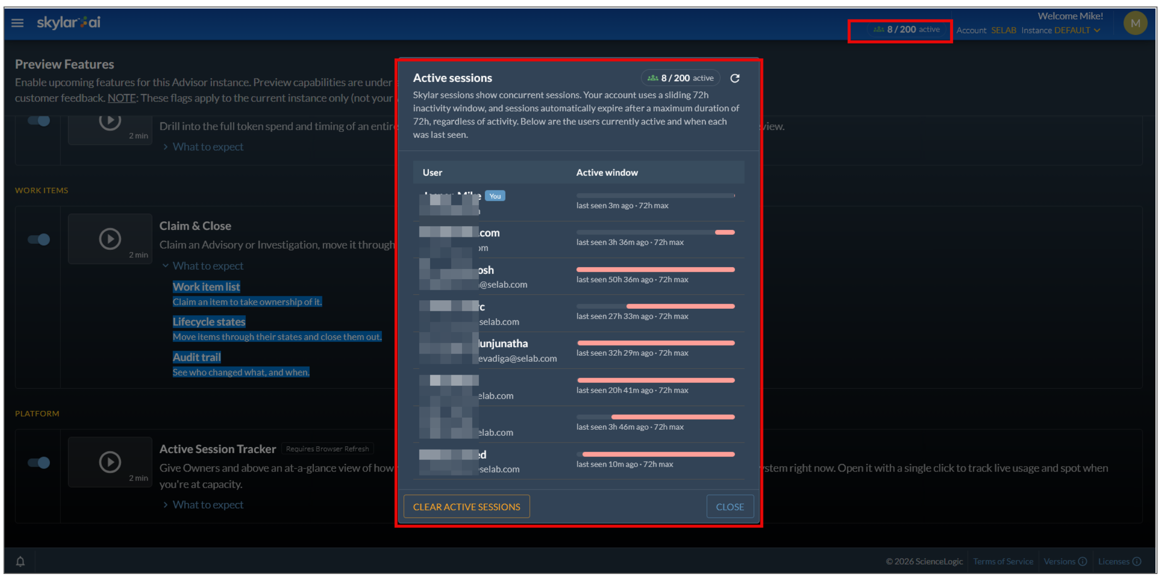


- **[Activity]**. Charts the various activities, such as Predictions, Advisories, Investigations, and Agentic Turns, by users over time. The graph displays the value delivered by each activity type.

Managing Active Sessions

The **Active Session Tracker** option adds a new button in the top navigation bar of the user interface for an Owner user or higher.

The label for this button lists the number of active user sessions along with the total number of allotted user sessions, such as "8/200" for eight users out of 200. When you click the button, a list of active sessions and active users appears.



To clear all active sessions, click the **[Clear Active Sessions]** button.

Sharing Information with Slack and Microsoft Teams Integrations

On the **Integrations** page (> Account Settings > Account Access > Integrations), you can create integrations with Slack and Microsoft Teams using webhooks. These integrations let users share an Ask Skylar conversation with other users by using the **[Share a Conversation]** icon () and the **Collaborate** pane.

Before you can create the integration in the Skylar Advisor user interface, you will first need to locate a webhook in either Slack or Teams. To locate the webhook, see the documentation for Slack or Teams, or ask Skylar AI using the **Ask Skylar** feature.

To create an integration with Slack or Teams:

1. In Skylar Advisor, go to the **Integrations** page (> Account Settings > Account Access > Integrations) and click **[Add Integration]**. A drop-down appears.

2. Select either *Slack* or *Microsoft Teams*. An integration pane appears to the right.

3. Complete the following fields:

   - ***Integration Name***. Type a name for this integration.
   - ***Enabled***. To use this integration immediately, leave this option at the default (blue). To disable this integration, click the toggle to turn it white.
   - ***Advisor Instances***. Select one or more instances in your Skylar Advisor system where you want to be able to share conversations.
   - ***Webhook URL***. Paste the webhook URL you found for Slack or Teams.

4. Click **Save**.

5. To test the connection, click the **[Test Connection]** button at the bottom of the integration pane.

To send a conversation to a Slack or Teams channel:

1. From the Ask Skylar prompt box for an existing conversation, click the **Collaborate with others** icon ( ) at the bottom right. A **Collaborate** pane appears.

2. Click the **[Slack]** or **[Teams]** button. A **Send to** window appears.

3. Complete the following fields:

   - **Select Channels**. For Teams only, select a channel from the list.
   - **Title**. Type a title for the conversation.
   - **Summary**. Update the existing summary as needed.
   - **[Compact Summary]**. Click this button to have Skylar Advisor optimize the summary before sending it to the channel.

4. Click **[Send to Slack]** or **[Send to Teams]**. The conversation is sent to the specified channel, with a link to return back to the Ask Skylar conversation. The conversation is also added to the **Shared** section on the **[Recent Activity]** tab of the **Dashboards** page. You might need to click the refresh icon ( ) to see the most recent questions and answers in this conversation.

Importing ServiceNow Data into Skylar Advisor

If you use ServiceNow to track incidents, alerts, or cases, or if you want to sync your ServiceNow Knowledge Base (KB) articles, you can use the "Skylar Advisor" SyncPack to import that ServiceNow data into Skylar Advisor using Skylar Automation.

The "Skylar Advisor" SyncPack lets you retrieve the content of KB articles from ServiceNow and send those articles as PDF attachments for Skylar Advisor to ingest. To enable this feature, you need to create an access token in Skylar Settings. For more information, see *Creating Access Tokens for Users*.

When you have the Skylar Advisor access token, you need to add it to a configuration object in Skylar Automation along with the SyncPack. For more information, see the *Skylar Advisor SyncPack* manual.

Chapter

2

Managing Activities on the Dashboards Page

Overview

The **Dashboards** page is the default page that displays when you open Skylar Advisor. This page contains a list of all your interactions and notices related to Skylar Advisor,

These activities include "Advisories", "Investigations", and "Predictions", which will be explained in this chapter. This page also includes links to your conversations with Skylar Advisor and any artifacts that you or Skylar Advisor generated.

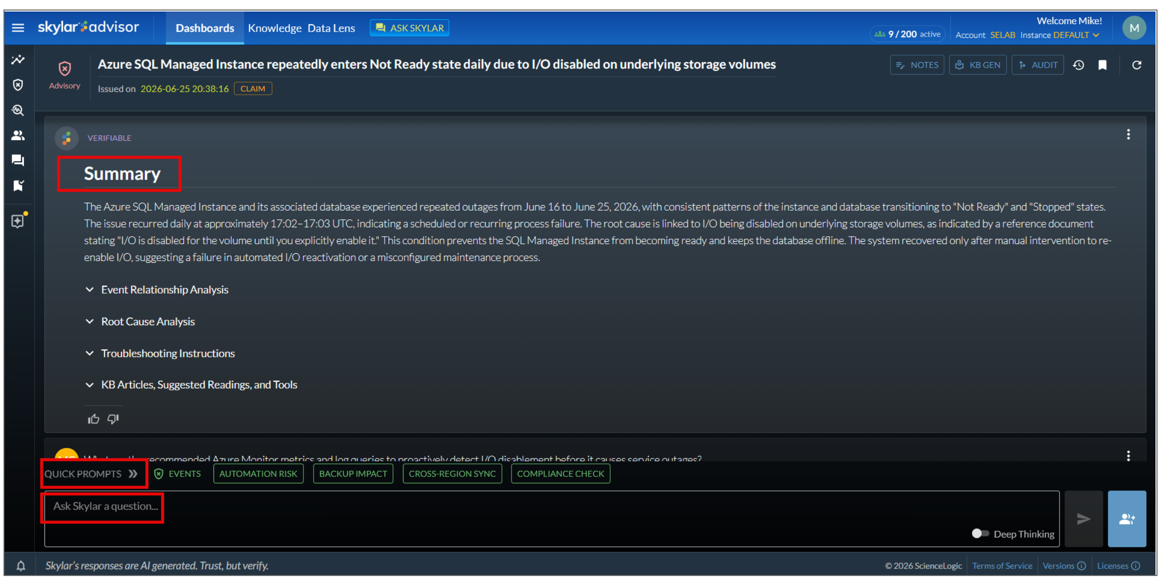
This chapter covers the following topics:

What is an Advisory?

Advisories are events that Skylar Advisor considers to be the most important issues for you. They help uncover and provide resolution guidance for critical problems. Advisories are automatically generated in Skylar Advisor by looking for meaningful patterns across events instead of reacting to every alert in isolation.

Advisories are designed to help you focus your attention so you can take informed action instead of chasing event noise. An Advisory is a synthesized insight, not a raw alert. An Advisory represents a pattern of related issues (an "event group") that is impacting multiple devices or components and is persisting long enough to indicate real operational impact. Correlation is based on event severity, event message patterns, and metadata, such as entity, status, or service.

When you click an Advisory on the **Dashboards** page, you can view additional details about it, including a summary of the issue, root cause analysis, troubleshooting information, and more. You can also use the **Ask Skylar** feature when you have an Advisory open to do more research on the Advisory. To help you with your questions, Skylar Advisor will generate a set of ***Quick Prompts***, which are additional prompts related to the event.



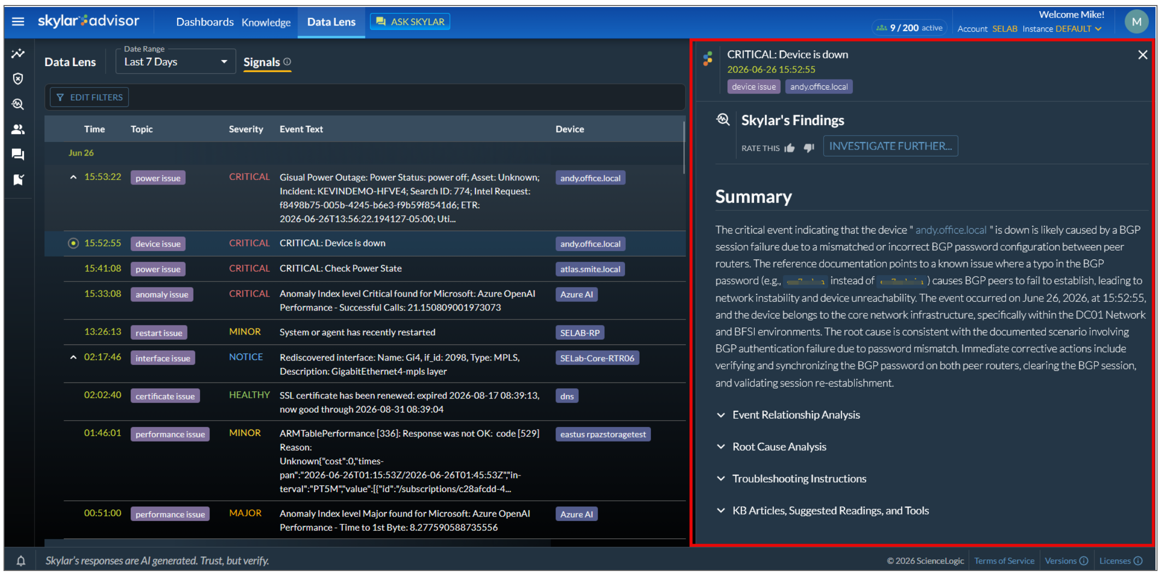
At the top of an Advisory, you can click the **[Events]** tag to open the **Related Events** panel. This panel lists additional information about all of the devices and events related to this Advisory, including root cause. You can click ***View graph*** on the panel to view the flow of the events leading to the Advisory.

When Skylar Advisor creates an Advisory, it also sends data about that Advisory to Skylar One as an alert. If you have an event policy set up to handle these kinds of alerts, Skylar Advisor will generate an event that includes the Advisory title, summary, and a direct link to the Advisory in Skylar Advisor for streamlined investigation.

What is an Investigation?

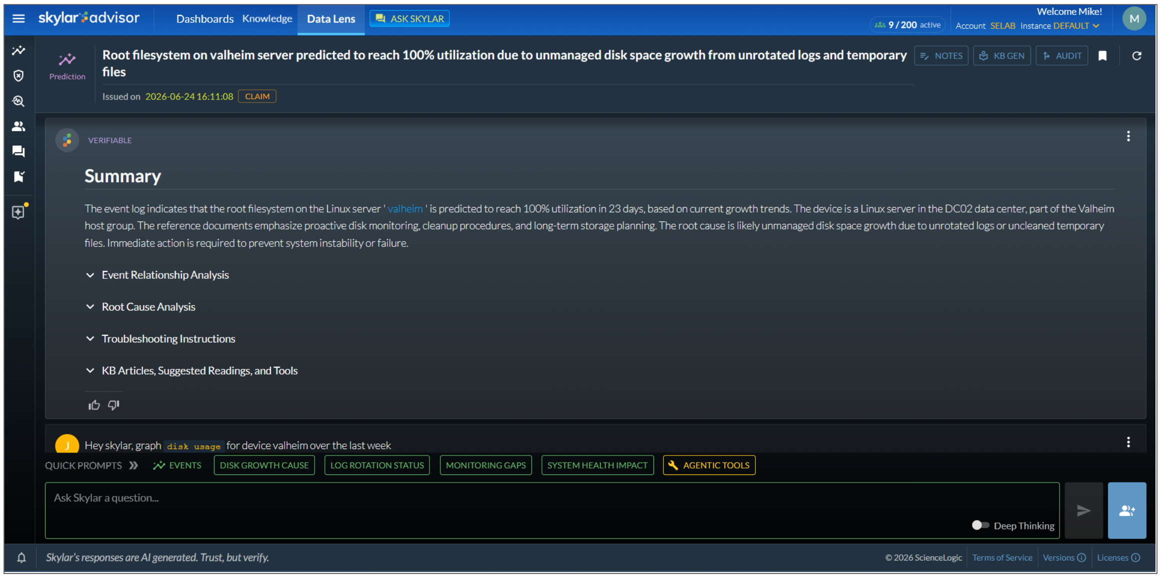
An ***Investigation*** is an on-demand event analysis that you can choose to generate for an event or event group.

