

Doctoral Dissertation Defense



Intelligent Data Mining Techniques for Automatic Service Management

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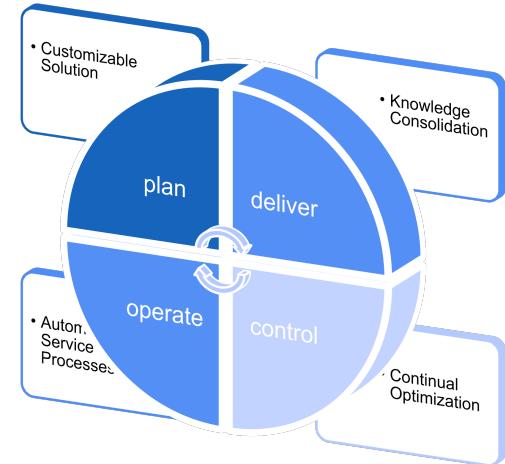
Professor Debra VanderMeer

Outline

- **Introduction**
- **Research Problems**
 - Learn Human Intelligence by Domain Knowledge Base Construction
 - Learn Automation Intelligence by Hierarchical Multi-armed Bandit Model
 - Multi-armed Bandit Problems with Dependent Arms
 - Hierarchical IT Automation Recommendation Modeling
 - Hierarchical Multi-armed Bandit Model
 - Learn Automation Intelligence by Interactive Collaborative Topic Regression Model
 - Interactive Collaborative Filtering Problem
 - Matrix-Factorization based IT Automation Recommendation Modeling
 - Interactive Collaborative Topic Regression Model
- **Summary**

Introduction

- Today, the success of a business is closely intertwined with its IT performance.
- IT Service Management (**ITSM**) refers to the all the activities that are performed to **plan**, **deliver**, **operate** and **control** the IT services provided to customers (i.e., business enterprises).
- Traditional ITSM technologies are impossible to handle the challenges introduced by today's growing complexity of IT environment.



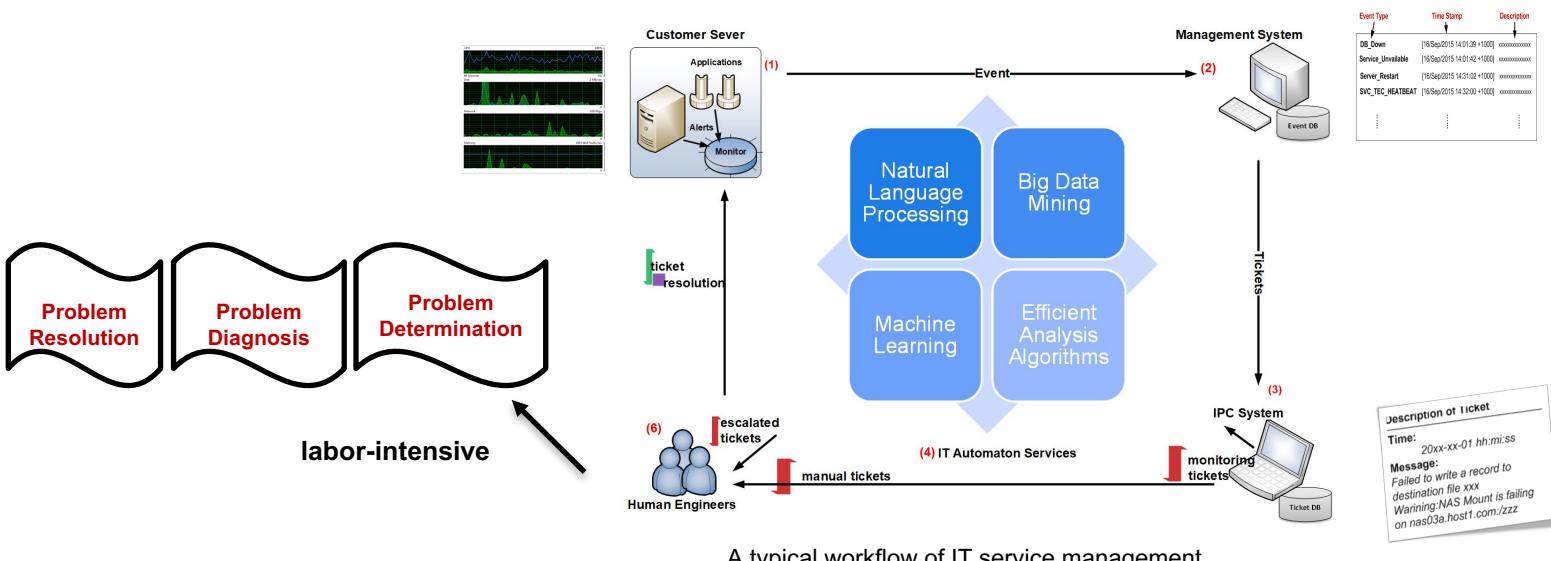
Introduction

- Many ITSM products are booming from different companies. Aiming at providing **higher quality** and **more complex** services, IT service providers are increasingly seeking cognitive techniques to automate or optimize their services.

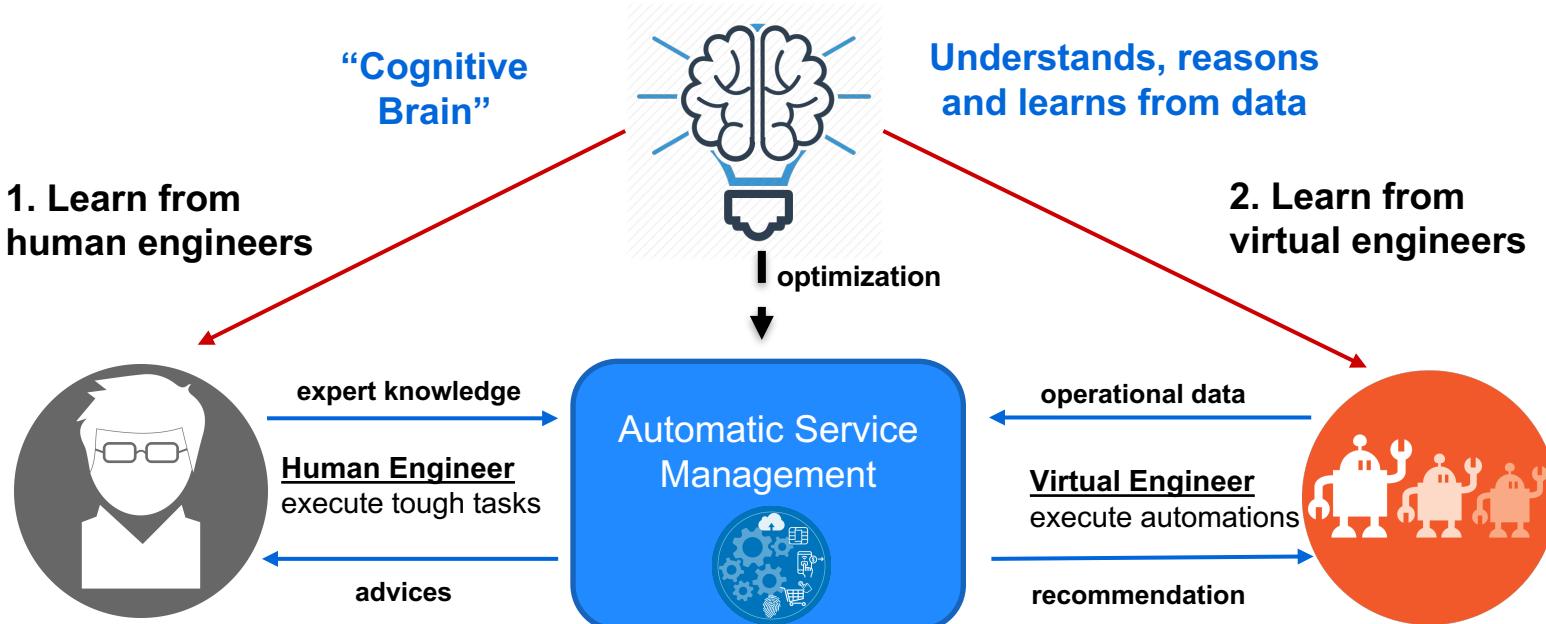


Background

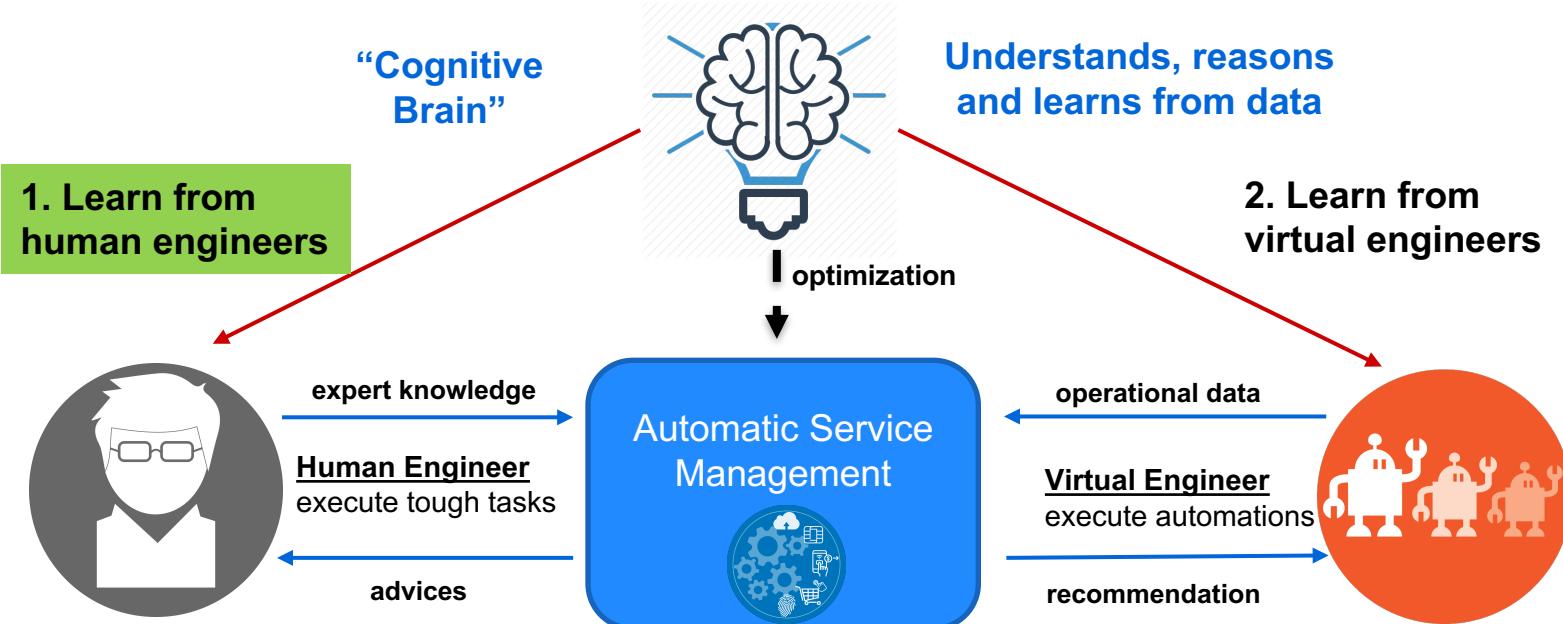
A typical workflow of IT Service Management involves a mix of **human engineers**, **process** and **information technology**.



Overview of Research Problems



Overview of Research Problems



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Motivation

Structured fields:

often inaccurate or incomplete especially information which is not generated by monitoring systems.

STRUCTURED INSTRUCTED	TICKET IDENTIFIER: WPPWA544:APPS:LogAdapter:NALAC:STARACTUAT_6600						
	NODE	FAILURECODE	ORIGINAL SEVERITY	OSTYPE	COMPONET	CUSTOMER	
	WPPWA544	UNKNOWN	4	WIN2K3	APPLICATION	XXXX	
	TICKET SUMMARY:		STARACTUAT_6600 03/01/2014 04:30:28 STARACTUAT_6600 GLACTUA Market=CAAirMiles:Report_ID=MRF600:ReportPeriod From: 2014/02/01 to 2014/02/28:ErrorDesc=For CAAirMiles Actuate is out of balance with STAR BalanceMRF600 & MRF601 Counts. Reconciliation Difference = 2MRF600 & MRF601 Net Fee. Reconciliation Difference = 25MRF600 & MRF601 Gross Fee .Reconciliation Difference = 25				
	RESOLUTION						
	ProblemSolutionText:***** Updated by GLACTUA ***** Problem Reported : Reconciliation difference Root cause : Reconciliation was run before all reports completed. This is as per the new SLAs. Solution provided : Reconciliation was re-run after the next set of reports completed. There was no user impact. Closure code : WRKS_AS_DSIGND						
	RCADescription:***** Updated by GLACTUA ***** Problem Reported : Reconciliation difference Root cause : Reconciliation was run before all reports completed. This is as per the new SLAs. Solution provided : Reconciliation was re-run after the next set of reports completed. There was no user impact. Closure code : WRKS_AS_DSIGND						

Unstructured text:

written by human engineers in natural language. Potential knowledge includes:

1. What happened? **Problem**
2. What troubleshooting was done?
Activity
3. What was the resolution? **Action**

A ticket in IT service management and its corresponding resolution are given.

Challenges

- Challenge 1: Structured fields contribute little information to the problem inference.
- Challenge 2: The ambiguity brought by **the free-form text** in both ticket summary and resolution poses difficulty in information extraction and problem inference.

