

CCL2500-K25

AI Agent Administration

Summary:

ServiceNow's AI Agents orchestrate work around your organization. Learn about our new Admin Console and improved configuration experience. Get hands on experience configuring in the Admin Console and testing use cases to automate key processes in your organization.

Lab Objectives

In this lab, you will:

- Explore the AI Agent framework
- Take a first look at AI Agent Studio
- Test an existing AI Agent
- Duplicate an Agentic Workflow (Use Case)
- Duplicate an AI Agent
- Build a Tool for an AI Agent
- Set up Triggers for an AI Agent
- Invoke an AI Agent from the Now Assist Panel

Dependencies and Foundational Setup

Let's start by understanding the AI Agent components in our instance. The **Now Assist AI Agents** application and its dependencies must be installed.

To verify application/plugin versions:

1. In the navigation menu, go to All > System Applications > All Available Applications > All.
2. In the Application Manager, search for "Now Assist AI Agents".
3. Go to the **Installed** tab.
4. Examine the **Now Assist AI Agents** application.
 - Note that the current version is representative of the March 2025 release of Now Assist AI Agents.
 - The Now Assist AI Agents application creates its own application scope of the same name.

The screenshot shows the ServiceNow Application Manager interface. At the top, there is a search bar with the placeholder "Search your licensed applications and plugins" and a help link "How search works". Below the search bar, a search result for "now assist ai agents" is displayed. The "Installed (1)" tab is selected. On the left, there are filters for "Available for you" (9), "Updates", and "Installed (1)". A message indicates there are more results in the "Available for you" tab. The main area shows a single application entry under "Store applications (1)". The application is named "Now Assist AI Agents" with App ID "sn_aia". It has a status badge "Up to date" and an "Installed version 3.0.8".

Now Assist AI Agents application in the Application Manager

Other dependencies for the Now Assist AI Agents application include:

- Platform family version of Xanadu Patch 7 or Yokohoma Patch 1
- Now Assist Pro Plus/Enterprise License
- AI Search enabled
- The **sn_aia_admin** role for your Agentic AI Administrator(s)

In this particular lab, we are also leveraging components from core platform and IT Service Management applications:

- AI Agents Platform Usecase
- Now Assist for IT Service Management (ITSM)

In addition, for human agents to interact with the AI Agents, we also need to enable the Now Assist Panel. This will allow a human agent to interact with the AI Agent through a conversational interface, and is particularly important when the AI Agent has to ask clarifying questions or provide responses back to the human agent.

To turn on the Now Assist Panel:

1. In the navigation menu, go to Now Assist Admin > **Experiences**.
 2. In Now Assist Experiences > Applications > Now Assist panel, go to the **Summary** widget.
 3. Select **Turn on** to enable the Now Assist Panel.
- Note that at least one Now Assist product plugin (ITSM, HRSD, CSM, SecOps, etc.) must be activated to turn on the Now Assist Panel.

The screenshot shows the 'Now Assist panel' configuration page. At the top, there's a breadcrumb navigation: 'Applications > Now Assist panel'. Below it, the title 'Now Assist panel' is followed by a green link 'Included in license'. To the right of the title, there are three status indicators: 'Product Touchpoint: Next Experience Unified Navigation', 'Business Impact: Productivity', and 'LLM Service: Now LLM' with a help icon. The main content area is divided into two sections: 'Summary' on the left and 'Manage' on the right. The 'Summary' section contains text about AI-powered assistance and global accessibility. The 'Manage' section indicates that the panel is turned on for users and features a 'Turn off' button. The entire interface has a light gray background with blue and green accents for buttons and links.

Explore AI Agent Studio

Create, manage, and test AI agents and use cases with one admin experience to create self-executing workflows to help you achieve your business goals.

Purpose: Create, manage, and test AI agents and use cases to achieve business goals.

The screenshot displays the AI Agent Studio interface. At the top, there are tabs for Overview, Create and manage, Testing, and Settings. The main area is titled "AI Agent Studio" with the subtitle "Create, manage, and monitor use cases and the AI agents working across your organization." Below this, there's a section titled "Ready-made use cases and AI agents" containing several cards:

- Use case** **Generate change request plans**: Given the change request number, come up with a detailed implementation plan, test plan and backlog plan.
- Use case** **Generate enterprise architecture diagram**: This use case creates/generates a diagram for a business application of type business hierarchy.
- Use case** **Suggest survey responses**: This use case will assist in filling surveys by suggesting answers to survey questions.
- AI Agent** **Post-incident reviewer**: This AI agent generates post incident review report for the user to review and revise based on feedback and update major incident report.
- AI Agent** **Order an iPhone**: This agent helps users in ordering iPhone.
- AI Agent** **Information email responder**: The information email responder manages email responses. Acting as a response assistant, it consolidates and displays email response, facilitates...

To the right, there's a "How to put AI agents to work" section with a "View steps" button and a "Steps to success" icon. Below this is a "Introduction to agentic AI" card featuring a play button and a progress bar.

At the bottom, there's a section titled "Recent use cases and AI agents activity" with tabs for "Use cases" (selected) and "AI agents". It shows a table of recent entries:

Name	Description	AI agents	Date created
Generate enterprise architecture diagram	This use case creates/generates a diagram for a business application of type business hierarchy	0	2025-03-04 15:12:02
Suggest survey responses	This use case will assist in filling surveys by suggesting answers to survey questions.	0	2025-03-04 15:09:37

With buttons for "Edit", "Delete", and "New". A "View analytics" link is also present.

Key Features

1. Templates & Ready-Made Agents:
 - a. Access templates and AI agents for immediate use or customization.
2. Recent Activity:
 - a. View recently created or configured use cases and agents.
 - b. Options to create, duplicate, or delete entries.
 - c. Link to the AI Agents Dashboard for performance review.
3. Journey Checklist:
 - a. Step-by-step guide for incorporating AI agents into workflows.
 - b. Includes an introductory video on AI agents.

Manage use cases and AI agents

Create from scratch, duplicate, or manage existing use cases and AI agents.

Use cases AI agents

Use cases 21
Last refreshed 4m ago.

