

## Use And POC on AI Agents

In the Pega Infinity 25' version there are many changes that are being introduced when compared to last previous releases. There are new rules that are being introduced are AI Agents and Tool.

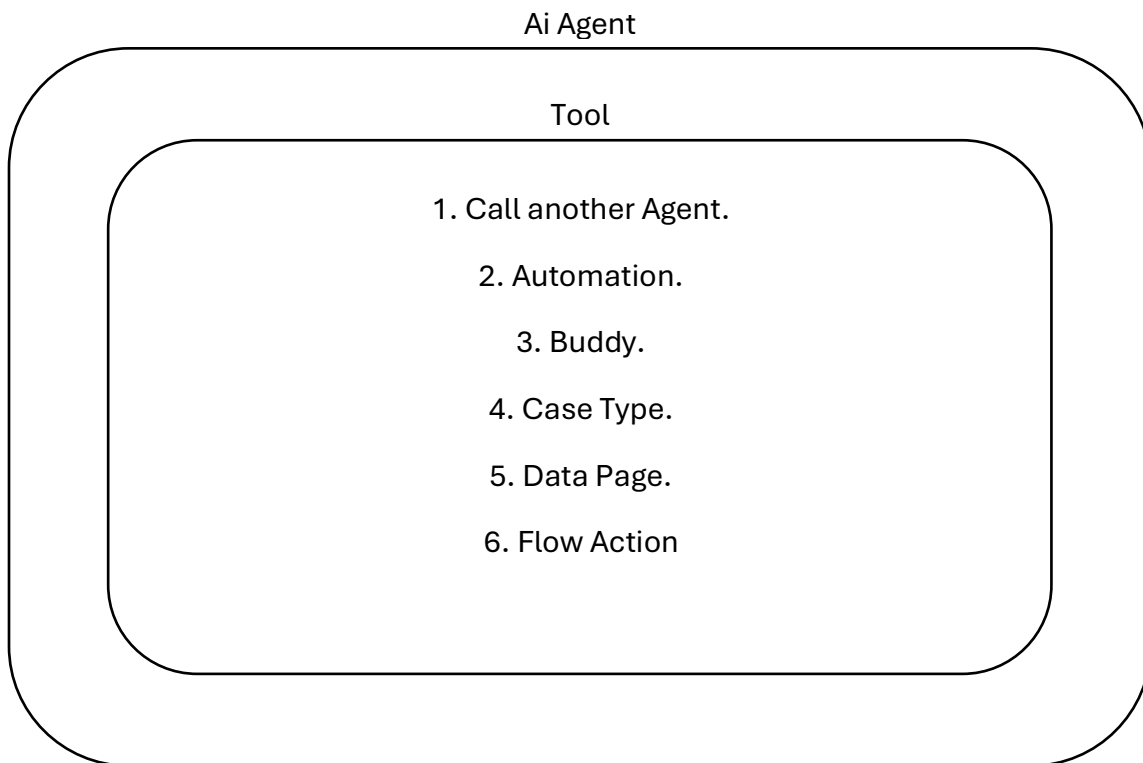
### **Ai Agents:**

This new rule is not just like an Ordinary Agent it has its own agenda and brain. And It does not come under AI Chatbot as well. Or this is not something like Gen Ai connect rule in pega.

### **Different Between traditional Agents and AI Agent Rule:**

<b>Traditional Agents</b>	<b>Gen AI Agent</b>
<ul style="list-style-type: none"><li>• Manual and reactive, executing a pre-defined activity based on the set schedule.</li><li>• Follows, static and pre - configured task.</li><li>• Performs simple and repetitive tasks.</li><li>• Security and access are defined through the group.</li><li>• Risk is minimal since the actions are preconfigured.</li></ul>	<ul style="list-style-type: none"><li>• Autonomous and proactive, able to plan and execute complex workflows, without human Interventions.</li><li>• Use Large Action models(LAMs) and generative AI to reason, learn and adapt to the situations.</li><li>• Performs End-to-end process with complex task and dynamically resolve the cases.</li><li>• Introduced for Workflows and auditability for transparency.</li><li>• Requires care management to mitigate risk like inaccuracy and Unpredictability.</li></ul>