Related Work

- Ontology modeling [1]
 - Applied into various domain (e.g., natural language processing [2], recommender systems [3])
 - Automatic ontology generation [4,5,6,7,8]
 - by analysing natural structured text [6, 8]
 - by exploring Wikipedia semi-structured text [7]

System Overview

- Our proposed integrated framework consists of three stages:

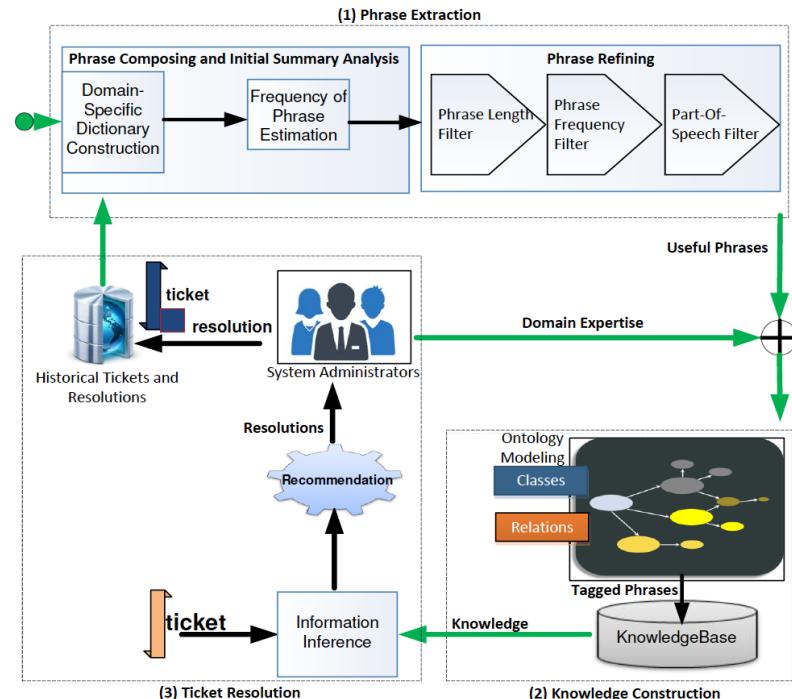
1. Phrase Extraction Stage

- (a) Phrase Composition and Initial Summary Analysis Component

- (b) Phrase Refining Component

2. Knowledge Construction Stage

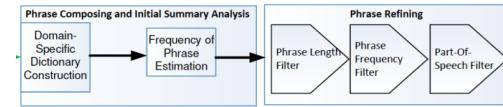
3. Ticket Resolution Stage



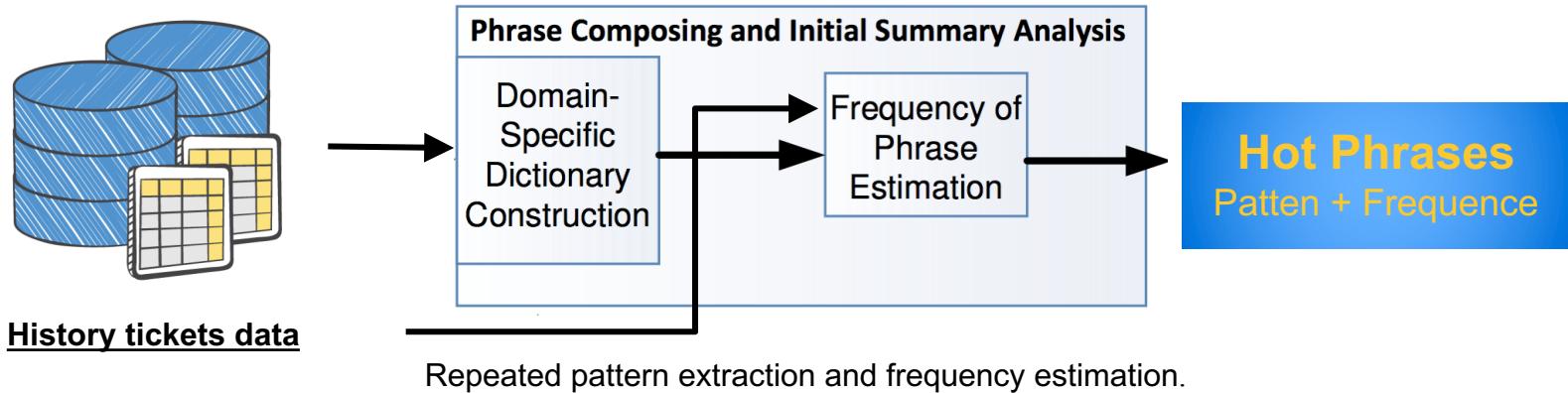
An overview of the integrated framework.

I: Phrase Extraction Stage

- In this stage, our framework finds **important domain-specific words and phrases** ('kernel').
 - Constructing a domain-specific dictionary
 - Mining the **repeated words and phrases** from unstructured text field.
 - Refining these repeated phrases by diverse criteria filters (e.g., length, frequency, etc.).



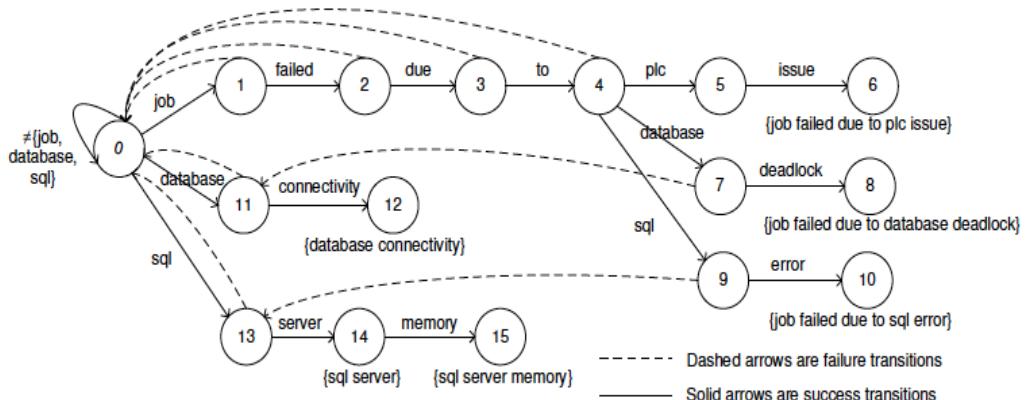
Phrase Composition and Initial Summary Analysis



- Use [Stanford NLP Annotator \[9\]](#) for preprocessing ticket data.
- Build a domain dictionary by using [Word-Level Lempel-Ziv-Welch compression algorithm. \[10\]](#)
- Calculate the frequency of the repeated phrases in tickets data by using [Aho-Corasick algorithm. \[11\]](#)

Frequency of Phrase Estimation

Assume we have a dictionary D
composing {
“job failed due to plc issue,”
“job failed due to database deadlock,”
“job failed due to sql error,”
“database connectivity,”
“sql server,”
“sql server memory”
}.

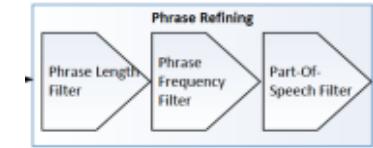


An example of a finite state string pattern matching machine.

Phrases Refining

In this stage, we apply two filters to the extracted repeated phrases allowing the omission of non-informative phrases.

- Phrase Length & Frequency Filters (length > 20 & frequency ≥ 10)
- Part-Of-Speech Filter



Definition of technical term's schemes

Justeson-Katz Patterns	Penn Treebank Entity Patterns	Examples in Tickets
A N	JJ NN[P S PS]*	global merchant
N N	NN[P S PS]* NN[P S PS]*	database deadlock
A A N	JJ JJ NN[P S PS]*	available physical memory
A N N	JJ NN[P S PS] NN[P S PS]	backup client connection
N A N	NN[P S PS] JJ NN[P S PS]	load balancing activity
N N N	NN[P S PS] NN[P S PS] NN[P S PS]	socket connectivity error
N P N	NN[P S PS] IN NN[P S PS]	failures at sfdc
A:Adjective, N: Noun, P: Preposition		
JJ: Adjective, NN: singular Noun, NNS: plural Noun, NNP: singular proper Noun, NNPS: plural proper Noun, IN: Preposition		

Definition of action term's schemes

Penn Treebank Action Patterns	Examples in Tickets
VB[D G N]*	run/check, updated/corrected affecting/circumventing, given/taken
VB: base form Verb, VBD: past tense Verb, VBG: gerund Verb, VBN: past participle Verb,	

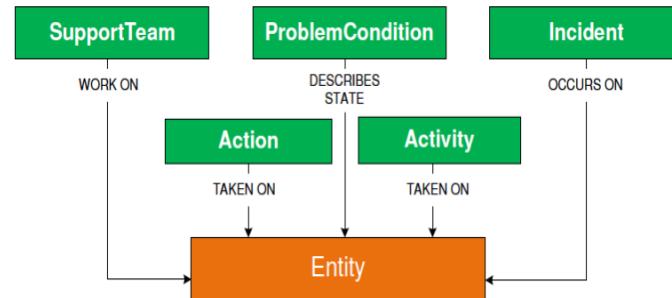
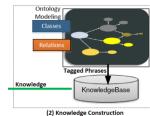
Result of Frequency/Length Filter and PoSTag Filter.

Applied Filter	Left Phrases
Frequency Filter ≥ 10	1117 items
Length Filter > 20	613 items
PoSTag Filter	323 items

II: Knowledge Construction Stage

In this stage, we first develop an ontology model, and then tag all the phrases of the generated dictionary with the defined classes.

- Build the ontology model
 - Define classes
 - Define relations
- Knowledge Archive
 - Manually tag the important phrases in the dictionary with their most relevant defined classes.



Ontology model depicting interactions among classes.

Definition of the Classes in Ontology

Class	Definition	Examples
Entity	Object that can be created/destroyed/replace	memory fault; database deadlock
Action	Requires creating/destroying an entity	restart; rerun; renew
Activity	Requires interacting with an entity	check; update; clean
Incident	State known to not have a problem	false alert; false positive
ProblemCondition	Describe the condition that causes a problem	offline; abended; failed
SupportTeam	Team that works on the problem	application team; databases team

II: Knowledge Construction Stage

→ Initial Domain Knowledge Base:

Entity	Activity	Action	ProblemCondition	Support Team
automated process	accept	reboot	abended	active direcory team
actual start	accepted	renew	bad data	app team
additional connection	achieved	rerun	deactived	application team
address information	acting	reran	disabled	aqpefds team
afr end	add	reset	dropped	bazaarvoice team
alert	added	restoring	expired	bmc team
alert imr	affecting	retransmit	fails	bsd team
alerts	affects	fixed	failed	Bureau team
alphanumeric values	altered	restart	false alert	business team
amex	aligned	restarted	false positive	bwinfra team
api calls	allocate	renewed	human error	cdm team
application	allocated	fixed	not working	CDM/GLEUDBD team
application code	applied	fixing	offline	cmit team
application impact	assign	recycle	stopped	control m team
atm messages	assigned	recycled	unavailable	convergys team
audit	blocks	recycling	under threshold	csp team
audit log	bring	reopen	wrong	cu team

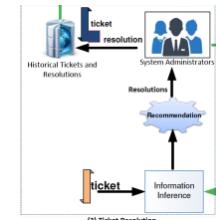
	Number of Tagged Phrases
Class	628 items
Entity	243 items
Activity	24 items
Action	22 items
Problem Condition	76 items

III: Ticket Resolution Stage

The goal of this stage is to recommend operational phrases for an incoming ticket.

➤ Information Inference component:

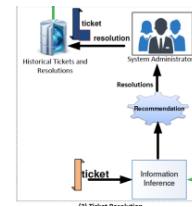
- **Class Tagger Module** processes incoming ticket in three steps.
 - tokenize the input into sentences;
 - construct a Trie using ontology domain dictionary;
 - find the longest matching phrases of each sentence using the Trie and knowledge base, then map them onto the corresponding ontology classes
- Define Concept Patterns for Inference: concept patterns based on Problem, Activity and Action concepts:
 - **Problem** describes an entity in negative condition or state.
 - **Activity** denotes the diagnostic steps on an entity.
 - **Action** represents the fixing operation on an entity.



Concept	Pattern	Examples
Problem	Entity preceded/succeeded by ProblemCondition	(jvm) is (down)
Activity	Entity preceded/succeeded by Activity	(check) the (gft record count)
Action	Entity preceded/succeeded by Action	(restart) the (database)

III: Ticket Resolution Stage

Post loading failed due to plc issue. Update the gft after proper validation and processed the job and completed successfully.



(post loading)/(Entity) (failed)/(ProblemCondition) due to (plc issue)/(Entity). (Update)/(Activity) the (gft)/(Entity) after (proper validation)/(Entity) and (processed)/(Activity) the (job)/(Entity) and (completed)/(Action) successfully.



- Problem - {failed: plc issue, post loading}
- Activity - {update: gft, proper validation; process: job}
- Action - {complete: job}

III: Ticket Resolution Stage

The goal of this stage is to recommend operational phrases for an incoming ticket.

- Ontology-based Resolution Recommendation component
 - Ontology model can greatly facilitates our resolution recommendation task by better **capturing the similarity** between ticket summaries.