You can create an Investigation by clicking the **[Start Investigation]** button or the **[Investigate Further]** button for an Advisory or an event group on the **Data Lens** page. Skylar Advisor will then run an analysis on that event or event group. The Investigation detail page lists the devices involved with the issue, along with any impacted device groups and business services.



What is a Prediction?

In Skylar Advisor, a ***Prediction*** is a potential event that might occur in the near future if no action is taken. Predictions in Skylar Advisor are based on data from Skylar One and Skylar Analytics.

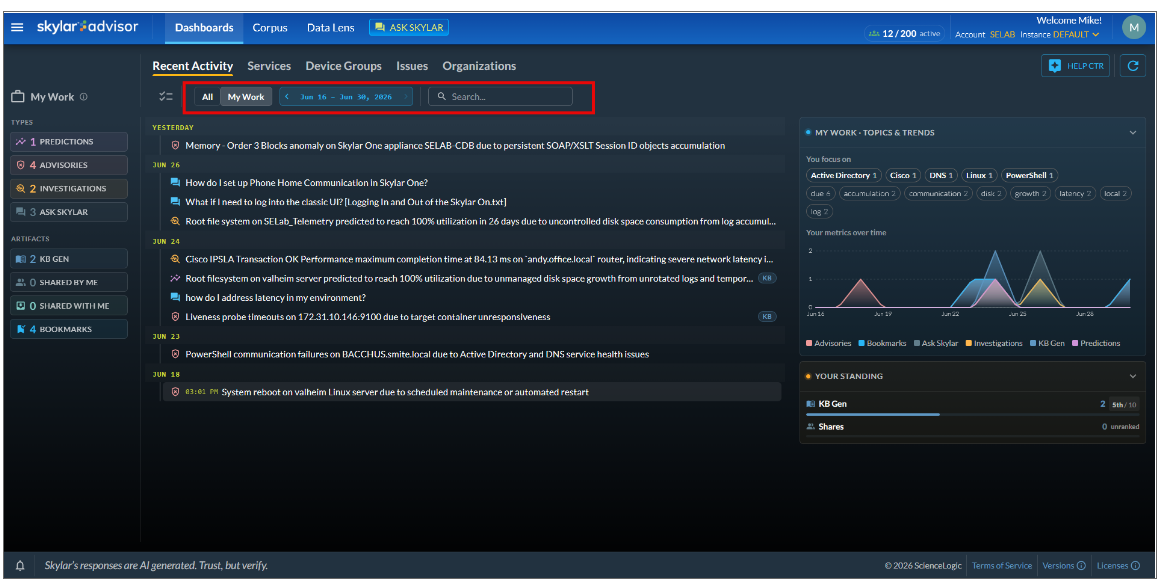


Skylar Advisor will label an Advisory as a "Prediction" if that Advisory was based on Predictive Alerting. Currently, Skylar Advisor generates predictions only from file system data.

The Dashboards Page

The **Dashboards** page contains a list of all your interactions related to Skylar Advisor, including Predictions, Advisories, Investigations, and conversations with Skylar Advisor.

This page also provides access to filtered lists of alerts and events, organized by business service, device group, issue type, or organization.



You can use the filters at the top of the **[Recent Activity]** tab on the **Dashboards** page to focus on the information displayed on this page:

- **All**. Shows all activities that occurred during the current time frame. On the left, a set of buttons display a numbered list of your activities, organized by type.
- **My Work**. Shows all activities that you investigated, claimed, closed, asked, shared, or were shared with you. This filter always displays your Ask Skylar questions and answers. On the left, a set of clickable views display a numbered list of your activities and a numbered list of any artifacts you have generated, such as Knowledge Base (KB) articles, shared conversations, and bookmarked activities.
- **Time frame**. Click the dates on this field to update the time frame of the data display. lets you move week-by-week through your past activities. You can update the time range, from six hours to 14 days, or you can select a custom range.
- **Search**. Type search information into this text box to display activities that match your search text, or click the **[Filters]** button to select additional filters.

TIP: All of the tabs on the **Dashboards** page have a **[Help Ctr]** button at top right. Click this button to open a pane with short training videos that walk you through the various features of Skylar Advisor, including a short video of the latest features for this version of Skylar Advisor.

Activities and Options on the Recent Activity Tab

The **[Recent Activity]** tab on the **Dashboards** page displays the following activities and options:

- ***Predictions*** (). Events that could potentially occur soon if nothing is done about them, based on data from Skylar One and Skylar Analytics. Currently, Skylar Advisor generates predictions only from file system data.
- ***Advisories*** (). Events that Skylar Advisor considers to be the most important issues for you. They help uncover and provide resolution guidance for critical problems. Advisories are automatically generated by Skylar Advisor, and they directly correlate to alerts and events from Skylar One.
- ***Investigations*** (). Ad-hoc event analyses that you can choose to generate for an event or event group. You create an Investigation by clicking the **[Start Investigation]** button for an Advisory on the **Data Lens** page.
- ***Shared Conversions*** (). A list of interactions with Skylar Advisor using the **Ask Skylar** feature that have been shared with you by other Skylar Advisor users.
- ***Ask Skylar*** () The **Ask Skylar** text box includes the questions you asked Skylar Advisor using the Ask Skylar feature. You can ask Skylar Advisor "plain English" questions just like you would for any other large-language model (LLM) like ChatGPT or Claude. To continue a conversation from the list, click a question.
- ***Bookmarks*** (). A list of any of the activities that you selected with the enter selection mode icon () enabled to save to this section. If you bookmark an Advisory or an Investigation, that icon will display in blue to show it has been bookmarked.

- *Help Center* (). This icon is not specific to an activity type, but you can click it to open the **Help Center** pane.

Archiving an Activity

You can archive an activity to remove it from the list on the **[Recent Activity]** tab. Please note that Skylar Advisor never deletes activities or conversations.

To archive or remove one or more activities that you no longer want to see on this tab:

1. On the **[Recent Activity]** tab, click the enter selection mode icon () to enable it (turn it blue).
2. Click the check box for any activity that you want to remove from the list. To select all activities, click the check all icon ().
3. Click the archive selected icon (). After you confirm your action, the activities are removed from the tab.
4. To view your archived activities, click the **[Filters]** button and select *Archived*. On this pagem you can also "unarchive" an activity that was archived.

Bookmarking an Activity

You might want to bookmark an activity that has important data so you can find them quickly. This can be especially helpful for activities that are more than three months in the past, because you would need to use filters to find activities that are over three months old.

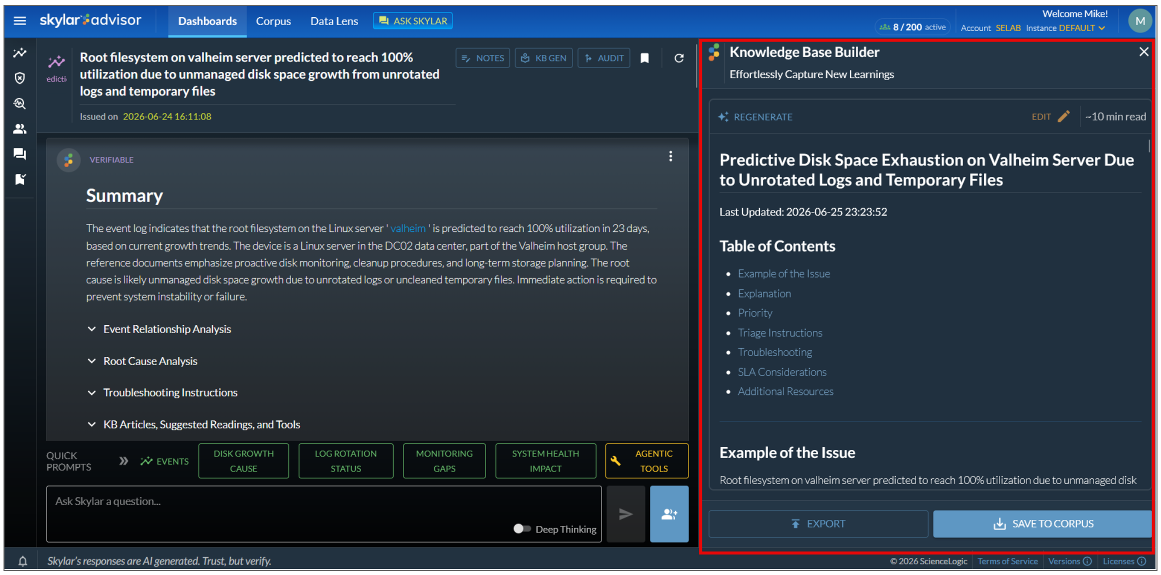
To bookmark one or more activities that you want to add to the **Bookmarks** section:

1. On the **[Recent Activity]** tab, click the enter selection mode icon () to enable it (turn it blue).
2. Click the check box next to any activity that you want to bookmark. To select all activities, click the check all icon ().
3. Click the bookmark selected icon (). The activities are removed from the tab.
4. To view your archived activities, click the **[Filters]** button and select *Archived*.

TIP: On an activity detail page, you can also click the bookmark icon () at top right to add or remove a bookmark.

Creating a Knowledge Base Article Based on an Activity

On an activity detail page for an Advisory, Investigation, Prediction, or a Conversation, you can click the **[KB Gen]** button to have Skylar Advisor create a draft Knowledge Base (KB) article based on that activity.



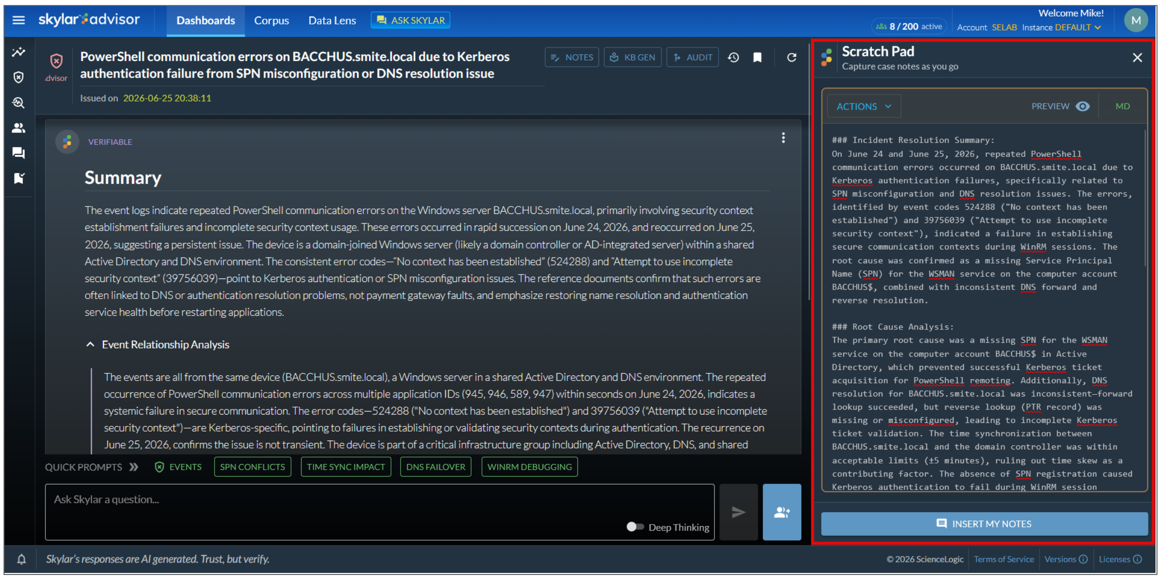
After Skylar Advisor creates the KB article, you can:

- Click **[Regenerate]** to create the article again. You might want to regenerate an article if you asked Skylar Advisor additional questions or added a comment.
- Click **[Edit]** to edit the article in Markdown format. In edit mode, you can click **[Preview]** to see how your text looks with formatting, and you can click **[MD]** for a list of basic Markdown commands.
- Click **[Export]** to download the article as a PDF.
- Click **[Save to Corpus]** to save the article to the **Corpus** page.

All KB articles created by Skylar Advisor include a "[Generated by Skylar AI]" tag at the end of the article.

Using the Notes Feature

On an activity detail page for an Advisory, Investigation, Prediction, or Conversation, you can click the **[Notes]** button to open the **Scratch Pad** pane, where you can add notes in plain text or Markdown format.



