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Brazil Enable AI

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Enable AI Experiences

AI experiences on the ServiceNow AI Platform® extend your workflows with AI-driven automation. Use generative AI skills, AI agents, and agentic workflows to automate multi-step tasks, surface relevant answers, and support self-service across your organization.

Implementing AI on the ServiceNow AI Platform follows a natural sequence: assess your readiness and install Now Assist, establish governance policies, choose your language model strategy, prepare your data and search infrastructure, activate generative AI skills, deploy AI agents and agentic workflows, deliver AI capabilities to your users, measure effectiveness, and drive adoption across your organization.

Now Assist introduced AI on the platform. As that experience has evolved, there's a new name for the experience. ServiceNow Otto® is the conversational AI platform integrated into ServiceNow workflows. It provides agentic capabilities, supports multimodal interactions across web, mobile, and messaging channels, and enables autonomous orchestration for cross-system workflows.

AI journey

Get started

Assess your AI readiness, install Now Assist, and build the foundation for AI experiences across your workflows.

AI governance

Establish policies, roles, and guardrails for responsible AI deployment with AI Control Tower.

Large language models

Choose your language model strategy and configure the providers that power Now Assist generative AI.

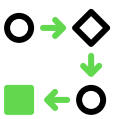
Manage data

Prepare your data foundation and configure AI Search and Knowledge Graph to power AI-driven results.

Generative AI

Activate and configure Now Assist generative AI skills to enhance productivity across your workflows.

AI agents and agentic workflows



Design, deploy, and evaluate AI agents and agentic workflows that autonomously complete multi-step tasks.

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AI user experiences	Analyze AI effectiveness	Adoption and change management
Explore the Now Assist panel, assistants, and mobile experiences through which users interact with AI capabilities.	Measure the performance and adoption of AI capabilities to identify what is working and where to improve.	Apply proven change management strategies to help your workforce embrace AI and sustain adoption over time.

Helpful resources

Additional Now Assist resources

Additional resources for AI products and solutions

Additional implementation information

Best Practices

ServiceNow Community

ServiceNow Community

ServiceNow Store

ServiceNow Store

Support

- Now Support
- Known Error Portal

Getting started with AI on the ServiceNow AI Platform

Prepare your instance for AI by learning about the applications and roles involved, exploring the AI Admin Center, and evaluating your data and configuration readiness.

Implementing AI on the ServiceNow AI Platform begins with learning what is available, confirming that your environment is ready, and building the foundation that all AI capabilities depend on. A few key steps prepare your data, verify your applications, and align your organization's AI policies with your implementation.

Now Assist introduced AI on the platform. As that experience has evolved, there's a new name for the experience. ServiceNow Otto® is the conversational AI platform integrated into ServiceNow workflows. It provides agentic capabilities, supports multimodal interactions across web, mobile, and messaging channels, and enables autonomous orchestration for cross-system workflows.

ServiceNow® AI implementation

A successful AI implementation depends on three things:

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- Familiarity with the applications and features that make up the AI experience
- Clearly assigned roles for everyone involved in managing AI on the ServiceNow AI Platform
- A shared vocabulary for the concepts behind generative AI and agentic AI capabilities

Platform administrators, AI administrators, data stewards, knowledge managers, and business stakeholders each play a distinct part in an AI implementation. Existing platform engineers and domain experts can implement AI when they have clear role definitions and the right access.

To review the applications and features that make up the AI experience, the roles for everyone who manages AI on the platform, and a glossary of terms, see Implementing AI on the ServiceNow AI Platform.

AI Admin Center

AI Admin Center is a single workspace where you set up, manage, and optimize your generative AI solutions on the ServiceNow AI Platform. The home page is tailored to your environment, role, and business objectives, and surfaces AI-generated actionable use cases to help you implement AI adoption and best practices. AI Agent Advisor analyzes your instance data to identify leading automation opportunities and estimates the potential time savings for each one.

AI Admin Center also tracks performance of recently activated AI solutions with usage trend lines, provides direct access to AI readiness assessments, and links to other AI applications on the platform such as AI Agent Studio, AI Control Tower, and the AI Admin Hub.

To set up, manage, and optimize your generative AI solutions from one workspace and act on the automation opportunities AI Agent Advisor surfaces, see AI Admin Center (formerly Now Assist Center).

Assessing your AI readiness

AI Readiness Evaluation

The AI Readiness Evaluation app automates the assessment process by gathering, processing, and analyzing instance data, then delivering results within seconds with direct hyperlinks to improve any issues found. Each assessment provides an overall go or no-go status along with estimated remediation effort.

Data readiness

High-quality data that is complete, accurate, and contextually relevant is the foundation for delivering precise and trustworthy AI responses. Evaluate whether your records, knowledge articles, and catalog items are prepared for AI.

Application readiness

AI depends on several platform applications to deliver AI capabilities. Preparing these applications for AI spans the following areas:

- Knowledge base readiness: Verify that articles are current, well-structured with consistent templates, and populated with complete metadata so that ServiceNow Otto can deliver accurate responses across AI Search and Q&A Genius Results.
- Service Catalog readiness: Confirm that catalog items have clear names, user-friendly descriptions, and manageable variable counts, and identify which items can be made conversational for use with ServiceNow Otto for Virtual Agent.

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- AI Search readiness: Verify that AI Search is active, configure search sources and search profiles, and install ServiceNow Otto for AI Search to power Q&A Genius Results across your portals.
- ServiceNow Otto for Virtual Agent readiness: Install and configure an LLM assistant, review your Virtual Agent topic inventory, and migrate NLU topics to LLM to enable AI-driven conversational experiences.

To prepare your knowledge base, Service Catalog, AI Search, and Virtual Agent for AI, see Application readiness for AI on the ServiceNow AI Platform.

Implementing AI on the ServiceNow AI Platform

Preparing for an AI implementation involves more than installing plugins — your data, applications, and AI policy each shape the result. Working through these foundations before activation reduces rework whether you're enabling conversational catalogs, automating content generation, or enriching user interactions.

Get started

Organization and tools	Roles and responsibilities	Glossary
Learn about the applications and features that make up the ServiceNow AI experience.	Identify the administrative roles required to install, configure, and manage each ServiceNow AI capability.	Look up definitions for ServiceNow AI terminology.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Additional implementation information is available on Now Create.

For additional Now Assist resources, see Additional resources for AI products and solutions.

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Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

AI organization and tools on the ServiceNow AI Platform

The ServiceNow AI experience includes generative AI skills, agentic AI, and a conversational user engagement layer. An effective AI experience depends on quality data and a coherent AI policy that guides your implementation. AI Search capabilities and other tools help connect the pieces.

The following image illustrates the components of the ServiceNow AI experience. You can think of each area as a layer, with AI policy as the basis for your implementation. Data plays an important role, since poor data will lead to poor outcomes, and the search experience drives both generative and agentic AI capabilities. The conversational engagement layer allows your users to communicate with AI and perform tasks and self-serve more easily.

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AI policy

AI governance is defined by your organization and then implemented on the platform using AI Control Tower. AI Control Tower is designed to scale with your organization's AI maturity. It enables end-to-end life cycle management of AI agents and models, from intake and evaluation to deployment and optimization. It also connects governance committees and implementation teams, so that policy decisions are translated into technical configurations and operational controls. The platform includes the AI Risk and Compliance application, which comes with prebuilt content aligned to the EU AI Act and NIST AI Risk Management Framework (AI RMF), helping organizations address these requirements and implement responsible AI practices. For more information, see AI governance on the ServiceNow AI Platform.

For real-time guardrail enforcement for AI interactions, you can use AI Guardian to monitor and mitigate risks related to offensive content, sensitive topics, and security threats in generative AI outputs. Admins can configure these guardrails directly in the AI Admin Hub console, and logs are available to track detection events and guide decisions about blocking or escalation.

For more information about these tools, see:

- AI Control Tower
- AI Risk and Compliance
- AI Guardian

Data management

Poor, incomplete, or unstructured data leads to poor AI outcomes. To prepare your data for AI implementation, see Data readiness for implementing AI on the ServiceNow AI Platform.

ServiceNow provides several tools to help you manage data and provide user context on your instance. The AI Data Kit helps organizations manage AI training data on their ServiceNow instance. It provides a centralized workspace to curate, generate, cleanse, and evaluate datasets, including importing data from tables, adding ground truth, and creating derived datasets. It supports synthetic data generation—up to 1,000 records at a time—and includes tools to anonymize sensitive information for privacy compliance. Integrated with the AI Skill Kit, it enables teams to test custom AI skills and measure performance.

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Knowledge Graph makes AI more personal by using structured enterprise data to tailor responses to each user. It helps AI understand context, such as a user's role, location, or assigned assets, making answers more relevant and accurate. It also supports intelligent slot-filling, automatically pulling in known information to streamline conversations and reduce repetitive questions. This results in faster, more personalized, and trustworthy AI interactions.

For more information about these tools, see:

- AI Data Kit
- Knowledge Graph
- AI Readiness Evaluation

Internal and external content search

ServiceNow Otto for AI Search is the primary tool used to find content on your instance, whether it's in the form of knowledge articles, Service Catalog items, system users, Knowledge Graph schemas, or content in enhanced chats using ServiceNow Otto for Virtual Agent.

ServiceNow Otto for AI Search is a plugin that enhances your existing AI Search configuration, adding support for Genius Result answers.

