Build AI Agents that plan, reason, and automate your workflows (LAB2496)

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WiFi - **K25Learning**
PW - **Training@K25**

Build an AI Agent that plan, reason, and automate your workflow LAB2496

Student Instance Reservation Page

https://clabs.link/lab2496-5xjck

Reservation code - **61GTW**

Lab guidebook

https://bit.ly/lab2496-k25

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Agentic AI solves for high variability & high complexity

UNLOCKING MILLIONS OF AUTOMATION OPPORTUNITIES FOR CUSTOMERS

Deterministic Workflows

Rule-based & predictable

Some flexibility and exception-handling

Good for well-defined tasks or highly-regulated use cases

Provision laptop to a new employee

Request manager to approve expense report

Agentic Workflows

Highly flexible & adaptable

Understands context & intent

Able to leverage rule-based workflows

Good for undefined & complex tasks

Automate a time sheet based on "unstructured data" of a week's activities

Determine and execute follow-ups from a business dinner

ServiceNow AI Agents

AGENTIC WORKFLOW

WHY

This is the overall business problem or goal you're trying to solve.

Think of it as the ***why***—the reason you're deploying AI agents.

AI AGENT ORCHESTRATOR

HOW

the orchestrator conducts the planning and leads a team of AI Agents to address a given use case.

AI AGENT

WHO

the virtual worker that performs specific tasks.

The AI Agent will leverage tools from the platform (workflow, skill, script, KB, etc.) to perform the task.

TOOLS

WHAT

The technologies and resources that AI Agents leverage to perform their tasks and achieve the use case.

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Out of the Box Agentic Workflows

Resolve requests
Auto-answer questions using existing knowledge to avoid human assignment.

Categorize incidents
Auto categorization of incidents

Resolve policy for tuition reimbursement
Resolve tuition reimbursement requests

Suggest survey responses
Assist requestors in filling out surveys

Close security incident
Analyze and close security incidents.

Classify tasks
Gather relevant information so that tickets are actionable.

Investigate IT problems
Assist agents and SMEs in problem determination

Triage cases
Generate actionable plans to resolve problems.

Test and repair telecom services
Telecom service test and repair.

Generate enterprise architect diagram
Generate EA diagrams and summarize them.

Generate OT KB articles
automatically creates a KB article with relevant contextual information

Notify users with Twilio
IT help desk agent assistance on IT issues

Generate change request plans
Generate implementation, test, and backout plan for a change request

Generate post incident reviews
Generates post incident reviews

Monitor project tasks
Assist project managers in maintaining project status health updates

Analyze and improve services
Analyze feedback and metrics to recommend optimizations.

Analyze incident trends
Detect recurring patterns and flag them for proactive resolution.

Also – Spoke to AI Agent

Getting Started

How to install and activate AI Agents

Prerequisites:

- Now Assist license (Pro Plus/Enterprise Plus)
- Yokohama Patch 1+, Xanadu Patch 7+
- AI Agents store app installed. Make sure dependency apps and main "Now Assist for..." store apps are also installed and updated.
- AI Search enabled
- Now Assist Panel turned on

Turning on AI Agents:

- Add role: **sn_aia.admin**
- In your instance, navigate to **All > AI Agent Studio > Overview**

Additional considerations:

- AI Agents use the context of your ticket and your searchable content to generate plans and actions. Ensure that your ticket data and knowledge base have the latest accurate information for the best results.

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Lab time!

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Lessons Learned

You are dealing with non-deterministic systems. Running the same thing twice might give different results due to LLM and instructions

When creating your use case, keep it simple. Start with a clear team capability statement. Try to maintain a single processing step. Example: "This team can handle [specific task] related to [system]." Or "Process [specific] request."

When creating use cases with more than one assigned agents make sure the agents are defined clearly with non-overlapping responsibilities and include explicit limitations in the agents' roles.

The Agent Framework is using GPT-4o and has a 128K token context window. There is a limit of 150 LLM calls per conversation. The more tools and agents contained within a use case, orchestration performance may differ (we don't recommend >15).