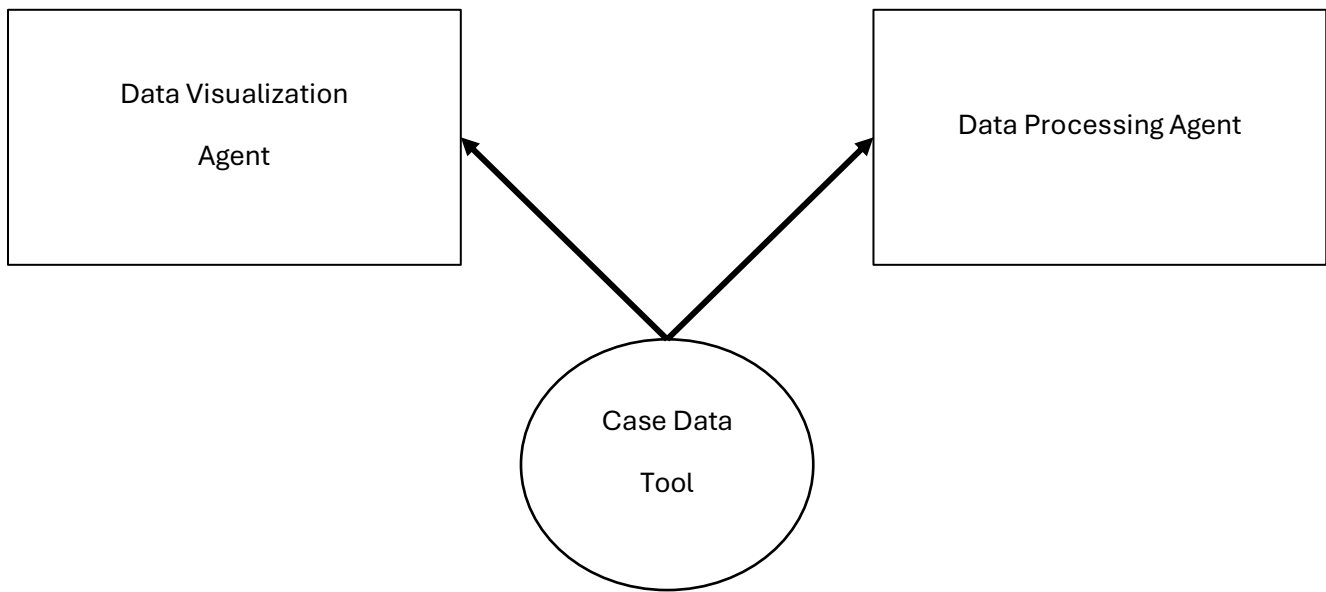
### Tasks that can be Performed by the AI Agent:



### Tool:

Agent rule and Tool rule are Interrelated. If we consider agent rule as frontend then tool rule is the Back end that does the work. We define what action should be done in the Tool rule and then How and When these rules should be executed is defined in the agent rule and how that task is also done is being defined in the Agent rule.

Why Pege introduced 2 different rules instead of introducing only one rule? The answer is simple for reusability since we can use the Tool rule only in the Agent rule. Where we can use One tool rule in different Agent and according to the System rules that are defined in the Agents, we can see different behaviors when different agents execute. Since We can use different AI for Different Agents.



## POC On Ai Agents

### Use Case:

The business wants to fetch the highest ordered Product category from the data type using AI Agent. Where the task is, we are going to tell AI agent that gives me the Highest ordered product Category in the Db and give an output.

### Steps:

1. First We are going to Create a Tool for giving the data to AI for Processing. Go to **Records>Generative AI>Tool**.

The screenshot shows the Pega application interface. On the left is a navigation menu with 'Records' selected. The main area displays a table titled 'Instances of Tool'. The table has columns for 'pyClassName\*', 'pyPurpose\*', 'RuleSet:Version', 'Updated on', and 'Updated by'. The table lists various tools created for different purposes, such as 'Test\_tL', 'pxChatWithYourData', 'pxCWDYDataPageTool', etc.