Noisy ticket summary examples

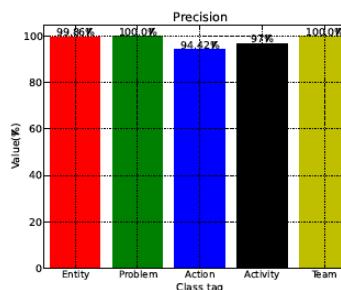
Inside ProcessTransaction. DetermineOutcome failed. Database save failed: Tried an insert, then tried an update
CRPE3I1Server Database save failed on lppwa899 00:19:46 lppwa899 /logs/websphere/wsfppllppwa 899CRPE3I1Server/SystemOut.log [3/20/14 0:19:33:371] MST] 0000002b SystemOut 20140320 00:19:33, 371 [WebContainer:30] [STANDARD] [DI_US:01.22] (ng.AEXP_US_ISR_Work_Txn.Action) FATAL lp-pwa899—10.16.4.4—SOAP—AEXP_US_ISR_Roads3_Pkg —AEXPUSRWork-Inquiry—ProcessInquiry

Experiment

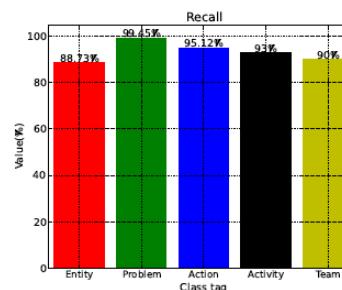
- Dataset
 - Experimental tickets are collected from real production servers of IBM Cloud Monitoring system covers three month time period containing $|D| = 22,423$ tickets.
 - Training data: 90% of total tickets
 - Testing data: 10% of total tickets
- Evaluation Metrics
 - Precision, Recall, F1 score and Accuracy.
 - $\text{Accuracy} = (\text{TP} + \text{TN}) / (\text{TP} + \text{TN} + \text{FP} + \text{FN})$
 - $\text{Precision} = \text{TP} / (\text{TP} + \text{FP})$ $\text{Recall} = \text{TP} / (\text{TP} + \text{FN})$
 - $\text{F1 score} = 2 \cdot \text{Precision} \cdot \text{Recall} / (\text{Precision} + \text{Recall})$

Experiment

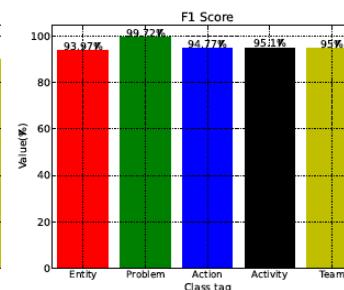
- Ground Truth
 - Domain experts manually find and tag all phrases instances into six predefined classes in testing dataset.
- Evaluate our integrated system
 - Class Tagger is applied to testing tickets to produce tagged phrases with predefined classes. Comparing the tagged phrases with ground truth, we obtain the performance.



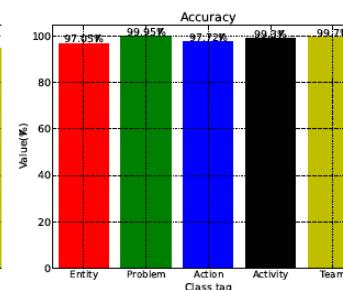
(a) Precision.



(b) Recall.



(c) F1-Score.



(d) Accuracy.

Evaluation results of our integrated system.

Experiment

- Evaluate Information Inference
 - Usability: we evaluate the average accuracy to be 95.5%, 92.3%, and 86.2% for Problem, Activity, and Action respectively.
 - Readability: we measure the time cost. Domain expert can be quicker to identify the Problem, Activity and Action which output from the Information Inference component from 50 randomly selected tickets.

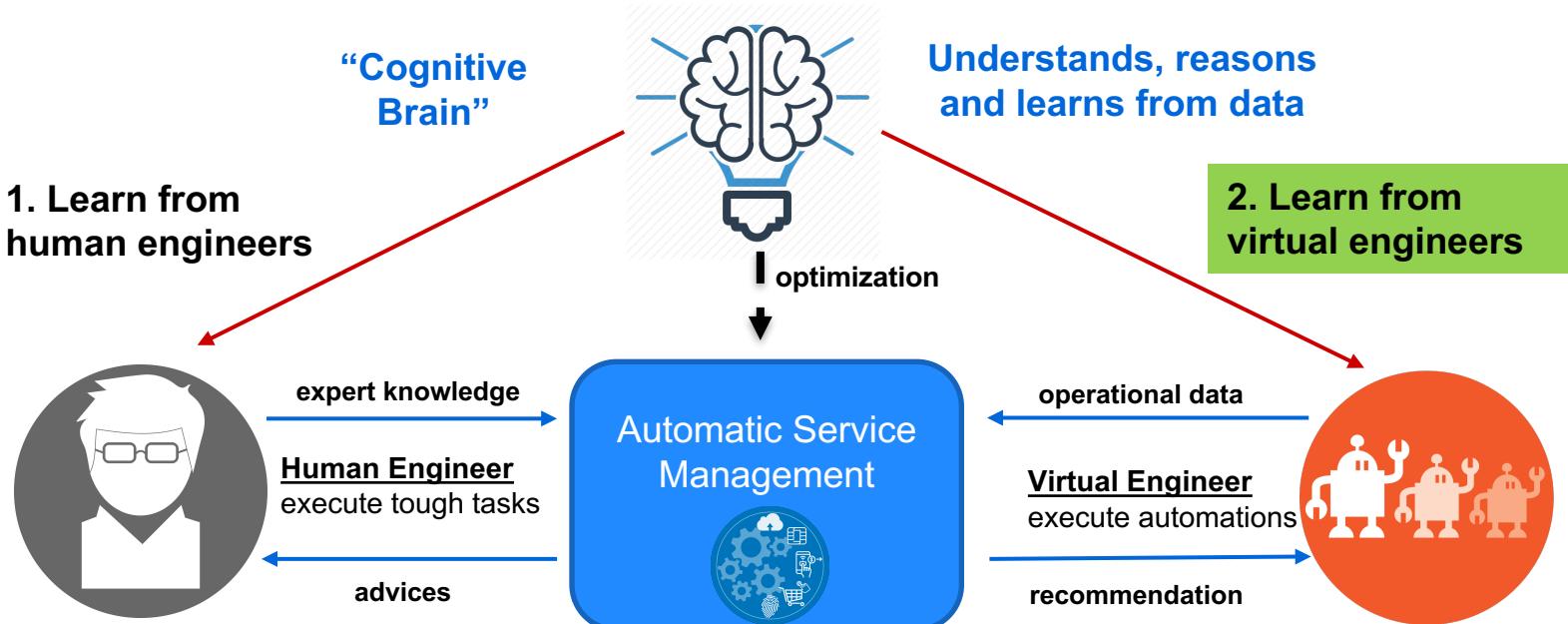
Summary of this section

This work has been published in IEEE SCC 2017 and awarded as **the best student paper.**

Wang, Qing, et al. "Constructing the knowledge base for cognitive IT service management." Services Computing (SCC), 2017 IEEE International Conference on. IEEE, 2017.

The extended work with a deep ranking model is submitted to the journal TSC.

Overview of Research Problems

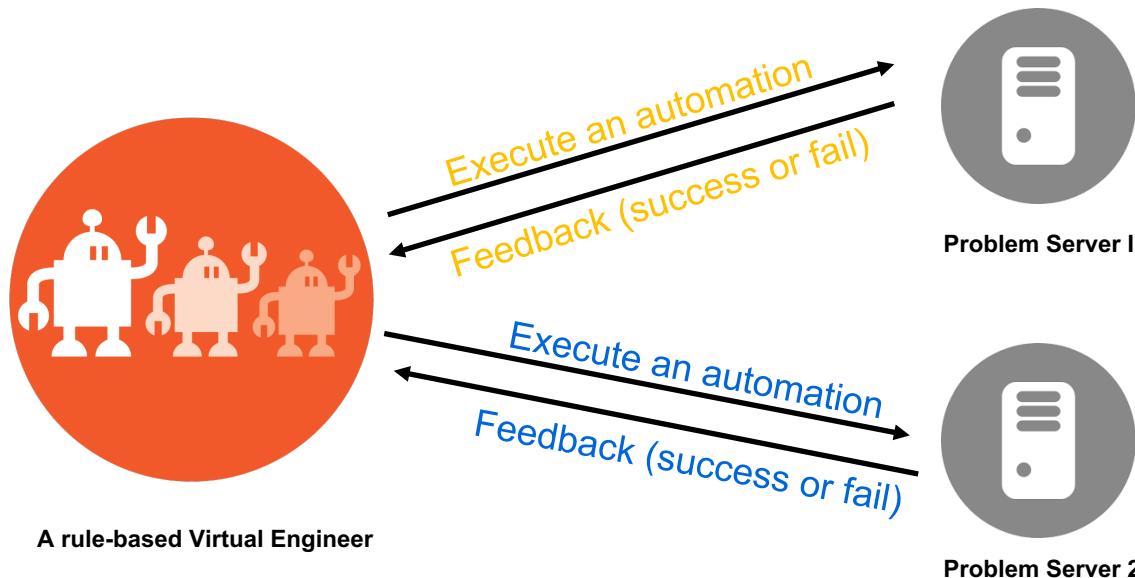


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IT automation recommendation modeling

IT automation services (ITAS) [12] is introduced into IT service management.



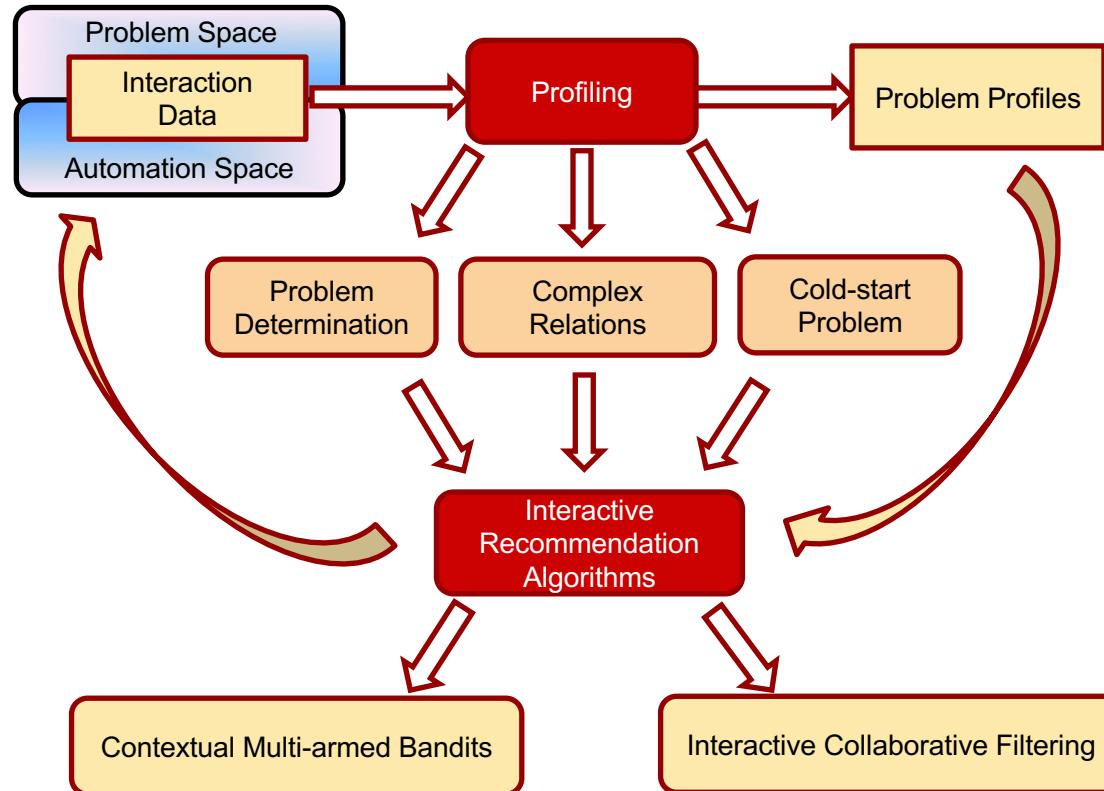
IT Automation Recommendation Modeling

ALERT_KEY	cpc_cpoutil_gntw_win_v3		AUTOMATON_NAME	CPC:WIN:GEN:R:W:System Load Handler			
OPEN_DTTM	CLIENT_ID	HOSTNAME	ORIGINAL SEVERITY	OSTYPE	COMPONENT	SUBCOMPONENT	AUTO RESOLVED
2016-04-30 12:43:07	136	LEXSBWS01 VH	2	WIN	WINDOWS	CPU	1
TICKET SUMMARY	CPU Workload High. CPU 1, busy 99% time.		TICKET RESOLUTION	The CPU Utilization was quite reduced, hence closing the ticket.			

feedback

A sample ticket in ITSM with its corresponding automaton.

A General Process of Interactive Recommendation



Challenges

- Challenge 1: How do we appropriately solve the well-known **cold-start** problem [13] in IT automation services?
- Challenge 2: How do we utilize the **interactive feedback** to adaptively optimize the recommending strategies of the enterprise automation engine to enable a quick problem determination by IT automation services?

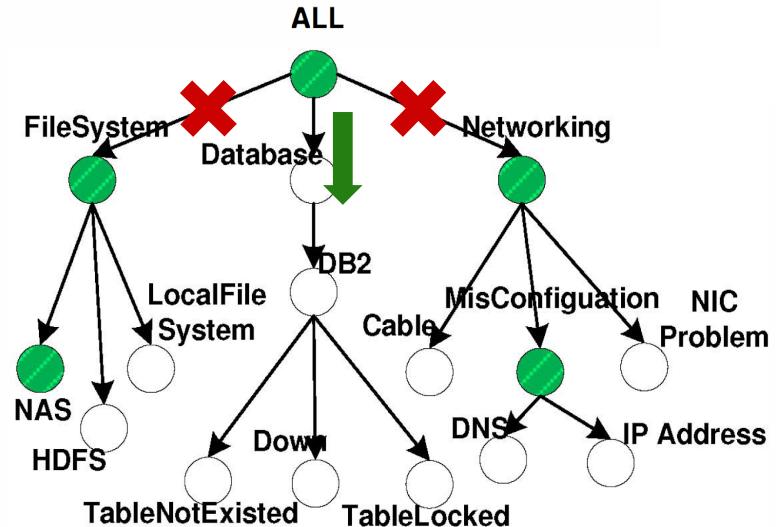
This can be naturally modeled as a **contextual multi-armed bandit problem**, which has been widely applied into various interactive recommender systems. [14, 15, 16]



Challenges

- Challenge 3: How do we efficiently improve the performance of recommendation using the explicit **automation hierarchies** of IT automation services?

For example, a ticket is generated due to a failure of the DB2 database. The root cause may be database deadlock, high usage or other issues.