You can expand the amount of content available to ServiceNow Otto for AI Search by using External Content Connectors. With this tool, AI Search applications can search content and metadata from external content repositories such as Atlassian Confluence Cloud and Microsoft SharePoint Online.

For more information about these tools, see:

- AI Search
- ServiceNow Otto for AI Search
- External Content Connectors

Generative AI skills

AI product plugins provide workflow-specific, generative AI skills that are tailored to specific use cases. For example, a skill might summarize a customer chat, suggest next steps in a workflow, or generate resolution notes for a task. For a list of available skills by product, see Generative AI skills.

Use the AI Admin Hub console to install and configure AI plugins, and perform the following tasks:

- Set up and configure skills to align with your business processes.
- Monitor and analyze usage, including adoption rates and performance metrics across the platform.
- Manage provider policies, data handling rules, and access controls.
- Turn on and configure the ServiceNow Otto panel.
- Manage large language models (LLMs).
- Configure translation for ServiceNow Otto.

If you need to customize or adapt existing skills, you can use the AI Skill Kit to build, customize, and test generative AI skills that are tailored to your organization's workflows. With features like a prompt editor, visual builder, and evaluation tools, it helps you fine-tune performance and ensure quality. It also integrates with the AI Data Kit and AI Guardian for testing and governance.

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For more information about these tools and features, see:

- Overview tab in AI Admin Hub
  - ServiceNow Otto panel
  - Manage AI models
  - Analyzing AI performance
  - Multilingual service for Now Assist
  - ServiceNow Otto for Mobile
- AI Skill Kit

Agentic AI

In an agentic AI system, autonomous agents perform complex tasks by reasoning, planning, and executing actions across multiple steps. These agents break down goals, coordinate with other agents or systems, and complete workflows across multiple steps. In AI Agent Studio, AI agents and agentic workflows are built to handle tasks such as resolving incidents, managing requests, or navigating service catalogs using generative AI and orchestration logic. For a list of available agentic workflows by product, see Agentic workflows.

Use AI Agent Studio to perform the following tasks:

- Build or modify AI agents and agentic workflows using list views and guided setup tools.
- Simulate tasks and view execution logic to refine agent behavior.
- Access execution logs and version control to track performance and changes.
- Use the Settings page to enable AI Guardian for runtime safety, including detection of offensive content and prompt injection.
- Use the AI Agent Analytics dashboard to view usage stats, efficiency gains, and execution volume to help measure value.

The Model Context Protocol (MCP) client enables you to access the Model Context Protocol tools that are hosted externally and published using an MCP Server. MCP facilitates communication between an AI host application (like AI Agent Studio) and one or more MCP servers that expose specific capabilities such as tools.

The MCP Server Console is a tool for administrators to set up and manage Model Context Protocol (MCP) servers. These servers provide AI applications with access to ServiceNow features like incident lookups, case summaries, and workflow actions. The console lets you choose which capabilities to make available, so that everything stays secure and compliant. Then, from an MCP client, users can request information from the server and automate functionality using the available tools and data that the server returns.

For more information about these tools, see:

- AI Agent Studio (legacy)
  - AI Agent Studio overview
  - Implement access control in AI agents
  - AI Agent Analytics dashboard
  - Examples of using AI agents
- Model Context Protocol Client
- MCP Server Console

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Conversational AI engagement

ServiceNow Otto for Virtual Agent is the primary conversational interface for your organization's AI capabilities. It enables users to interact naturally with AI-powered assistants that understand intent, recommend actions, and deliver synthesized responses—all within familiar channels like the service portal, mobile app, and Microsoft Teams. This conversational layer enables your users to communicate with AI and perform tasks and self-serve more easily. It connects users to a wide range of AI-powered resources, including AI agents, generative AI skills, catalog items, Virtual Agent topics, Q&A Genius results from AI Search, and even custom subflows and actions.

By integrating with the AI agent framework, Virtual Agent can discover and trigger agentic workflows that dynamically solve problems based on context. For example, a user might ask about ordering a device, and the system can invoke a multi-turn catalog ordering skill, refine the request, and complete the task, within a single conversation. Similarly, Q&A Genius capabilities allow users to ask open-ended questions and receive actionable answers, links, or follow-up options, to help reduce the need for live agent intervention.

ServiceNow Otto for Virtual Agent also makes it easier to discover content without needing to know exact keywords. Users can search for and interact with catalog items, AI agents, and Virtual Agent topics using natural language. LLM topic discovery and Knowledge Graph slot-filling can return personalized responses and reduce repetitive questions.

To configure ServiceNow Otto for Virtual Agent, you set up an assistant. An assistant is a container for a specific conversational experience that can be delivered in portals on your instance, mobile apps, Microsoft Teams, and Slack. Use the Assistant Designer to create, configure, and manage these assistants, as well as link them to conversational assets in Virtual Agent.

To implement ServiceNow Otto for Virtual Agent, admins use the guided setup that requires no deep technical expertise. Assistant configuration includes the following options:

- AI agent enablement and orchestration
- Search sources
- Knowledge Graph schema usage
- Conversational assets, such as Virtual Agent topics, subflows, actions, generative AI skills, and AI agents
- The portals, channels, or apps the assistant will be used in
- Branding (the look and feel of the assistant)
- Chat experience, such as greeting, closing, and fallback messages

You can also customize an assistant for the ServiceNow Otto panel. The panel is available in workspace experiences and is typically used for contextual assistance within a specific workflow or record. ServiceNow Otto panel assistants have different configuration options and skill availability.

For more information about these tools, see:

- Virtual Agent
  - Assistants overview
  - Enhanced chat
  - Premium chat
  - Integrating ServiceNow® Otto for Virtual Agent with Microsoft Teams

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- Using ServiceNow Otto for Virtual Agent conversations with Slack
- Analyzing assistants
- ServiceNow Otto for Mobile
- ServiceNow Otto panel

Roles and responsibilities for AI administration

AI capabilities on the ServiceNow AI Platform require specific administrative roles. Identify these roles before implementation to plan access and assign accountability.

AI administration on the ServiceNow AI Platform is distributed across multiple specialized roles rather than a single platform-wide role. Each tool has its own dedicated administrative role. This separation supports least-privilege access and lets organizations assign responsibility to the people closest to each capability.

The sys_admin role does not automatically grant the following roles. Assign the AI administrative roles directly to the users who require them.

The following table identifies the role required to administer each area of AI implementation. Reviewing the table during planning helps you confirm assignments, request access ahead of activation, and align team members with their administrative responsibilities.

Note: Some roles, such as the Now Assist admin, apply to more than one implementation area. A single user can hold multiple administrative roles when their responsibilities span several areas.

Administrative roles by implementation area

Implementation area	Role	Responsibilities
AI policy	AI steward [sn_ai_governance_ai_steward]	Manages the platform's data assets and AI capabilities, ensuring data quality, integrity, and ethical use. Implements governance policies to maintain compliance, security, and responsible AI practices across ServiceNow applications and workflows.
	AI asset owner [sn_ai_asset_mgmt.ai_asset_owner]	Drives the development and delivery of AI-powered products, ensuring

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Administrative roles by implementation area (continued)

Implementation area	Role	Responsibilities
		alignment with business goals and user needs. Defines product vision, manages feature prioritization, and translates business requirements into technical deliverables.
	AI Risk and Compliance Manager [sn_grc_ai_gov.ai_risk_and_compliance_manager]	Identifies, assesses, and mitigates risks related to AI use within the enterprise. Ensures AI compliance with laws, regulations, and internal standards while addressing issues such as bias, privacy, and transparency.
	AI Risk and Compliance admin [sn_grc_ai_gov.ai_risk_and_compliance_admin]	Configures risk assessment methodologies, risk contribution factors, and impact assessment templates. Defines automation rules for impact assessments, sets up and profiles AI case types, and deletes AI systems.
	Now Assist admin [sn_nowassist_admin.nsa_admin]	Enables and manages the AI Guardian guardrails within the AI Admin Hub console.

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Administrative roles by implementation area (continued)

Implementation area	Role	Responsibilities
		Configures detection settings for offensiveness, prompt injection, and sensitive topics, and monitors logs to assess harmful or malicious AI outputs.
Data management	AI Data Kit admin [sn_data_kit.admin]	Creates, updates, and publishes datasets in AI Data Kit.
	Knowledge Graph admin [kg_admin]	Designs, manages, and audits Knowledge Graph schemas, including configuring nodes (tables), properties (columns), and relationships.
Internal and external content search	AI Search admin [ais_admin]	Manages configuration settings for the AI Search application.
	External Content Connectors admin [sn_ext_conn.xcc_admin]	Manages configuration and crawl settings for the External Content Connectors application.
Generative AI skills	Now Assist admin [sn_nowassist_admin.nsa_admin]	Installs AI plugins, activates skills, and configures generative AI preferences and settings.
	AI Skill Kit admin	Creates, updates, and

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Administrative roles by implementation area (continued)

Implementation area	Role	Responsibilities
	[sn_skill_builder.admin]	publishes skills in AI Skill Kit.
Agentic AI	AI Agent admin [sn_aia_admin]	Creates, manages, updates, tests, and deletes AI agents and agentic workflows.
	MCP Client admin [sn_mcp_client.admin]	Administers the MCP client in AI Agent Studio. This role is inherited from the AI Agent admin [sn_aia.admin] role.
	MCP Server administrator [sn_mcp_server.admin]	Administers the MCP Server Console.
Conversational AI engagement	Virtual Agent [virtual_agent_admin]	Installs ServiceNow Otto for Virtual Agent and sets up and manages assistants in Assistant Designer. Also required for users who create and manage Virtual Agent topics and assets. The admin role can be used in place of this role.
	Now Assist admin [sn_nowassist_admin.nsa_admin]	Turns on and configures the ServiceNow Otto panel in the AI Admin Hub console.