pyClassName*	pyPurpose*	RuleSet:Version	Updated on	Updated by
DHFC-DHF-Work-TravelPackage	Test_tL	MyPOC:01-01-04	10/29/2025 5:49 AM	Opr
@baseclass	pxChatWithYourData	Pega-GenAI:08-25-01	8/25/2025 4:08 AM	Administrator
@baseclass	pxCWDYDataPageTool	Pega-GenAI:08-25-01	8/20/2025 2:51 AM	Administrator
@baseclass	pxConfiguredCaseTypes	Pega-ProcessEngine:08-25-01	7/31/2025 10:47 AM	CB Admin
@baseclass	pxPostToPulse	Pega-GenAI:08-25-01	6/18/2025 4:53 AM	Administrator
@baseclass	pxGetAssignmentDetailsForEmailClassification	Pega-ProcessEngine:08-25-01	6/18/2025 2:48 AM	CB Admin
@baseclass	pyKnowledgeBuddy	Pega-ProcessEngine:08-25-01	6/3/2025 9:06 AM	Likitha Bandi
Pega-Ext-ExpExplorer-Data-DataModel	pxCreateData TypeBP	Pega-GenAI:08-25-01	6/2/2025 9:18 AM	Squid Local Developer
@baseclass	pxPerformAssignment	Pega-GenAI:08-25-01	5/12/2025 10:47 PM	praveen vellaturi
@baseclass	pxGetAssignmentDetails	Pega-GenAI:08-25-01	5/12/2025 10:47 PM	praveen vellaturi
@baseclass	pxCreateCaseTool	Pega-GenAI:08-25-01	5/12/2025 10:47 PM	praveen vellaturi
Work-	pyChangeCaseStage	Pega-GenAI:08-25-01	5/9/2025 10:30 AM	Aniket Khalasi
@baseclass	pxCreateCaseFromEmail	Pega-ProcessEngine:08-25-01	5/7/2025 8:31 AM	Chalthanya Cholleti
Pega-Ext-ExpExplorer-Data-DataModel	pxReadOASFromURL	Pega-GenAI:08-25-01	4/29/2025 4:17 AM	Squid Local Developer
Pega-Ext-ExpExplorer-Data-DataModel	pxKnownOASServices	Pega-GenAI:08-25-01	4/29/2025 4:17 AM	Squid Local Developer
Work-	pySendEmailWithAttachments	Pega-GenAI:08-25-01	4/25/2025 6:42 AM	Suvarchala
Work-	pyPostToPulse	Pega-GenAI:08-25-01	4/25/2025 6:42 AM	Suvarchala
Work-	pyGetPulseDetails	Pega-GenAI:08-25-01	4/25/2025 6:42 AM	Suvarchala
Work-	pyGetCaseHistory	Pega-GenAI:08-25-01	4/25/2025 6:42 AM	Suvarchala
Work-	pyGetCaseData	Pega-GenAI:08-25-01	4/25/2025 6:42 AM	Suvarchala
Work-	pxGetSendEmailPDF	Pega-GenAI:08-25-01	4/25/2025 6:42 AM	Suvarchala

## 2. Creating a rule named "Give Orders" in the version 01-01-03.

Create Tool

?

Cancel

Create and open

Tool Record Configuration

Label\*

Give Orders

A short description or title for this record

Identifier

GiveOrders

Edit

Context

☒ DHF

☐ Constellation UI

☐ Pega Platform

Apply to\*

DHFC-DHF-Work-TravelPackage

View all

Add to ruleset\*

MyPOC

01-01-03

Current work item

Associated workitem

Select...

C

## 3. In the General Tab where we are going to give instructions and Description of the task that tool is going to perform and give the output for User information.

Tool: Give Orders [Available]

CL: DHFC-DHF-Work-TravelPackage

ID: GiveOrders

RS: MyPOC:01-01-03

Save as

▼

Delete

Actions

Check out

×

General

Action

Parameters

History

Description \*

?

Get the Highest Ordered product Category

Example phrases \*



?


Give me the highest ordered Category


What is the Ordered category

+ Add example

4. There is Example Phrases that we going to give to the user most options to express this tool by user. We have given it 2 different pharases.

Example phrases  


Give me the highest ordered Category 

What is the most Ordered category 

[+ Add example](#)

5. Next, in the Action tab where we are going to configure the task that this Tool.  
In the **Category** We have multiple Options where there are many options :

**Edit Tool: Give Orders [Available]**



**CL:** DHFC-DHF-Work-TravelPackage  **ID:** GiveOrders **RS:** MyPOC:01-01-03


General


Action


Parameters


History


Category  

Data Page 

☒ Ask for confirmation 

Rule name 





General
Action
Parameters
History

Category
★
?