On the ***Actions*** menu, you can:

- Click *Task List* to generate a checklist of actions based on the selected activity.
- Click *Incident Resolution* to generate an Incident Resolution Summary document, which contains Root Cause Analysis, Impact, and other notes.

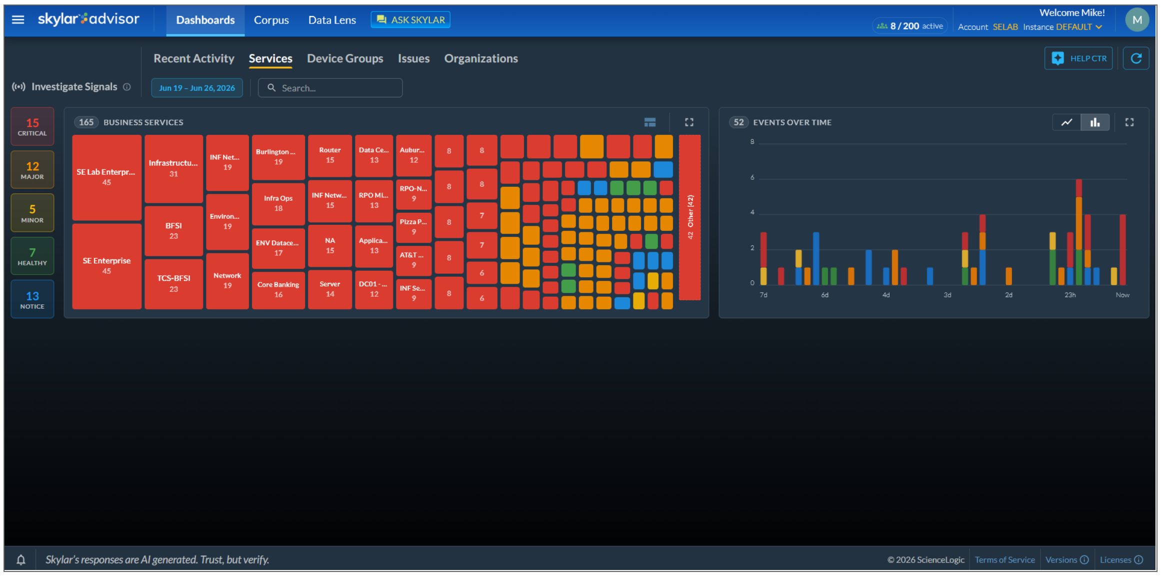
Click **[Preview]** to see how your text looks with formatting. Click **[MD]** for a list of basic Markdown commands.

When you are done, you can click **[Insert My Notes]** to add the contents of the Scratch Pad to the selected activity. Your notes will appear as a comment in the conversation.

The Services, Device Groups, Issues, and Organizations Tabs

The remaining tabs the **Dashboards** page display event information in different ways, but the various icons and buttons on those tabs work in the same way. There are four tabs:

- The **[Services]** tab displays a list of events for Skylar One business services.
- The **[Device Groups]** tab of displays a list of events organized by Skylar One device group.
- The **[Issues]** tab displays a list of events organized by issue type.
- The **[Organizations]** tab of the **Dashboards** page displays a list of events organized by Skylar One organizations.



TIP: If you do not have any events for a specific tab, that tab will not display on the **Dashboards** page.

Viewing Basic Event Details on a Tab

You can use the icons on the left of the **[Services]**, **[Device Groups]**, **[Issues]**, and **[Organizations]** tabs to filter the list of events on these tabs to only show one type of severity, such as all Critical events for your organizations or customers. You can click multiple buttons as needed. Click the button or buttons again to view all the events again.

These tabs display a "heatmap" view ( ) that shows the events organized by severity in a color-coded graph, with Critical events displaying in red, Major events in orange, and so on. Click the "show treemap" view icon ( ) to view the events without the heatmap colors.

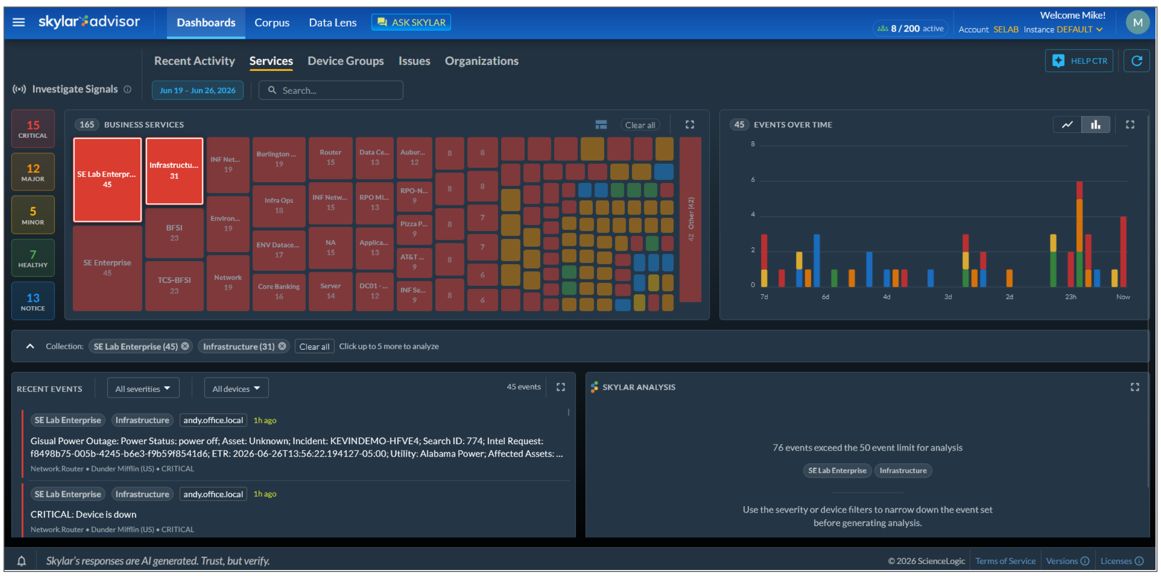
When you mouse over a set of events organized by device group, issue, or organization, a pop-up displays a summary of the events for that set of events.

The **Events Over Time** pane displays events on a timeline based on either severity ( ) or by volume ( ).

TIP: For any of the panes on these tabs, you can click the "expand to fullscreen" icon ( ) to make that pane full-screen. Click the "exit fullscreen" icon ( ) to return the pane to its default size again.

Viewing More Event Details on a Tab

When you select one or more sets of services, device groups, issues, or organizations (based on the tab you selected), the **Recent Events** pane and the **Skylar Analysis** pane appear at the bottom of the page. Also, the **Events Over Time** pane updates to display date only for the selected items.



On the **Recent Events** pane, you can:

- Review the events from the item you selected above (in this example, all the "Server" events and the "Test-kgc" events).
- Click a device IP or device name to show only events for that device.

On the **Skylar Analysis** pane, you can:

- Click **[Generate Analysis]** to have Skylar Advisor create a new analysis of the items you selected above.
- When the analysis is done, if you need more information, you can click **[Investigate This Problem with Skylar]** to do a deeper investigation of the issue and create a new Investigation. The new Investigation is added to the **[Recent Activity]** tab of the **Dashboards** page.

Chapter

3

Managing Documents and Data on the Knowledge Page

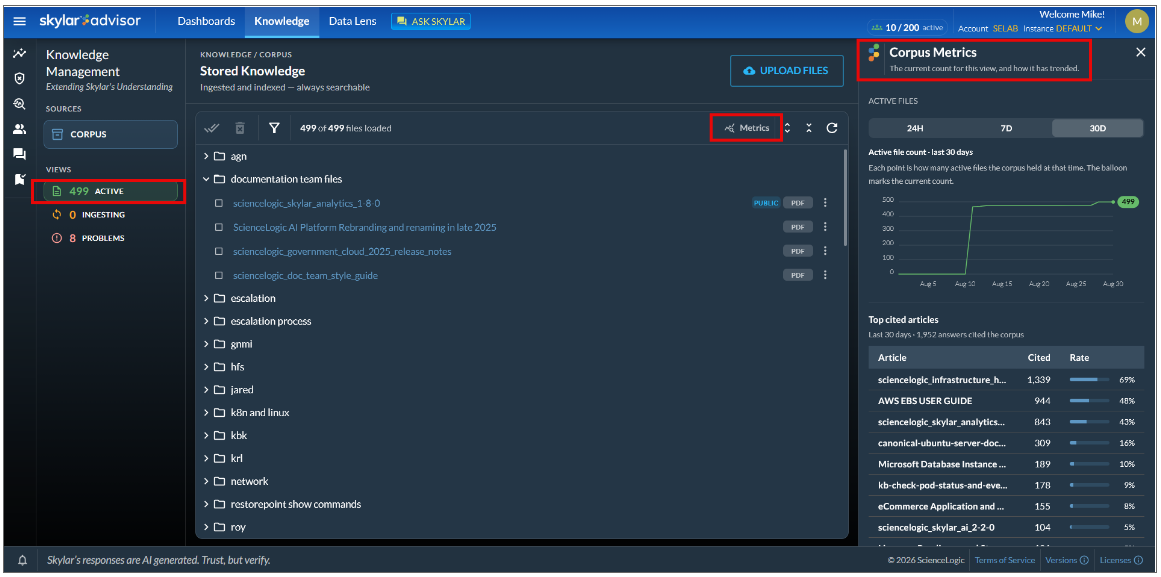
Overview

The **Knowledge** page in Skylar Advisor includes the **[Corpus]** tab, where you can upload and manage your own documents to further train Skylar Advisor on your company-specific workflows, policies, and processes.

This chapter covers the following topics:

The Knowledge Page

Skylar Advisor uses the documents that you and our team adds to the **[Corpus]** tab of the **Knowledge** page to answer Ask Skylar questions and generate Advisories. You can also track the metrics related to how Skylar Advisor and other users are using your uploaded documents.



To get the most out of Skylar Advisor, ScienceLogic recommends adding Knowledge Base articles, product documentation, support tickets, release notes, and other similar documents. The more documents you upload to the **[Corpus]** tab of the **Knowledge** page, the more that Skylar Advisor learns about what is important in your environment.

> **IMPORTANT:** Until you upload documents to the **[Corpus]** tab of the **Knowledge** page, Skylar Advisor uses only the general knowledge on which it was trained for its answers. ScienceLogic strongly suggests you start uploading documents specific to your environment, workflows, and best practices as soon as possible to make the feedback from Skylar Advisor more useful.

For more information, see *Best Practices for Uploading Documents to the Corpus*.

The Active View on the Corpus Tab

The **[Active]** view on the **[Corpus]** tab of the **Knowledge** page displays a list of the documents that you have uploaded for your knowledge sources. This list is organized by most recently uploaded first, and you can further organize your documents by creating folders. You can add as many folders as needed.

You can monitor the files in each state of being uploaded on the following views on the **[Corpus]** tab of the **Knowledge** page:

- **[Active]**. These documents are completely uploaded and can be used by Skylar Advisor.
- **[Ingesting]**. These documents are in the process of being uploaded and ingested by Skylar Advisor. The countdown timer on the right side of the tab displays how long until the list will be updated again, and it starts over every 15 seconds, or if the timer is clicked.
- **[Problems]**. These documents could not be added to the Corpus, along with an explanation for why it was not added. In some cases, the file might have been the wrong file type, empty, or corrupt, or the same content was already uploaded.

You can upload .pdf, .txt, .doc, .ppt, .ppx, .xls, and .xlsx files to the Corpus. You can also upload Confluence documents and generic JSON documents. The maximum file size for a document is 31 MB.

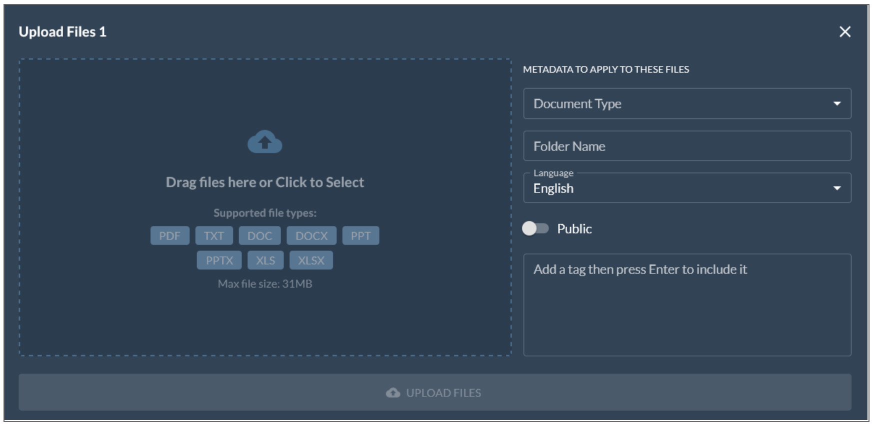
NOTE: Ingesting documents can take time, as Skylar Advisor creates an "embedding" that lets it search the document. It also adds tokens to the document. A rough estimate for ingesting documents while onboarding is about 2,500 documents per hour.

