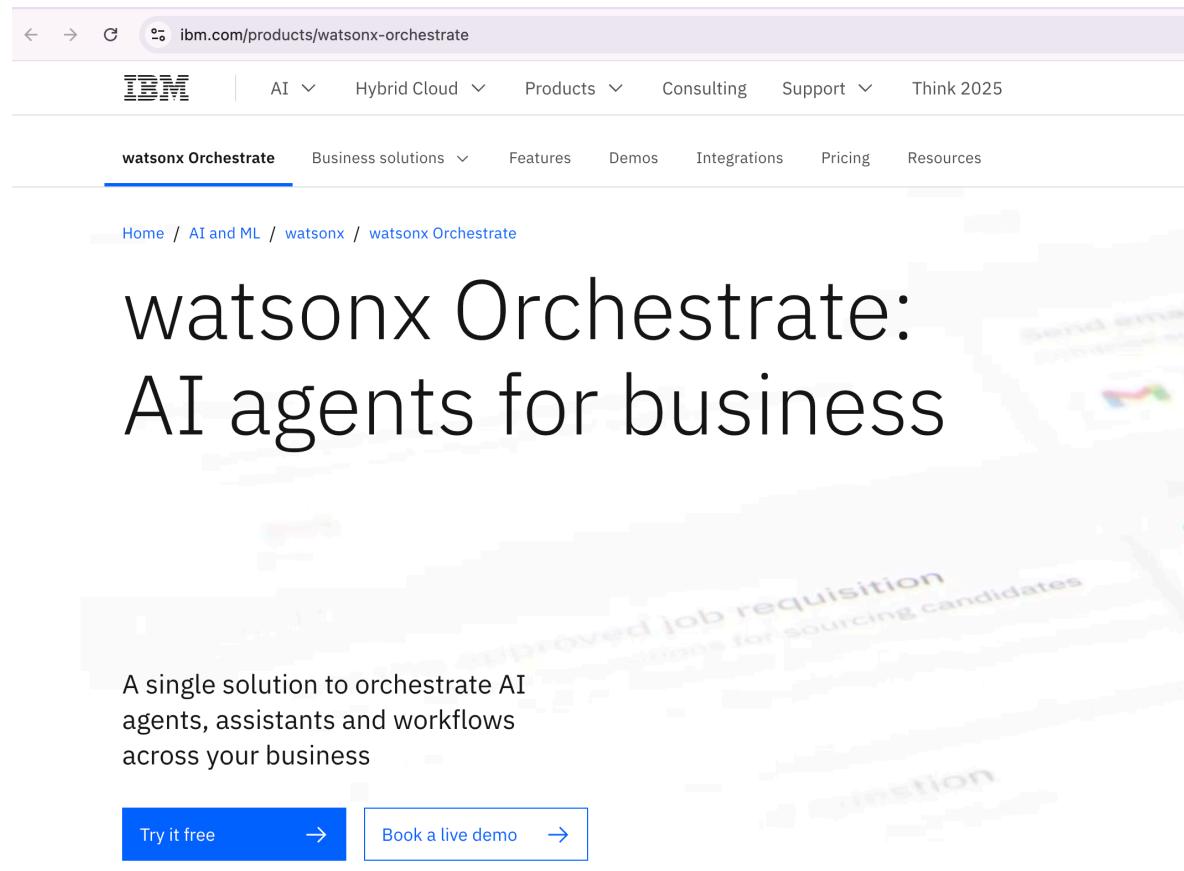


## Step 1 : Create a Watsonx Orchestrate Trial instance

1) Navigate to Product page:

<https://www.ibm.com/products/watsonx-orchestrate> and click on the link “Try it Free”



2) It opens a URX form : <https://www.ibm.com/account/reg/us-en/signup?formid=urx-52753>

Enter the details in the page: **Business email, Password, First Name, Last Name, Country** and **Company** and click the button Next

The screenshot shows the IBM Watsonx Orchestrate trial sign-up page. On the left, there's a sidebar with three sections: 'Build AI agents in minutes' (with a build icon), 'Leverage your existing investments' (with a gear icon), and 'Deliver a next-gen user experience' (with a user icon). The main content area has a heading 'Register for your trial' and a sub-section 'Account information'. It includes fields for 'Business email' (with a placeholder 'Your email address will become your IBMid, which you'll use to log into IBM.com.'), 'First name', 'Last name', 'Country or region of residence' (set to 'India'), and 'Company'. Below these fields is a note about sharing guidance during the trial. At the bottom of the form are 'Next' and 'Verify email' buttons.