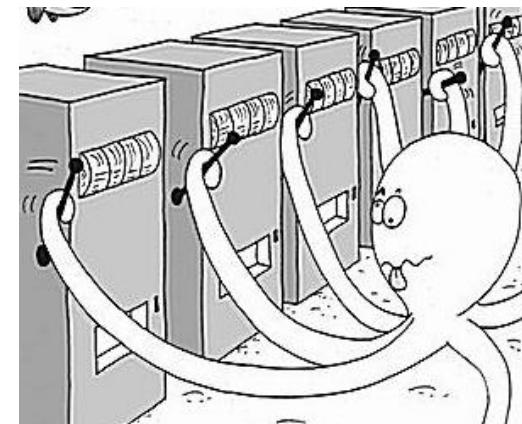
Related Work

- Interactive Recommender Systems [15, 16]
- Multi-armed Bandit Algorithms [14, 20]
 - ϵ -greedy, UCB [14], Thompson Sampling [20].
 - Used to balance the tradeoff between exploration and exploitation in recommender system.
- Multi-armed Bandit Problems with Dependent Arms [17, 18, 19]
 - Use the taxonomy to explore the dependencies among arms in the context-free bandit setting. [18]
 - Learn the item hierarchy by a small number of user profiles. [19]

Multi-armed Bandit Problem

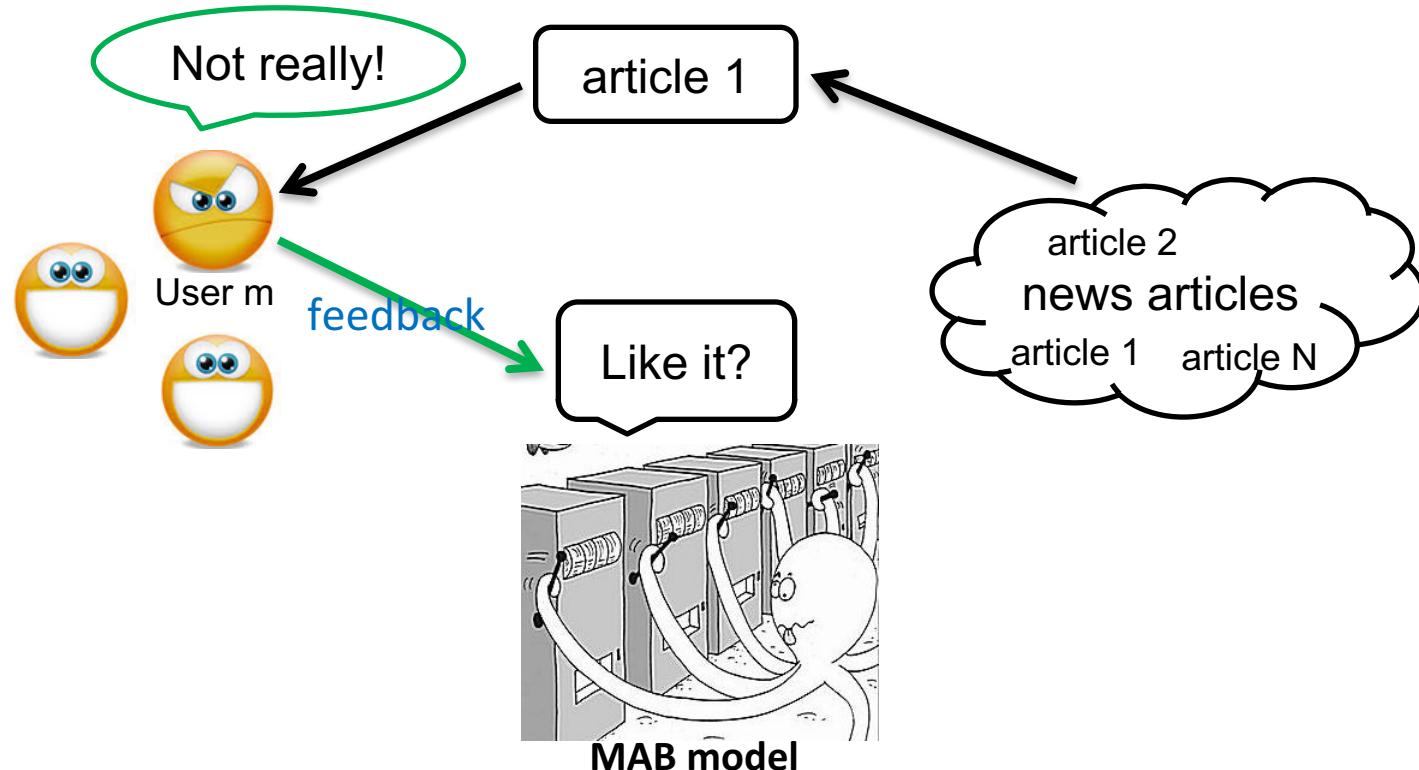
- The MAB problem is a classical paradigm in machine learning in which an **online algorithm** chooses from a set of strategies in a sequence of trials so as to **maximize the total payoff** of the chosen strategies. [30]

- A gambler walks into a casino
- A row of slot machines providing a random rewards
- A tradeoff between *exploration* and *exploitation*.

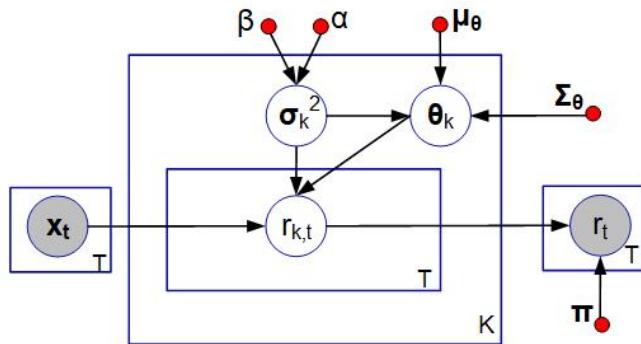


Objective: Maximize the sum of rewards (Money)!

Example: News Recommendation



Contextual Multi-armed Bandit Model



A graphic model of conventional contextual MAB.

The reward $r_{k,t}$ is typically modeled as a linear combination of the feature vector x_t given at time $t = [1, \dots, T]$ as follows:

$$r_{k,t} \sim N(x_t^T \theta_k, \sigma_k^2)$$

The optimal policy π^* is defined as the one with maximum accumulated expected reward after T iterations:

$$\pi^* = \operatorname{argmax}_\pi \sum_{t=1}^T E_{\theta_{\pi(x_t)}}(x_t^T \theta_{\pi(x_t)} | t)$$

Table 1: Important Notations

Notation	Description
$a^{(i)}$	the i -th arm.
\mathcal{A}	the set of arms, $\mathcal{A} = \{a^{(1)}, \dots, a^{(K)}\}$.
\mathcal{H}	the hierarchy (taxonomy) defined by domain experts.
\mathcal{X}	d -dimensional context feature space.
x_t	the context at time t .
$r_{k,t}$	the reward (payoff) of pulling the arm $a^{(k)}$ at time t .
$\hat{r}_{k,t}$	the predicted reward (payoff) for the arm $a^{(k)}$ at time t .
π	the policy for pulling arm sequentially.
R_π	the cumulative reward of the policy π .
$S_{n,t}$	the sequence of $(x_i, \pi(x_i), r_{\pi(x_i)})$ observed until time $t = 1, \dots, T$.
θ_k	the coefficients predicting reward of the arm $a^{(k)}$.
σ_k^2	the reward prediction variance for arm $a^{(k)}$.
α, β	the parameters of the distribution of σ_k^2 .
$\mu_\theta, \Sigma_\theta$	the parameters of the distribution of θ .

Online IT Automation Recommendation Modeling

In IT automation recommendation modeling,

- let $\mathcal{A} = \{\mathbf{a}^{(1)}, \dots, \mathbf{a}^{(N)}\}$ denote a set of automations (i.e., scripted resolutions) feasible in IT automation system.
- Every time a ticket is reported, the IT automation engine selects a proper automation according to contextual information (i.e., the ticket symptom) and recommends it as a possible resolution. The contextual information for a reported ticket at time t is represented as a feature vector $\mathbf{x}_t \in \mathbf{X}$, where \mathbf{X} denotes the d-dimensional feature space.
- Every recommended automation $\mathbf{a}^{(i)} \in \mathcal{A}$ at time t , has a corresponding feedback indicating whether or not the ticket has been successfully resolved.

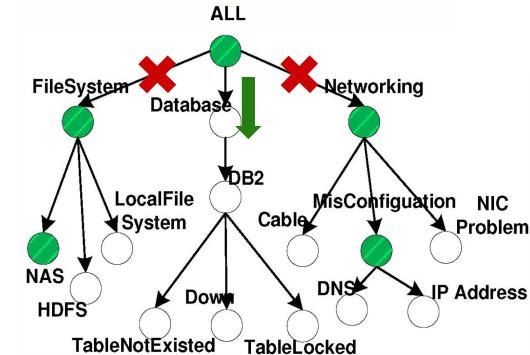
The optimal policy π^* is defined as the one with maximum accumulated expected reward after T iterations,

$$\pi^* = \arg \max_{\pi} E(R_{\pi}) = \arg \max_{\pi} \sum_{t=1}^T E(r_{\mathbf{x}_t, \pi(\mathbf{x}_t)} | t). \quad (2)$$

Hierarchical IT Automation Recommendation Modeling

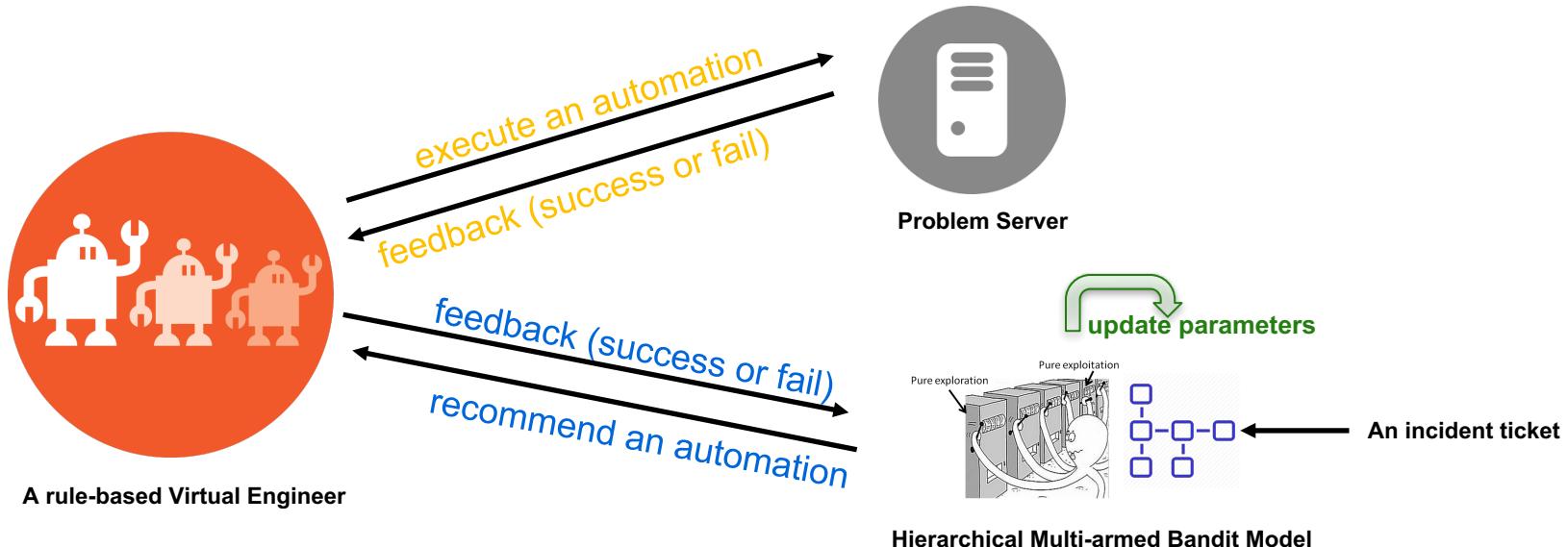
Let \mathcal{H} denote the taxonomy. Given a node $a^{(i)} \in \mathcal{H}$, $pa(a^{(i)})$ and $ch(a^{(i)})$ are used to represent the parent and children sets, respectively.