Agent names and descriptions are important. The Orchestrator is using the Agent name, role, description, and tools to build out the agent "proficiency" that is used to find the right agent. If you are testing or using a trigger and you notice the orchestrator saying there are no agents to perform the task, review your agent information. You can also try changing the object in your use case trigger or rewording your task in AI Agent Studio.

Start simple, iterate based on observed performance. Use structured sections with clear headers. Include examples of correct agent behavior. Anticipate and prevent common failure modes. The most effective prompts combine structural clarity with explicit verification requirements.

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Troubleshooting

"There are no agents available at the moment. Please try again later."

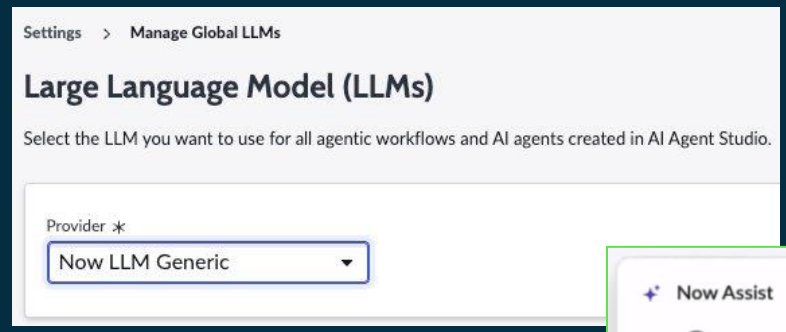
- Quick fixes
  - Update to the latest (stable) instance version and store app
  - Make sure your AI Agent is active and connected to your use case
  - Make sure your tools are active
  - Make sure that AI Search, Now Assist Panel are enabled (with roles)
- Review your **agent "proficiency"** [sn_aia_agent] - auto-generated based on agent description, roles, tools, and instructions. Used by the Orchestrator. The proficiency should cover your expected instructions and Objective.

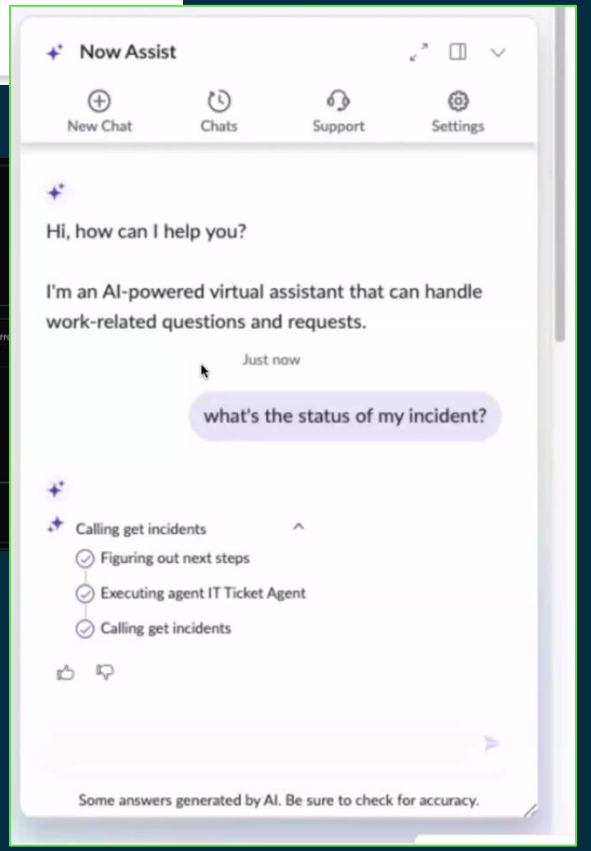
The use case/agent doesn't run as expected.

- Check agent proficiency and prompts
- Check the Execution Plan and Task tables [sn_aia_execution_plan], [sn_aia_execution_task] - see tasks and statuses, compare proficiency to Objective