Data Page
▼

Agent
Automation
Buddy
Case Type
Data Page
Flow Action

?

<b>Agent</b>	Calling another Agent.
<b>Automation</b>	Perform an Automated action.
<b>Buddy</b>	Integrating the Knowledge Buddy with the Agent using the Tool.
<b>Case type</b>	Select the Case type that an Agent can pick and create a case automatically.
<b>Data Page</b>	You can use Data Pages to retrieve lists of items, such as a list of transactions, a list of followers of a given Case, and so on.
<b>Flow Action</b>	To run a User Action.

There is a check box named “**Ask for confirmation**” this is used whether we need a confirmation before performing the task or not. We are checking this checkbox.

Category ★ ?

Data Page ▼

☒ Ask for confirmation ?

Rule name \*

6. Now in the Rule Name We are going to provide Data page of D\_orderlist and Saving the rule.

Category ★ ?

Data Page ▼

☒ Ask for confirmation ?

Rule name \*

D\_OrdersList

No Parameters

7. After the creation of tool rule and we are going to create an agent rule. Go to the **Records>Generative AI>Agents.**

Records	Home Tool Agent				
	Instances of Agent				
	Class Name*	Purpose*	RuleSet:Version	Updated on	Updated by
Application Definition	@baseclass	pxChatWithYourData	Pega-GenAI:08-25-01	8/20/2025 2:51 AM	Administrator
Data Model	Data-GenerativeAI-Channel-Email	pxEmailClassificationAssistant	Pega-ProcessEngine:08-25-01	8/4/2025 9:19 AM	CB Admin
Decision	@baseclass	pzCWYDAssistant	Pega-GenAI:08-25-01	7/4/2025 1:13 AM	Sahithi Darnam
Generative AI					
Agent					
GenAI Coach					
GenAI Connect					
Tool					
Integration-Connectors					
Integration-Mapping					
Integration-Resources					
Integration-Services					
Organization					
Process					
Reports					
Security					

8. Created an Agent rule named as “Order Info” in the same class as Case type that we are going to refer.

**Create Agent** ? Cancel Create and open

**Agent Record Configuration**

Label\* Order Info Identifier OrderInfo Edit  
A short description or title for this record

**Context**

☒ DHF ☐ Constellation UI ☐ Pega Platform

Apply to\* DHFC-DHF-Work-TravelPackage Add to ruleset\* MyPOC 01-01-03

CASES  
DHFC-DHF-Work-TravelPackage Travel Package

**Current work item**

Associated workitem  
Select...

9. There are Three different Prompt areas in the first tab.

**Agent: Order Info [Available]** CL: DHFC-DHF-Work-TravelPackage ID: OrderInfo RS: MyPOC:01-01-03 Save as Delete Actions Check out

Definition Case Types Knowledge Advanced Tools Settings History

**Instructions** Generate Instructions

**Agent instructions**

Format B I U Ix

**Guardrails**

Format B I U Ix

**Response Style & Tone**

Format B I U Ix



Instructions

Re-generate Instructions


Agent instructions

Format


**B**

*I*

U



*I*<sub>x</sub>



Purpose and Responsibilities

The Order Info agent is designed to process order details and identify the product category with the highest order count. Its primary role is to analyze the provided data records, aggregate the order information, and determine the "PType" (product type) with the greatest number of orders.

Functionality

- Receive and process order data records containing information such as order ID, product type, and order count.
- Analyze the order data to identify the product category with the highest cumulative order count across all records.
- Provide the "PType" (product type) that has the maximum number of orders as the output.


Guardrails

Format


**B**

*I*

U



*I*<sub>x</sub>




Response Style & Tone

Normal


**B**

*I*

U



*I*<sub>x</sub>



|

The three text areas are having different purposes where:

### Agent Instructions:

We are going to provide a detailed description of what this agent is supposed to work on and what needs to be given output.

In the top we have button “Generate Instructions” when clicked the instructions are generated automatically according to the Tool that is being provided as input in Agent.

## Guardrails:

Providing the Strict info to Ai for the Security purpose where it should not provide inappropriate answers and an output that is not expected.

**Response Style & Tone:**

This area is where the output should be presented and the tone and format of the response of AI.

10. If we go further down, we will be able to see some more options where we have quickly selected a question we can define and its instructions.