- A leaf node of \mathcal{H} represents an automation
- Non-leaf node is category or subcategory information.
- Therefore, the multi-armed bandit problem for IT automation recommendation is reduced to selection of a path in \mathcal{H} from root to a leaf node, and multiple arms along the path are sequentially selected based on the contextual vector x_t at time t .



$$\pi^* = \arg \max_{\pi} \sum_{t=1}^T \sum_{\substack{a^{(i)} \in \pi_{\mathcal{H}}(\mathbf{x}_t | t), \\ ch(a^{(i)}) \neq \emptyset}} E_{\theta_{\pi(\mathbf{x}_t | ch(a^{(i)}))}} (\mathbf{x}_t^T \theta_{\pi(\mathbf{x}_t | ch(a^{(i)}))} | t).$$

Hierarchical IT Automation Recommendation Modeling



Hierarchial Multi-armed Bandit Algorithms

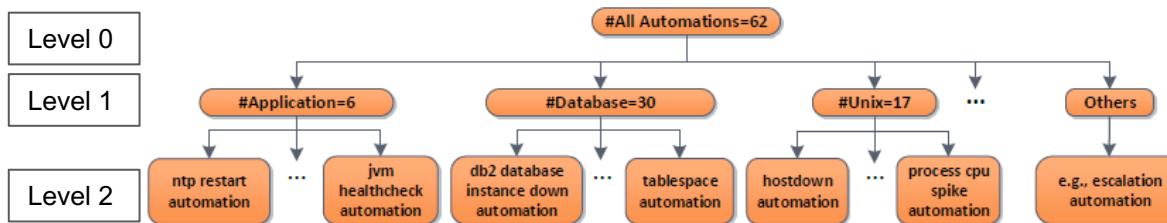
Algorithm 1 The algorithms for HMAB model

```
1: procedure MAIN( $\mathcal{H}, \pi, \lambda$ )                                ▷ Main entry,  $\pi$  is the policy.  
2:   for  $t \leftarrow 1, T$  do  
3:     Initialize parameters of  $a^{(m)} \in \mathcal{H}$  to  $\alpha_m, \beta_m, \Sigma_{\theta_m} = \mathbf{I}_d, \mu_{\theta_m} = \mathbf{0}_{d \times 1}$ .  
4:     Get contextual vector  $\mathbf{x}_t \in \mathcal{X}$ .  
5:     for each path  $P$  of  $\mathcal{H}$  do  
6:       Compute the reward of  $P$  using Equation (4.6), by calling  
    EVAL( $\mathbf{x}_t, a^{(k)}, \pi$ ) for each arm  $a^{(k)} \in P$ .  
7:     end for  
8:     Choose the path  $P^*$  with maximum reward.  
9:     Recommend the automation  $a^{(*)}$  (leaf node of  $P^*$ ).  
10:    Receive reward  $r_{*,t}$  by pulling arm  $a^{(*)}$ .  
11:    UPDATE( $\mathbf{x}_t, P^*, r_{*,t}, \pi$ )  
12:  end for  
13: end procedure  
14:  
15: procedure EVAL( $\mathbf{x}_t, a^{(k)}, \pi$ )                               ▷ Get a score for  $a^{(k)}$ , given  $\mathbf{x}_t$ .  
16:   if  $\pi$  is TS then  
17:     Sample  $\sigma_{k,t}^2$  according to Equation (4.10).  
18:     Sample  $\theta_{k,t}$  according to Equation (4.11).  
19:     return  $\hat{r}_{k,t} = \mathbf{x}_t^T \theta_{k,t}$ .  
20:   end if  
21:   if  $\pi$  is LinUCB then  
22:     return  $\hat{r}_{k,t} = \mathbf{x}_t^T \mu_{\theta_{k,t-1}} + \frac{\lambda}{\sigma_{k,t-1}} \sqrt{\mathbf{x}_t^T \Sigma_{\theta_{k,t-1}}^{-1} \mathbf{x}_t}$   
23:   end if  
24: end procedure  
25:  
26: procedure UPDATE( $\mathbf{x}_t, P, r_t, \pi$ ) ▷ Update the inference. $P$  is the path in  $\mathcal{H}$ ,  $r_t$  is  
    the reward.  
27:   for each arm  $a^{(k)} \in P$  do  
28:     Update  $\alpha_{k,t}, \beta_{k,t}, \Sigma_{\theta_{k,t}}, \mu_{\theta_{k,t}}$  using Equation (4.12).  
29:   end for  
30: end procedure
```

Hierarchial Multi-armed Bandit Algorithms

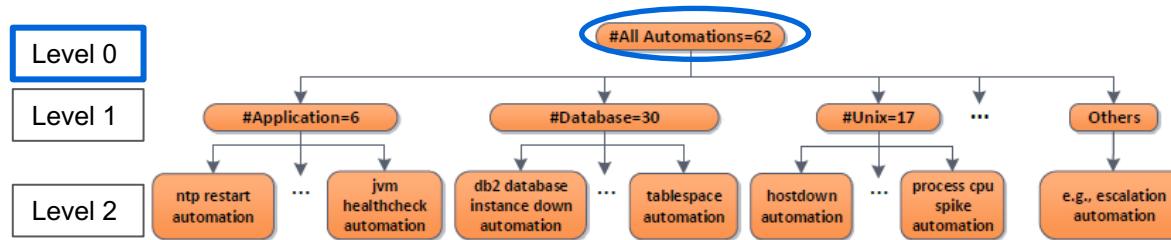
- We formulate it as a contextual bandit problem with dependent arms organized hierarchically, which can match the arm feature spaces from a coarse to fine level.

At time $t = [1, \dots, T]$:



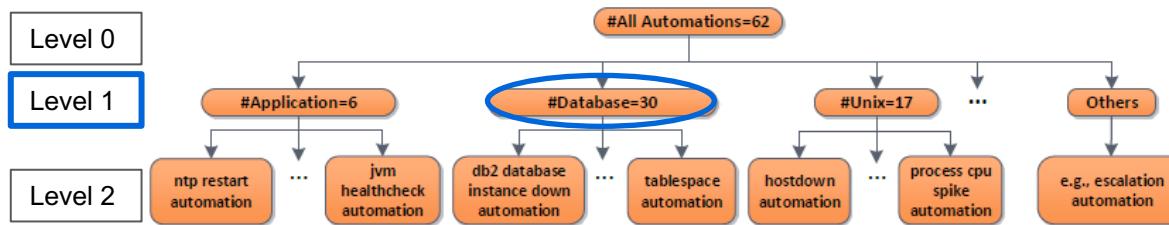
Hierarchial Multi-armed Bandit Algorithms

At time $t = [1, \dots, T]$:



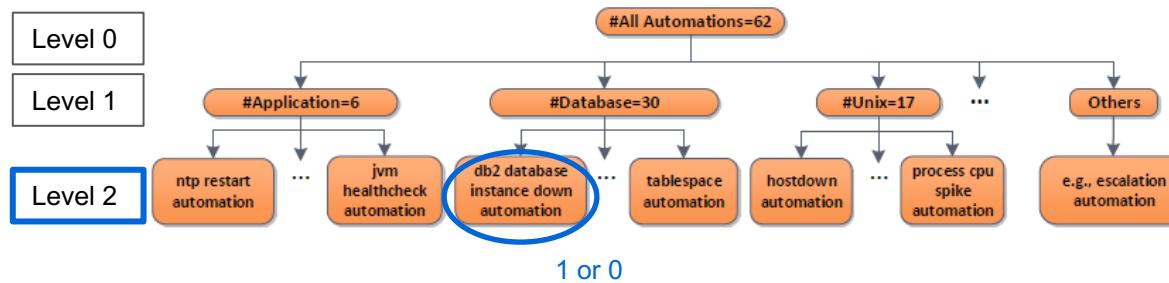
Hierarchial Multi-armed Bandit Algorithms

At time $t = [1, \dots, T]$:



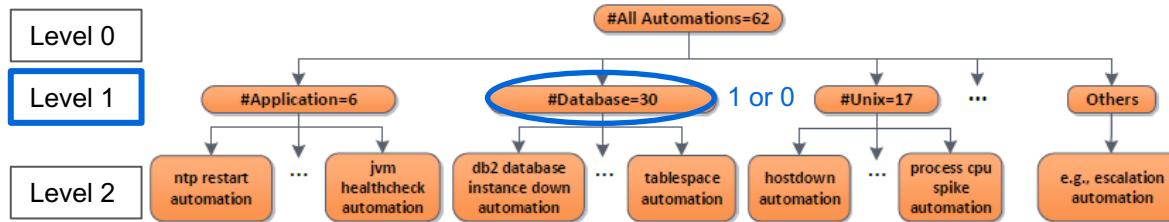
Hierarchial Multi-armed Bandit Algorithms

At time $t = [1, \dots, T]$:



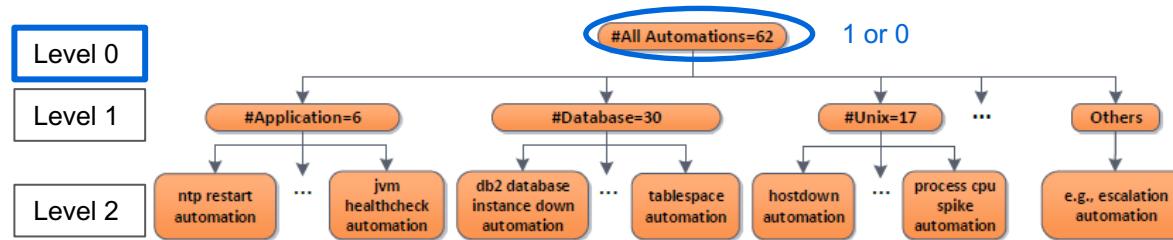
Hierarchial Multi-armed Bandit Algorithms

At time $t = [1, \dots, T]$:



Hierarchial Multi-armed Bandit Algorithms

At time $t = [1, \dots, T]$:



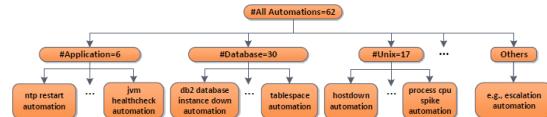
Experiment

➤ Data Set

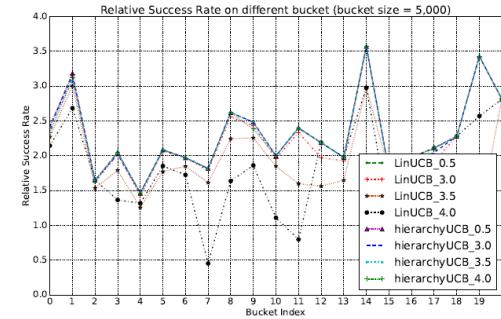
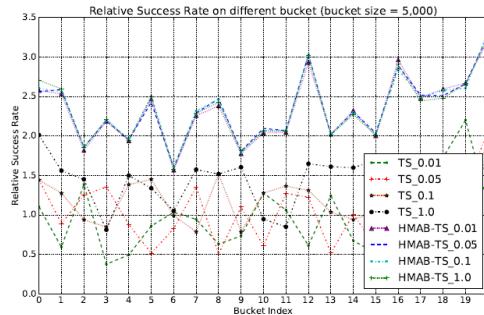
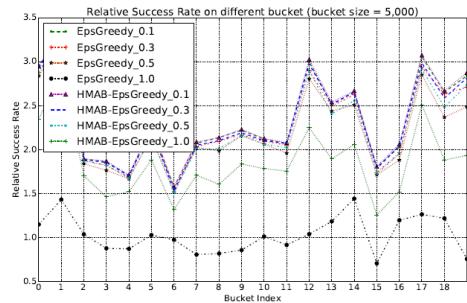
- Experimental tickets are collected by IBM Tivoli Monitoring system covering from July 2016 to March 2017 with the size of $|D| = 116,429$.
- The dataset contains 1,091 alert keys (e.g., cpusum_xuxc_aix, prccpu_rlzc_std) and 62 automations (e.g., NFS automation, process CPU spike automation) in total.
- A given three-layer hierarchy H.

➤ Evaluate Method

- Replayer method. [21, 29]



Experiment



Experiment: A Case Study

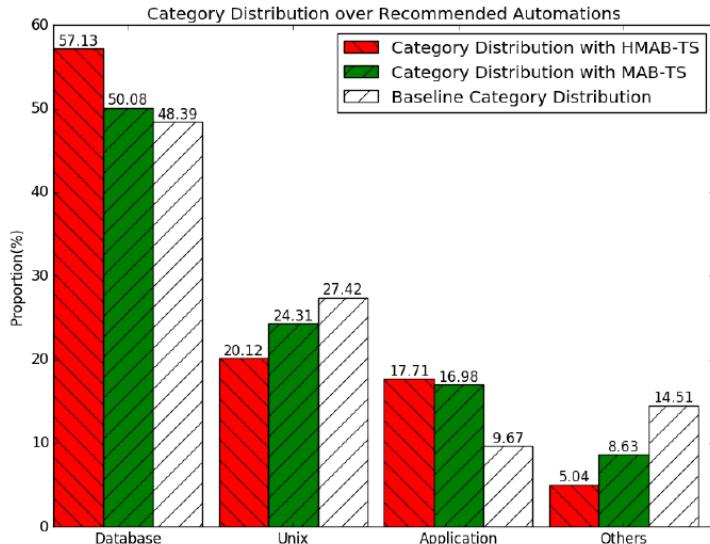


Figure 4.9: The comparison of category distribution on the recommended automations.

ALERT_KEY	ac2_dbinact_grzc_std	AUTOMATON NAME	Escalation Handler
TICKET SUMMARY	Database fin91dm0 status is inactive.	TICKET RESOLUTION	The database is down. It has been restarted, hence closing the ticket.
RECOMMENDED CATEGORY	(%)	RECOMMENDED AUTOMATON	
DATABASE	57.13	(1) database instance down automation; (2) db2 database inactive automation; (3) mysql database offline automation.	
UNIX	20.12	(1) asm space check diskgroup dbautomation ; (2) hostdown automation; (3) certification expiration automation.	
APPLICATION	17.71	(1) ntp restart automation; (2) mq manager down automation.	
OTHERS	5.04	(1) system load automation; (2) others.	