3) Fill the verification code received in the email and click Submit button.

#### Verify email

We emailed a 7 digit code to **agentdemo123@yopmail.com**  
This code will expire in 30 minutes.

Verification token

8447164

Didn't receive the email? Check your spam filter for an email from  
ibmacct@iam.ibm.com.

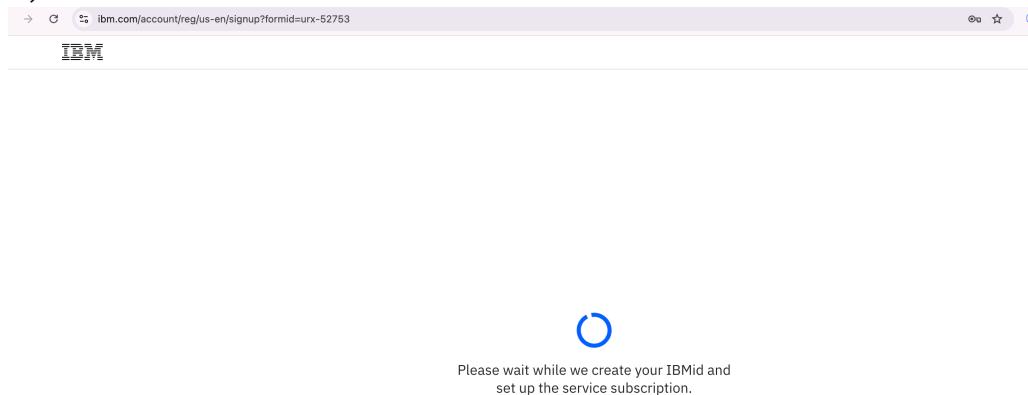
You can resend the verification token in **21** seconds

I'd like IBM to use my contact details to keep me informed about products, services, and offers. More information on how IBM uses data and ways to [opt-out](#) can be found in the [IBM Privacy Statement](#).

I accept the product [Terms and Conditions](#).

**Submit**

#### 4)Wait until an IBM-id is created



5)Select the region and Region as - **N. Virginia (us-east-1)** , any **instance name** (say -demowxo) and click create button.

#### Create instance

Create an instance in the current subscription.



### watsonx Orchestrate

IBM watsonx Orchestrate is a cloud-based platform, running on AWS, that helps companies empower their employees to change the nature of day-to-day work.

#### Instance information

Cloud Provider  
AWS

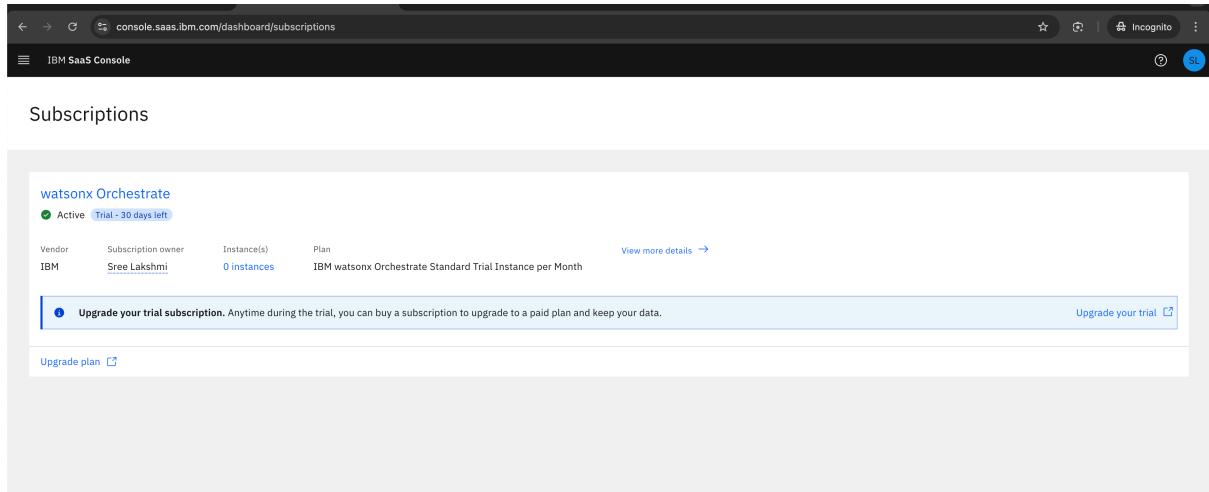
Region (i)