Additional Context

Configure Data Pages to fetch dynamic data during Agent initialization and include it in the Agent's instructions. Avoid adding too much information, as it can slow responses or exceed token limits. Only include what the Agent truly needs.

Name

Data page

No items

+ Add Data Page

Guided Questions

Pre-configure questions to enhance user interactions with the Agent.

Starter Question

Configure an initial question to be asked as soon as the Agent is launched.

Question

Additional Instructions

Quick-Select Question

Configure the questions or instructions that users can choose at any time during their interaction with the Agent.

Question

Additional Instructions

No items

We even have an option where we have an additional context exactly; we can provide data pages as an input for providing Agent Instructions dynamically.

11. We have Different tabs for different purposes in this rule if we go to Case type tab. Where we are going to provide a Tool which is going create a case for us.

Agent: Order Info [Available]

CL: DHFC-DHF-Work-TravelPackage ID: OrderInfo RS: MyPOC:01-01-03

Definition

Case Types

Knowledge

Advanced Tools

Settings

History

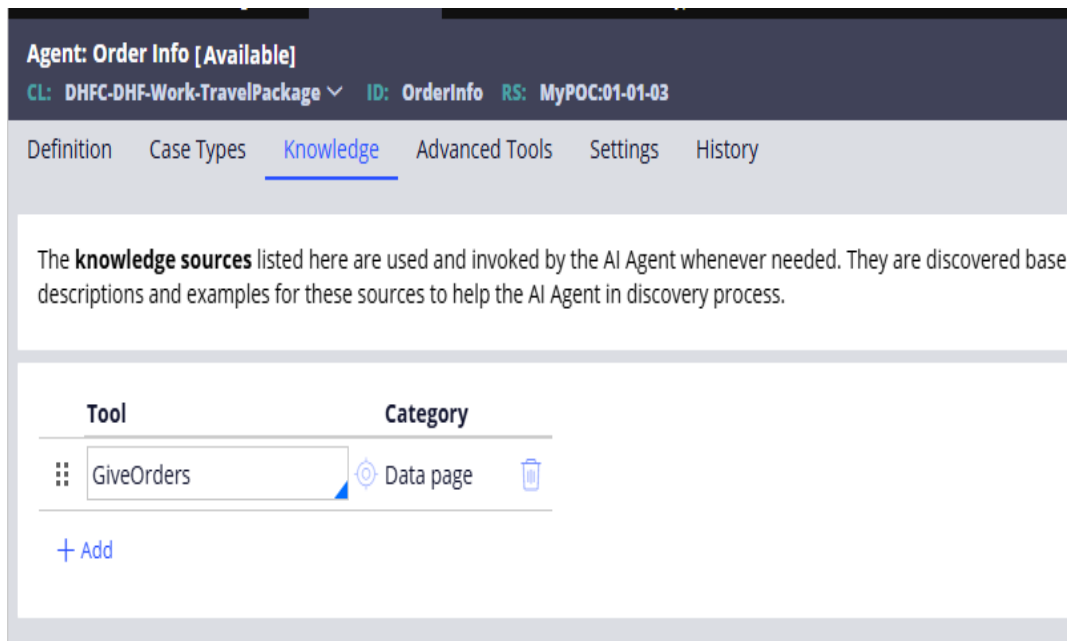
The Case Type sources listed here are used and invoked by the AI Agent whenever needed. They are discovered based on the user's question, descriptions and examples for these sources to help the AI Agent in discovery process.