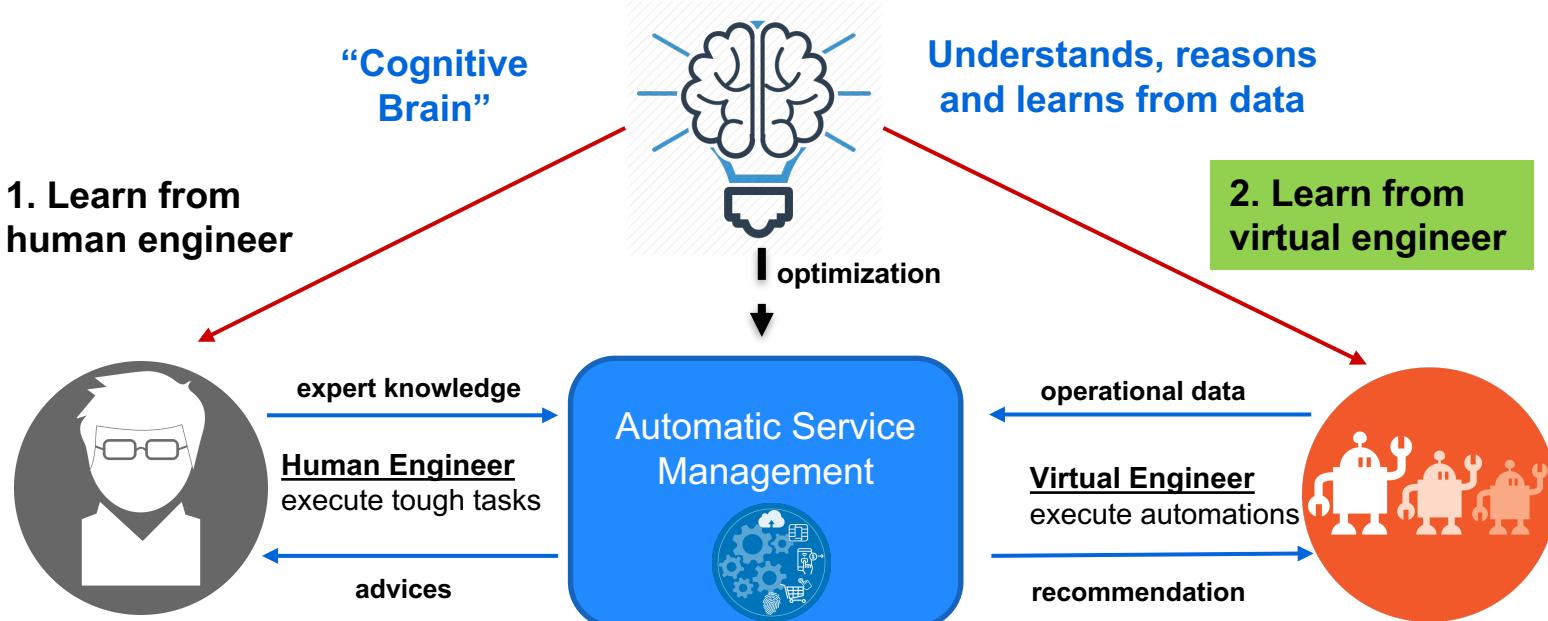
Figure 4.10: The *exploration* by HMAB-TS of a cold-start ticket case.

Summary of this section

This work has been published in SIAM International Conference on Data Mining (SDM) 2018.

Q. Wang, T. Li, S. S. Iyengar, et al. Online it ticket automation recommendation using hierarchical multi-armed bandit algorithms. In SDM. SIAM, 2018.

Overview of Research Problems

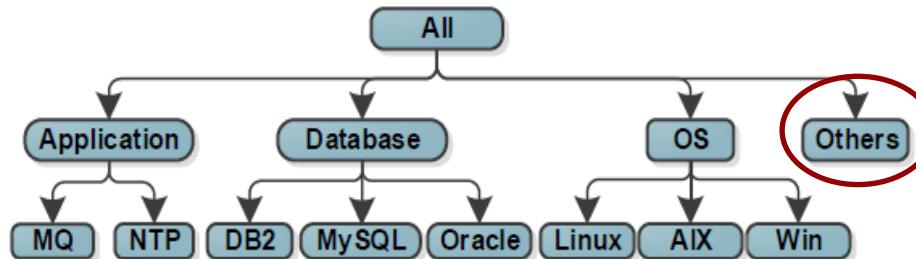


Outline

- Introduction
- Research Problems
 - Learn Human Intelligence by Domain Knowledge Base Construction
 - Learn Automation Intelligence by Hierarchical Multi-armed Bandit Model
 - Multi-armed Bandit Problems with Dependent Arms
 - Hierarchical IT Automation Recommendation Modeling
 - Hierarchical Multi-armed Bandit Model
 - Learn Automation Intelligence by Interactive Collaborative Topic Regression Model
 - Interactive Collaborative Filtering Problem
 - Matrix-Factorization based IT Automation Recommendation Modeling
 - Interactive Collaborative Topic Regression Model
- Summary

Challenges

- Challenge 1: How do we solve the cold-start problem in IT automation services?
- Challenge 2: How do we adaptively recommend a proper automation in IT automation services?
- Challenge 3: How do we effectively recommend a proper automation with no explicit hierarchical information and, in the worse case, with no contextual information of the incident ticket in IT automation services?



Challenges

This can be naturally modeled as an [interactive collaborative filtering problem](#), which has been first introduced in [15].

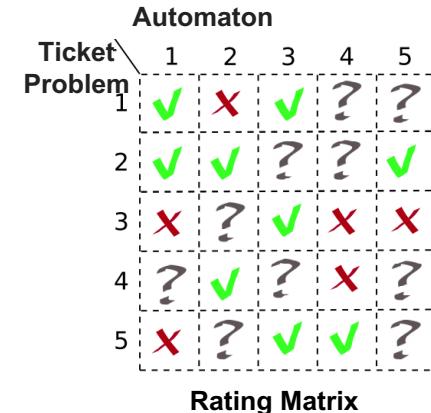
Ticket Problem 1

ALERT_KEY	xxx_cpusum_xuxc_aix	AUTOMATON_NAME	Process CPU Spike Automation					
OPEN_DTTM	CLIENT_ID	HOSTNAME	ORIGINAL SEVERITY	OSTYPE	COMPONENT	SUBCOMPO NENT	AUTO RESOLVED	
1456383421000	90	XXX	4	AIX	UNIX	UNKNOWN	1	
TICKET SUMMARY	XXX CPU Utilization is very high, workloads affected			TICKET RESOLUTION	Alert in question has recovered, hence closing the ticket.			

Ticket Problem 2

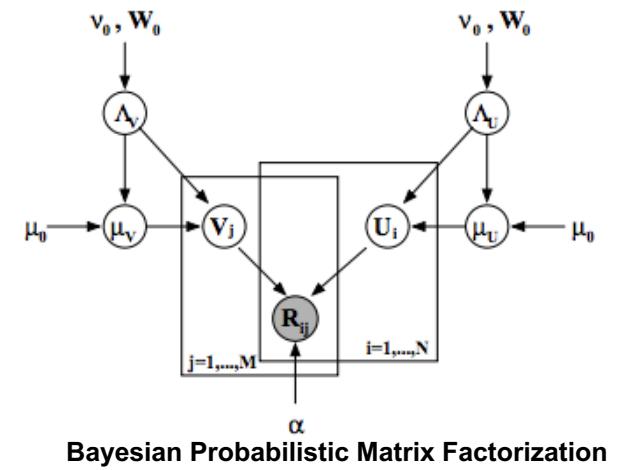
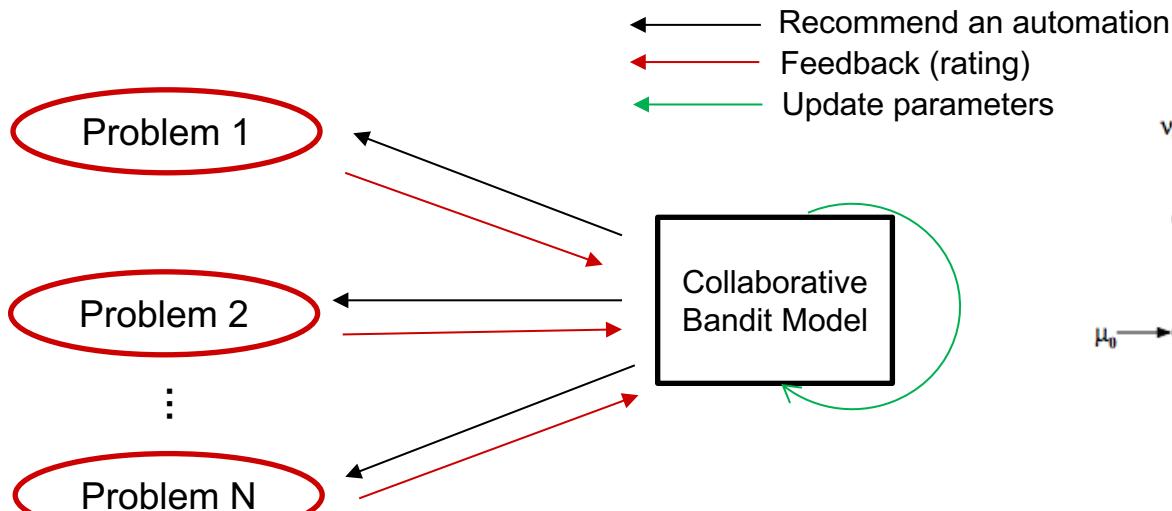
ALERT_KEY	xxx_prccpu_rlzc_std	AUTOMATON_NAME	Process CPU Spike Automation					
OPEN_DTTM	CLIENT_ID	HOSTNAME	ORIGINAL SEVERITY	OSTYPE	COMPONENT	SUBCOMPO NENT	AUTO RESOLVED	
1454900281000	52	XXX	4	UNKNOWN	LINUX	Process	1	
TICKET SUMMARY	XXX Process using high cpu (97.30%) nsrdmpix			TICKET RESOLUTION	Alert in question has recovered, hence closing the ticket.			

Two different ticket problems in IT service management



Interactive Collaborative Filtering Problem

No context information can be observed.



Matrix-Factorization based IT Automation Recommendation Modeling

There are M ticket problems and N automations. The partially observed matrix R is the preference of the ticket problem for the automation. In the collaborative bandit model, the rating is estimated by a product of ticket problem and automation feature vectors p_m and q_n .

$$r_{m,n} \sim N(p_m^T q_n, \sigma^2)$$

The objective function can be written as follows:

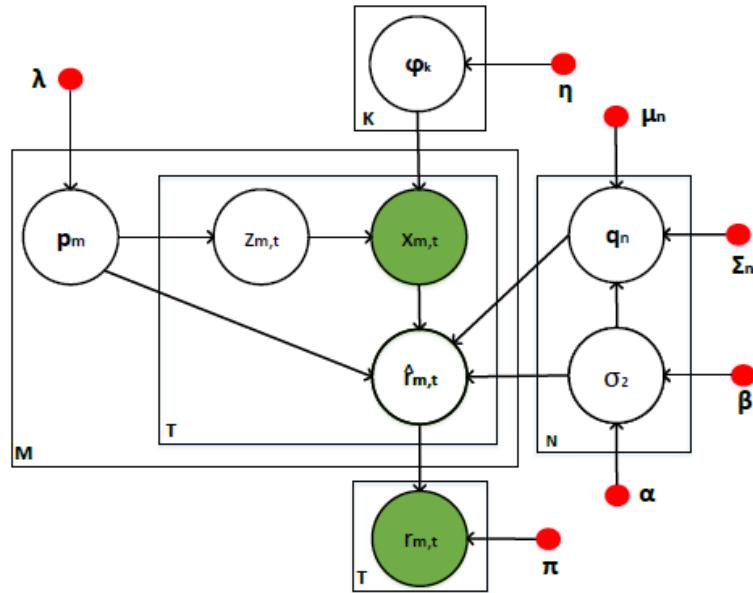
$$\pi^* = \arg \max_{\pi} \sum \mathbb{E}_{p_m, q_{\pi(\mathbb{S}(t))}} (p_m^T q_{\pi(\mathbb{S}(t))} | t)$$

Where $\mathbb{S}(t) = \{(n(1), r_{m,n(1)}), \dots, (n(t-1), r_{m,n(t-1)})\}$. $\mathbb{S}(t)$ is available information observed at time t .

Related Work

- Probabilistic Matrix Factorization [27, 28]
- Interactive Collaborative Filtering [15, 24, 25, 26]
 - Study the collaborative filtering in the bandit setting [15, 24]
 - Considering the user-side clustering [25, 26]
- Collaborative topic modeling [22, 23]
 - Integrate topic modeling into an matrix factorization setting

Interactive Collaborative Topic Regression Model



$$p_m | \lambda \sim Dir(\lambda) \quad p(\sigma_n^2 | \alpha, \beta) = \mathcal{IG}(\alpha, \beta)$$

$$q_n | \mu_q, \Sigma_q, \sigma_n^2 \sim \mathcal{N}(\mu_q, \sigma_n^2 \Sigma_q), \quad \varphi_k | \eta \sim Dir(\eta)$$

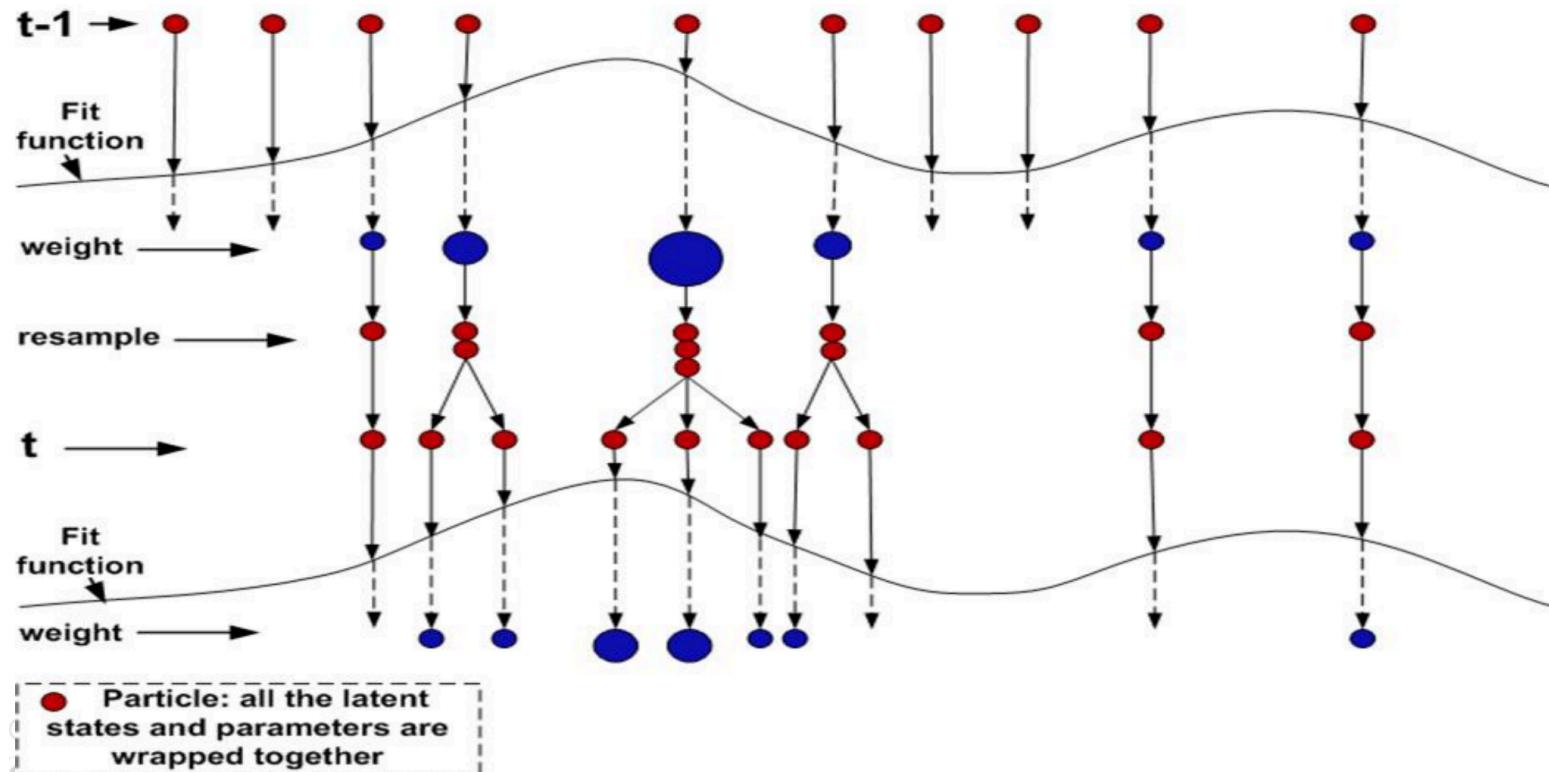
$$z_{m,t} | p_m \sim Mult(p_m), \quad x_{m,t} | \varphi_k \sim Mult(\varphi_k)$$