N. Virginia (us-east-1) ▾

Instance name (i) 8/25

demo-wxo

6)In case you are redirected to the following intermediate page, click on **0 instances** link.



watsonx Orchestrate  
Active Trial - 30 days left

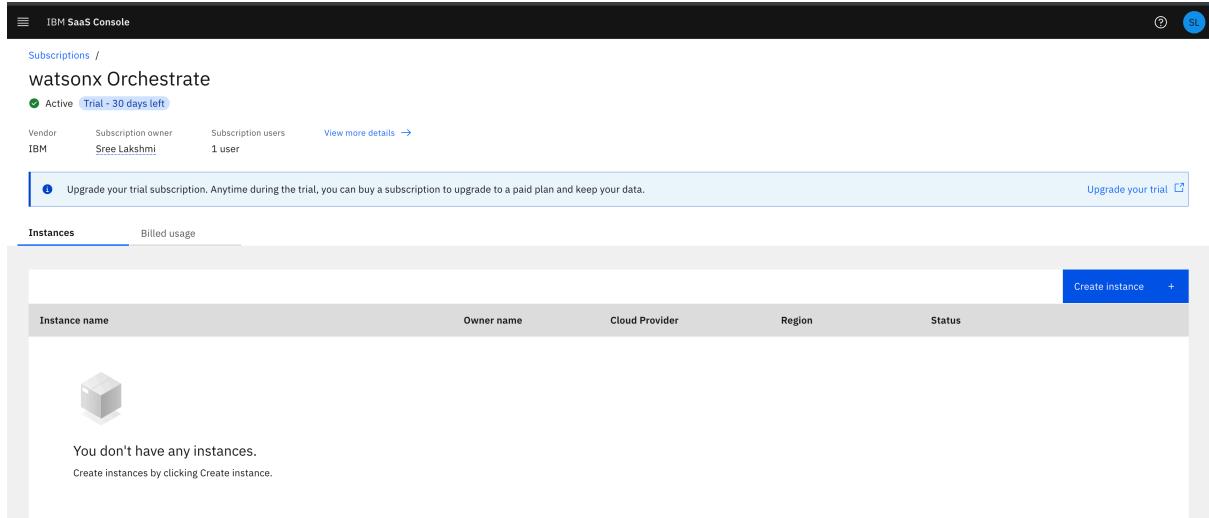
Vendor IBM Subscription owner Sree Lakshmi Instance(s) 0 instances Plan IBM watsonx Orchestrate Standard Trial Instance per Month

View more details →

Upgrade your trial subscription. Anytime during the trial, you can buy a subscription to upgrade to a paid plan and keep your data. Upgrade your trial ↗

Upgrade plan ↗

7)Click **Create instance** button.



Subscriptions / watsonx Orchestrate  
Active Trial - 30 days left

Vendor IBM Subscription owner Sree Lakshmi Subscription users 1 user

View more details →

Upgrade your trial subscription. Anytime during the trial, you can buy a subscription to upgrade to a paid plan and keep your data. Upgrade your trial ↗

Instances Billed usage

Create instance +

Instance name	Owner name	Cloud Provider	Region	Status

You don't have any instances.  
Create instances by clicking Create instance.

8)As mentioned in step 6 above, Select the Region as - **N. Virginia (us-east-1)**, enter any instance name (say -demowxo) and click create button.

9)Click launch to access the trial instance.

Subscriptions / watsonx Orchestrate

Active Trial - 30 days left

Vendor: IBM Subscription owner: Sree Lakshmi Subscription users: 1 user View more details →

Instances Billed usage

Instance name	Owner name	Cloud Provider	Region	Status
demowxo	agentdemo123@yopmail.com	AWS	us-east-1	● Running Launch

**Note :** You can also login to trial instance from the login link received in your email or the URL : <https://dl.watson-orchestrate.ibm.com/>

## Step 2 : Create your first Agent

1) Click Create new agent link in the bottom.