Tool

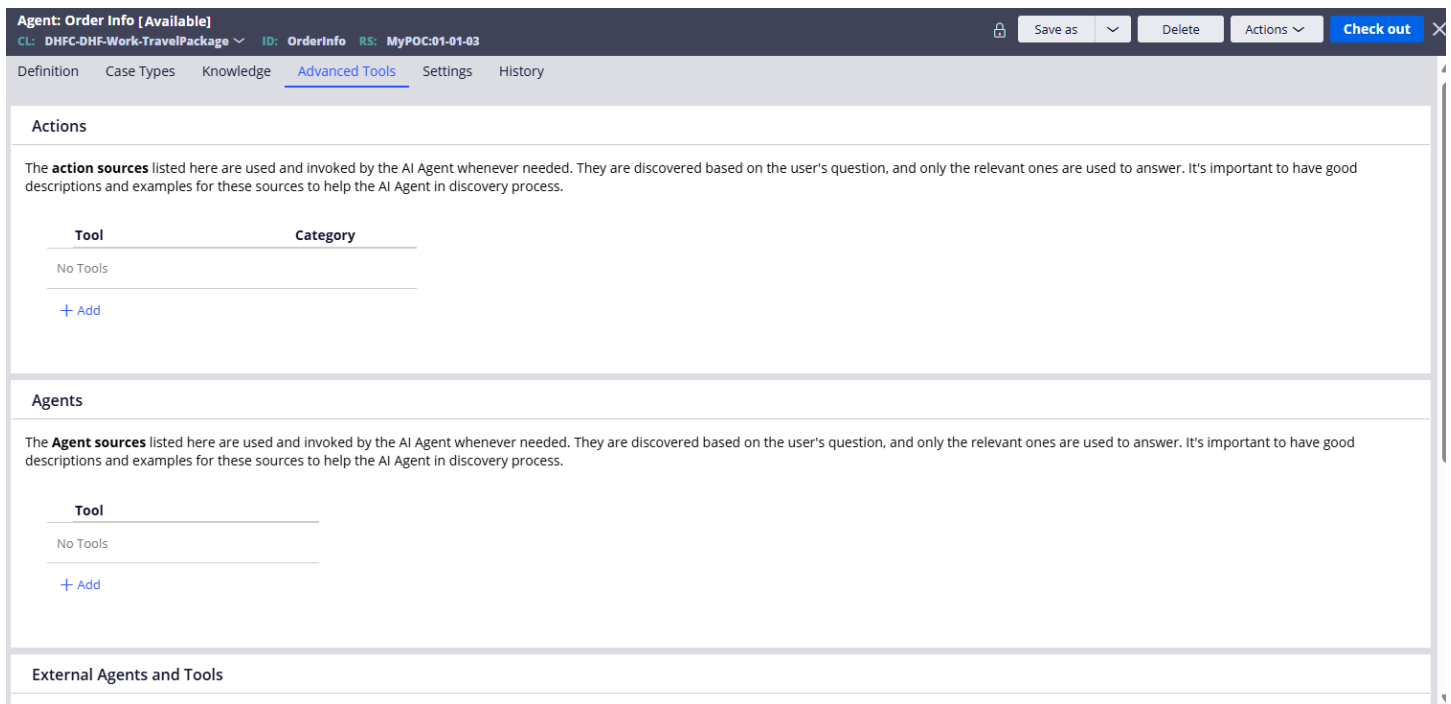
No Tools

+ Add

12. Next Knowledge tab where we are going provide the data as an input for the Agent to process and give an output. In this one we are going to provide our created Tool.



13. In Advanced Tools, we have options that are being used for specific purposes.



## Actions:

All the tools for the automation are being referred to under this tab and being used.

### Agents:

Call for another agent.