The predicted rating $\hat{r}_{m,t}$ can be inferred by

$$\hat{r}_{m,t} \sim \mathcal{N}(p_m^\top q_n, \sigma_n^2).$$

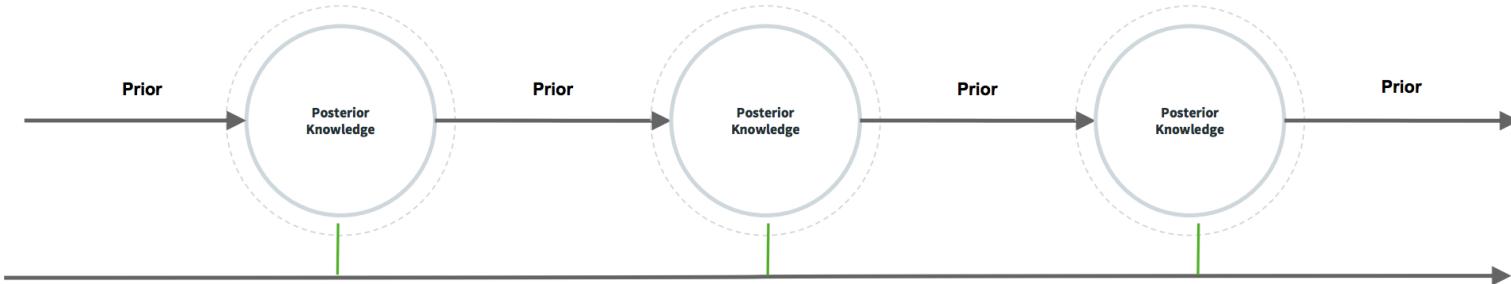
The graphical representation for ICTR model.

Online Inference of ICTR Model: Particle Learning



Online Inference of ICTR Model: Particle Learning

Definition 1 (Particle). A particle for predicting the reward $\hat{r}_{m,t}$ is a container that maintains the current status information for both user m and item $x_{m,t}$. The status information comprises of random variables such as p_m , σ_n^2 , Φ_k , q_n , and $z_{m,t}$, as well as the hyper parameters of their corresponding distributions, such as λ , α , β , η , μ_q and Σ_q .



Re-sample Particles with Weights

Let $\mathcal{P}_{m,n(t-1)}$ denote the particle set at time $t - 1$ and $\mathcal{P}_{m,n(t-1)}^{(i)}$ be the i^{th} particles given both ticket problem m and automation $n(t - 1)$ at time $(t - 1)$, where $1 \ll i \ll B$. Each particle has a weight, denoted as $\rho^{(i)}$, where $\sum_{i=1}^B \rho^{(i)} = 1$. **The fitness of each particle $\mathcal{P}_{m,n(t-1)}^{(i)}$ is defined as the likelihood of the observed data $x_{m,t}$ and $r_{m,t}$.** Therefore,

$$\rho^{(i)} \propto p(x_{m,t}, r_{m,t} | \mathcal{P}_{m,n(t-1)}^{(i)}).$$

As further deriving,

$$\rho^{(i)} \propto \sum_{z_{m,t}=1}^K \{N(r_{m,t} | p_m^T q_n, \sigma_n^2) E(p_{m,k} | \lambda) E(\varphi_{k,n} | \eta)\}$$

where $E(p_{m,k} | \lambda) = \frac{\lambda_k}{\sum_{k=1}^K \lambda_k}$ and $E(\varphi_{k,n} | \eta) = \frac{\eta_{k,n}}{\sum_{n=1}^N \eta_{k,n}}$ represent the conditional expectations of $p_{m,k}$ and $\varphi_{k,n}$ given the observed reward λ and η of $\mathcal{P}_{m,n(t-1)}^{(i)}$.

Latent State Inference

Provide with new observation $x_{m,t}$ and $r_{m,t}$ at time t , the random state $z_{m,t}$ can be any one of K topics. The posterior distribution of $z_{m,t}$ is shown as follows, where $\theta \in \mathcal{R}^K$:

$$z_{m,t} | x_{m,t}, r_{m,t}, \mathcal{P}_{m,n(t-1)}^{(i)} \sim Mult(\theta),$$

θ can be computed by

$$\theta \propto E(p_{m,k} | r_{m,t}, \lambda) \cdot E(\Psi_{k,n} | r_{m,t}, \lambda)$$

$$E(p_{m,k} | r_{m,t}, \lambda) = \frac{\mathcal{I}(z_{m,t} = k)r_{m,t} + \lambda_k}{\sum_{k=1}^K [\mathcal{I}(z_{m,t} = k)r_{m,t} + \lambda_k]},$$

$$E(\Phi_{k,n} | r_{m,t}, \eta) = \frac{\mathcal{I}(x_{m,t} = n)r_{m,t} + \eta_{k,n}}{\sum_{n=1}^N [\mathcal{I}(x_{m,t} = n)r_{m,t} + \eta_{k,n}]}.$$

Where $\mathcal{I}(\cdot)$ is an indicator function, returns 1 when the input Boolean expression is true and otherwise return 0.

Parameter Statistics Inference

Assume $\mu'_{\mathbf{q}'}, \Sigma'_{\mathbf{q}'}, \alpha', \beta', \lambda',$ and η' are the sufficient statistics at time t , which are updated on the sufficient statistics $\mu_{\mathbf{q}}, \Sigma_{\mathbf{q}}, \alpha, \beta, \lambda, \eta$ at $t-1$, and new observation data $x_{m,t}$ and $r_{m,t}$ at time t as follows.

$$\begin{aligned}\Sigma'_{\mathbf{q}_n} &= (\Sigma_{\mathbf{q}_n}^{-1} + \mathbf{p}_m \mathbf{p}_m^\top)^{-1} \\ \mu'_{\mathbf{q}_n} &= \Sigma'_{\mathbf{q}_n} (\Sigma_{\mathbf{q}_n}^{-1} \mu_{\mathbf{q}_n} + \mathbf{p}_m r_{m,t}) \\ \alpha' &= \alpha + \frac{1}{2} \\ \beta' &= \beta + \frac{1}{2} (\mu_{\mathbf{q}_n}^\top \Sigma_{\mathbf{q}_n}^{-1} \mu_{\mathbf{q}_n} + r_{m,t}^\top r_{m,t} - \mu_{\mathbf{q}_n}^\top \Sigma_{\mathbf{q}_n}'^{-1} \mu'_{\mathbf{q}_n}) \\ \lambda'_k &= \mathcal{I}(z_{m,t} = k) r_{m,t} + \lambda_k \\ \eta'_{k,n} &= \mathcal{I}(x_{m,t} = n) r_{m,t} + \eta_{k,n}\end{aligned}$$

At time t , the sampling process for the parameter random variables $\mathbf{q}_n, \sigma_n^2, \mathbf{p}_m, \Phi_k$ is summarized as below:

$$\begin{aligned}\sigma_n^2 &\sim \mathcal{IG}(\alpha', \beta'), \\ \mathbf{q}_n | \sigma_n^2 &\sim \mathcal{N}(\mu'_{\mathbf{q}_n}, \sigma_n^2 \Sigma'_{\mathbf{q}_n}), \\ \mathbf{p}_m &\sim Dir(\lambda'), \\ \Phi_k &\sim Dir(\eta').\end{aligned}$$

Integrate with Policies: Thompson sampling

Without new observation $x_{m,t}$ and $r_{m,t}$, the particle re-sampling, latent state inference and parameter statistics inference for time t , therefore, we utilize the latent vectors p_m and q_n sampled from their posterior distributions at time $t-1$ predicting the reward for each arm.

In our model, each item has B independent particles. Based on Thompson sampling, the policy select an arm $n(t)$ using the following equation:

$$n(t) = \arg \max_n (\bar{r}_{m,n}),$$

Where $\bar{r}_{m,n}$ denotes the average reward:

$$\bar{r}_{m,n} = \frac{1}{B} \sum_{i=1}^B \mathbf{p}_m^{(i)\top} \mathbf{q}_n^{(i)}.$$

Integrate with Policies: UCB

According to UCB policy, it select an arm $n(t)$ based on the upper bound of the predicted reward.
Assuming that

$$r_{m,t}^{(i)} \sim \mathcal{N}(\mathbf{p}_m^{(i)\top} \mathbf{q}_n^{(i)}, \sigma^{(i)2})$$

$$\bar{r}_{m,n} = \frac{1}{B} \sum_{i=1}^B r_{m,t}^{(i)}$$

the UCB is developed by the mean and variance of predicted reward.

$$n(t) = \arg \max_n (\bar{r}_{m,n} + \gamma \sqrt{\nu}),$$

where $\gamma \gg 0$ is a predefined threshold, and the variance is

$$\nu = \frac{1}{B} \sum_i \sigma^{(i)2}$$

ICTR Algorithms

Algorithm 2 The algorithms for ICTR model

```
1: procedure MAIN( $B$ )                                 $\triangleright$  Main entry.
2:   Initialize  $B$  particles, i.e.,  $\mathcal{P}_{m,n(0)}^{(1)} \dots \mathcal{P}_{m,n(0)}^{(B)}$ .
3:   for  $t \leftarrow 1, T$  do
4:     User  $m$  arrives for item recommendation.
5:      $n(t) = \arg \max_{n=1,N} \text{EVAL}(m, n)$  by Equation (5.24) or Equation (5.25).
6:     Receive  $r_{m,t}$  by rating item  $n(t)$ .
7:     UPDATE( $m, n(t), r_{m,t}$ ).
8:   end for
9: end procedure

10: procedure EVAL( $m, n$ )                          $\triangleright$  Get a rating score for item  $n$ , given user  $m$ .
11:   for  $i \leftarrow 1, B$  do                            $\triangleright$  Iterate on each particle.
12:     Get the user latent vector  $\mathbf{p}_m^{(i)}$ .
13:     Get the item latent vector  $\mathbf{q}_n^{(i)}$ .
14:     Predict  $i^{th}$  reward  $r_{m,t}^{(i)}$ .
15:   end for
16:   Compute the average reward as the final reward  $r_{m,t}$ .
17:   return the score.
18: end procedure

19: procedure UPDATE( $m, n(t), r_{m,t}$ )            $\triangleright$  Update the inference.
20:   for  $i \leftarrow 1, B$  do                       $\triangleright$  Compute weights for each particle.
21:     Compute weight  $\rho^{(i)}$  of particle  $\mathcal{P}_{m,n(t)}^{(i)}$  by Equation (5.17).
22:   end for
23:   Re-sample  $\mathcal{P}'_{m,n(t)}$  from  $\mathcal{P}_{m,n(t)}$  according to the weights  $\rho^{(i)}$ s.
24:   for  $i \leftarrow 1, B$  do                       $\triangleright$  Update statistics for each particle.
25:     Update the sufficient statistics for  $z_{m,t}$  by Equation (5.21).
26:     Sample  $z_{m,t}$  according to Equation (5.20).
27:     Update the statistics for  $\mathbf{q}_n, \sigma_n^2, \mathbf{p}_m, \Phi_k$  by Equation (5.22).
28:     Sample  $\mathbf{q}_n, \sigma_n^2, \mathbf{p}_m, \Phi_k$  by Equation (5.23).
29:   end for
30: end procedure
```

Experiment

➤ Data Set

Data Set	IBM Global IT Ticket	Data Set	Yahoo News	MovieLens (10M)
# ticket problems	1,091	#users	226,710	71,567
# automations	62	#items	652	10,681
# ratings	116,429	#ratings	280,410,150	10,000,054

➤ Evaluate Method

- Replayer method. [21]

Experiment

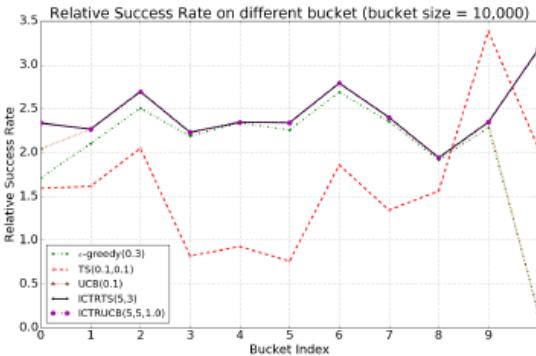


Fig. 1: The average RSR of IT ticket data is given along each time bucket. All algorithms shown here are configured with their best parameter settings.

