

# Cheat Sheet: CrewAI Fundamentals and Advanced Applications

Estimated time: 15 minutes

## 1. What is CrewAI?

CrewAI is a framework for orchestrating autonomous AI agents, enabling them to collaborate on complex tasks. It allows you to build a "crew" of agents, each with a specific role, goal, and tools, who work together to achieve an objective, much like a human team. This approach is ideal for automating multi-step workflows, from research and analysis to content creation and customer service.

## 2. Core Components of a Crew

A CrewAI system is built from three main components: **Agents**, **Tasks**, and the **Crew** itself.

### AI Agents

Agents are the individual workers in your crew. Each one is an autonomous AI with a defined purpose.

| Attribute        | Description  |
|------------------|--|
| <b>Role</b>      | The agent's job title or function (e.g., "Nutrition Analyst").                               |
| <b>Goal</b>      | The specific objective the agent is meant to achieve.  |
| <b>Backstory</b> | Context or personality that shapes the agent's behavior.                                     |
| <b>Tools</b>     | A list of functions or capabilities the agent can use (e.g., web search, PDF reader).        |
| <b>llm</b>       | The language model that powers the agent's reasoning.  |
| <b>verbose</b>   | Is a boolean parameter; if True, it enables detailed logging of the agent's thought process. |

### Example: Creating an Agent

```
from crewai import Agent
from crewai_tools import SerperDevTool
# Initialize a search tool
search_tool = SerperDevTool()
# Define an agent and provide it with the search tool
research_agent = Agent(
    role='Senior Research Analyst',
    goal='Uncover cutting-edge information on a given topic',
    backstory='An expert researcher skilled at synthesizing data.',
    tools=[search_tool],
    llm=my_llm, # An initialized LLM
    verbose=True
)
```

### Tasks

Tasks are the specific assignments given to agents. They define what needs to be done and what the expected outcome is.

| Attribute              | Description   |
|------------------------|---|
| <b>Description</b>     | A clear explanation of the assignment, often with placeholders like {topic} for dynamic inputs. |
| <b>Expected Output</b> | A description of what a successful result should look like.                                     |
| <b>Agent</b>           | The agent assigned to complete the task.  |
| <b>Context</b>         | A list of other tasks whose output this task depends on.  |
| <b>Tools</b>           | A list of tools specifically provided for this task (see Section 3).                            |
| <b>output_pydantic</b> | A Pydantic model to structure the task's output (see Section 4).                                |

### Example: Creating a Task

```
from crewai import Task
# Define a task for the research_agent
research_task = Task(
    description='Analyze the major trends in {topic}.',
    expected_output='A detailed report on key trends and technologies.',
    agent=research_agent
)
```

## Crews

The Crew brings everything together, managing the agents and tasks according to a defined process.

| Attribute      | Description  |
|----------------|--|
| <b>Agents</b>  | A list of all agents in the crew.  |
| <b>Tasks</b>   | A list of all tasks to be executed.  |
| <b>Process</b> | The execution strategy. Process.sequential runs tasks one after another. Process.hierarchical allows for more complex, delegation-based workflows. |

### Example: Assembling and Running a Crew

```
from crewai import Crew, Process
# Create the crew with a sequential process
content_crew = Crew(
    agents=[research_agent, writer_agent],
    tasks=[research_task, writer_task],
    process=Process.sequential,
    verbose=True
)
# Start the crew's work with a specific input
result = content_crew.kickoff(inputs={'topic': 'AI in Healthcare'})
print(result)
```

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### 3. Structuring Workflows: Agent-Centric vs. Task-Centric Tools

A key design choice in CrewAI is *how* you provide tools to your agents. This choice impacts the efficiency and reliability of your system.

#### The Generalist (Agent-Centric Approach)

This is the standard method where you give an agent a full "toolbox" of all the tools it might need. The agent uses its own reasoning to decide which tool to use for a given task.