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ServiceNow product tiers

ServiceNow structures its products and packages in three tiers — Foundation, Advanced, and Prime. Each tier incorporates AI and builds progressively on the previous one with additional AI capabilities, agents, and governance tools.

The Foundation tier delivers AI-assisted insights and routine automation. Advanced adds agentic workflows capable of synthesizing context across complex processes. Prime unlocks a fully autonomous workforce that executes multi-step tasks end to end.

This structure makes the path to greater automation simple, predictable, and scalable across your organization.

Note: Contact your ServiceNow account team for information about availability and entitlement details for your organization. The rollout of new product tiers is independent of your organization's upgrade cycle.

For the latest information about supported product lines, see ServiceNow Product tiers

Product tiers

Foundation	Advanced	Prime
AI skills, routine AI agents	Agentic workflows	Autonomous AI workforce
This solution provides task-based assistance using routine pattern recognition and categorization to accelerate understanding and help you work faster.	This solution automates entire steps in a workflow, working side-by-side with you while synthesizing new insights, understanding context, and applying deep domain knowledge.	This solution offers fully independent AI specialists to make and execute decisions autonomously. They apply deep, role-based expertise to master and run multiple agentic workflows.

AI platform enablers

Every offering has a set of platform-level AI capabilities powering the skills, agents, and governance experience across all product lines.

Now Assist

Now Assist is the generative AI experience embedded throughout the ServiceNow AI Platform, delivering skills such as incident summarization, sentiment analysis, reply generation, and case resolution assistance. AI skills are available at every tier, across ITSM, CSM, ServiceNow Otto for HRSD, and industry solutions. For a full overview of the ServiceNow Otto panel and administration tools, see Now Assist panel.

Now Assist AI agents

AI agents extend generative AI into autonomous agentic workflows. Using AI Agent Studio, administrators can configure out-of-the-box agents at Foundation and Advanced tiers, or build net-new agents from natural language instructions at the Prime tier.

AI Action Fabric

AI Action Fabric is the communication layer that enables ServiceNow AI agents to collaborate with each other and with third-party AI systems. It uses open protocols to facilitate this collaboration. These protocols include Agent-to-Agent (A2A) and Model Context Protocol (MCP). Foundation and Advanced tiers include A2A outbound connectivity; Prime adds inbound MCP Server Console

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capability, enabling external platforms to invoke ServiceNow agents directly. For implementation details, see Enable MCP and A2A for your agentic workflows.

AI Control Tower

AI Control Tower is included in every tier (Foundation, Advanced, and Prime) with the same capabilities at each. It discovers and visualizes ServiceNow AI assets automatically, and external AI with setup. It also allows you to manage ServiceNow AI assets (governs, secures, observes, and measures). Full management of external AI assets (govern, secure, observe, measure) requires a separate AI Control Tower for Enterprise AI license. For configuration guidance, see Exploring AI Control Tower and Configuring AI Control Tower.

Workflow Data Fabric

Workflow Data Fabric grounds AI agents in real enterprise data by connecting any application, database, or system to the ServiceNow AI Platform — without requiring data to be moved or replicated. Workflow Data Fabric Foundation, including Integration Hub, Robotic Process Automation (RPA) Hub, Automation Center, and Data Catalog, is embedded in every tier edition. Workflow Data Fabric Advanced, adding Zero Copy Connectors and Stream Connect, is available as a paid upgrade.

RaptorDB

RaptorDB is the next-generation ServiceNow database, purpose-built to deliver the performance and scale that AI-native workloads demand. RaptorDB Standard underpins every tier edition with improved response times and optimized query performance. RaptorDB Professional unlocks ultra-scale analytics, enhanced column-store capabilities, and advanced instance topology support for organizations running the most demanding generative AI and machine-scale data use cases.

Moveworks for ServiceNow (EmployeeWorks)

ServiceNow EmployeeWorks brings together Moveworks' conversational AI and enterprise search with ServiceNow's unified portal and autonomous workflows. This combination gives employees a single, natural-language front door to enterprise services. The solution is available across Microsoft Teams, Slack, browser, and mobile. EmployeeWorks capability is bundled at a level aligned with each tier, ensuring that conversational access scales with your agentic AI investment. For more information, see the Autonomous Workforce and EmployeeWorks announcement.

Get started

To begin implementing the capabilities offered at each tier on your instance, see the following resources.

- Now Assist overview — Learn about the applications and features that make up the AI experience.
- AI Control Tower — Learn about the importance of AI governance to ensure responsible use, regulatory compliance, and alignment with enterprise goals.
- Data readiness — Learn how to prepare your instance data for AI.

Related ServiceNow applications and features

- Now Assist panel
- Exploring Now Assist
- AI Agent Studio

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- AI Control Tower
- Workflow Data Fabric
- RaptorDB
- Now Assist for ITSM release notes

AI glossary

Learn about the terms and concepts used on the ServiceNow AI Platform.

AI Admin Hub

A console for administrators to quickly set up, configure, and monitor generative AI features and capabilities offered on the ServiceNow AI Platform.

AI Analytics

A dashboard that provides insights into the usage, value, and performance of AI on a ServiceNow instance.

AI Guardian

A feature that monitors and evaluates content created with generative AI to protect users from harmful, offensive, or inappropriate content. It can log incidents and prevent such content from being displayed.

agents

An agent, in the context of AI, refers to a software entity that can perceive its environment, make decisions, and take actions to achieve specific goals. Agents can be simple or complex, ranging from basic reactive systems to sophisticated entities that learn and adapt over time. They are often used to automate tasks, interact with users, or manage complex processes.

agentic AI

Agentic AI refers to artificial intelligence systems that possess autonomy, enabling them to function independently and make decisions without continuous human oversight. These systems can perceive their environment, reason, learn from experience, and execute tasks to achieve specific goals. In ServiceNow AI Platform, agentic AI is powered by AI agents, agentic workflows, and Voice/Web agents.

agentic conversation

Agentic conversation refers to interactions between humans and AI systems where the AI exhibits autonomous behavior, making decisions and taking actions to achieve specific goals. In an agentic conversation, the AI agent can understand the context, reason, and respond accordingly, often without requiring explicit human direction. You can enable it in Virtual Agent, ServiceNow Otto panel, Voice/Web agents, and enhance it through Knowledge Graph, RAG, and Open Prompts.

agentic system

An agentic system is a type of software or AI that perceives its environment, makes decisions that are based on that perception, and takes actions to achieve specific goals, often with minimal human intervention. An agentic system can learn, adapt, and operate independently to solve problems or perform tasks.

agentic workflow

An agentic workflow is a structured sequence of tasks executed by one or more AI agents with minimal human intervention to fulfill a business objective. You can create and manage

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these workflows in AI Agent Studio by using triggers, tools, and evaluation plans, and deploy across ITSM, HR, and CSM use cases.

AI agents

AI agents are autonomous digital workers that use LLMs, tools, and workflows to complete tasks across ITSM, HR, and CSM on behalf of users. They can reason, plan, and act independently or collaboratively. You can create and manage them using AI Agent Studio and orchestrate them in AI Agent Orchestrator. These agents are embedded in ServiceNow Otto panels, Virtual Agent, and custom workflows.

The AI agent is a virtual worker that performs specific tasks leveraging tools from the ServiceNow AI Platform such as workflow, skill, script, knowledge base, etc.

AI compliance

AI compliance refers to the adherence to regulatory requirements, standards, and guidelines governing the development, deployment, and use of artificial intelligence systems. It involves ensuring that AI systems are designed and implemented in a way that meets legal, ethical, and organizational standards. This includes addressing issues related to data privacy, bias, transparency, and accountability. You can manage it through audit trails, model life cycle management, and data masking by using AI Control Tower in ServiceNow AI Platform.

AI Control Tower

AI Control Tower is a centralized governance hub for managing AI models, agents, and compliance across the ServiceNow AI Platform. It provides visibility into model usage, performance, risk and compliance, and is integrated with AI Admin Hub.

AI governance

AI governance refers to the set of policies, procedures, and standards that guide the development, deployment, and use of AI systems within an organization. It ensures that AI systems are aligned with organizational values, comply with regulatory requirements, and are used in a responsible and transparent manner. In ServiceNow AI Platform, you can manage AI governance through AI Control Tower, AI Trust Guard, and role-based access in AI Admin Hub.

AI steward

An AI steward within ServiceNow AI Platform is a governance role responsible for overseeing the life cycle of AI assets, including models, data sets, and prompts. You can use AI stewards in AI Control Tower to coordinate governance activities between legal, security, compliance, and innovation teams for the responsible deployment of AI agents, skills, and models across the platform.

citation

Small, interactable number next to AI-generated content in the ServiceNow Otto panel that cites the source of the information.

custom skill

A user-defined AI capability tailored to meet specific business needs. It is created and trained using relevant data and prompts.

Dynamic Translation

A feature on the ServiceNow AI Platform that translates user input to English and then translates the AI-generated responses back to the user's preferred language.