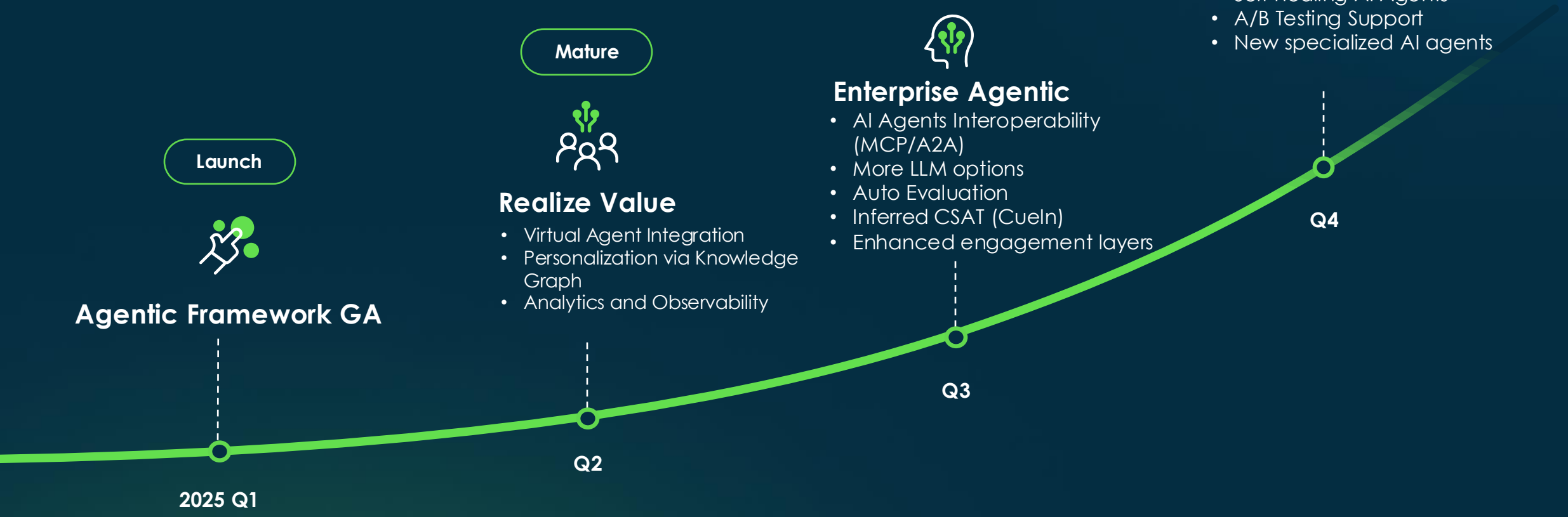
AI Agent Features Added for May 2025 release

- AI Agent Troubleshooting and Monitoring dashboard
- Support for Now LLM as an option for Orchestrator
- New tools: Knowledge Graph, File Upload
- Access AI Agents in the Virtual Agent
- Enhancements to the Orchestrator and the 'Run As' field
- New Out-of-box AI Agents:
  - Now Assist in Document Intelligence
  - Now Assist for ITSM – *Plan Changes, Recommend Incident Resolution*
  - Now Assist for HRSD – *Generate Onboarding Ramp up Plan*
  - Now Assist for CSM – *Triage Cases, Troubleshooting steps identification*
  - And more…





Agentic roadmap built on a strong foundation



AI Agents assists consumption

Incident Triage Use Case

- Includes Trigger
- Comprised of 3 underlying Agents

Autonomous Agent A
(capable of 4 Tools)

Autonomous Agent B
(capable of 4 Tools)

Autonomous Agent C
(capable of 4 Tools)

Assists consumed at RUNTIME

Actions	Assists Consumed
autonomous agents **perform 4 or less actions** across all autonomous agents*	Small = 25 Assists
autonomous agents **perform 5-8 actions** across all autonomous agents*	Medium = 50 Assists
autonomous agents **perform 9-20 actions** across all autonomous agents*	Large = 150 Assists

**If more than >20 actions, the s/m/l counters stack again.*

Additional Resources

- Visit **Now Learning** for the Learning Patch on Now Assist AI Agents
- Visit our **Now Assist Community Forum** for more tips and best practices – https://sn.works/ai
- ServiceNow Documentation – https://servicenow.com/docs
- Blog: *Best practices for prompt engineering with the OpenAI API*

Thank you for participating in the AI Agent lab. **Before you go, please fill out the post-lab survey on your mobile app!** Also, take 2 minutes to provide our Product Team with feedback on AI Agents using the QR code below. Your input helps us continue providing engaging content, including hands-on exercises.

Thank you

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