IBM watsonx Orchestrate | New chat | AI

No agents available.  
Create or Deploy an agent to enable selection.

New chat

9:07 PM

Hello, welcome to watsonx Orchestrate.

Accuracy of generated answers may vary. Please double-check responses.

Create new agent Manage agents

2) Select Create from scratch option. Enter **Name** as **Hotel Booking Agent**. Give a detailed description regarding the purpose of this agent

You are an AI Agent that helps the user to look for

- Search the major cities in a country
- Get the weather info pertaining to a city of the users choice
- Get the hotels in that city through collaborator agent
- Book hotels per the user requirements through collaborator agent

Do not execute repeated tools

I want the response in Form structure rather than plain JSON

### 3) Click **Create** button

### Create an agent

Create from scratch

Build your custom agent step by step to create a custom solution.

Create from template

Browse the catalog and use the attributes of another agent as a template to create your agent.

Name\*

Description\*

You are an AI Agent that helps the user to look for

- Search the major cities in a country
- Get the weather info pertaining to a city of the users choice
- Get the hotels in that city through collaborator agent
- ~~- Book hotels per the user requirements through collaborator agent~~

Describe your agent's purpose.

Cancel

**Create**

### 4) Navigate to Toolset section and click Add tool.

Profile

Knowledge

**Toolset**

Behavior

**Toolset**

Add tools and other agents to help your agent take action.

**Tools**

Give your agent access to your organization's tool to help it accomplish tasks.

Add tool +



Start by adding a tool

To add a tool, click Add tool.

5)Select Import and upload the file : list\_hotels\_location.json

Add a new tool Close X

 Add from catalog <p>Choose from a catalog of existing tools</p>	 Add from local instance <p>Choose from a list of tools available on this instance.</p>
 Import <p>Import an external tool.</p>	 Create a new tool <p>Use the tool builder to create a new tool.</p>

## Import tool

Upload file Select operations

Upload an OpenAPI specification file.  
Max file size is 500 KB. Supported file types are json, yml and yaml

Drag and drop OpenAPI files here or click to upload.

Import tool

Cancel Next

Operations

<input checked="" type="checkbox"/> Name	Method	Description
<input checked="" type="checkbox"/> Get list of hotels in a city	POST	Takes a city as input and returns 5 randomly generated premium hotels.

Items per page: 10 1–1 of 1 items 1 of 1 page < >

Cancel Done

Click Done after selecting the checkbox.

6) Repeat the same steps (4 and 5) for second file :  
:hotel\_booking\_confirmation.json

7) Try if the agent is working with a sample prompt - Provide me the best hotels in Mumbai

8) Click the button- Deploy to publish the agent as Live.

Agent chat / Manage agents / Hotel Booking Agent

Hotel Booking Agent

**Profile**

**Knowledge**

**Toolset**

**Behavior**

**Behavior**  
Define how and where your agent should react to requests and respond to users.

Instructions  
Ex: Answer customer questions on return and cancellation policies with clear, friendly responses, referencing policy details, and escalating complex cases as needed

Specify what your agent should do, how it should respond and any restrictions it should follow.

**Channels**  
Define where users can chat with this agent

Show agent ⓘ  
Enable your team to chat directly with this agent on the chat homepage

Deploy AI

**Preview**

You 11:07 PM 1

watsonx 11:07 PM What is your hotel choice?

You 11:08 PM Provide me the best hotels in Mumbai

watsonx 11:08 PM | Show Reasoning ▾ Here are some hotels in Mumbai.

1. Elegant Empire - 297 Emerald Lane, Mumbai - 0351161627 - ₹14,094  
2. Opulent Palace - 741 Golden Circle, Mumbai - 7719795766 - ₹10,646  
3. Tranquil Gardens - 423 Emerald Lane, Mumbai - 2557959800 - ₹11,000  
4. Grand Retreat - 733 Sapphire Drive, Mumbai - 3298675187 - ₹14,813  
5. Elegant Haven - 473 Palm Street, Mumbai - 5656805020 - ₹16,414

WatsonX

Type something... ➤

## Step 3: Create your Expert Agent

1) Repeat the same steps to create an agent with agent name **Travel Agent** and the following description -

You are an AI Agent that helps the user to look for  
 - Get the hotels in a city of user's choice  
 - Book hotels per the user's requirements  
 Do not execute repeated tools  
 I want the response in Form structure rather than plain JSON

Agent chat / Manage agents / Travel Agent

Travel Agent

**Profile**

**Knowledge**

**Toolset**

**Behavior**

**Description**  
You are an AI Agent that helps the user to look for  
- Get the hotels in a city of user's choice  
- Book hotels per the user's requirements  
Do not execute repeated tools  
I want the response in Form structure rather than plain JSON

**Preview**

11:15 PM

Hello, welcome to watsonx Orchestrate.