On the **[Corpus]** tab, you can:

- Click the batch actions icon () to add check boxes next to each document. You can click a check box for one or more documents, and then click the delete icon () to delete those documents. To delete a folder and all its contents, check all the documents in that folder and then click the delete icon.
- Click the filter corpus icon () to filter the list of documents by titles, tag names, regular expressions, documentation type, or last modified dates.
- If you have your documents organized in folders, you can click ***Expand All*** to open all the folders or ***Collapse All*** to close all the folders.
- Click the refresh icon () to update the content on the **Corpus** page.
- Click the ellipsis icon ( ) to view more info about a document, including metadata. You can also delete a file from this menu.
- Click the name of a document to open that document in a new browser tab or window. Please note that all uploaded documents currently display as PDF files after you upload them to the Corpus.
- Click the ***Show Older Files*** link to load files that users added to this page earlier.
- Click the **[Add Files to Corpus]** button to upload a PDF or text document. You can add metadata and make folders, language, and tags for additional search context.

To add one or more files to the **Corpus** page:

1. Click the **[Upload Files]** button. The **Upload Files** page appears:



2. Drag and drop one or more files onto the window, or select the files to add them.
3. To help Skylar Advisor locate and learn each document, select the document type, type the folder name, and select the language for that document.
4. Click the ***Public*** toggle to turn it blue to make the document available to all organizations using this instance, or turn it white to make it available only to the organizations to which you have access.
5. To add specific tags, type in a tag below the ***Public*** toggle and press **[Enter]** for each tag.
6. Add more files as needed.
7. Click Upload Files. It will take Skylar Advisor a few moments to process the document you just uploaded, and when the document is processed, it will appear on the **Corpus** page.
8. Click the refresh icon () to update the content on the **Corpus** page as needed.

NOTE: If the same document is added the **Corpus** page, Skylar Adwill highlight that file in yellow, and you can click the ellipsis icon ( ) to delete the duplicate document.

Best Practices for Uploading Documents to the Corpus

Skylar Advisor learns from the operational knowledge provided by your organization. The quality of the documents in your knowledge corpus directly influences the accuracy and usefulness of the guidance from Skylar Advisor. As a result, when loading documents to page in Skylar Advisor, you should not simply upload every document you have. The best results come from a set of focused documents instead of a large amount of slightly related documents.

Not all documentation contributes equally to the effectiveness of Skylar Advisor. Start by uploading documents that answer the following operational questions:

1. What is this system supposed to do?
2. What does failure look like?
3. How do we fix it?

Upload the following types of documents first:

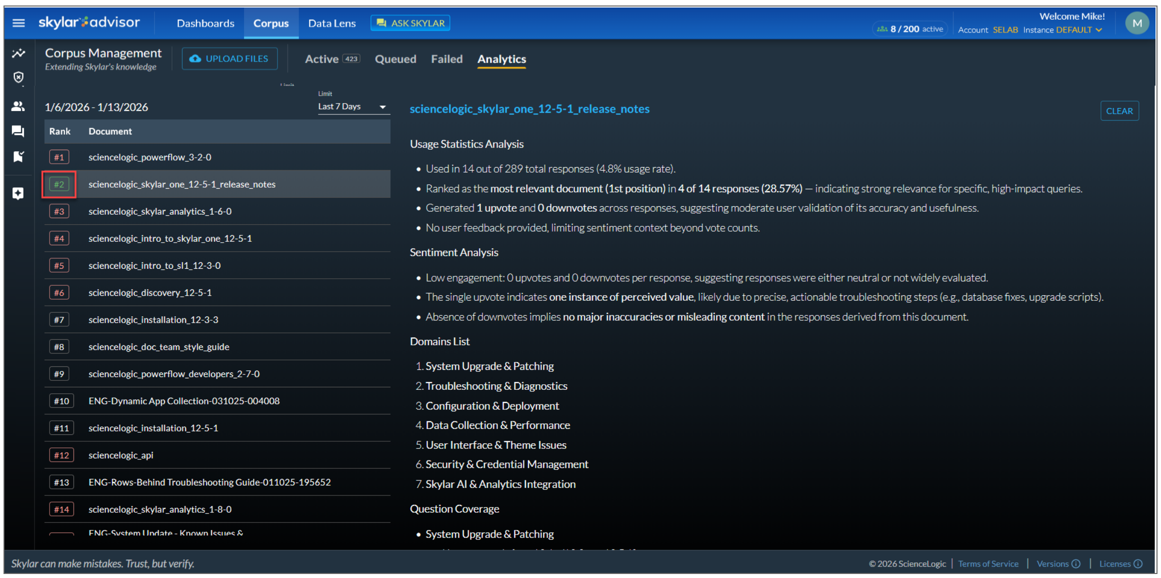
- **Run books or operational playbooks**. Examples of this type of document include incident response run books, service restart procedures, recovery workflows, failover procedures, and troubleshooting guides. These documents contain explicit remediation steps, which Skylar Advisor can surface as actionable guidance.
- **Incident portmortems**. Upload post-incident reports from recent or high-impact outages. Make sure these reports include the root cause analysis, symptoms observed, and resolution steps. These documents lets Skylar Advisor identify patterns and known failure scenarios.
- **System architecture overview**. Include a document describing the architecture of your core systems, including major components, service dependencies, and data flows. This document helps Skylar Advisor understand how systems interact when diagnosing issues.
- **Service dependency documentation**. Upload documentation that maps how services depend on one another, such as upstream/downstream services, database dependencies, and external API dependencies. These documents enable Skylar Advisor to identify cascading failures.
- **Troubleshooting guides**. Add step-by-step guides for diagnosing common issues. Examples include database connection errors, authentication failures, and network latency issues. These guides provide diagnostic workflows for Skylar Advisor.
- **Known Issues list**. Upload a document that records recurring or unresolved problems. This list should include symptoms, temporary workarounds, and conditions that trigger the issue to help Skylar Advisor repeat incidents faster.

For best results, focus first on uploading the documents for your three to five most critical services. These systems typically generate the majority of alerts and incidents.

The Corpus Metrics Pane

The **[Analytics]** tab on the **Corpus** page lets you view a list of the uploaded documents that have been used the most by Skylar Advisor to answer questions.

When you click a document in the list on the left, detailed information appears on the right, including usage statistics, sentiment analysis, domains list, question coverage, and potential document deficiencies.



The document analysis requires multiple question-and-answer interactions to provide meaningful insights. In addition, the numbers for the documents might have a colored # ranking based on the number of upvotes (thumbs up) or downvotes (thumbs down).

For example, a document that has a green #2 received more upvotes than downvotes, while a pink #1 document has been downloaded the most but received more downvotes than upvotes by users. Based on the user voting, the green #2 document would appear to be a more reliable source of information and the pink #1 document.

Chapter

4

Managing Events on the Data Lens Page

Overview

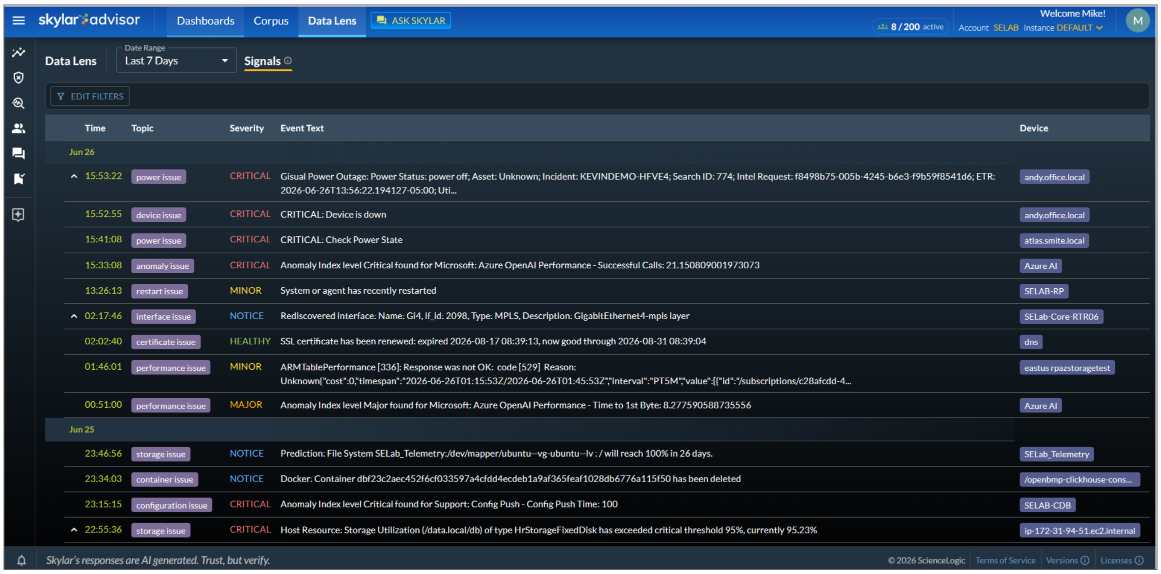
The **Data Lens** page in Skylar Advisor lets you view details about the Skylar One events that have been received by Skylar Advisor. These inbound events from Skylar One are found on the **[Signals]** tab. In previous versions of Skylar Advisor, this page was called the **Event Lens** page.

Skylar Advisor performs semantic event correlation to group together related events based on how it understood the events. Skylar Advisor also considers related attributes like device groups.

This chapter covers the following topics:

The Data Lens Page

The **Data Lens** page lets you view details about the Skylar One events that have been received by Skylar Advisor. Skylar Advisor performs semantic event correlation to group together related events based on how it understood the events. Please note that not all events are listed on this page, but just related events organized by Skylar Advisor.



The **Data Lens** page has a **[Signals]** tab, which contains a list of *signals*: a group of correlated events from your monitored environment that need you to review or triage. These signals can be rolled up into an Investigation. In previous versions of Skylar Advisor, the **[Signals]** tab was called the **[Event Groups]** tab.

> **NOTE:** You can also look at the **[Signal/Noise]** tab on the **Customer Insights** page (☰ > Advisor > Customer Insights > Signal/Noise) to view the ratio of "signal to noise," or the amount of useful data versus the amount of unhelpful data generated in this account by Skylar Advisor. Signals can become Advisories, Investigations, or Predictions. The middle of the **[Signal/Noise]** tab includes a visual Sankey chart that displays the different types of useful signals versus the noise generated. You can also track the estimated savings as a result of the noise reduction in Skylar Advisor.

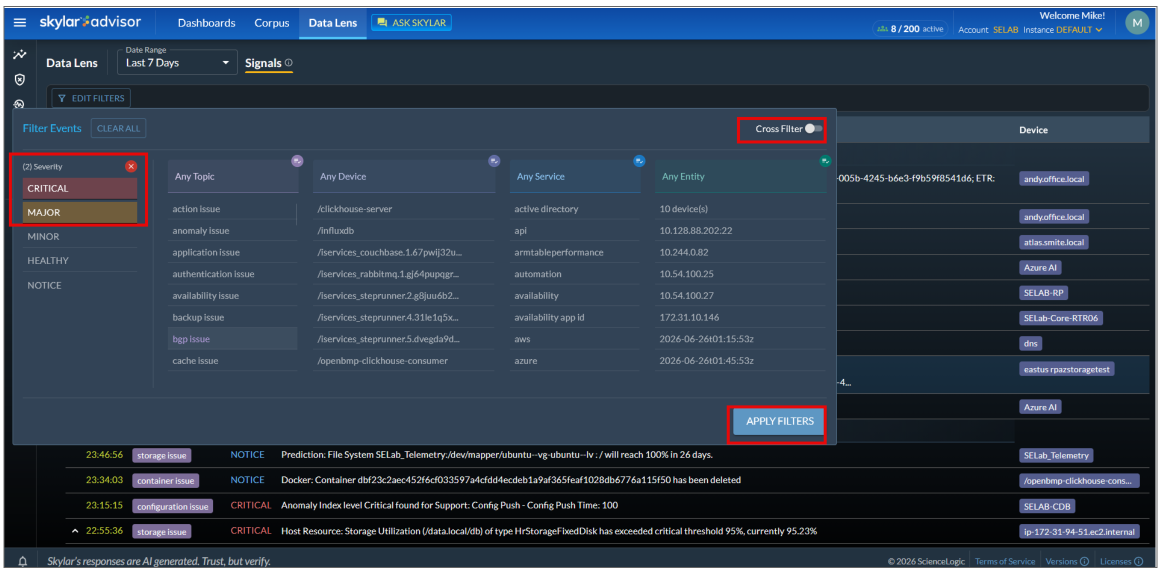
Events are listed on the **Data Lens** page with the most recent events at the top. You can adjust the ***Date Filter*** drop down to change the time frame of the events. For more information, see *Filtering the Data Lens Page*.

In the list of events, the up arrow icon (^) to the left of a event indicates the event is part of a group. Click the up arrow icon (^) to view the related events that make up the group.

Click an event on the **Data Lens** page to open a **Summary** pane on the right with more information. If you want to dig deeper into that event, click the **[Start Investigation]** button on the pane to generate a new Investigation activity. You will then be able to interact with and share the Investigation.