Name	Description	AI agents	Created by	Date updated	Date created
<input type="checkbox"/> Generate enterprise architecture diagram	This use case generates a diagram for a business application of type business hierarchy	1	admin	2025-03-03 09:44:32	2025-02-07 23:03:26
<input type="checkbox"/> Investigate IT problems	Perform a root cause and risk assessment for a problem, and devise an actionable resolution plan.	1	admin	2025-03-03 06:33:57	2025-02-10 08:13:30
<input type="checkbox"/> Suggest survey responses	This use case will assist in filling surveys by suggesting answers to survey questions.	2	admin	2025-03-02 23:17:08	2025-02-10 08:06:05
<input type="checkbox"/> Generate change request plans	Given the change request number, come up with a detailed implementation plan, test plan and backout plan.	4	admin	2025-03-02 15:32:51	2025-02-28 22:26:33
<input type="checkbox"/> Classify tasks	This use case Classify a given task by updating corresponding fields, evaluating sentiment and summarizing.	2	admin	2025-02-28 14:43:47	2025-01-28 04:43:45
<input type="checkbox"/> Analyze incident trends	This Usecase is designed to retrieve incident clusters, analyze data, identify recurring issues and root causes, and provide actionable recommendations. It is intended for IT teams and support staff to help them manage and resolve incidents more efficiently.	1	admin	2025-02-28 09:06:21	2025-02-10 02:31:48

Management

Create & Manage Page: Create, duplicate, and manage use cases and agents.

Testing

Testing Capabilities: Test agents by assigning tasks and observing their performance.

Overview Create and manage Testing Settings

Test scenario Output

Define your test scenario to get started

Testing allows you to preview performance in real time and verify that use cases and AI agents are working as you'd like.

What to test *

AI agent

Use case

Resolve requests

Task *

Help me resolve REQ1239883



Choose an AI agent or use case to start

Select your desired AI agent or use case and include a short task to commence testing.

Start test

Settings

Now Assist Guardian: Enable features for offensiveness detection and prompt injection detection.

Analytics Dashboard

Performance Metrics: Review statistics on agent usage, efficiency gains, and execution counts.

Exercise 1: Review an AI Agent for Problem

With the tools of AI Agent Studio known to us, let's quickly review the AI Agent functionality. A good example is available to us from IT Service Management.

1. To access the AI Agent Studio, in the navigation menu, go to: All > AI Agent Studio > **Create and manage**.
2. In the Create and manage tab, go to the **Use cases** sub-tab.
3. Select **Investigate IT Problems**. Sort the list by Name, if necessary.
4. Take a minute and review the AI Agent configuration. Notice that this AI Agent is part of OOB/baseline, and is therefore set to a read-only protection policy (unable to be modified directly).
 - a. Under **Describe and connect**, examine the field values:
 - i. **Name:** Business challenge that you want to solve
 - ii. **Description:** Brief summary of what business problem your use case
 - iii. **Instructions:** Guided actions to be followed by your AI agent
 - Note: The Instructions field is designated as AI Instruction, meaning it is directly associated to the LLM input.
 - iv. **Connect AI agents:** This section maps AI Agents to this particular Use Case
 - v. **Suggested AI agents to add:** This section allows the AI to recommend and suggest AI agents to map to this Use Case.

The screenshot shows the 'Investigate IT problems' configuration page. At the top left, there are three tabs: 'Describe and connect' (selected), 'Define trigger', and 'Select display'. The 'Describe and connect' tab has a sub-section titled 'Describe and connect' with a note: 'Describe the business outcome that this use case targets and connect AI agents based on your requirements. Or use Now Assist to help you craft the description and instructions.' Below this is a button labeled '+ Use Now Assist'. The 'Describe the use case' section contains fields for 'Name *' (set to 'Investigate IT problems') and 'Description *' (set to 'Perform a root cause and risk assessment for a problem, and devise an actionable resolution plan.'). At the top right of the form, there is an 'Exit' button.

- b. Under **Define trigger**, you can set a trigger condition for this use case to be automatically triggered. This particular use case does not have a preset

trigger condition.

- c. Under **Select display**, you can choose if this use case will be displayed on the Now Assist panel. This particular use case defaults to no, so it will be shown in the Now Assist panel.

The screenshot shows the 'Investigate IT problems' configuration page. On the left, there are three tabs: 'Describe and connect' (selected), 'Define trigger', and 'Select display'. The 'Select display' tab is currently active. It contains a heading 'Select display' and a sub-instruction 'Configure where this use case will display and who has access to it.' Below this is a 'Recommended' section showing a small icon of a computer screen with a grid. To its right, the text 'Now Assist panel' is listed with the sub-instruction 'Displays AI agent output in the Now Assist panel.' At the bottom right of this section is a 'Display' toggle switch, which is turned on (green).

5. Go back up and select the **Describe and connect** tab. Scroll down to the **Connect AI agents** section.

- Note that AI agents are mapped to a parent use card record - you can have many AI agents linked to a single use case.

The screenshot shows the 'Connect AI agents' section. It includes a button 'Add AI agent' with a dropdown arrow. Below is a table with columns: Name, Description, Tools and knowledge sources, Date added, and Remove. One row is visible for 'Problem investigator'.

Name	Description	Tools and knowledge sources	Date added	Remove
Problem investigator	Problem investigator	Get details of problem, Problem investigator skill, Collect relevant incident details for a problem	2025-02-10	

6. Select the **Problem investigator** AI agent record. The **Problem investigator** AI agent opens up in a new tab.

- a. Under **Describe and instruct**, examine the field values:
 - i. **Name:** Unique name for the AI Agent
 - ii. **Description:** Summarizes what the AI Agent can do
 - iii. **AI agent role:** The capabilities and responsibilities defined for your AI agent; also describes your AI agent performing its required actions.
 - iv. **Instructions:** Specific, task-oriented guidelines or commands that clearly delineate what the AI agent should do in each situation, complete with conditions, steps, or constraints.

- b. Under **Add tools and information**, you can add Tools to empower your AI Agent. Tools can come in many forms, but include the following:

- Catalog item
- Conversational topic
- Flow action
- Now Assist skill
- Record operation
- Script
- Search retrieval (previously known as RAG)
- Subflow
- Web search

Name	Execution mode	Display output	Description	Date added	Remove
Get details of problem	Autonomous	false	A problem refers to an unplanned interruption or a reduction in the quality of a service, meaning something is broken or not functioning as expected. This tool retrieves the details of the problem, including all related list details, such as linked incidents, change requests, and configuration items.	2025-02-10	
Collect relevant incident details for a problem	Autonomous	false	Collect relevant incident details for a problem	2025-02-10	

Note that you can also ask the system to recommend tools with the **Suggested tools to add functionality**.

- a. Under **Define availability**, you can define if your AI Agent is active or not

Problem investigator

Exit 

Describe and instruct

Add tools and information

Define availability

Define availability
Toggle the availability status of this AI agent.

Status **Active** 
AI agent is active and running.

 Included in license
Now Assist panel turned off
Turn on Now Assist panel to use this skill.

7. This concludes the click-through review of the Agentic AI framework for Agentic Workflow (Use Case) and AI Agent records.

Exercise 2: Test an AI Agent for Problem

Let's conduct our first test of the AI Agent in the Testing playground. Continuing with the same example, we can execute a quick test of AI Agent.