Accuracy of generated answers may vary. Please double-check responses.

2) Import the following tools in this agent

Country\_code.JSON  
cities\_api.json  
Country\_info.JSON  
weather\_info\_demo.json  
weather\_forecast\_week.json

The screenshot shows the IBM Watsonx Orchestrate interface for managing agents. On the left, there's a sidebar with sections for Profile, Knowledge, Toolset (which is selected), and Behavior. The main area displays a list of imported tools under the 'Tools' section. Each tool entry includes a small icon, the name of the operation, and a brief description. To the right, there's a preview window showing a welcome message: "Hello, welcome to watsonx Orchestrate." Below the preview is a text input field with placeholder text "Type something...".

Tool Name	Description
get_searchJSON	Operation: get_searchJSON
get_v_____name____name_	Operation: get_v3_1_name_{name}
get_v_____name____name__1	Operation: get_v3_1_name_{name}
get_forecast	Retrieve weather forecasts for a specific location and date range.
get_v_forecast	Operation: get_v1_forecast

3) Add Knowledge Base from the files –

City Info.xlsx,

Flight Booking Tips for Smart Travelers.docx,

General Travel Information for International Travelers.docx

4) Add the description :

Refer to the documentation

- when the user asks about the cities in a country OR
- when the user asks for best tips on flight booking or when asked some generic information about the travel

### Files (3)

Upload files to give additional context to your agent.

Files must have unique names. The max file size is 25 MB. The maximum number of files uploaded in one batch is 20, and the total size limit of one batch is 50 MB. Supported files types are .txt, .pdf, .csv, .docx, .xlsx, .pptx, and .htmlx.

[Upload files](#)

Name	Date uploaded
City Info.xlsx	07/05/2025, 09:16
Flight Booking Tips for Smart Travelers.docx	07/05/2025, 09:16
General Travel Information for International Travelers.docx	07/05/2025, 09:16

## 5) Add the Hotel Booking Agent as a collaborator agent

### Agents

Identify agents to whom your agent can delegate tasks.

[Add agent](#)



Start by adding an agent

You haven't added any agents to support your agent in collaboration.

Add agents to 'Travel Agent'

[Close](#) [X](#)

Selected agents (0) <a href="#">Clear selection</a>	
	<b>Hotel Booking Agent</b> You are an AI Agent that helps the user to look for... <ul style="list-style-type: none"><li>- Search the major cities in a ...</li></ul> <a href="#">2 Tools</a>

Agents <a href="#">?</a>	
Identify agents to whom your agent can delegate tasks.	
	<b>Hotel Booking A...</b> <a href="#">:</a>
You are an AI Agent that helps the user to look for...	
<a href="#">Tools</a> 2	<a href="#">Agents</a> -

Execute the following steps after Deploying the Agent.

Prompt - Give me information about <country name>

**Sample : Give me information about France**

Tool – Country Info.JSON

This would give you the information about the country you chose

Prompt - **What are the 5 major cities there**

Tool - cities\_api.json OR Knowledge base

This tool would give you the cities, refer that you have not specified the name of the city explicitly

Once the list of cities are received

Prompt – **What is the weather like in** <provide a number from the list> today

**What is the weather like in the nicest city in France**

Tool - weather\_info\_demo.json

It provides the current weather info

Prompt – **What about the weather there for next week?**

Tool - weather\_forecast\_week.json

Provides weather info for a week

Prompt - **Cool. Provide me the best hotels there**

Expected behaviour – Should transfer to collaborator Agent

Tool - list\_hotels\_location.json

Provides 5 hotels

Prompt – Let's go with <hotel name> OR lets go with the expensive/cheap one there

Expected behavior – Should get the details from collab agent and confirm the booking

Tool - hotel\_booking\_confirmation.json

Output