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External Content Connectors

External

External Content Connectors is a ServiceNow® Store application that enables AI Search to index and search content from external repositories like Atlassian Confluence Cloud and Microsoft SharePoint Online. It expands search capabilities to include external content while maintaining original access permissions.

generative AI

A technology that uses large language model (LLM) to generate text, summaries, and other content.

generative AI skill

A predefined capability on the ServiceNow AI Platform that uses generative AI to perform tasks such as generating summaries, resolution notes, and so forth.

Generative AI Controller

A tool to customize the generative AI experience on the ServiceNow AI Platform, including integrating third-party large language model (LLM) licenses.

guardrail

A mechanism that monitors and evaluates user input and AI-generated response to ensure it is safe and appropriate.

Knowledge Graph

Knowledge Graph organizes structured and unstructured enterprise data into a semantic network that AI agents can query. The ServiceNowKnowledge Graph application enhances the performance of ServiceNow Otto for Virtual Agent, AI agents, and generative AI skills by leveraging structured and unstructured data from various sources. It provides a customized user experience by creating and managing Knowledge Graph schemas through a user-friendly interface. The application integrates with AI agents and Virtual Agent, offering prebuilt integrations for seamless functionality.

large language model (LLM)

A complex machine-learning model trained on large datasets to generate human-like responses to user input.

multi-turn catalog ordering

A feature in ServiceNow Otto for Virtual Agent that allows users to order catalog items from the service catalog through a conversational interface.

native translation

A feature in ServiceNow Otto that uses integrated large language models (LLMs) to generate responses in the user's preferred language. You can enable and configure it in the AI Admin Hub.

offensive content detection

A guardrail in AI Guardian that logs and blocks offensive, harmful, or inappropriate content.

orchestrator

The AI agent orchestrator is a specialized agent that plans, coordinates, and manages the execution of tasks across multiple AI agents. It holds short-term memory, tracks goals, and ensures agents collaborate effectively. This component is central to agentic AI architecture

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and is configured in AI Agent Studio. The orchestrator conducts the planning and leads a team of AI agents to address a given agentic workflow.

prompt injection detection

A security feature in AI Guardian that identifies and prevents malicious inputs from being used to manipulate AI-generated responses.

Q&A genius result

Q&A Genius Results in ServiceNow Otto provide users with concise, actionable answers generated from relevant knowledge articles and other sources. These results are displayed as actionable cards, each including a link to the source knowledge article for further reference.

Retrieval Augmented Generation

Retrieval Augmented Generation is a generative AI technique that enhances large language model (LLM) outputs by retrieving relevant enterprise content, such as knowledge articles or records and using it as context to generate more accurate and actionable responses. Within ServiceNow, RAG is implemented in products like ServiceNow Otto for AI Search, where it powers Genius Results cards by combining AI Search with generative responses. It is also configurable in AI Agent Studio, allowing admins to define RAG based tools that retrieve external or internal data to support autonomous or supervised agentic workflows.

ServiceNow Otto context menu

A generative AI feature that assists agents in creating and editing emails and chat replies, available in the Next Experience for specific workflows.

ServiceNow Otto panel

A conversational interface to summarize chat, case, or incident or generate resolution notes so that you can get the context of the information more quickly.

AI Admin Center (formerly Now Assist Center)

Set up, manage, and optimize your AI solutions on the ServiceNow AI Platform from a single workspace.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

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Get started

Explore

Learn about AI Admin Center concepts and features.

Configure

Set up AI Admin Center to get started.

ServiceNow Otto

Use the conversational interface to perform tasks and answer questions.

Increase AI readiness

Find improvable areas in your instance to prepare for AI implementation.

Set up AI on your instance

Set up, manage, and optimize your AI solutions.

AI Agent Advisor

Discover opportunities in your instance to use AI agents to automate work

Monitor

Monitor AI readiness, usage, and performance

Reference

Get details about AI Admin Center properties and components, such as roles and limitations.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

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Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

Troubleshoot and get help

- Additional resources for AI products and solutions.
- ServiceNow Community on AI and Intelligence.
- Access real-time courses, self-paced training, and career resources at ServiceNow University.
- Search the Known Error Portal for known error articles.
- Contact Customer Service and Support.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. In addition, this application will collect information extracted from documents. Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

Exploring AI Admin Center

The ServiceNow® AI Admin Center application is a single control hub that brings together other AI capabilities and configuration functions, making it fast and effortless for administrators to set up and manage AI solutions from a unified experience.

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The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

AI Admin Center overview

AI Admin Center is a unified administration workspace that consolidates the various AI applications into a single, guided, conversational environment.

It provides a centralized location for setup, configuration, navigation, recommendation, and solution-building capabilities so administrators can activate, manage, and scale AI solutions quickly and with far less complexity.

AI Admin Center users

The following table lists the primary users of AI Admin Center.

Users

User	Description
AI administrators	AI administrators responsible for organization-wide AI deployment and management
Platform administrators	Platform administrators overseeing enterprise AI governance
AI builders and practitioners	AI practitioners building and deploying custom AI solutions across ServiceNow workflows

AI Admin Center workflow

The following diagram shows the AI adoption activities you can accomplish in AI Admin Center.

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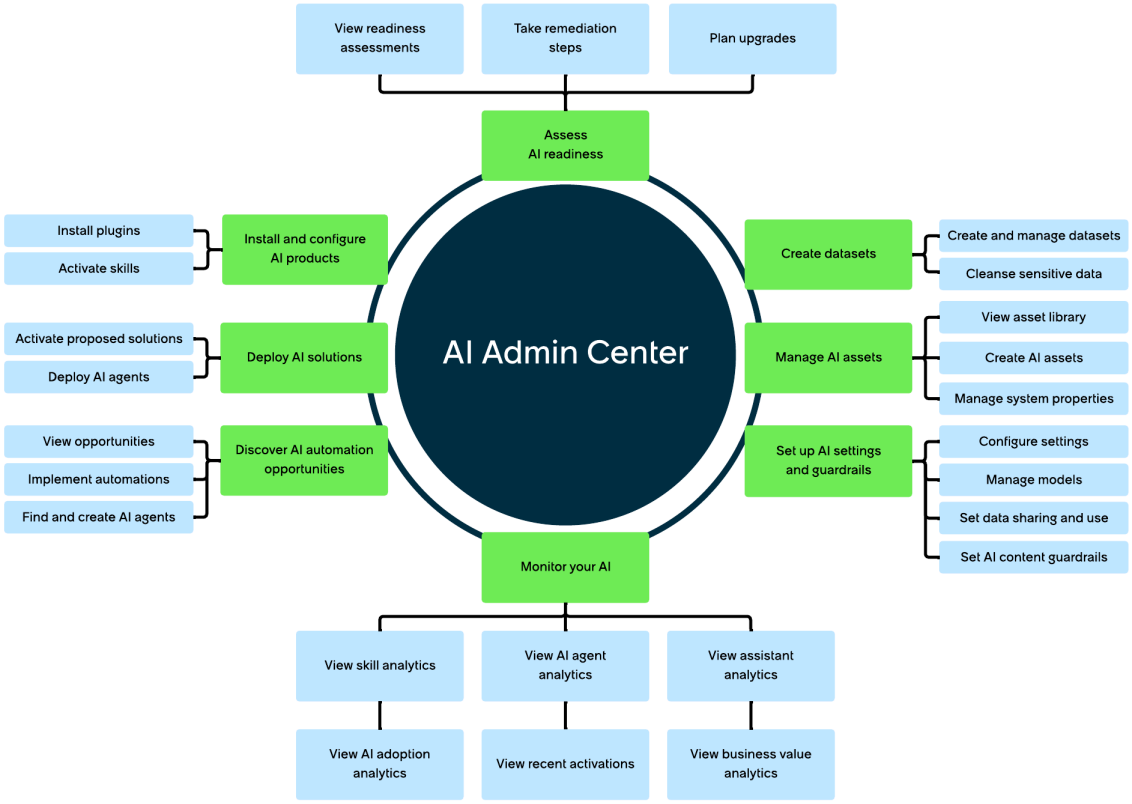
AI Admin Center activities



This diagram shows the following capabilities in AI Admin Center:

- Assess AI readiness
  - View readiness assessments
  - Take remediation steps
  - Plan instance upgrades
- Install and configure AI products
  - Install plugins
  - Activate skills
- Deploy AI solutions
  - Activate proposed solutions
  - Deploy AI agents
- Discover AI automation opportunities
  - View opportunities
  - Implement automations
  - Find and create AI agents
- Create datasets
  - Create and manage datasets
  - Cleanse sensitive data
- Manage AI assets

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  - View asset library
  - Create AI assets
  - Manage system properties
- Set up AI settings and guardrails
  - Configure settings
  - Manage models
  - Set data sharing and use
  - Set AI content guardrails
- Monitor your AI
  - View skill analytics
  - View AI agent analytics
  - View assistant analytics
  - View AI adoption analytics
  - View recent activations
  - View business value analytics

AI Admin Center benefits

AI Admin Center provides the following benefits.