1. In the AI Agent Studio, go to the **Testing** tab.
2. In the Test scenario pane, select the following:
 - What to test: AI agent
 - Use case: Problem investigator
 - Task: Investigate PRB0000011
 - Note: In this case, we are selecting a Problem (PRB) record that has the necessary data that already exists to make this a meaningful investigation.

The screenshot shows the 'Test scenario' page of an AI Agent interface. At the top, there are tabs for 'Overview', 'Create and manage', 'Testing' (which is selected), and 'Settings'. Below the tabs, there are two sections: 'Test scenario' and 'Output'. The 'Test scenario' section contains a heading 'Define your test scenario to get started' and a description: 'Testing allows you to preview performance in real time and verify that use cases and AI agents are working as you'd like.' A dropdown menu titled 'What to test *' is open, showing the option 'AI agent' selected (indicated by a blue circle) and 'Use case' as an unselected option (indicated by a grey circle). A list of AI agent types is displayed in a dropdown menu, with 'Weather Report Agent' highlighted in blue. Other options include: Case context gatherer, Customer document verifier, Information email responder, Customer escalation handler, Problem investigator, Post-incident reviewer, Tuition reimbursement checklist creator, and Next best action recommender.

3. Select **Start test**.
4. The AI agent execution begins, and you can monitor the progress in the **Output** pane. The AI agent decision logs are recorded on the right-hand side. Expand the dropdowns to view the details of each step.

The screenshot shows the AI Agent Studio interface. On the left, there's a 'Test scenario' tab and an 'Output' tab. The 'Output' tab is active, displaying a workflow diagram with three nodes: 'Task Start' (top), 'Orchestrator' (middle), and 'Problem investigator - AI Agent' (bottom). Arrows indicate a sequential flow from Task Start to Orchestrator, and from Orchestrator to Problem investigator. To the right of the diagram is a section titled 'AI agent decision logs'. It says 'Observe the AI agents as they work to solve the task. Watch their interactions, decisions, and thought processes as they happen in real time.' Below this, it lists 'Orchestrator' (Success) and 'Problem investigator - AI Agent' (Ongoing). Under 'Problem investigator - AI Agent', it shows a log entry for 'Gen AI - AIA ReAct Engine' with status 'Success' and duration '4 secs'. The log details the mission to investigate PRB0000011, mentioning the need to gather problem details and align with predefined directives. It also shows an 'Action' entry for 'Get details of problem' and an 'Action Inputs' entry for 'Problem number'.

3. Wait a few minutes for the AI agent execution to complete.
4. Check your Output pane for an output, similar to this:

This screenshot shows the same interface after the AI agent has completed its task. The 'Output' tab is active, displaying the same workflow diagram. However, the 'Problem investigator - AI Agent' node now has two green circular icons with checkmarks, indicating successful completion. To the right of the diagram is the 'AI agent decision logs' section. It shows the 'Orchestrator' log entry with status 'Success' and duration '3 secs'. The log details the completion of the mission, stating that the problem details have been gathered, and a resolution plan has been generated. It also shows an 'Action' entry for 'FINISH' and an 'Action Inputs' entry for 'Observation'.

5. Verify that the Problem has been investigated by the AI agent. Expand the **Show more** dropdown to view all the details.
6. This concludes the testing of the AI agent in the AI Agent Studio's Testing playground.

Exercise 3: Duplicate an Agentic Workflow (Use Case) for Change

Now that we've tested an AI Agent, let's learn how we can modify AI Agents in the ServiceNow out-of-box/baseline. IT Service Management gives us another good example with the "Generate change request plans" use case for Change Management

To recap, a Change is defined as the addition, modification, or removal of anything that could have an impact on an IT Service. Change Management is the process responsible for facilitating the implementation of changes.

The goal of the Change Management process is to enable beneficial changes to be made with minimum disruption to business operations, ensuring that the best possible levels of service quality and availability are maintained.

- Change Management should apply a consistent approach to risk assessment, business continuity, change impact, resource requirements, and change approval.
- The approach should maintain a proper balance between the need for a change and the timing of its integration into the live environment.

As a reminder, for a mature Change Management process, on the Change form, in the Planning section, some fields of interest are:

- Implementation plan: Enter sequential steps to implement this change. In addition, enter dependencies between steps and assignee details for each step
- Backout plan: Enter steps to revert the change to its state prior to implementation. Include information regarding when the change can be backed out during implementation and if the change window includes time to backout
- Test plan: Enter details of planned and completed tests prior to implementation that indicate the potential success of this change. Enter details of planned post-implementation tests to confirm success of this change

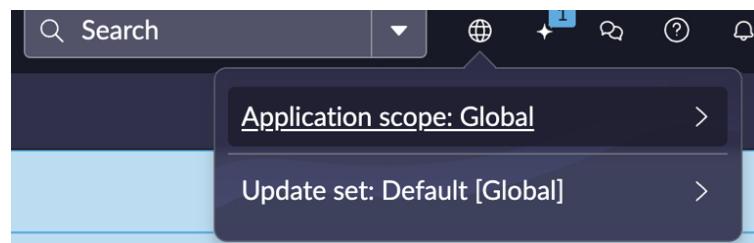
The screenshot shows a 'Change Request' form with the identifier 'CHG0038669'. The top navigation bar includes icons for back, forward, and search, along with the title 'Change Request' and the ID 'CHG0038669'. Below the title is a horizontal tab bar with five tabs: 'Planning' (which is selected and highlighted in green), 'Schedule', 'Conflicts', 'Notes', and 'Closure Information'. The main content area is titled 'Justification' and contains a large empty text box. Below this is a section titled 'Implementation plan' which contains a numbered list of 7 steps. Further down are sections for 'Risk and impact analysis', 'Backout plan', and 'Test plan', each with its own numbered list of steps.

Section	Details
Implementation plan	<ol style="list-style-type: none"> Review the change request details and ensure all necessary approvals are in place. Schedule a maintenance window for the deployment of KB10984599. Notify all AMS Production users about the upcoming deployment and potential impact. Prepare a rollback plan in case of deployment failure. Execute the deployment during the scheduled maintenance window. Monitor the system for any issues post-deployment and address them promptly. Document the deployment process and any issues encountered for future reference.
Risk and impact analysis	
Backout plan	<ol style="list-style-type: none"> Notify all stakeholders about the initiation of the backout process. Revert the system to the last known good configuration. Rollback the deployment of KB10984599 from all AMS Production users. Verify the system's functionality post-backout to ensure stability. Document any issues encountered during the backout process. Communicate the completion of the backout process to all stakeholders.
Test plan	<ol style="list-style-type: none"> Review the change request details and ensure all necessary approvals are in place. Schedule a testing window for the deployment of KB10984599. Notify all AMS Production users about the upcoming testing and potential impact. Prepare a rollback plan in case of test failure. Execute the test during the scheduled testing window. Monitor the system for any issues post-test and address them promptly. Document the testing process and any issues encountered for future reference.