Filtering the Data Lens Page

On the **Data Lens** page, events are shown with the most recent at the top. You can click the **[Edit Filter]** button to view more or less information on this page. By default, this page is filtered to just show Advisories.



To filter this page, click the **[Edit Filter]** button to access the **Filter Events** window, where you can:

- Under ***Severity***, select one or more severities to show on the **Data Lens** page.
- Narrow down the selections by typing in the "Any" text boxes at the top of each column.
- Enable cross filtering with the ***Cross Filter*** toggle at the top right. When enabled (blue), filter options are constrained based on your current selections.
- Click **[Apply Filters]** to save your filters.

TIP: After you save your filter setup, the filters that are currently in use display at the top of the page.

Chapter

5

Using the Ask Skylar Feature

Overview

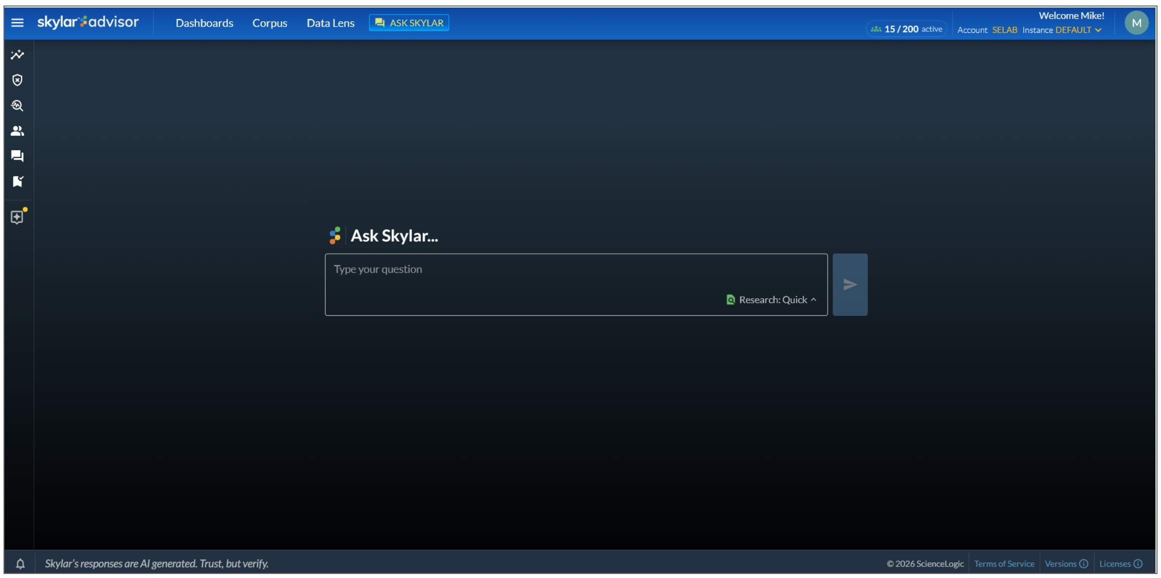
You can query Skylar Advisor for advice using the Ask Skylar feature to perform deeper investigations of your issues and events from Skylar One.

Skylar Advisor offers tailored guidance based on real-time data from Skylar One, helping you make informed decisions quickly and efficiently.

This chapter covers the following topics:

The Ask Skylar Page

The **Ask Skylar** button lets you query Skylar Advisor for tailored guidance based on real-time data, which empowers you to make informed decisions quickly and efficiently.



You can ask Skylar Advisor any question, and Skylar Advisor will respond by drawing on everything it has learned from the documents uploaded to the **Corpus** page to provide you with the most accurate answers to your questions.

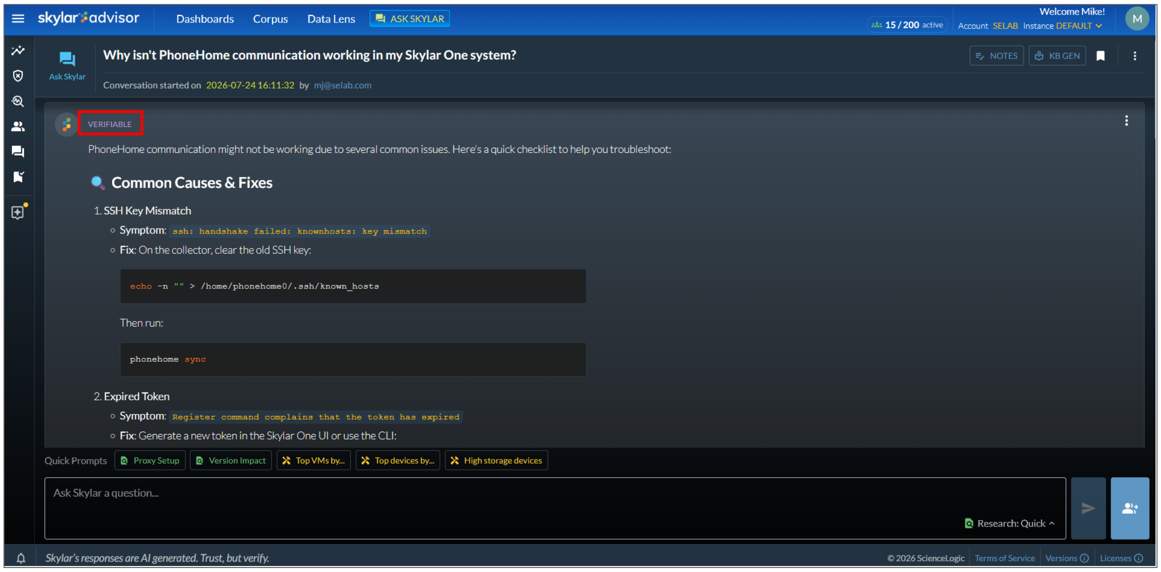
Using the Ask Skylar Feature

To use the **Ask Skylar** feature:

1. Click the **[Ask Skylar]** button at the top of the Skylar Advisor user interface or at the bottom of an existing activity from the **[Recent Activity]** tab of the **Dashboards** page.
2. In the **Ask Skylar** prompt box, type your question for Skylar Advisor.
3. Before you click the send icon ( ), you can use the **Tools** options to select an agentic AI tool to handle your question.

   The **Tools** options only appear on the Ask Skylar prompt box if you enable the *MCP Tools* option on the **Preview Features** page. The tools that display as options on the Ask Skylar prompt box should be enabled on the **[MCP Tools]** tab on the **Agentic Control Plane** page (> Account Settings > Agentic Control Plane > MCP Tools).

4. Also, before click the send icon (), you can use the **Research** options to specify the depth of research that Skylar Advisor should use when generating its answer. Select **[Quick]** for faster, less-technical answers. Select **[Deep]** to tell Skylar Advisor to perform a thorough analysis of the corpus. This option is more time-consuming, but you might find it useful for more complex questions.
5. Click the send icon (). Skylar Advisor displays its progress and a timer, along with a **[Stop]** button if you would like to cancel the query:



6. If you would like more information about any text in an answer, highlight and right-click the text and select *Quick Take*. A **Quick Take** pane appears, displaying additional information about that text.
7. To view additional features you can use with Ask Skylar, see the following topic.

Additional Options on the Ask Skylar Page

Along with the answer to your question, Skylar Advisor also displays the following buttons and options:

- **Quick Prompts**. Based on the original question, Skylar Advisor displays additional prompts in green boxes that you can click for additional information. You can hover over a Quick Prompt to see more information about it.

  If you have the *Agentic* preview feature enabled, you can click one of the yellow agentic tools buttons in the **Quick Prompts** section to select an AI agent to help with your Ask Skylar questions and conversations.

  If you are using the **Ask Skylar** feature in an Advisory or Investigation detail record, this section will display an ***Events*** link that you can click to view the Skylar One events that were used to generate this Advisory.

- **Collaborate with others** icon (). Opens the **Collaborate** pane, where you can share your Skylar AI conversation with another user. Click the **[Copy Link]** button to generate a URL that you can share with another user. You can also click the **[Slack]** or **[Teams]** buttons to send this conversation to Slack or Microsoft Teams; for more information, see *Slack and Teams Integrations*.

  After you share the conversation, it is also added to the **Shared Conversations** section on the **[Recent Activity]** tab of the **Dashboards** page. You might need to click the refresh icon () to see the most recent questions and answers in this conversation.

- **[Verifiable]** tag. This tag displays at the top of the answer when the information for that answer comes from a document in the Corpus. Click the **[Verifiable]** tag to open the **Facts from Corpus** pane, which lists the documents from the Corpus used for the answer, along with a link to the document.

  You can also click the ***Show Raw Facts*** toggle to display the content used for the answer. If an answer did not come from the Corpus but from the general knowledge of Skylar Advisor, this tag displays as **[Unverifiable]**.

- **[Verified (via Agents)]**. This tag displays at the top of the answer when the information for that answer comes from an AI agent instead of documents from the **Corpus** page. You can click this tag to open the **Response Audit** pane, which lists the number and type of tokens used for that response.

- Thumbs up and thumbs down icons (). At the bottom of the answer, these buttons let you vote for or against on the quality of the response from Skylar Advisor. You can use the prompt box that appears after you click thumbs up or down to explain your answer.

TIP: Try to provide as much feedback as possible, both positive or negative, as that feedback will continue making Skylar Advisor smarter.

- **[Notes]** button. Opens the **Scratch Pad** pane, where you can add notes in plain text or Markdown format. For more information, see *Using the Scratch Pad Feature*.

- **[KB Gen]** button. Tells Skylar Advisor to create a draft Knowledge Base article based on that conversation. For more information, see *Creating a Knowledge Base Article Based on an Activity*.

- **[Audit]** button. If you have the *Conversation Audit* preview feature enabled, you can click this button to view the full token spend and timing of an entire conversation thread for cost and performance review. This information displays on the **Thread Audit** pane.

- Add bookmark icon (). Adds the conversation to the **Bookmarks** section on the **[Recent Activity]** tab of the **Dashboards** page.

- Refresh icon (). Updates the content on the current page.

Chapter

6

Experimenting with New Features on the Preview Features Page

Overview

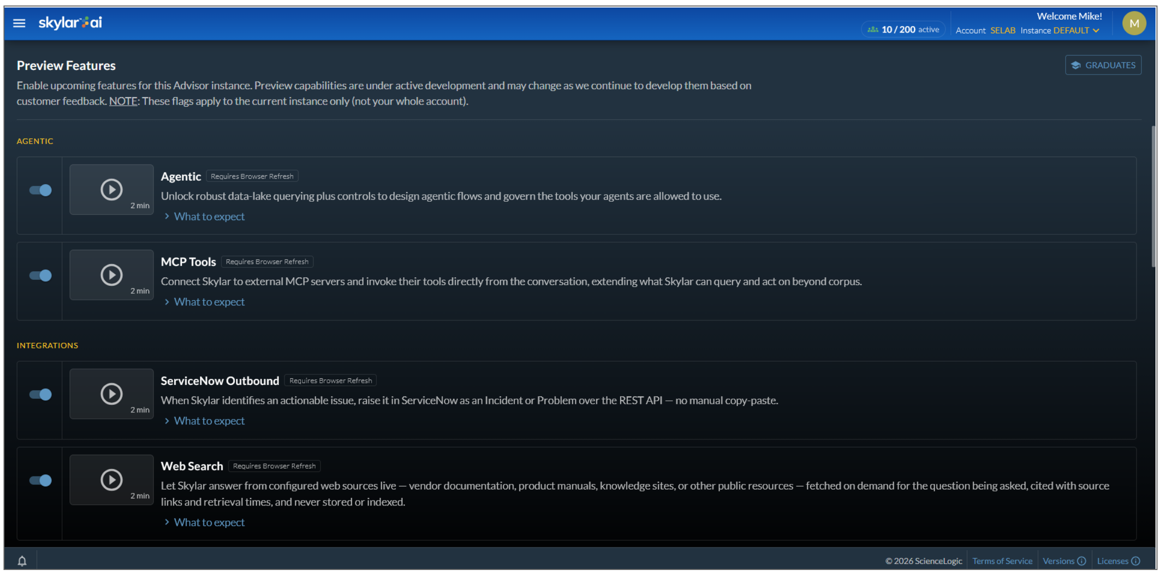
The **Preview Features** page in Skylar Advisor lets users toggle on and experiment with new features. These features are stable, but ScienceLogic is actively developing and improving them in dialogue with users.

This chapter covers the following topics:

The Preview Features Page

The **Preview Features** page (> Account Settings > Preview Features) gives users the option to toggle on one or more new features that will be coming to a future release of Skylar Advisor. Please note that these features are stable, and ScienceLogic is actively developing and improving them in dialogue with users.

These toggles apply only to the current instance, not the entire Skylar Advisor account.