Benefits of AI Admin Center

Benefit	Feature	User
Accelerate and simplify setup of your AI solutions in a unified experience. The workspace enables you to work with multiple AI applications without leaving AI Admin Center.	AI Admin Center user experience (Lux UI) AI Admin Center workspace (Next Experience UI)	AI administrator
Easy-to-use conversational interface to perform common admin tasks, from basic setup to proposed AI implementations to guided help.	ServiceNow Otto panel in AI Admin Center	AI administrator
Automated assessment of your instance readiness helps you prepare for AI adoption. The readiness assessment enables you to assess whether updates, installations, or customizations on your instance could affect AI implementation. It helps you to identify configuration gaps,	AI readiness	AI administrator

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Benefits of AI Admin Center (continued)

Benefit	Feature	User
view actionable insights, measure readiness over time.		
Get started right away with guided quick-start use cases that appear as top actions on the home page. This gives both new and experienced administrators a clear starting point for enabling AI.	Actionable use cases	AI administrator
Quickly discover automation opportunities for your instance. AI Agent Advisor analyzes actual instance data to identify and propose AI automations that provide the greatest efficiency gains.	Automation opportunity discovery with AI Agent Advisor	AI administrator
Matches identified automation opportunities to existing AI agents on the platform and supports automated creation and deployment of new agents, shortening the path from insight to action.	AI agent matching and automated deployment	AI administrator AI developer
Provides centralized access to the broader AI ecosystem within a consistent workspace experience.	ServiceNow AI applications	AI administrator
View performance and usage statistics for your AI implementation.	AI adoption metrics	AI administrator

AI Admin Center workspace (Next Experience UI)

Use the AI Admin Center workspace to set up, monitor, and manage your AI solutions.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Note: This topic describes the AI Admin Center feature based on the Next Experience UI. If you're using the Lux user experience for AI Admin Center, see the Lux UI version of this topic.

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Overview of the AI Admin Center workspace

The AI Admin Center workspace provides features that enable you to set up of your AI solutions in a unified experience without switching between separate AI applications.

With the AI Admin Center workspace, you can:

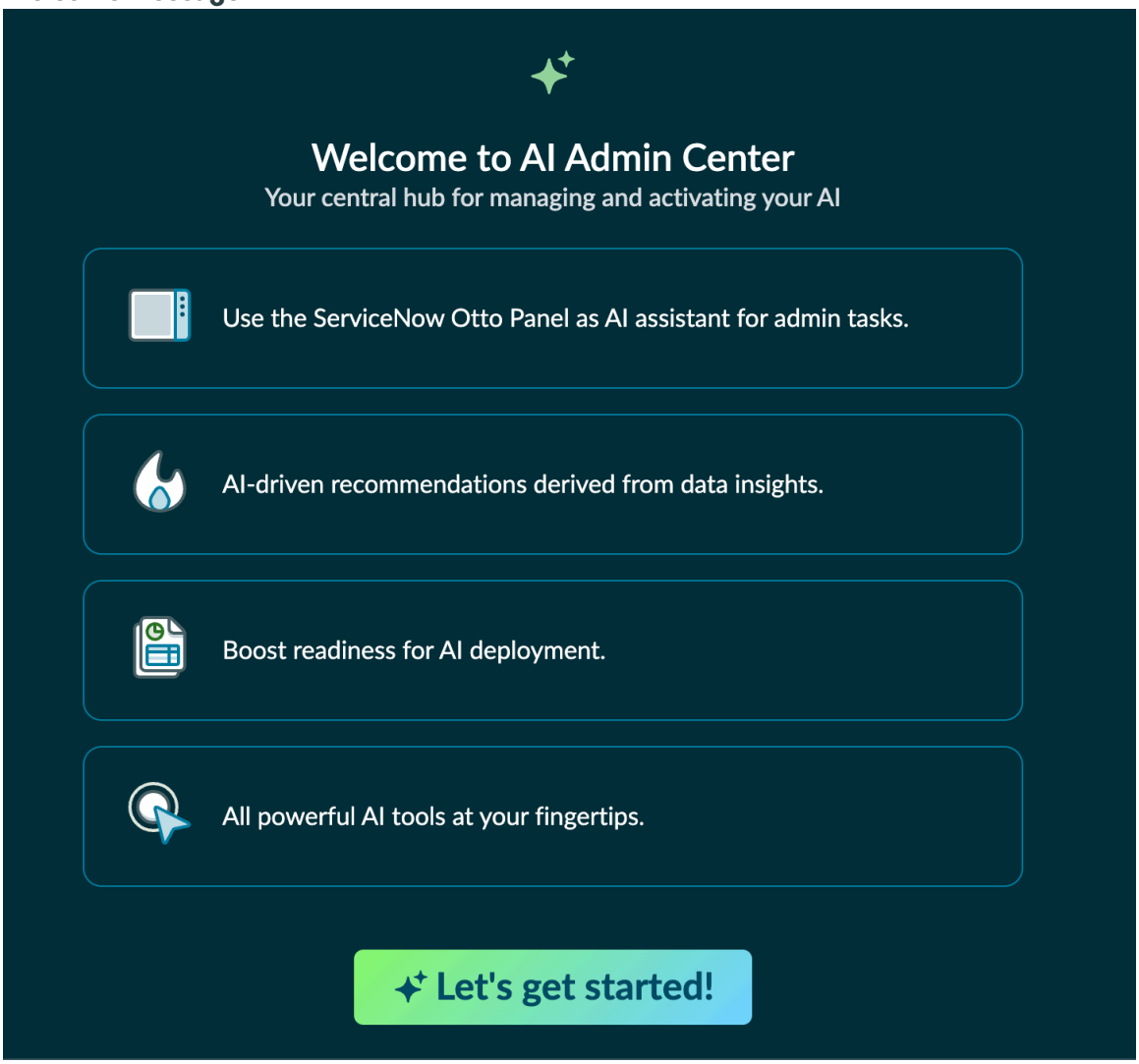
- Access your integrated AI adoption capabilities using the side navigation bar.
- Use the home page features to assess your instance readiness, set up AI solutions, find and activate automation opportunities, and open related AI applications.
- Use the conversational interface in the ServiceNow Otto panel as your AI assistant to perform common setup, building, and question answering tasks.

Access the AI Admin Center workspace

To access the AI Admin Center workspace, navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)**.

The first time you access AI Admin Center, a welcome message displays prompting you to get started by installing essential ServiceNow Otto plugins. If you already have these plugins installed, the message simply introduces the benefits of AI Admin Center. Select **Let's get started** to continue to the home page.

Welcome message



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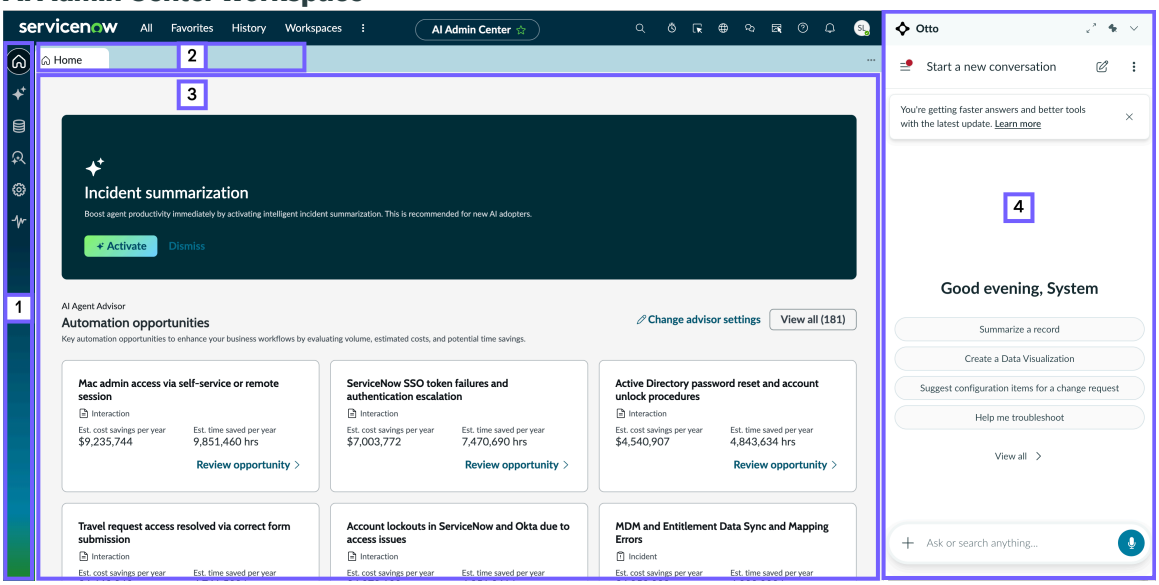
Layout of the AI Admin Center workspace

The following illustration shows the AI Admin Center workspace. The workspace includes:

- 1 - Side navigation bar
- 2 - Tabs
- 3 - Home page
- 4 - ServiceNow Otto panel

AI Admin Center workspace



Side navigation bar

The side navigation bar provides access to the applications and features integrated with AI Admin Center.

Select an item in the navigation bar to open it in a workspace tab.