Change Request form's Planning section

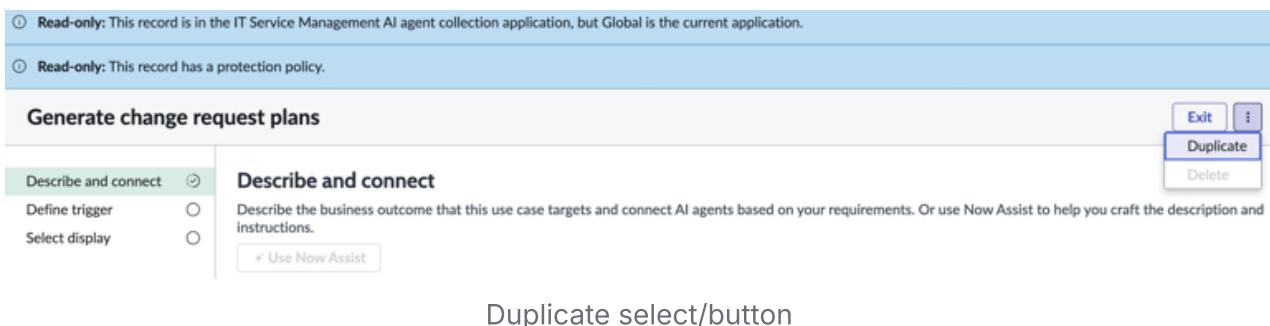
Coming back to AI Agents, the "Generate change request plans" use case will come up with a detailed implementation plan, test plan and backout plan, given a Change Request number. We will duplicate the use case and AI Agents, and add our own enhancements to the scenario.

1. In the top-right hand corner, verify that you are working in the "Global" application scope

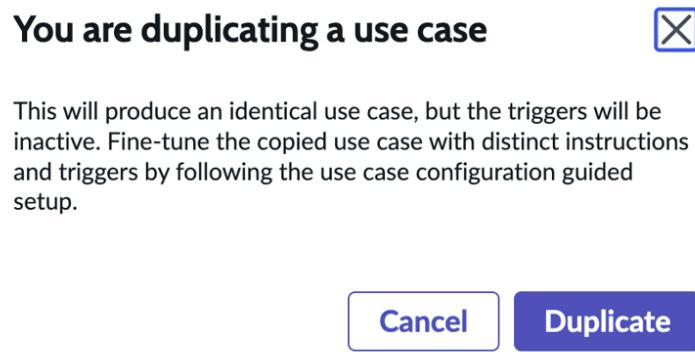


Check session and switch to Global application scope, if not yet already

- Note: The selected scope itself is not vital to this lab exercise, but goes to illustrate that the Duplicate function will duplicate the selected Agentic Workflow (Use Case) into the session's application scope. Be consistent with your application scope usage!
2. To access the AI Agent Studio, in the navigation menu, go to: All > AI Agent Studio > Create and manage
 3. Under the "Use cases" pane, select **Generate change request plans**
 4. In the vertical ellipsis icon (...), select **Duplicate**



5. From the dialog popup box, select **Duplicate**



6. You should now be in a new, duplicate Agentic Workflow (Use Case) called "Generate change request plans (Copy)"
7. Let's update the use case with our desired changes. Modify the field values as follows:
 - Name:** "Generate change request plans with notes"
 - Description:** Given the change request number, come up with a detailed implementation plan, test plan and backout plan. Add updates to work notes.

No changes should be necessary to the Instructions field at this time, we will take care of this at the AI Agent's Tool level.

8. At the bottom, click **Save and continue**
9. At the next screen for Define Triggers, click **Save and continue**. We will handle this in the next exercise.
10. At the next screen for Set Display, select **Save and test**. We will handle the Now Assist Panel in a later exercise.
11. You should now have a duplicated use case named **Generate change request plans with notes**

Generate change request plans with notes

Describe and connect	<input checked="" type="radio"/>	Describe and connect Describe the business outcome that this use case targets and connect AI agents based on your requirements. + Use Now Assist
Define trigger	<input type="radio"/>	
Select display	<input type="radio"/>	

Describe the use case

Name *

Description *

Duplicated use case: Generate change request plans with notes

Exercise 4: Duplicate an AI Agent for Change

When a Use Case is duplicated, the newly duplicated Agentic Workflow (Use Case) will have new mappings to the source Agentic Workflow's (Use Case's) AI Agents. The newly duplicated Agentic Workflow (Use Case) will be functional, but if we want to make changes to any of the children AI Agents, we must duplicate those as well, then re-map them to the latest Agentic Workflow (Use Case).

In the last exercise, we duplicated the Agentic Workflow (Use Case) with the name **Generate change request plans with notes**. Our goal is to add the ability for the AI Agent to update the Work notes on the Change Request record as it updates the Implementation plan field on the Planning section. Let's dive back in.

1. Check to make sure that you are working in the same application scope as you had duplicated the Use Case into, from the last exercise. If you followed the previous exercise, your session should be in the **Global** application scope.
2. In the AI Agent Studio, go to the **Create and manage tab**.
3. Under the "Use cases" pane, select **Generate change request plans with notes**.
4. In the Describe and connect pane, scroll down to the **Connect AI agents section**.
5. Select the **Change Implementation Planner** AI Agent. It should open in a new browser tab.

Connect AI agents

Add one or more AI agents to execute the instructions for the use case.

Name	Description	Tools and knowledge sources	Date added	Remove
Change backlog planner	Change backlog planner	Update backlog plan to change request,Get Similar change requests,Get details of current Change request	2025-03-24	
Change test planner	Change test planner	Get Similar change requests,Get details of Change request,Update test plan to change request	2025-03-24	
Change plan finisher	Change plan finisher	Flush the cache	2025-03-24	
Change implementation planner	Change implementation planner	Get Similar change requests,Get details of Change request,Update implementation plan to change request	2025-03-24	

6. On the right-hand side menu, under the vertical ellipsis (...), select **Duplicate**.
7. In the popup dialog window, select **Duplicate**.

You are duplicating an AI agent

This will produce an identical AI agent. Fine-tune the copied AI agent with distinct instructions and tools by following the AI agent configuration guided setup.

Cancel**Duplicate**

8. You should have a new AI Agent with the Name of **Change implementation planner (Copy)**.
9. Change the Name to **Change implementation planner with work notes**.

Describe the AI agent

Give your AI agent a unique name and description.

Name * ⓘ

Change implementation planner with work notes

Description * ⓘ

Change implementation planner identifies the implementation plan for a provided change request. It collaborates with the user to create a step-by-step Implementation plan, revising it based on feedback.