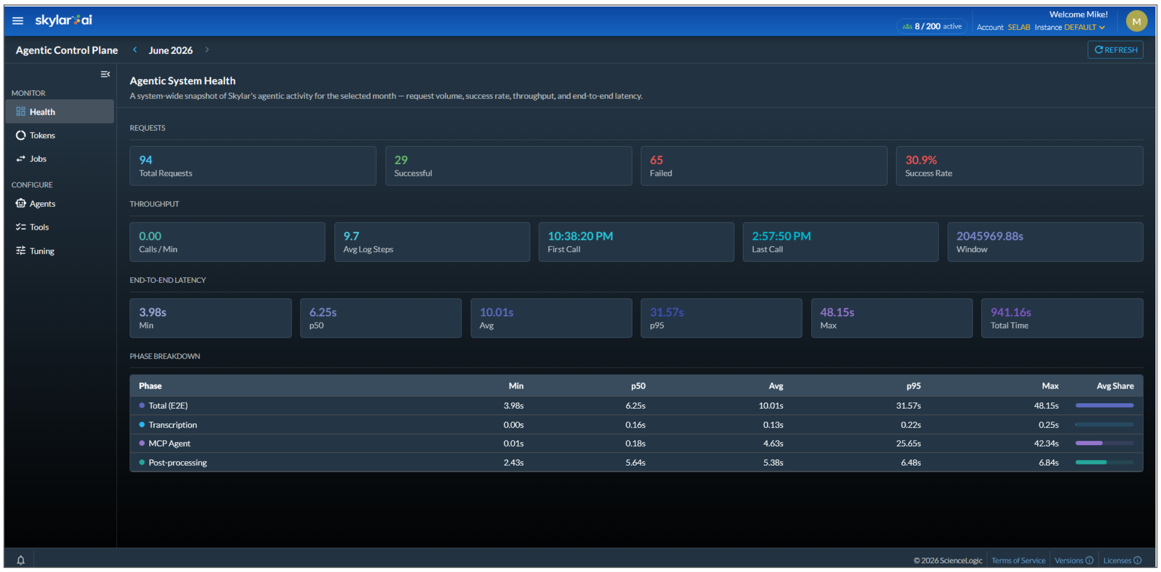
TIP: Click the "Play" icon next to each preview feature to watch a short demo of that feature. Also, some features might require you to refresh your browser before they appear.

With the release of Skylar AI 2.6.0, the following preview features have "graduated" to become permanent features in the Skylar Advisor user interface:

- Slack Integrations and Teams Integrations, which are now covered in *Sharing Information with Slack and Microsoft Teams Integrations*.
- Active Session Tracker, which is now covered in *Managing Active Sessions*.

Agentic

Selecting the **Agentic** option on the **Preview Features** page enables the **Agentic Control Plane** page (> Account Settings > Agentic Control Plane). This page lets you monitor any AI agents that you are using with Skylar Advisor. You can view a list of agents, jobs, tools, and health, along with latency information, audit trails, agent limits and bounds, and token spend over time.



When you enable an agentic tool, Skylar Advisor routes the relevant questions to that tool instead of searching the documents on the **Corpus** page. Each agentic tool comes pre-loaded with a list of sample questions.

The **Agentic Control Plane** page (> Account Settings > Agentic Control Plane) contains the following tabs:

- **[Health]**. Displays a system-wide snapshot of the AI agent activity in Skylar Advisor for the selected month: volume, success rate, and latency, compared across agent jobs and direct tool calls. For example, in the **Agents** section, if the **Success Rate** is below 90%, an agent might be failing.
- **[Tokens]**. Displays the token consumption for the selected month: totals, per-call averages, range and efficiency, and spend by hour of day.
- **[Jobs]**. Every action that uses an AI agent gets a Job ID, which is listed on this page. You can search by job ID, description, or agent to inspect status, duration, and token usage. Select a job to view more information about that job in an **Agent Audit** pane; on this pane you can click **[View Anonymize Request]** to hide personal data, questions, and device information while still showing resource usage and the complete audit trail. You can also click the **[Analyze]** button for traces, logs, and SQL queries to troubleshoot agent behavior.

- **[Agents]**. Lists the different AI agents that Skylar Advisor runs to answer a question. You can enable and disable existing agents, and in future releases you can register new agents and add them to the list of agents. Select an agent in the list to view more information for that agent, including a description of what the agent does, and its privileges, token limits, and time limits.
- **[Tuning]**. Choose how a question reaches the Skylar Advisor agents. *Eager* sends more questions to the agents for higher spend, while *Cautious* sends more to the standard answer for lower spend. *Balanced* is the default, and it is recommended, as it sends data and chart requests, plus everyday device and metric lookups, to the Skylar Advisor agents.
- **[Agent Tools]**. Lists the different types of agentic tools you can use with Skylar Advisor. The agent tools are grouped into **Device Telemetry** (for a single device) and **Fleet Ranking** (for all devices, VMs, or interfaces). Select a tool to view more information about that tool, including sample questions for Ask Skylar.
- **[MCP Tools]**. Lets you register and preview external MCP servers that contain a variety of AI tools you can use to analyze your data. When you enable an MCP server, it is added as a resource on the **Tools** menu of the **[Ask Skylar]** prompt box and the **Quick Prompts** toolbar. This tab only displays if you *selected the MCP Tools option* on the **Preview Features** page.

Selecting the **Agentic** option on the **Preview Features** page also enables the following features:

- The **[Tools]** button on the Ask Skylarprompt box. When you click this button, a list of AI-powered tools appear to help with your questions and conversations. Select a tool and add any additional information, including the device name in most cases, and click **[Run]** to run the selected AI tool.
- Additional device performance data in an Advisory, Investigation, or Prediction, or in an Ask Skylar answer. In these activities, the name of a device will be highlighted in blue text. When you click the device name, a pop-up menu displays options for *Memory*, *Disk*, and *CPU*. Click one of the options for more information, which appears as an answer in an Ask Skylar prompt box. You can click the **[View Graph]** button to see a visualization of the data flow that includes events, devices, device groups, and business services, where relevant.
- **AI Agent Quick Prompts**. In addition to the standard green Quick Prompts, you can also click one of the yellow Quick Prompts to run an AI Agent tool related to the Ask Skylar conversation. Based on the original question, Skylar Advisor displays additional prompts in green boxes that you can click for additional information.

  Questions that were answered using agents have a **[Verifiable (Via Agents)]** tag. Clicking this tag opens a **Response Audit** pane that lists the token usage, the length of the Ask Skylar conversation, and an **Audit Logs** section with links to the key sections of the conversation. Conversations also have an **[Audit]** button, which you can click to view more details on the **Thread Audit** pane.

NOTE: To control and enforce the behavior of the Skylar Advisor AI agents, ScienceLogic has placed two gates in front of every agentic capability. The first gate is based on the release, where ScienceLogic only releases capabilities that have been vetted as production-ready, and anything unpublished is invisible to the agents. The second gate is based on customer opt-in, where a Skylar Advisor administrator must deliberately enable an agent before users can access it. As a result, a Skylar Advisor AI agent does not run unless it has cleared both the ScienceLogic release gate and the explicit opt-in by the site administrator.

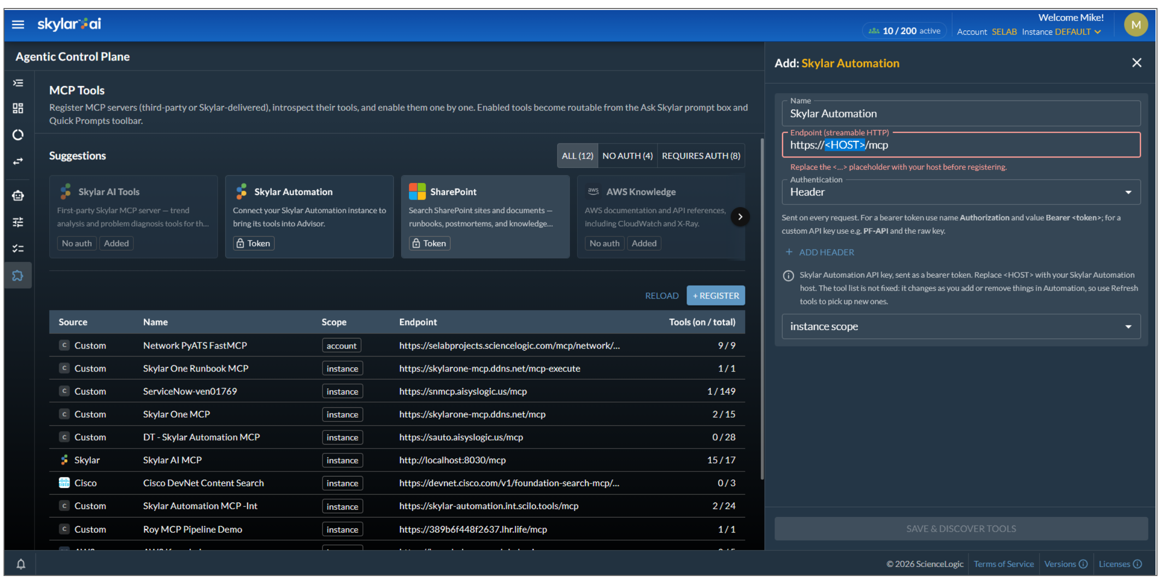
MCP Tools

Selecting the **MCP Tools** option on the **Preview Features** page enables the following features in Skylar Advisor:

- The **[MCP Tools]** tab on the **Agentic Control Plane** page (> Account Settings > Agentic Control Plane > MCP Tools). This tab provides access to a set of ScienceLogic and external MCP servers that contain a variety of AI tools you can use to analyze your data.

  You can register (add) a new MCP server and enable (configure) the AI tools in an MCP server so that you can preview those new features.

  Starting with version 2.6.0 of Skylar Advisor, you can add the "Skylar Automation" MCP Tool from the list of suggested integrations. This tool lets you connect a Skylar Automation instance and bring the Skylar Automation MCP tools directly into the Skylar Advisor interface. For more information, see *Configuring the Skylar Automation MCP Server*.



NOTE: If a tool has a **[gated]** tag, then that tool must be part of an approval workflow before you can use it.

- The **Tools** menu of the **[Ask Skylar]** prompt box and the **Quick Prompts** toolbar contain AI tools from the MCP servers you have enabled. These options expand on what Skylar Advisor can query and act on beyond the uploaded documents on the **Corpus** page.

- The **Toolbox** page (> Advisor > Toolbox). This page lets you view and test all tools from the MCP servers that have been enabled in Skylar Advisor. Select a tool from the list on the left to view more information about the tool, including a short description and the time frame for the data used by that tool.

  If you find an issue or other data that you'd like to explore further, click the **[Discuss with Skylar]** button to send that information to an Ask Skylarconversation.

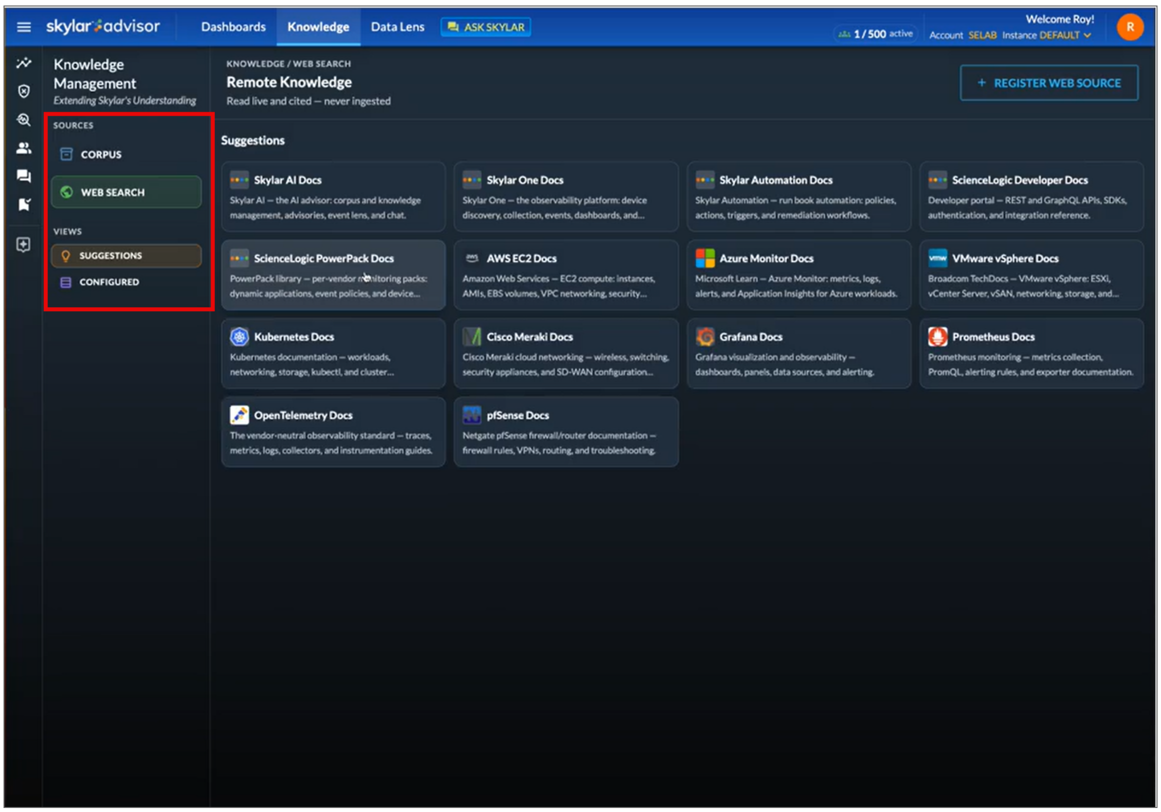
NOTE: The "Skylar AI MCP" server is a ScienceLogic MCP server that includes a number of diagnosis and analytics tools. The other MCP server tools listed on the **MCP Tools** page, such as Microsoft Learn, AWS Knowledge, and Cisco DevNet Content Search, are public servers that have been curated by ScienceLogic.