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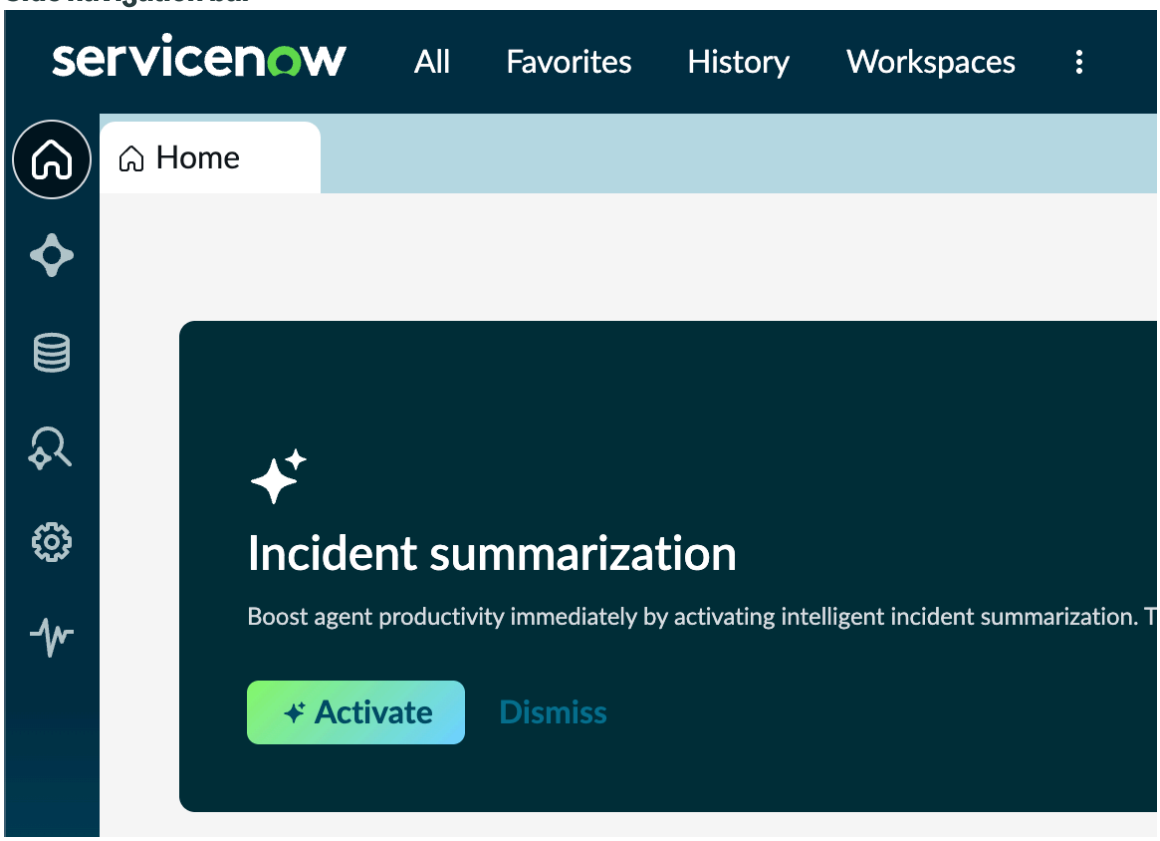
Side navigation bar



The side navigation bar includes the following options:

Navigation bar options

Option	Icon	Description
Home		The home page provides AI setup, administration, and monitoring features tailored to suit your instance.
Asset inventory		The asset inventory shows you all the ServiceNow AI assets in your instance. Each tab in the series provides a list for that asset type. You can view a list of all assets in the Overview tab.
Data		The data page allows you to use AI Data Kit in the AI Admin Center workspace.
AI readiness assessment		The AI readiness assessment page provides a general assessment summary and a list of AI readiness assessments based on your instance data.
Admin		The admin page allows you to use AI Admin Hub and AI Guardian in the AI Admin Center workspace.

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Navigation bar options (continued)

Option	Icon	Description
		The admin page provides a series of links to admin pages. Select an item to open it in a separate workspace tab.
Monitor		The monitor page shows usage, performance, and adoption metrics for your AI solutions.

For more information, see Using other AI applications and features from AI Admin Center.

Home page

The AI Admin Center home page provides features to quickly set up your AI implementation, find automation opportunities, check the AI readiness status of your instance, track usage and performance of AI solutions, and access related AI applications.

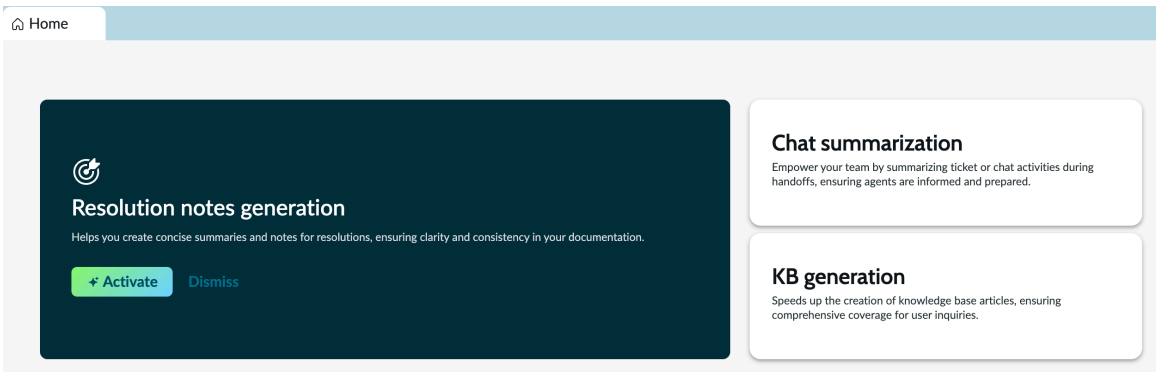
Your home page is tailored to suit your specific environment, role, and business objectives. The appearance your home page and its sections display accordingly. The entitlements, Impact subscription, plugin installations, and data associated with your instance may affect your experience on the home page.

The following sections may appear on your home page based on your instance.

Actionable use cases

The first section of the home page displays a series of AI-generated cards that represent quick-start use cases. Each use case is tailored to your environment and proposed to help you implement AI adoption, best practices, and administrative setup on the platform.

Actionable use cases section



Select **Activate** on the card to begin, and a conversation will open in the ServiceNow Otto panel. In the ServiceNow Otto panel, you can use natural language to have your AI companion implement the use case.

After it is implemented, the card disappears and the new solution appears under the **Recently activated AI** section of the home page.

For more information, see Activating actionable use cases from AI Admin Center.

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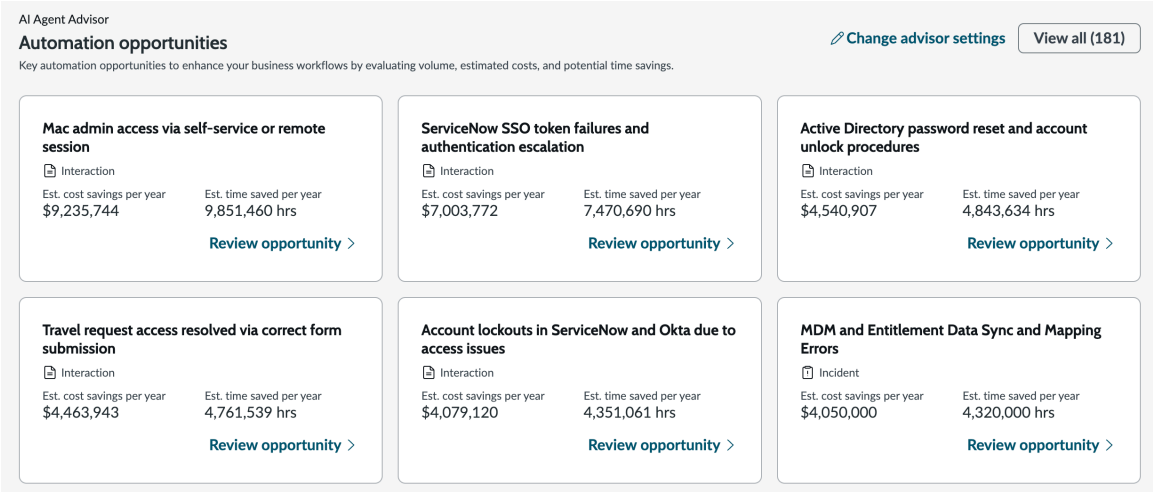
Automation opportunities

This section shows the most relevant opportunities to automate actions or workflows in your instance using AI. The opportunities appear as actionable cards, each showing the results of an assessment performed by AI Agent Advisor.

Automation opportunities section



AI Agent Advisor analyzes your instance data to identify the leading AI opportunities, estimates the potential time savings for each opportunity, and finds the AI agents needed to support the automation.

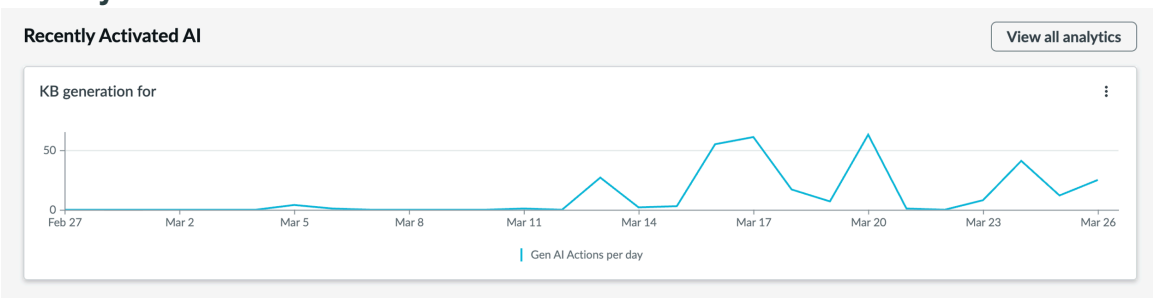
Select **View all** to see a list of all the opportunities identified by AI Agent Advisor.

For more information, see .

Recently activated AI

The Recently activated AI section provides performance statistics on your most recently activated AI solutions.

Recently activated AI section



Each card displays a usage trend line to show adoption over time beginning at the time of activation.