10. Scroll down to the **Instruct the AI agent section**.
11. Review the field for **Instructions**. Take note of the steps that this AI Agent executes.
12. We're going to make a change to **Step 6**. We want the AI Agent to also update the Work notes upon completion of updating the Implementation Plan field.
Update Step 6 to say:

Step 6: Update the Change Request Record with the latest plan

Ensure that only the final user-approved version of implementation plan is stored in the change request record. **Also update the Work notes with the same implementation plan.**

IMPORTANT : The final Implementation Plan should be in NUMBERED LIST format with every point starting from a new line.

Do NOT update the record with an outdated or initial draft.

ONLY update the record if user approves. If the user denies permission,

acknowledge the decision and terminate the update process without further prompts.

Change implementation planner with work notes

Describe and instruct	<input checked="" type="checkbox"/>	implementation.
Add tools and information	<input type="radio"/>	<p>Step 5: Revise and Finalize the Plan Request explicit user feedback on the shared implementation plan. Based on the feedback, revise the plan and ensure the revised version completely replaces the previous draft before sharing it again. Important: Always maintain the latest version in memory. Discard all earlier drafts. Present the updated implementation plan in the NUMBERED LIST format and maintain correct sequential numbering of the list items after any revisions (additions, deletions, modifications). Always share the most updated implementation plan with the user and confirm whether further modifications are needed. Repeat this process until the user explicitly approves the final version of the implementation plan.</p>
Define availability	<input type="radio"/>	<p>Step 6: Update the Change Request Record with the latest plan Ensure that only the final user-approved version of implementation plan is stored in the change request record. Also update the Work notes with the same implementation plan. IMPORTANT : The final Implementation Plan should be in NUMBERED LIST format with every point starting from a new line. Do NOT update the record with an outdated or initial draft. ONLY update the record if user approves. If the user denies permission, acknowledge the decision and terminate the update process without further prompts.</p>

13. At the bottom, click **Save and continue**.
14. In the **Add tools and information** section, review the current Tools the AI Agent has access to. We will come back to this in the next exercise.
15. At the bottom, click the **Save and continue** button.
16. In the Define availability section, click **Save and test**.

Now that our AI Agent is complete, we must go and connect it to the correct Agentic Workflow (Use Case). Remember, our original Agentic Workflow (Use Case) had its own version of the Change implementation planner AI Agent, and we must swap it for this one.

17. In the AI Agent Studio, go to the **Create and manage tab**.
18. Under the Use cases pane, select **Generate change request plans with notes**.
19. In the Describe and connect pane, scroll down to the **Connect AI agents** section.

Generate change request plans with notes

Describe and connect

Define trigger

Select display

Connect AI agents
Add one or more AI agents to execute the instructions for the use case.

Name	Description	Tools and knowledge sources	Date added	Remove
Change backlog planner	Change backlog planner	Update backlog plan to change request,Get Similar change requests,Get details of current Change request	2025-03-24	
Change test planner	Change test planner	Get Similar change requests,Get details of Change request,Update test plan to change request	2025-03-24	
Change plan finisher	Change plan finisher	Flush the cache	2025-03-24	
Change implementation planner	Change implementation planner	Get Similar change requests,Get details of Change request,Update implementation plan to change request	2025-03-24	

Add AI agent

20. In the right-hand side dropdown, select **Add AI agent**.
21. In the popup modal window, under AI Agent, select **Change implementation planner with work notes**.

Add AI agent

Select one or multiple AI agents to manage all required sub tasks for the given use case.

AI Agent *

Change implementation planner with work notes

Cancel **Add**

22. Select Add.

Add AI agent

Select one or multiple AI agents to manage all required sub tasks for the given use case.

AI Agent *

Cancel **Add**

You should now have both **Change implementation planner** AI Agents connected to your Agentic Workflow (Use Case).

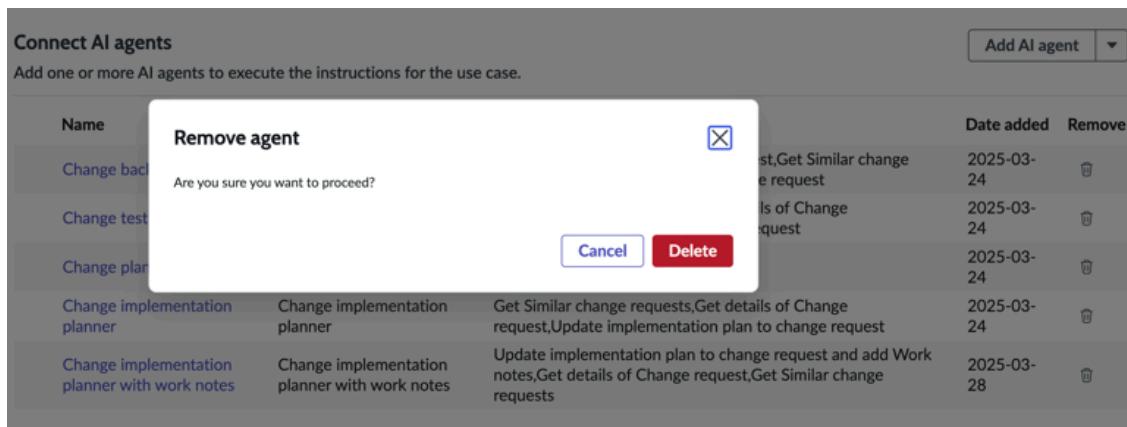
Connect AI agents

Add one or more AI agents to execute the instructions for the use case.

Name	Description	Tools and knowledge sources	Date added	Remove
Change backlog planner	Change backlog planner	Update backlog plan to change request,Get Similar change requests,Get details of current Change request	2025-03-24	
Change test planner	Change test planner	Get Similar change requests,Get details of Change request,Update test plan to change request	2025-03-24	
Change plan finisher	Change plan finisher	Flush the cache	2025-03-24	
Change implementation planner	Change implementation planner	Get Similar change requests,Get details of Change request,Update implementation plan to change request	2025-03-24	
Change implementation planner with work notes	Change implementation planner with work notes	Update implementation plan to change request and add Work notes,Get details of Change request,Get Similar change requests	2025-03-28	

23. For the AI Agent named Change implementation planner, select the **Remove** button (trash can). Leave the Change implementation planner with work notes connected.

24. In the popup confirmation window, select **Delete**.



25. You should now have 4 AI Agents, and only one version of the **Change implementation planner with work notes** connected to your Agentic Workflow (Use Case).

Connect AI agents

Add one or more AI agents to execute the instructions for the use case.