ServiceNow Outbound

You can also enable **ServiceNow Outbound** to enable Skylar AI to automatically create a ServiceNow Incident or Problem from a Skylar AI result, accelerating incident response and reducing manual operational handoffs. This feature is still under development.

Web Search

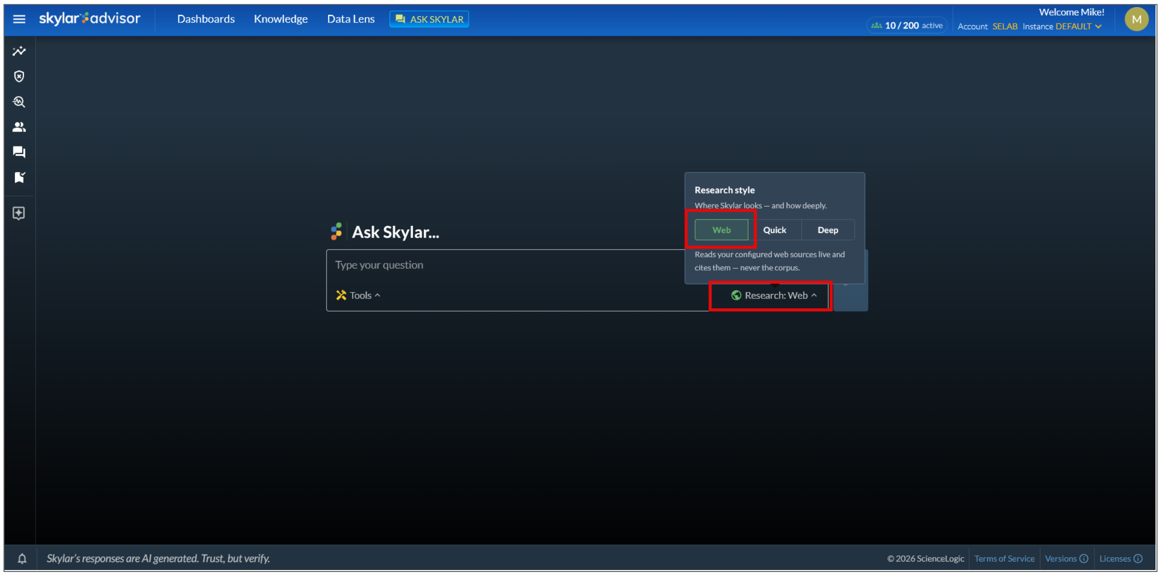
The **Web Search** feature lets you perform an on-demand web search of specific websites and web sources instead of using the documents in the Corpus. Answers include source links and retrieval times, and they are never stored nor indexed. You can set up the web sources on the **Web Search** view on the **Knowledge** page.



On the **[Web Search]** > **[Suggestions]** view, you can configure a suggested web source, such as ***Windows Server Docs***, to point Skylar Advisor at that source for answers. You can configure five different ScienceLogic Product Documentation sites as well as third-party sites.

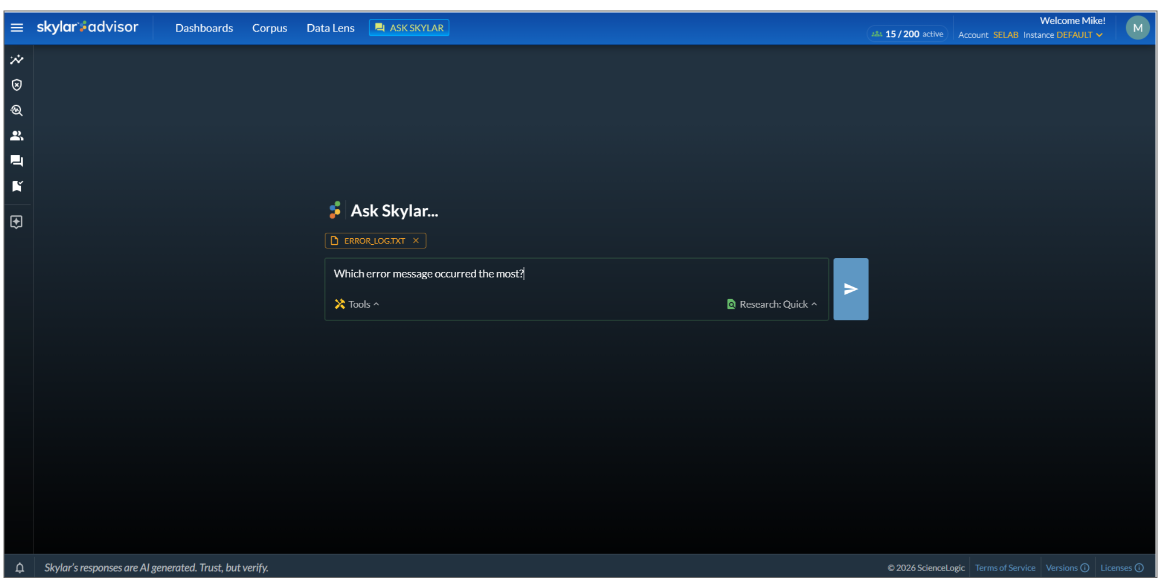
The **[Web Search]** > **[Configured]** view shows the web sources that have been configured for web searches.

You will need to click ***Research: Web*** in the Ask Skylar prompt box to use this feature:



Ad-hoc File Upload

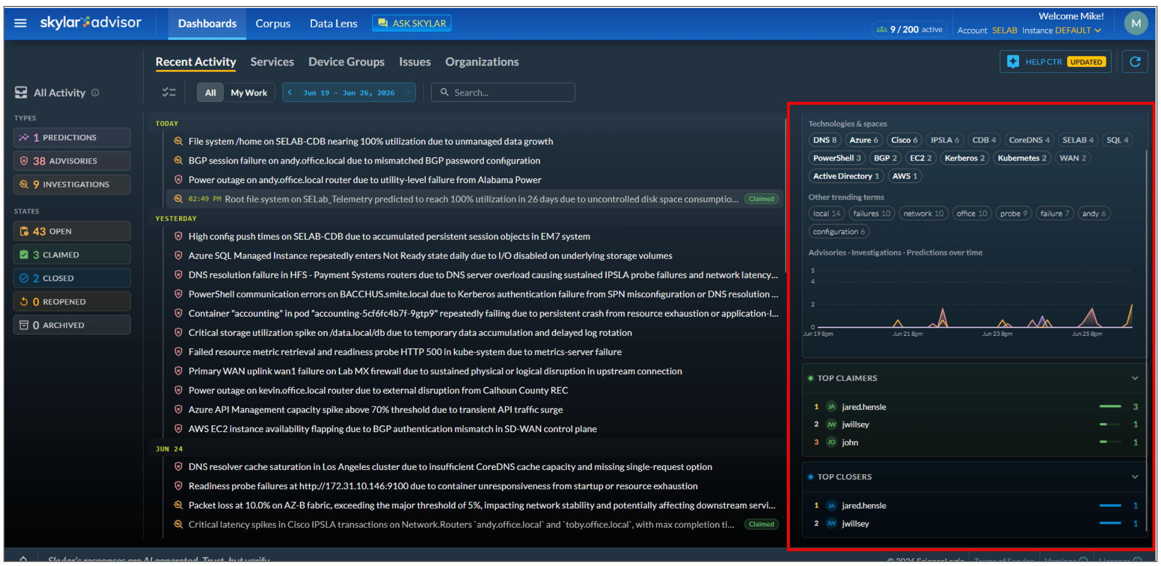
The **Ad-hoc File Upload** feature lets you drag and drop one or more text (**.txt**) files onto the Ask Skylar pompt box so you can ask Skylar questions using those files as context. For example, you could upload a text file containing log information, and then type your questions in the Ask Skylar prompt box.



Trend Analysis

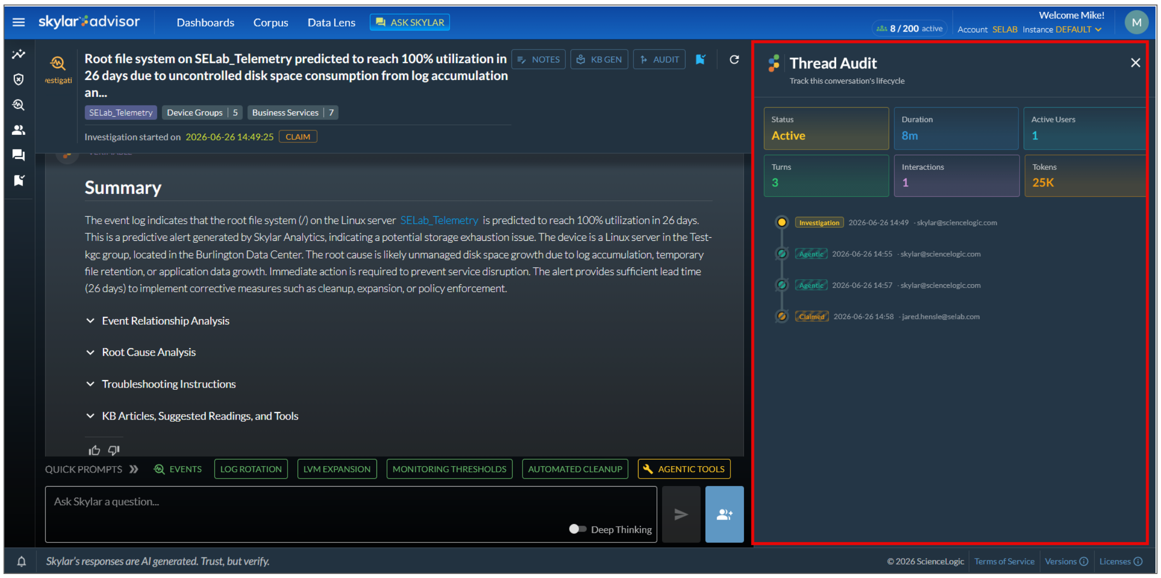
The **Trend Analysis** option adds a new pane to the **[Recent Activity]** tab on the **Dashboards** page that charts conversation volume, outcomes, and trends over time for a quick summary of your Skylar Advisor activities. The pane contains a list of commonly used terms and most active users. It also charts conversation volume, outcomes, and trends over time, so you can see how Skylar Advisor is being used at a glance.

The **Topics & Trends** section contains quick filters that you can use to find similar, related activities. Based on the filter that you selected, the graph and other data below this section update with the filtered data.



Conversation Audit

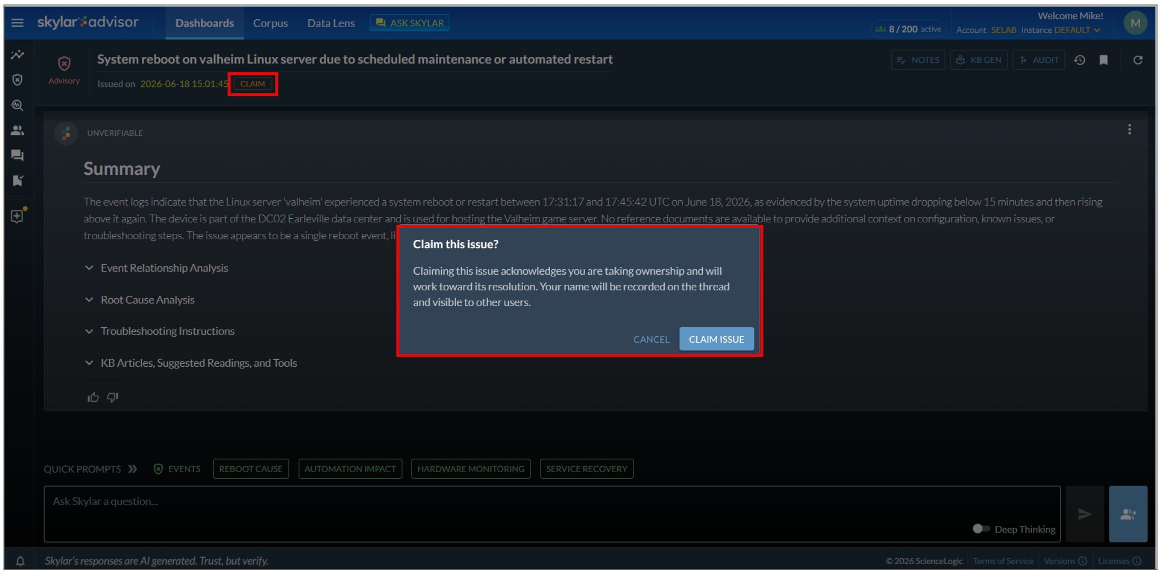
When enabled, this feature lets you click the *Thread Audit* option from the "More options" menu ( ) at the top right for any Ask Skylar conversation. The **Thread Audit** pane displays details about the conversation, including the claimed status, the duration of the conversation, and the full token spend for the conversation thread for cost and performance review.