- **Pro:** Simple to set up
- **Con:** Can be inefficient and unpredictable, as the agent may choose the wrong tool or take longer to decide

#### Agent-Centric Code Snippet

```
# The agent is given a toolbox with multiple tools
generalist_agent = Agent(
    role='Inquiry Specialist',
    goal='Answer all customer questions.',
    tools=[pdf_search_tool, web_search_tool] # Agent must choose
)
```

#### The Specialist (Task-Centric Approach)

In this more advanced and robust approach, you assign tools directly to the tasks that require them. When you assign tools to a task, CrewAI completely overrides the agent's tools for that specific task so only the tools it needs for that job are used.

- **Pro:** More efficient, predictable, and secure. It eliminates ambiguity and focuses the agent's efforts
- **Con:** Requires a more structured, multi-task workflow

#### Task-Centric Code Snippet

```
# The agent is not given tools directly
specialist_agent = Agent(
    role='Customer Service Specialist',
    goal='Follow a step-by-step process to answer questions.',
    tools=[] # No tools assigned to the agent; however, if tools are provided they are overridden
)
# Each task gets its own specific tool
faq_search_task = Task(
    description="Search the FAQ PDF for the query: '{customer_query}'",
    expected_output="Relevant info from the PDF.",
    tools=[pdf_search_tool], # Tool is specific to THIS task
    agent=specialist_agent
)
```

## 4. Structuring Output Data with Pydantic

To ensure your agents produce consistent, reliable, and structured data (like JSON), you can use Pydantic models. By defining a `BaseModel`, you create a template for the agent's output.

### Example: Defining and Using a Pydantic Model

```
from pydantic import BaseModel, Field
from typing import List #Used to ensure that the AI's output is a list of strings
# 1. Define the data structure
class GroceryShoppingPlan(BaseModel):
    """Complete simplified shopping plan"""
    total_budget: str = Field(description="Total planned budget")
    meal_plans: List[str] = Field(description="Planned meals")
    shopping_tips: List[str] = Field(description="Money-saving tips")
# 2. Assign the model to a task's output
shopping_task = Task(
    description="Organize a shopping list for {meal_name}。",
    expected_output="An organized shopping plan.",
    agent=shopping_organizer,
    output_pydantic=GroceryShoppingPlan
)
```

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## 5. Advanced Crew Management with @CrewBase and YAML

For larger, production-level projects, CrewAI offers a powerful way to organize your agents and tasks using the `@CrewBase` decorator and YAML configuration files.

- **@CrewBase Decorator:** A Python class decorator that automates the setup of your crew by discovering methods marked with `@agent` and `@task`.
- **@crew Decorator:** An optional decorator used inside a `@CrewBase` class that marks the specific method responsible for assembling the agents and tasks into a final `Crew` object. This method defines which agents and tasks are part of the crew and sets the execution process (e.g., `Process.sequential`).
- **YAML Configuration:** Allows you to define your agents' and tasks' properties (like `role`, `goal`, `description`) in separate `agents.yaml` and `tasks.yaml` files. This separates configuration from code, making your project cleaner and easier to manage.

**Crucial Note:** The `@CrewBase` class relies on Python's `inspect` module to find file paths, which **does not work correctly inside a Jupyter Notebook**. For this reason, you should always define your `@CrewBase` classes in separate `.py` files and import them into your main application.

### Example: Conceptual Structure in a .py file

```
# In a file named 'my_crew_defs.py'
from crewai.project import CrewBase, agent, task, crew
from crewai import Agent, Task, Crew, Process
@CrewBase
class FinancialCrew:
    """A class to manage the financial analysis crew."""
    agents_config = 'config/agents.yaml'
    tasks_config = 'config/tasks.yaml'
    @agent
    def market_analyst(self) -> Agent:
        return Agent(config=self.agents_config['market_analyst'])
    @task
    def analysis_task(self) -> Task:
        return Task(config=self.tasks_config['analysis_task'])
    @crew
    def crew(self) -> Crew:
        """Assembles the agents and tasks into a crew."""
        return Crew(
```

```
        agents=[self.market_analyst()],
        tasks=[self.analysis_task()],
        process=Process.sequential,
        verbose=True
    )
```

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