Name	Description	Tools and knowledge sources	Date added	Remove
Change backlog planner	Change backlog planner	Update backlog plan to change request,Get Similar change requests,Get details of current Change request	2025-03-24	
Change test planner	Change test planner	Get Similar change requests,Get details of Change request,Update test plan to change request	2025-03-24	
Change plan finisher	Change plan finisher	Flush the cache	2025-03-24	
Change implementation planner with work notes	Change implementation planner with work notes	Update implementation plan to change request and add Work notes,Get details of Change request,Get Similar change requests	2025-03-28	

26. At the bottom of the **Describe and connect** pane, select **Save and continue**.

27. At the bottom of the **Define trigger** pane, select **Save and continue**.
28. At the bottom of the **Select display** pane, select **Save and test**.
29. This concludes the exercise for duplicating an AI Agent.

Exercise 5: Building a Tool (Script)

Similar to how when the mapping to the source AI Agents are created when the Use Case was duplicated, the mapping to the source Tools are created when an AI Agent is duplicated. However, there is currently no functionality to duplicate a Tool in the AI Agent Studio, so it will have to be recreated.

1. Check to make sure that you are working in the same application scope as you had duplicated the Use Case into, from the last exercise. If you followed the previous exercise, your session should be in the **Global** application scope.
2. In the AI Agent Studio, go to the **Create and manage tab**.
3. Go to the **AI agents** sub-tab.
4. Select **Change implementation planner with work notes**.
5. Go to the **Add tools and information** pane.
6. Under **Scripts**, select the script named **Update implementation plan to change request**.

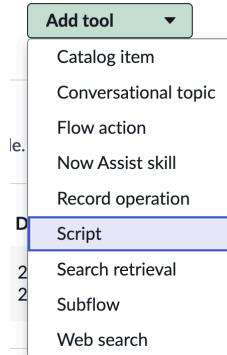
The screenshot shows the 'Change implementation planner with work notes' interface. On the left, there's a sidebar with options: 'Describe and instruct' (radio button selected), 'Add tools and information' (radio button unselected), and 'Define availability' (radio button unselected). The main area is titled 'Scripts' with a sub-label 'AI Instruction'. It contains a brief description: 'Use scriptable APIs and backend integration to support the AI agent with scripts.' Below this is a table:

Name	Execution mode	Display output	Description	Date added	Remove
Update implementation plan to change request	Supervised	false	This tool updates the Implementation Plan to change request.	2025-03-26	
Get Similar change requests	Autonomous	false	Fetch change requests which contain similar and relevant information to search query. It should be used only to fetch relevant change requests based on the current change request details. This tool is to be run ONLY ONE TIME to find any relevant change requests related to the issue in t...	2025-03-26	

7. Examine the Tool and its various components. Note the fields labeled as **AI Instruction**.
8. Let's reproduce this script tool. **Close** or **Cancel** the Edit Script popup window.
9. On the Add tools and information page, go to the **Add tool** dropdown menu on the right-hand side.

The screenshot shows the 'Add tools and information' interface. On the left, there's a sidebar with options: 'Describe and instruct' (radio button selected), 'Add tools and information' (radio button selected), and 'Define availability' (radio button unselected). The main area has a heading 'Add tools and information' and a sub-instruction: 'Add a single tool or information source for the AI agent to begin working. Additional tools can be added later as needed.' To the right, there's a 'Add tool' dropdown menu with a downward arrow.

10. Select **Script**.



11. In the **Add a script** popup window, enter the following:

- **Name:** Update implementation plan to change request and add Work notes
- **Description:** This tool updates the Implementation Plan to change request, and adds Work notes.
- **Script inputs: Input Name / Description**
 - **implementation_plan** / proposed implementation plan to be posted to the change request
 - **number** / number of the change request extracted from user input

Use the **Add an Input** button to make to separate rows.

- **Script:**

```
(function(inputs) {
    // only string inputs are allowed
    // return outputs object where the keys in it are understandable by LLM
    var gr = new GlideRecord('change_request');
    gr.addQuery('number', inputs.number);
    gr.query();
    if(gr.next()) {
        gr.implementation_plan = inputs.implementation_plan;
        gr.work_notes = inputs.implementation_plan; // Copy Implementation Plan
        gr.update();
    }
})(inputs);
```

- **Execution mode:** Supervised

- **Display output:** No
 - **Output transformation strategy:** None (source Tool says Paraphrase, but it's not necessary here)

Edit script

Use scriptable APIs and backend integration to support the AI agent with scripts.

Name *

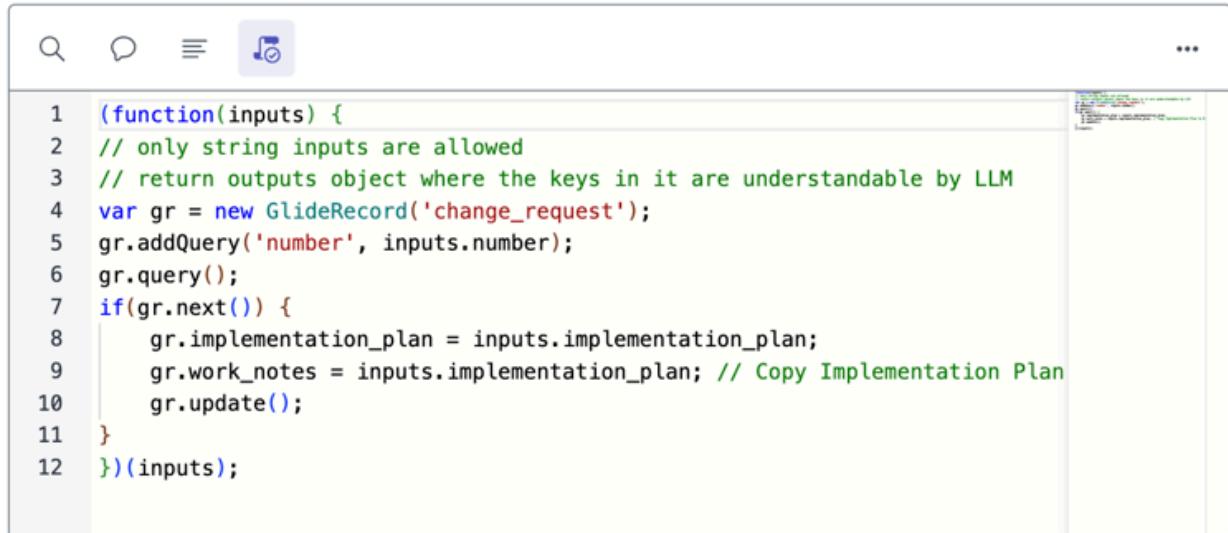
Update implementation plan to change request and add Work notes

Script inputs

Input name *	Description
<input type="text" value="implementation_plan"/>	proposed implementation plan to be posted to the change management system
Input name *	Description
<input type="text" value="number"/>	number of the change request extracted from user input

[+ Add an input](#)