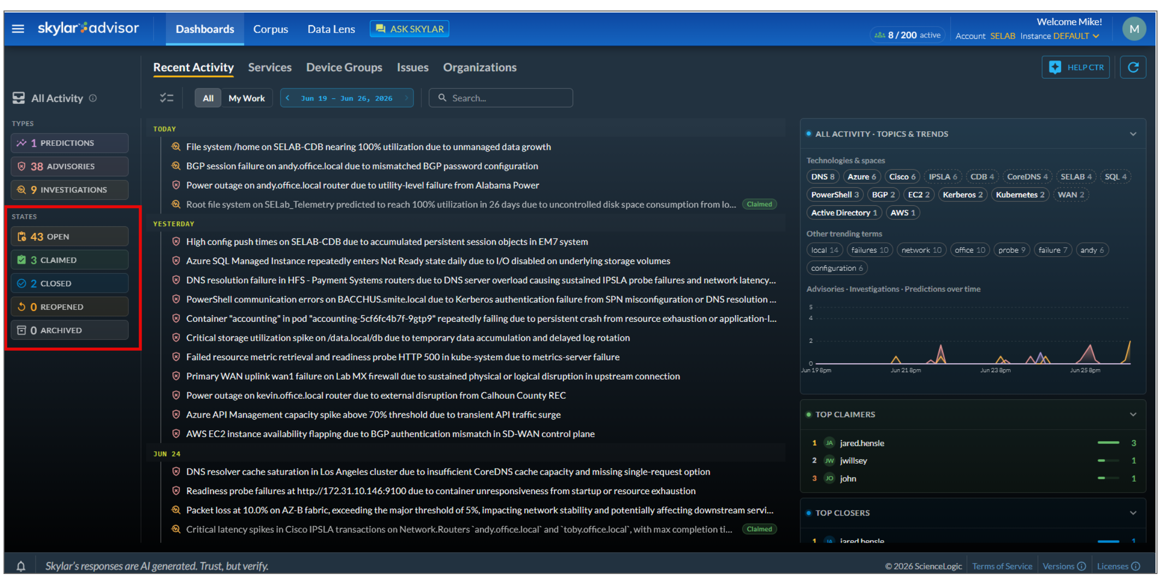
The bottom half of the **Thread Audit** pane contains links to any part of the conversation.

Claim and Close

In the **Work Items** section, you can enable the **Claim & Close** option to add the ability to ***claim*** an Advisory or an Investigation, which means you assign it to yourself. Your name will then appear on the activity next to "Claimed by". You can also ***close*** an Advisory or an Investigation when you have addressed it. If needed, you can re-open a closed activity.

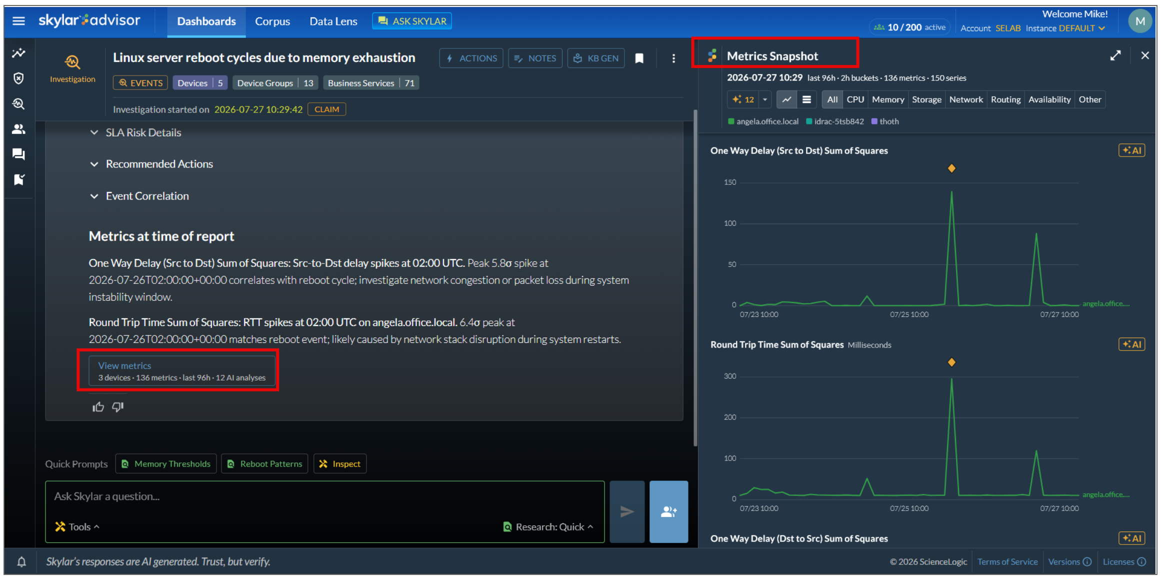


This option also adds additional, clickable filters to the **Dashboards** page: *Open*, *Claimed*, *Closed*, *Reopened*, and *Archived*. These filters create an audit trail for your activity, so you can see who changed what for that activity. You can see all of the activities that you have claimed on the *My Work* filter.



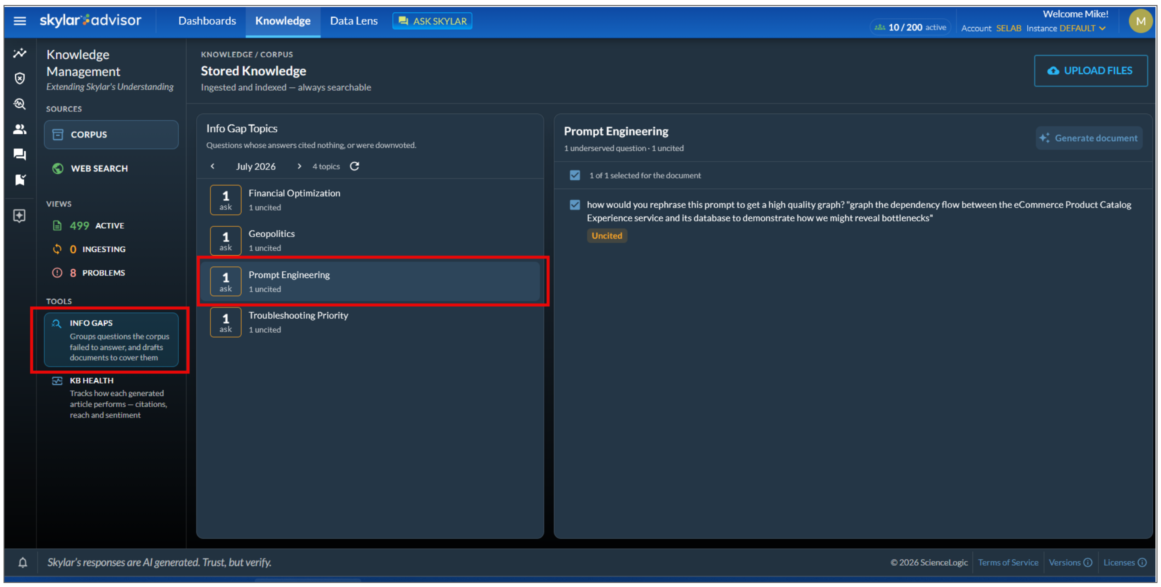
Metrics Enhanced Advisories

When an Advisory or Investigation is generated, Skylar Advisor snapshots the data-lake metrics for the affected devices and adds an AI-analyzed summary to the report. When you click the **[View metrics]** button, the data displays as a chart on the **Metrics Snapshot** pane.

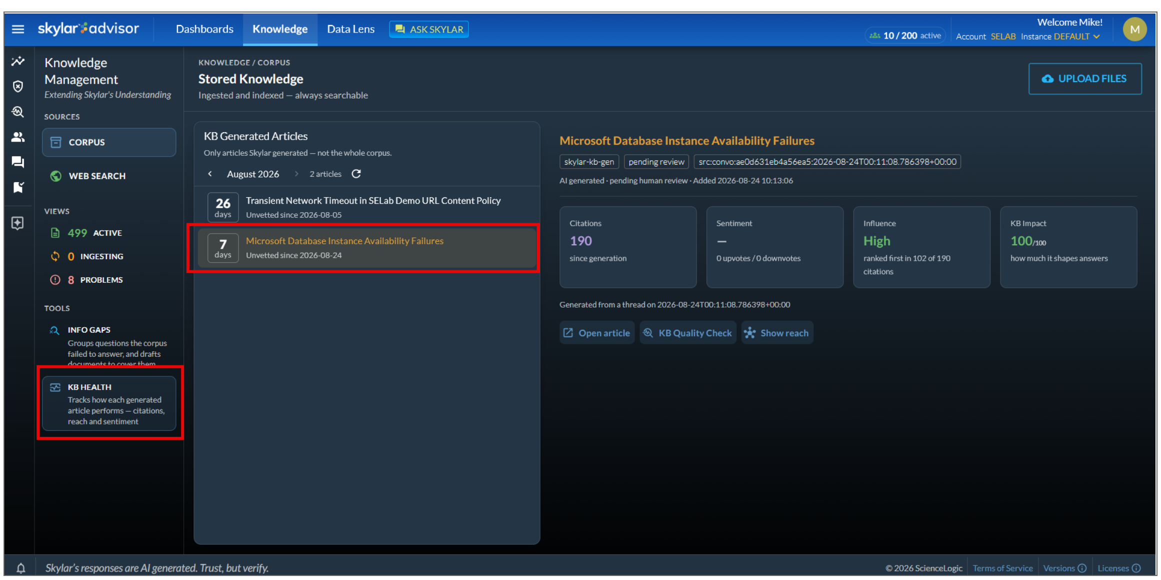


Corpus Tools

Enabling this option adds an **[Info Gaps]** view to the **[Corpus]** tab on the **Knowledge** page for situations where the documentation in the Corpus is insufficient or earned a down vote ( ). Skylar Advisor presents tools to cover the gaps, or you can generate a new document that addresses the issue.

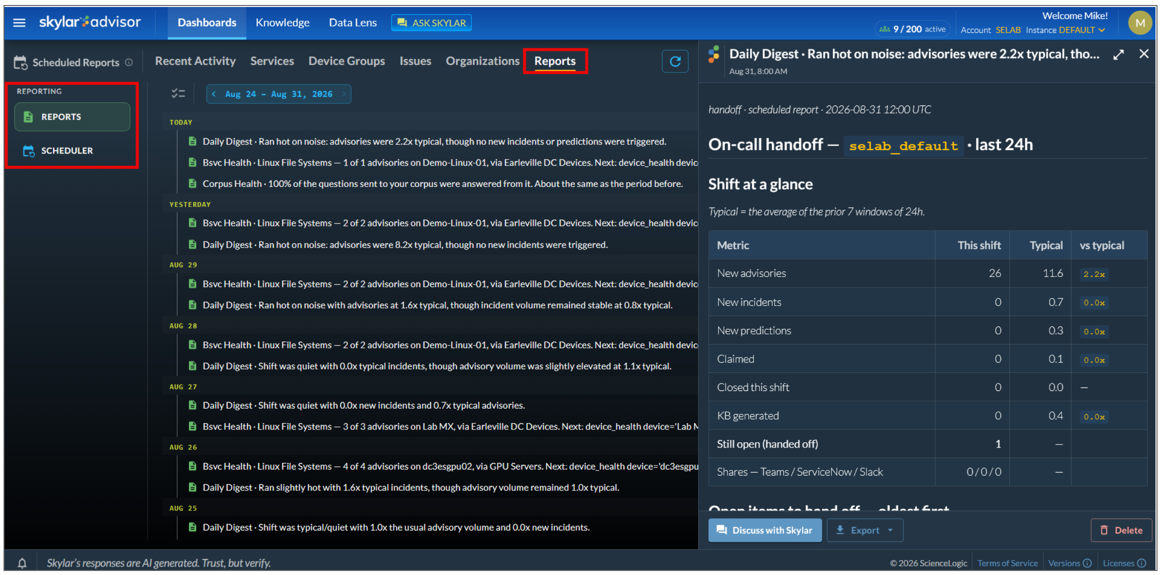


Enabling this option also adds a **[KB Health]** view to the **[Corpus]** tab on the **Knowledge** page for tracking citations, sentiment, influence, and impact for each generated article, with an AI quality check and a proposed rewrite.



Scheduled Reports

Enabling the **Scheduled Reports** option lets you create a recurring report for an MCP tool that you can read and export. You can view and edit these reports on the **[Reports]** tab of the **Dashboards** page (Dashboards > Reports). The **MCP Tools** preview feature must also be enable to use these features.



The **[Reports]** view displays a list of previously run reports. Click a report to view additional information about the report in a new pane.

The **[Scheduler]** view displays a list of scheduled reports. Click a scheduled report to view more information for that report or to edit the settings for that report. To schedule a report, go to the **Toolbox** page (> Advisor > Toolbox) and click the **[Schedule]** button from a finished tool run.

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