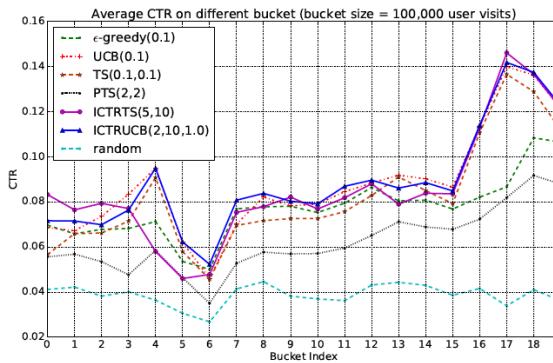


Fig. 2: The average CTR of Yahoo! Today News data is given along each time bucket. All algorithms shown here are configured with their best parameter settings.

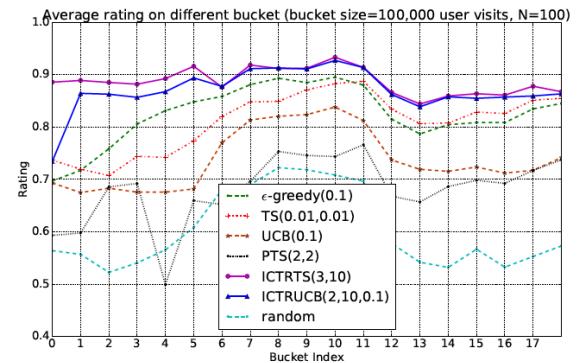


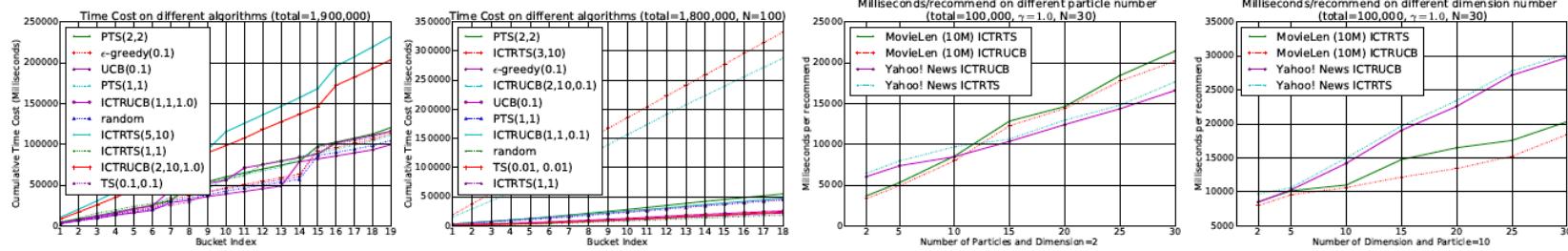
Fig. 3: The average rating of MovieLens (10M) data is given along each time bucket. All algorithms shown here are configured with their best parameter settings.

Experiment

TABLE 4: Average CTR/rating on two real world datasets.

Algorithm	Yahoo! Today News				MovieLens (10M)			
	mean	std	min	max	mean	std	min	max
ϵ -greedy (0.01)	0.06916	0.00312	0.06476	0.07166	0.70205	0.06340	0.60752	0.78934
ϵ -greedy (0.1)	0.07566	0.00079	0.07509	0.07678	0.82038	0.01437	0.79435	0.83551
ϵ -greedy (0.3)	0.07006	0.00261	0.06776	0.07372	0.80447	0.01516	0.77982	0.82458
ϵ -greedy (1.0)	0.03913	0.00051	0.03842	0.03961	0.60337	0.00380	0.59854	0.60823
UCB (0.01)	0.05240	0.00942	0.04146	0.06975	0.62133	0.10001	0.45296	0.73369
UCB (0.1)	0.08515	0.00021	0.08478	0.08544	0.73537	0.07110	0.66198	0.85632
UCB (0.5)	0.05815	0.00059	0.05710	0.05893	0.71478	0.00294	0.63623	0.64298
UCB (1.0)	0.04895	0.00036	0.04831	0.04932	0.63909	0.00278	0.60324	0.61296
TS (0.01, 0.01)	0.07853	0.00058	0.07759	0.07921	0.83585	0.00397	0.82927	0.84177
TS (0.1, 0.1)	0.07941	0.00040	0.07869	0.07988	0.83267	0.00625	0.82242	0.84001
TS (0.5, 0.5)	0.07914	0.00106	0.07747	0.08041	0.82988	0.00833	0.81887	0.84114
TS (1.0, 1.0)	0.07937	0.00079	0.07788	0.08044	0.83493	0.00798	0.82383	0.84477
PTS (2, 2)	0.06069	0.00575	0.05075	0.06470	0.70484	0.03062	0.64792	0.74610
PTS (2, 10)	0.05699	0.00410	0.05130	0.06208	0.65046	0.01124	0.63586	0.66977
PTS (5, 10)	0.05778	0.00275	0.05589	0.06251	0.63777	0.00811	0.62971	0.65181
PTS (5, 20)	0.05726	0.00438	0.05096	0.06321	0.62289	0.00714	0.61250	0.63567
PTS (10, 20)	0.05490	0.00271	0.05179	0.05839	0.61819	0.01044	0.60662	0.63818
ICTRTS (2, 5)	0.06888	0.00483	0.06369	0.07671	0.70386	0.15772	0.48652	0.85596
ICTRTS (2, 10)	0.06712	0.01873	0.03731	0.08487	0.56643	0.10242	0.42974	0.67630
ICTRTS (3, 10)	0.06953	0.00783	0.05857	0.07804	0.88512	0.00052	0.88438	0.88553
ICTRTS (5, 10)	0.08321	0.08236	0.08492	0.06292	0.55748	0.14168	0.38715	0.73404
ICTRTS (7, 10)	0.05066	0.00885	0.04229	0.06423	0.517826	0.07120	0.42297	0.59454
ICTRTS (7, 20)	0.04925	0.00223	0.04672	0.05285	0.61414	0.12186	0.44685	0.73365
ICTRUCB (2, 10, 0.01)	0.06673	0.01233	0.04588	0.08112	0.44650	0.06689	0.38678	0.53991
ICTRUCB (2, 10, 1.0)	0.08597	0.00056	0.08521	0.08675	0.86411	0.01528	0.85059	0.88547
ICTRUCB (3, 10, 0.05)	0.07250	0.00426	0.06799	0.07694	0.54757	0.13265	0.43665	0.73407
ICTRUCB (3, 10, 1.0)	0.08196	0.00296	0.07766	0.08530	0.57805	0.08716	0.46453	0.67641
ICTRUCB (5, 10, 0.01)	0.07009	0.00722	0.06411	0.08244	0.62282	0.02572	0.59322	0.65594
ICTRUCB (5, 10, 1.0)	0.08329	0.00140	0.08098	0.08481	0.80038	0.24095	0.29625	0.88554

Experiment



- (a) Cumulative time cost of different algorithms on MovieLens (10M) dataset (total=1,900,000).
(b) Cumulative time cost of different algorithms on MovieLens (10M) dataset (total=1,800,000, N=100).
(c) Time cost is given with different number of particles and dimension on MovieLens (10M) dataset (total=100,000, $\gamma=1.0$, N=30).
(d) Time cost is given with different number of latent feature vector dimensions on MovieLens (10M) dataset (total=100,000, $\gamma=1.0$, N=30).
Yahoo! Today News is given along each time bucket.

Fig. 4: Time cost comparison on both two datasets.

A Case Study on Ticket Data

- ICTR model can fully learns the latent feature vector of each automation.
- We are trying to categorize an automation named “process missing” using Euclidean distance.

UNCATEGORIZED AUTOMATION	process missing	
CATEGORIZED AUTOMATION	CATEGORY	EUCLIDEAN DISTANCE
(1) db2 percent db connection executing is to high automation	DATABASE	1.086
(1) process cpu spike automation	UNIX	1.014
(2) swap automation		0.858
(1) windows service automation	WINDOWS*	0.565*

An example of categorizing an automation.

A Case Study on MovieLens (10M)

Table 5.5: Movie topic distribution of MovieLens (10M).

Topic Cluster I			Topic Cluster II		
Movielid	MovieName	MovieType	Movielid	MovieName	MovieType
32	12 Monkeys	Sci-Fi,Thriller	344	Pet Detective	Comedy
50	Usual Suspects	Crime,Mystery,Thriller	588	Aladdin	Children,Animation,Comedy
590	Dances with wolves	Adventure,Drama,Western	595	Beauty and the Beast	Animation,Children,Musical
592	Batman	Action,Crime,Sci-Fi,Thriller	2857	Yellow Submarine	Adventure,Animation,Comedy,Musical

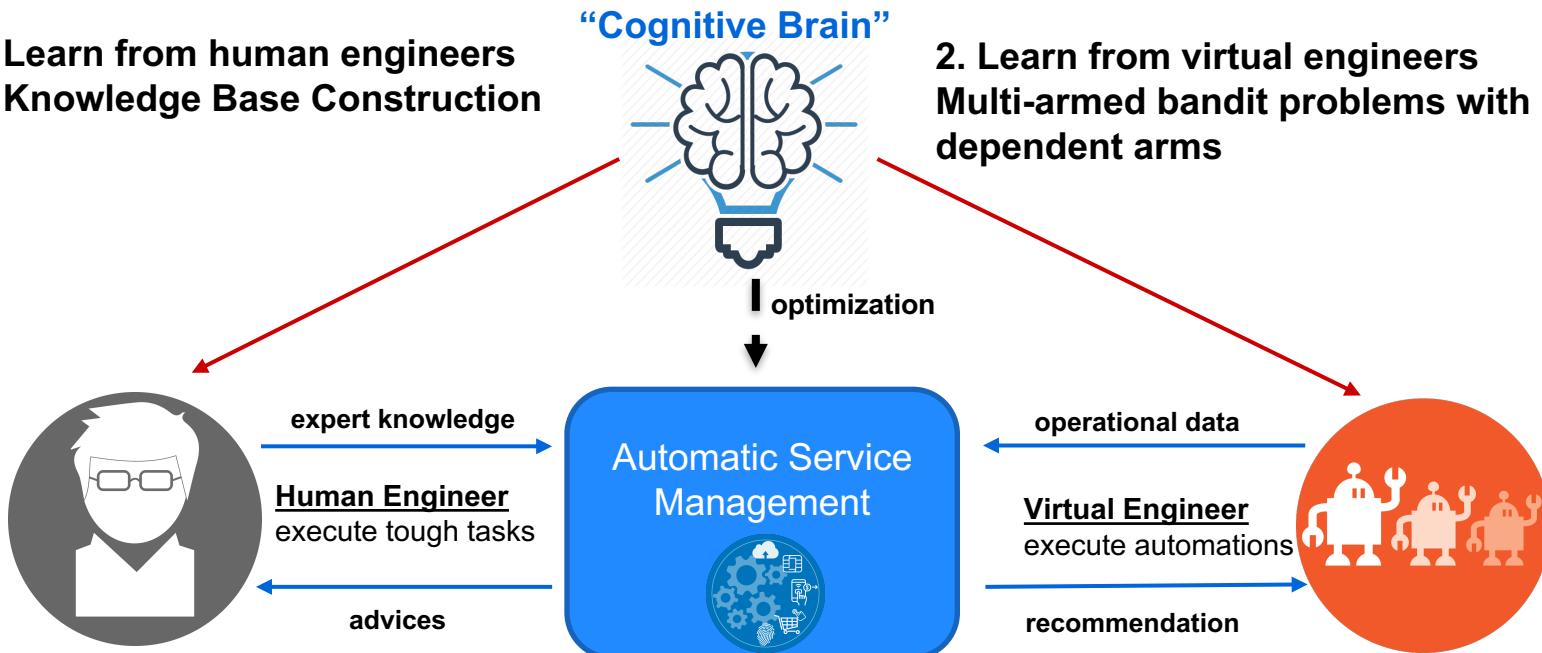
Summary of this section

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1. Wang, Qing, et al. "**Online interactive collaborative filtering using multi-armed bandit with dependent arms.**" *IEEE Transactions on Knowledge and Data Engineering* (2018).
2. Wang, Qing, et al, "**AISTAR: An Intelligent Integrated System for Online IT Ticket Automation Recommendation**", In Proceedings of the 6th annual IEEE International Conference on Big Data (IEEE Big Data 2018), Seattle, WA, USA 2018.

Summary

1. Learn from human engineers
Knowledge Base Construction



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Related Publications

1. **Qing Wang**, Chunqiu Zeng, S. S. Iyengar, Tao Li, Larisa Shwartz, Genady Ya. Graharnik, "AISTAR: An Intelligent Integrated System for Online IT Ticket Automation Recommendation", In Proceeding of the 6th annual IEEE International Conference on Big Data (IEEE Big Data 2018), Seattle, Washington, 2018.
2. **Qing Wang**, Wubai Zhou, Chunqiu Zeng, Tao Li, Larisa Shwartz, Genady Ya. Graharnik, "A Knowledge-Based Deep Ranking Model for Cognitive IT Service Management", In the IEEE Transactions on Service Computing (TSC) (submitted).
3. **Qing Wang**, Chunqiu Zeng, Wubai Zhou, Tao Li, S. S. Iyengar, Larisa Shwartz, Genady Ya. Graharnik, "Online Interactive Collaborative Filtering Using Multi-armed Bandit with Dependent Arms", In the IEEE Transactions on Knowledge and Data Engineering (TKDE).
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1. Wubai Zhou, Wei Xue, Ramesh Baral, **Qing Wang**, Chunqiu Zeng, Tao Li, Jian Xu, Zhen Liu, Larisa Shwartz, Genady Ya. Graharnik, "STAR: A System for Ticket Analysis and Resolution", In Proceeding of the 23rd annual ACM SIGKDD International Conference on Knowledge Discovery and Data Mining (KDD 2017), Halifax, Nova Scotia, Canada, 2017.
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Q & A