Script



```

1 (function(inputs) {
2 // only string inputs are allowed
3 // return outputs object where the keys in it are understandable by LLM
4 var gr = new GlideRecord('change_request');
5 gr.addQuery('number', inputs.number);
6 gr.query();
7 if(gr.next()) {
8     gr.implementation_plan = inputs.implementation_plan;
9     gr.work_notes = inputs.implementation_plan; // Copy Implementation Plan
10    gr.update();
11 }
12 })(inputs);

```

Execution mode *

Supervised Autonomous

Display output *

Yes No

Output transformation strategy

None



12. Select Add.

13. You should now have 3 scripts in the Scripts section:

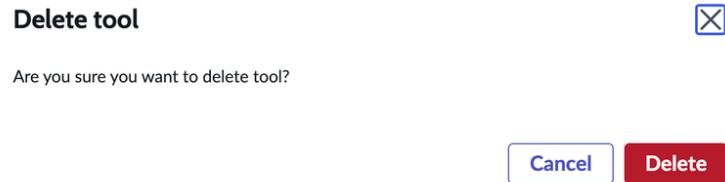
Scripts AI Instruction

Use scriptable APIs and backend integration to support the AI agent with scripts.

Name	Execution mode	Display output	Description	Date added	Remove
Update implementation plan to change request	Supervised	false	This tool updates the Implementation Plan to change request.	2025-03-26	
Get Similar change requests	Autonomous	false	Fetch change requests which contain similar and relevant information to search query. It should be used only to fetch relevant change requests based on the current change request details. This tool is to be run ONLY ONE TIME to find any relevant change requests related to th...	2025-03-26	
Update implementation plan to change request and add Work notes	Supervised	false	This tool updates the Implementation Plan to change request, and adds Work notes.	2025-03-26	

14. We need to remove the mapping to the existing script. Next to the **Update implementation plan to change request** Script, select **Remove**.

15. At the Delete tool popup confirmation, select **Delete**.



16. You should now only have 2 scripts in the **Scripts** section.

Scripts AI Instruction

Use scriptable APIs and backend integration to support the AI agent with scripts.

Name	Execution mode	Display output	Description	Date added	Remove
Get Similar change requests	Autonomous	false	Fetch change requests which contain similar and relevant information to search query. It should be used only to fetch relevant change requests based on the current change request details. This tool is to be run ONLY ONE TIME to find any relevant change requests related to th...	2025-03-26	
Update implementation plan to change request and add Work notes	Supervised	false	This tool updates the Implementation Plan to change request, and adds Work notes.	2025-03-26	

17. At the bottom of the form, select **Save and continue**.

18. On the Define availability pane, select **Save and test**.

19. You should now have a new Tool for your AI Agent.

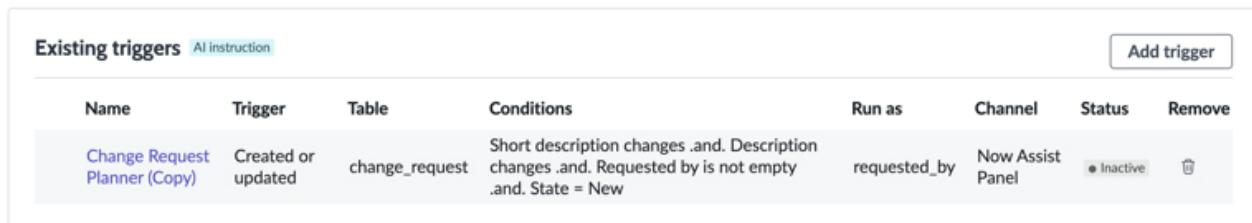
Exercise 6: Setting a Trigger for an Agentic Workflow (Use Case)

Before testing our new Agentic Workflow (Use Case), we should set up a Trigger for it so that it can be automatically executed upon a predefined set of conditions. Triggers are a way for the Agentic Workflow (Use Case) to hook into the transactional data set of the platform.

1. Check to make sure that you are working in the same application scope as you had duplicated the Use Case into, from the last exercise. If you followed the previous exercise, your session should be in the **Global** application scope.
2. In the AI Agent Studio, go to the **Create and manage tab**.
3. Under the "Use cases" pane, select **Generate change request plans with notes**.
4. Select the **Define trigger** sub-tab.
5. Notice that under **Existing triggers**, a copy of the source Trigger was created when the Agentic Workflow (Use Case) was initially duplicated.
6. Select the **Change Request Planner (Copy)** Trigger.

Define trigger

Define at least one trigger with a table the use case is applied to. Edit the conditions for when you want to activate your use case. Add a trigger objective as the template to instruct your AI agents on the necessary tasks to complete.



Existing triggers <small>AI instruction</small>							<button>Add trigger</button>
Name	Trigger	Table	Conditions	Run as	Channel	Status	Remove
Change Request Planner (Copy)	Created or updated	change_request	Short description changes .and. Description changes .and. Requested by is not empty .and. State = New	requested_by	Now Assist Panel	<input checked="" type="radio"/> Inactive	

7. The **Edit trigger** popup modal window opens up.
8. Change the Name of the Trigger, and make it Active. Verify the other field values are set to the following:
 - **Select trigger:** Created or updated
 - **Trigger name:** Change Request Planner with notes
 - **Active:** toggle to on
 - **Table:** Change Request

- **Conditions:** "Short description VALCHANGES" and "Description VALCHANGES" and "Requested by is not empty" and "State is New"
- **Run as:** Requested by [change_request]
- **Objective template:** Recommend content for change request \${number}
- **Channel:** Now Assist Panel
- **Show Notifications:** checked

Edit trigger

Select trigger *

Created or updated

Trigger name *

Change Request Planner with notes

Active

Table *

Change Request

Conditions *

Short descrip... ▾ VALCHANGES ▾ Enter value or and ×

and Description ▾ VALCHANGES ▾ Enter value or and ×

and Requested by ▾ is not empty ▾ or and ×

and State ▾ is ▾ New or and ×

The screenshot shows the AI Agent Studio interface for defining a trigger. At the top right is a button labeled '+ New condition set'. Below it, under 'Run as * ⓘ', is a dropdown menu set to 'Requested by [change_request]'. Under 'Objective template * ⓘ', there is a text area containing the objective: 'Recommend content for change request \${number}'. Under 'Channel * ⓘ', a dropdown menu is set to 'Now Assist panel'. A note below it states: 'To view the output from a triggered use case, you'll need the now_assist_panel_role.' There is also a checked checkbox for 'Show Notifications'. At the bottom right are two buttons: 'Cancel' and 'Save'.