Select **View all analytics** to see a complete list of the AI performance metrics in the **Performance** section of the AI Admin Hub.

For more information, see Monitor your recently activated AI solution in AI Admin Center (Next Experience UI).

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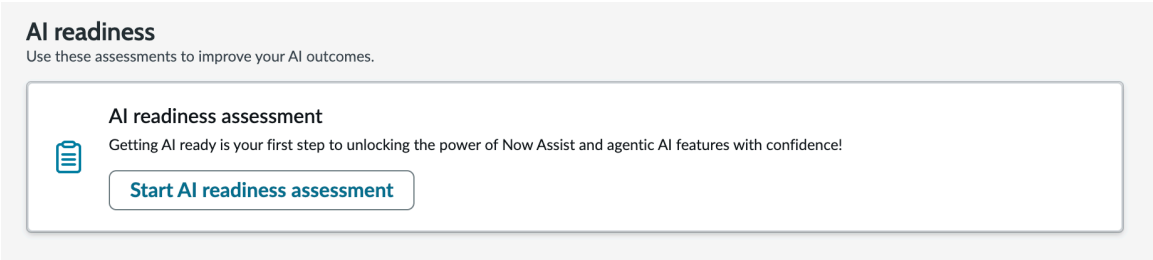
AI readiness

The AI readiness section shows the readiness assessments for your environment.

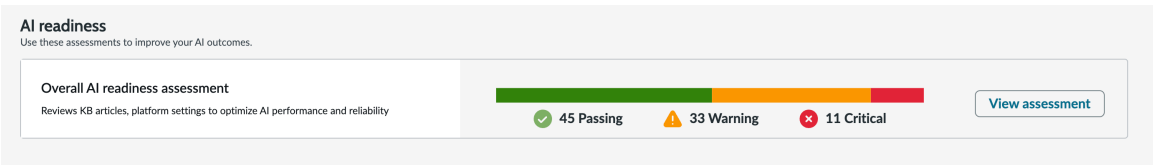
Each assessment helps to determine whether your organization's instance is ready to implement generative AI and agentic AI features. Explore actionable insights to enhance your data, applications, configurations, and workflows, improving the quality of your AI outcomes.

AI readiness section



Select **Start AI readiness assessment** to run the assessment of your instance. After the assessment is complete, the results display in a card showing your overall AI readiness status.

Overall AI readiness assessment



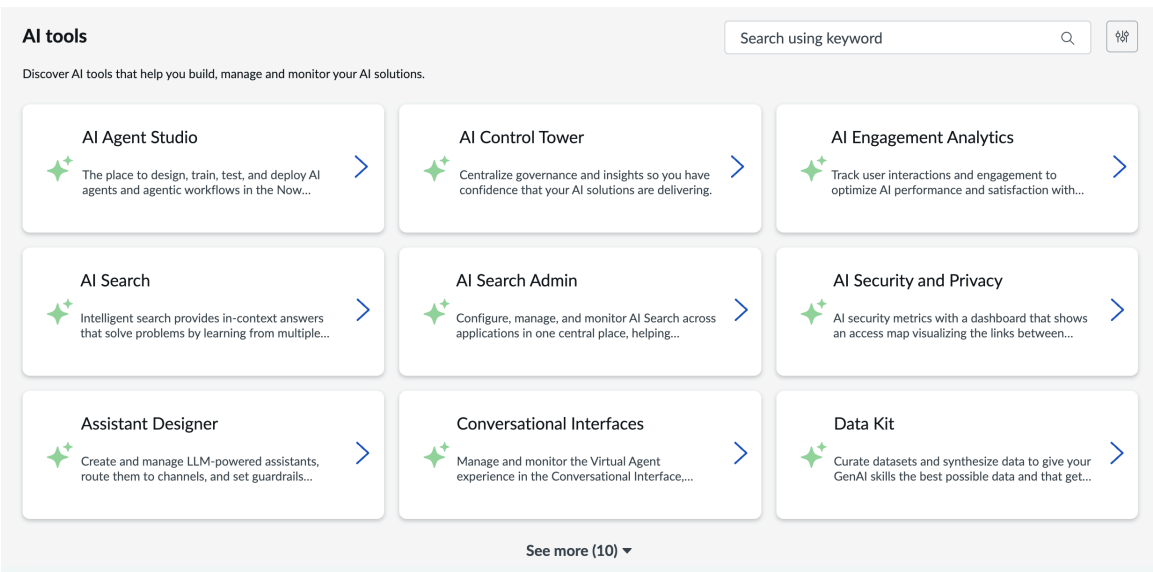
Select **View Assessment** to see the assessment on a separate workspace tab.

For more information, see Increasing AI readiness in AI Admin Center.

AI tools

The AI tools section shows other AI applications on the platform outside of AI Admin Center that can help you build, manage, and monitor your solutions.

AI tools section



Each application appears in a separate card or tile. Select the arrow in the card to open the application in a separate browser tab.

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ServiceNow Otto panel

The ServiceNow Otto panel is the conversational interface where you can interact with the AI companion to perform setup, solution building, and question answering tasks.

The AI companion in the ServiceNow Otto panel uses AI to accomplish AI setup and configuration tasks on your instance based on your requests. Describe what you want to accomplish and the AI companion guides you through the process, executes actions with your confirmation, and answers questions about your instance and the AI products.

Use the ServiceNow Otto panel to perform the following types of actions:

- Perform common administrator functions
- Implement the setup and configuration of AI solutions
- Answer questions and find help documentation
- Activate and set up base system skills
- Enable or disable native and machine translation
- Configure language support for supported language models
- View privacy policy details and guidance
- View data sharing details and guidance
- View data overflow processing details and guidance
- View policy and model providers with management guidance
- View active and deprecated AI model versions
- Discover and assign AI agents and agentic workflows that implement use cases

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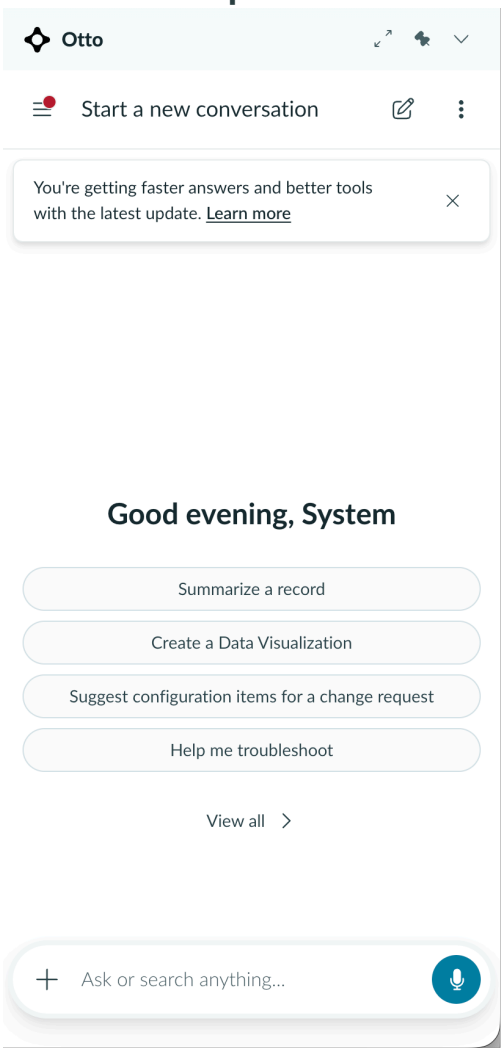
ServiceNow Otto panel



For more information, see Using the conversational experience in AI Admin Center.

AI Admin Center user experience (Lux UI)

Use the AI Admin Center experience to set up, monitor, and manage your AI solutions.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Note: This topic describes the AI Admin Center feature based on the Lux user interface (UI). If you're using the Next Experience UI for AI Admin Center, see the Next Experience UI version of this topic.

Overview of the AI Admin Center experience

The AI Admin Center experience provides features that enable you to set up your AI solutions in a unified experience without switching between separate AI applications.

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With the AI Admin Center experience, you can:

- Access your integrated AI adoption capabilities using the side navigation panel.
- Use the home page features to assess your instance readiness, set up AI solutions, find and activate automation opportunities, and open related AI applications.
- Use the conversational interface in the ServiceNow Otto panel as your AI assistant to perform common setup, building, and question answering tasks.