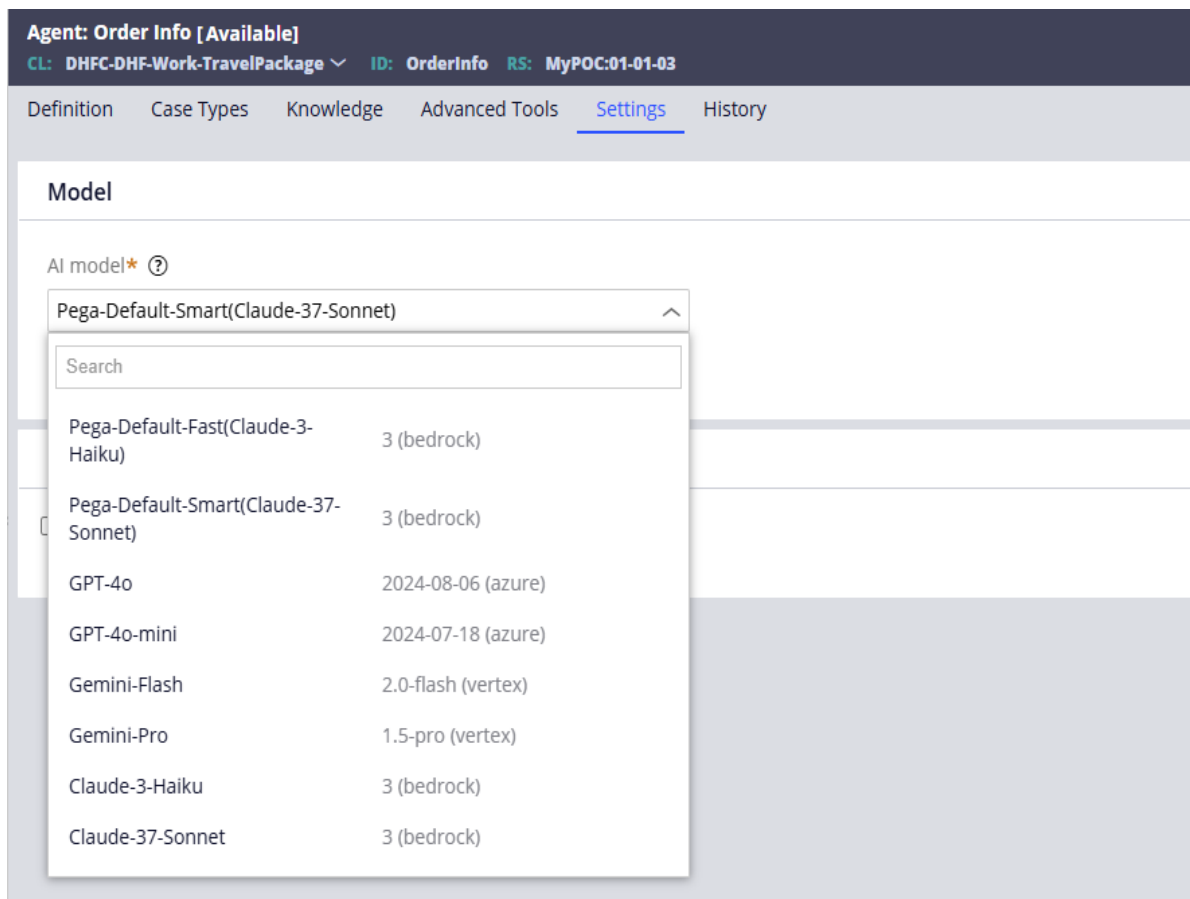
### External Agents and Tools:

Call an external agent

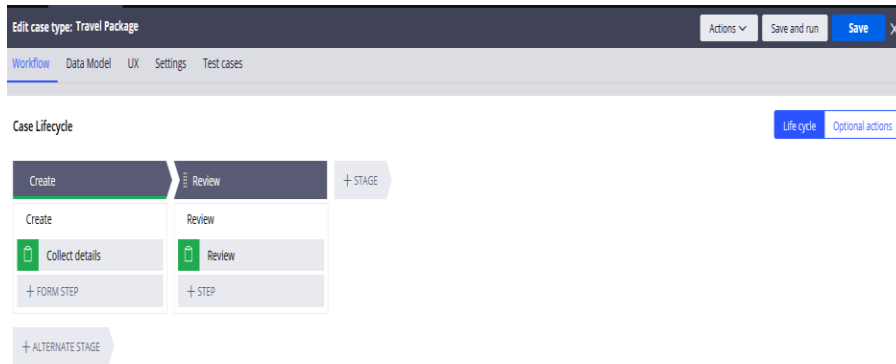
### Model Context protocol(MCP):

Calling an MCP Connect rule through tool rule.