9. Select the **Save** button.
 10. On the Define trigger sub-tab, select **Save and continue**.
 11. On the Select display sub-tab, select **Save and test**.
- The Trigger for the Agentic Workflow (Use Case) is now defined and activated. However, before we can do any tests, we should also verify that the Trigger for the source Agentic Workflow (Use Case) is deactivated as they are currently both keying off the same conditions. It would be poor practice to execute two similar or identical Agentic Workflows (Use Cases) off the same set of Trigger conditions.
12. In the AI Agent Studio, select the **Create and manage** tab.
 13. In the Use cases pane, select **Generate change request plans**. This is the source Agentic Workflow (Use Case).
 14. In the **Generate change request plans** Agentic Workflow (Use Case), go to the **Define trigger** sub-tab.
 15. Verify that the Change Request Planner Trigger has a Status set to **Inactive**. If not, select the Trigger record and deactivate it in the popup modal window.

Note: ServiceNow out-of-box/baseline Agentic Workflows (Use Cases) should be shipped as deactivated, and need to be manually activated before use.

Define trigger

Define at least one trigger with a table the use case is applied to. Edit the conditions for when you want to activate your use case. Add a trigger objective as the template to instruct your AI agents on the necessary tasks to complete.

Existing triggers <small>AI instruction</small>								<button>Add trigger</button>
Name	Trigger	Table	Conditions	Run as	Channel	Status	Remove	
Change Request Planner	Created or updated	change_request	Short description changes .and. Description changes .and. Requested by is not empty .and. State = New	requested_by	Now Assist Panel	<input checked="" type="radio"/> Inactive		

16. Your Trigger should be ready for testing now.

Exercise 7: Invoke from Now Assist Panel

For Agentic Workflows, the Now Assist Panel is the conduit between a human agent and an AI agent. Since we have built out a fully-functioning Agentic Workflow (Use Case), let's trigger it from the Now Assist Panel, and run through a full test of the AI agents.

Let's turn on the Now Assist Panel our Agentic Workflow (Use Case).

1. In the AI Agent Studio, go to the **Create and manage tab**.
2. Under the "Use cases" sub-tab, select **Generate change request plans with notes**.
3. Go to the **Select display** sub-tab, and review the **Now Assist panel** section.
4. Enable the **Display** field for Now Assist panel. There is currently no need to define any User roles under the Display dropdown. If you come back later, the default role of "now_assist_panel_user" will be entered automatically after save.

Select display

Configure where this use case will display and who has access to it.

The screenshot shows the 'Select display' configuration screen. At the top, there is a 'Recommended' section featuring a small icon of a computer monitor displaying a dashboard. Below this, the 'Now Assist panel' option is selected, with the text 'Displays AI agent output in the Now Assist panel.' To the right of this section is a 'Display' toggle switch, which is turned on (blue). Below the 'Now Assist panel' section is a large input field labeled 'Who can access from the Now Assist panel? User roles'. This field contains a single line of text: 'User roles' followed by a long, empty rectangular input box.

5. Select **Save and test**.

The next thing we should do is familiarize ourselves with our existing data set.

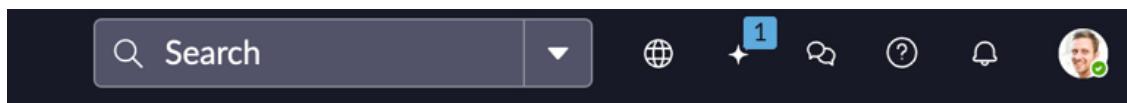
6. In the menu, go to **All**.
7. Type the word "**change**".
8. Select Change > **Open**.

9. Let's choose a Change Request (CHG) record that has sufficient data populated for our exercise. In the Change Request list, look for existing CHG record with Number **CHG0000036**

10. Select **CHG0000036** to open the CHG record form.

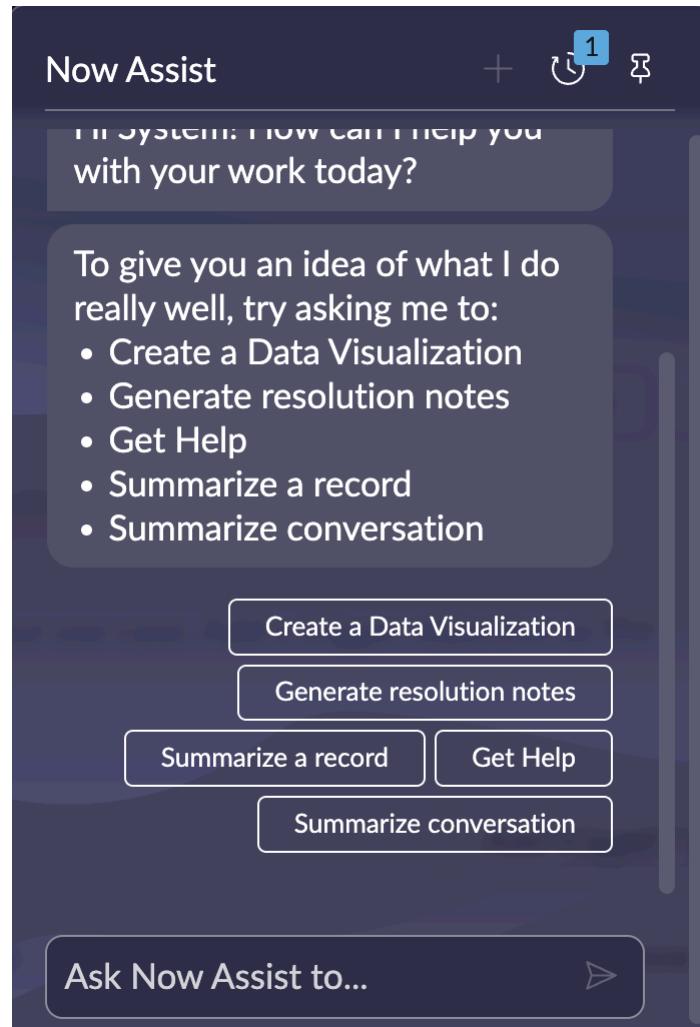
11. Notice that there are some field values populated, but the majority of the fields in the Planning section are empty. This record is a good candidate for our Agentic Workflow (Use Case).

12. In the Next Experience banner bar, go to the **Now Assist** icon:



Now Assist Panel is indicated by the star icon

13. Select the **Now Assist** icon to open up the Now Assist Panel.



14. In the text bar labeled "Ask Now Assist to...", enter "**Recommend content for change request CHG0000036**"
15. Hit the **Enter** key or select the **Send** button.
16. Allow some time for the Now Assist Panel to process the request.
- 17.

Conclusion

In this lab, we covered the basics of AI Agent administration on the ServiceNow platform:

- Reviewed dependencies and prerequisites of the Agentic AI framework
- Learned the tools within the AI Agent Studio
- Examined the elements of an AI Agent
- Duplicated an Agentic Workflow (Use Case) and an AI Agent
- Created a tool for an AI Agent
- Set up a Trigger on an Agentic Workflow (Use Case)
- Executed an Agentic Workflow (Use Case) from the Now Assist Panel