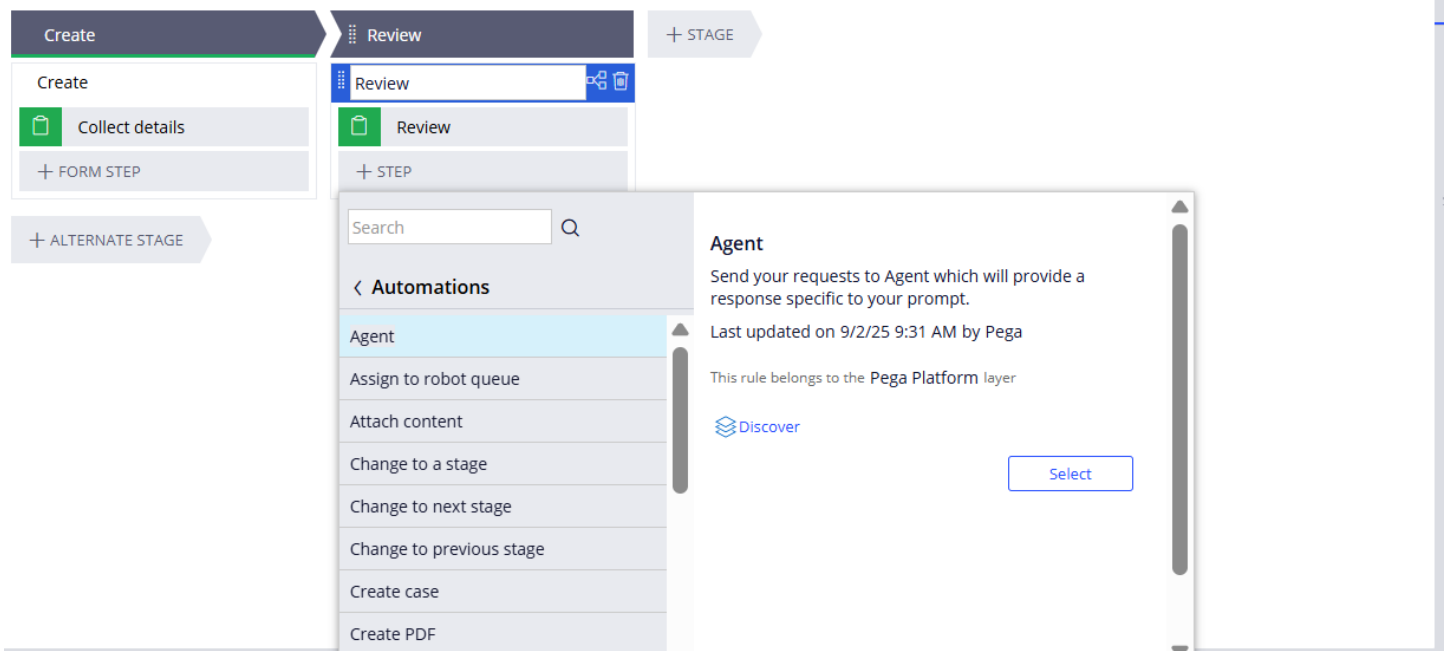
14. In the Settings tab, we can get an option to specific AI Model. Now we are selecting pega default AI.



15. Now we go the Case type and then in the Review stage and then Add our Gen AI Agent Step which is under automation.



#### Case Lifecycle



Case Lifecycle

Life cycle Optional actions

Create

Create

Collect details

+ FORM STEP

Review

Order Info

Review

+ STEP

+ STAGE

+ ALTERNATE STAGE

Step

Agent \*

Input message \*

Output message \*

Audit note

☐ Enable navigation link

16. Provide the Agent name and input and Output of the property where the prompt is going the map.

Case Lifecycle

Life cycle Optional actions

Create

Create

Collect details

+ FORM STEP

Review

Order Info

Review

+ STEP

+ STAGE

+ ALTERNATE STAGE

Step

Agent \*

OrderInfo

Input message \*

.DescribeSpot

Output message \*

.AIDescribeResponse

Audit note

☐ Enable navigation link

17. Now saving the case type and running the case and provided the required details and giving the prompt in the DescribeSpot field.

Create Travel Package (T-1114)

Travel Package

Description

Discover the rich cultural heritage and stunning natural beauty of this destination.

Traveler Details

Name

John Doe

Aadhaar Id

123,456,789

Age

35

Country

India

Describe Spot

What is the most ordered Product type

Cancel

✦ Fill form with AI

Submit

18. The Output is going to be mapped to the **AI Order Response** and we can see the output of the Ai Agent and it performed the action for us.

Create

Review

Review

Assigned to Opr • In T-1116 • Urgency 10

Review describe

AI Order Response

Based on the order data analysis, I can tell you that the most ordered product type is "Clo" (Clothing), with 4 orders. Here's the breakdown of product types by order count: - Clothing (Clo): 4 orders - Household Appliances (HusApl): 4 orders - Groceries (Gro): 3 orders - Personal Care (Prc): 3 orders - Kitchen (Kit): 2 orders - Electronics (Ele): 1 order Both Clothing and Household Appliances have the same number of orders (4 each), but Clothing appears to be listed first in the results when sorted by frequency.

Cancel

Fill form with AI

Save for later

Submit

Details

Label

Travel Package

Description

Discover the rich heritage and natural beauty of this captivating country.

## Note:

If you want to trace the rules, we can enable the Gen AI in tracer settings.