Access the AI Admin Center experience

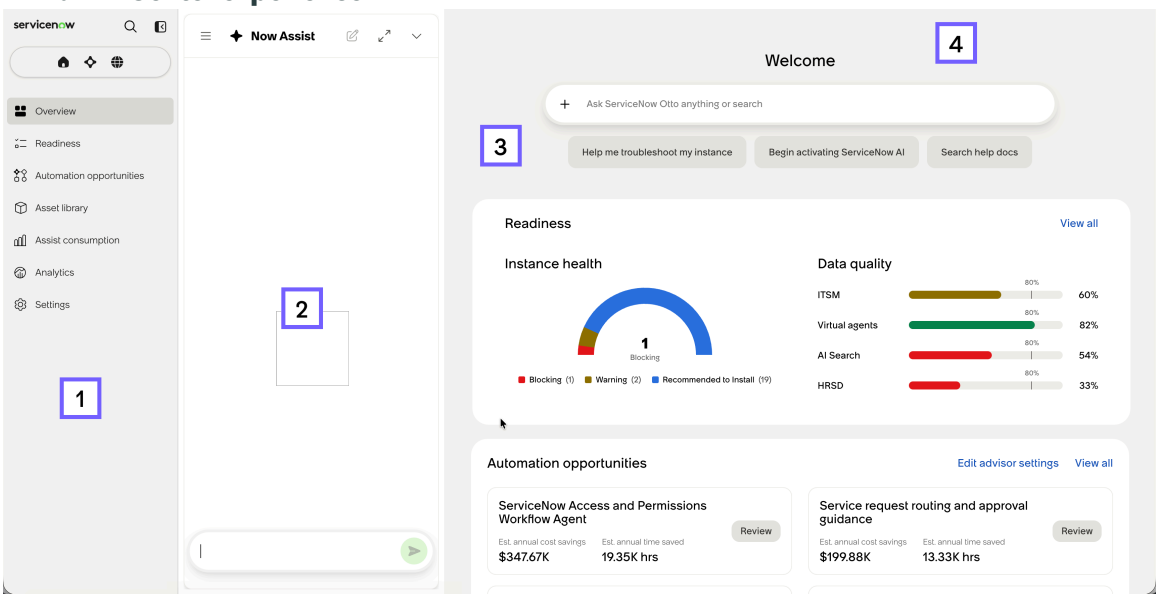
To access the AI Admin Center experience, navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center**.

Layout of the AI Admin Center experience

The AI Admin Center experience includes:

- 1 - Side navigation panel
- 2 - ServiceNow Otto panel
- 3 - ServiceNow Otto box
- 4 - Home page

AI Admin Center experience



Side navigation panel (Lux UI)

The side navigation panel provides access to AI Admin Center capabilities.

Select an item in the navigation panel to open it on the page.

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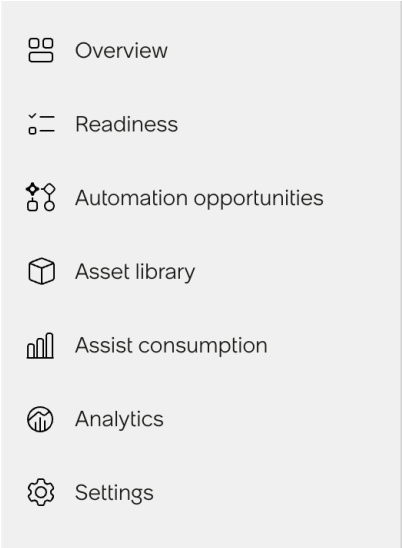
Side navigation panel



The side navigation panel includes the following options:

Navigation panel options

Option	Icon	Description
Overview		The Overview home page provides AI readiness, discovery, setup, and administration features tailored to your instance. The ServiceNow Otto box on the Overview page enables you to use a conversational experience to start activating AI solutions right away with the help of an AI companion.
Readiness		The AI readiness page provides readiness assessment results based on your instance data along with actionable findings to improve readiness to adopt AI.
Automation opportunitie		The Automation opportunities page shows a list of automation opportunities based on your instance data with features to deploy AI agents to implement the automations.
Asset library		The Asset library page shows you all the AI assets in your instance. Each tab in the series provides a list for that asset type. You can view a list of all assets in the **Overview** tab.
Assist consumptic		The Assist consumption page shows the amount of assists consumed by the AI skills and uses on your instance.

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Navigation panel options (continued)

Option	Icon	Description
Analytics		The Analytics page provides dashboards showing usage, performance, and adoption metrics for your AI solutions. Select a tab on the Analytics page to view the Overview, Performance Explorer, Business Value, or Custom Metric dashboard.
Settings		The Settings page provides a list of settings from AI Admin Hub, AI Guardian, and other applications that enable you to set up your AI configuration.

Overview home page (Lux UI)

The AI Admin Center home page provides features to quickly set up your AI implementation, find automation opportunities, check the AI readiness status of your instance, and access related AI applications.

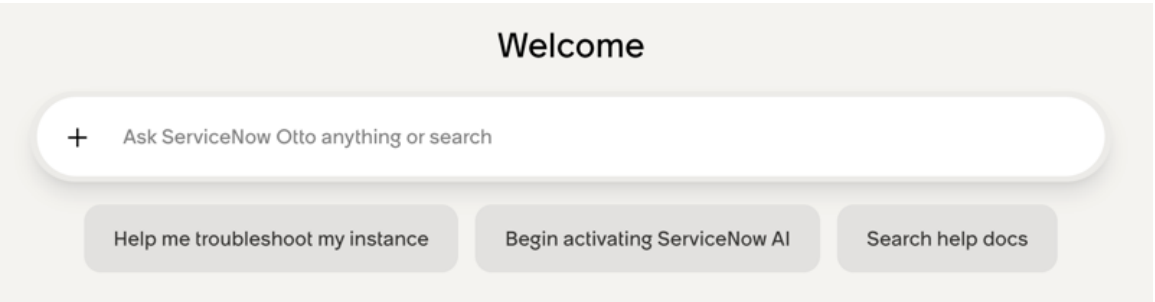
The **Overview** page is tailored to suit your specific environment, role, and business objectives. The sections on your home page display accordingly. The plugin installations and data associated with your instance may affect your experience on the page.

The following sections may appear on your home page based on your instance.

ServiceNow Otto search box

The ServiceNow Otto search box gives you a place on the home page to begin a conversation with your AI companion.

Use this conversational interface to begin a chat, where you can perform setup, solution building, and question answering tasks.



Type a request or select a quick action button to initiate a conversation. The ServiceNow Otto panel opens to continue your conversation.

For more information, see Using the conversational experience in AI Admin Center.

Top actions

The **Top actions** section of the home page displays a series of AI-generated items that represent quick-start use cases. Each use case is tailored to your environment and proposed to help you implement AI adoption, best practices, and administrative setup on the platform.

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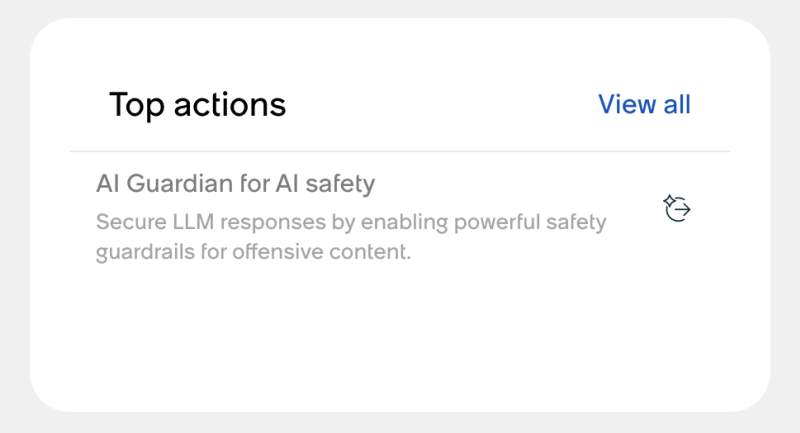


Select an action to begin, and a conversation opens in the ServiceNow Otto panel. In the ServiceNow Otto panel, you can use natural language to have your AI companion implement the use case.

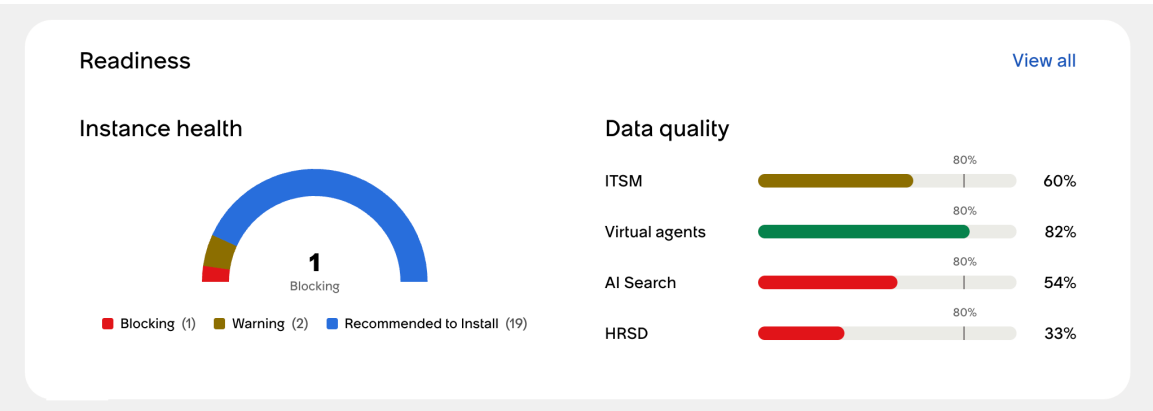
After it is implemented, the use case disappears from the **Top actions** list.

Select **View all** to see your top actions on the AI Solutions page.

For more information, see Activating actionable use cases from AI Admin Center.

Readiness

The **Readiness** section shows the readiness levels of the applications and data quality in your instance based on the readiness assessments performed. Readiness assessments help you to determine whether your organization's instance is ready to implement generative AI and agentic AI features.



The instance health visualization summarizes the outcome of health checks across your AI applications. The checks look for AI applications that are recommended for installation or might otherwise require a version upgrade, dependency installation, or licensing.

The data quality visualization shows the ratings of the data quality per domain based on a series of assessment checks. Each bar shows the percentage of checks that ranked with a passing score.

Select **View all** to see the AI readiness page with lists for instance health and data quality checks.

For more information, see Increasing AI readiness in AI Admin Center.

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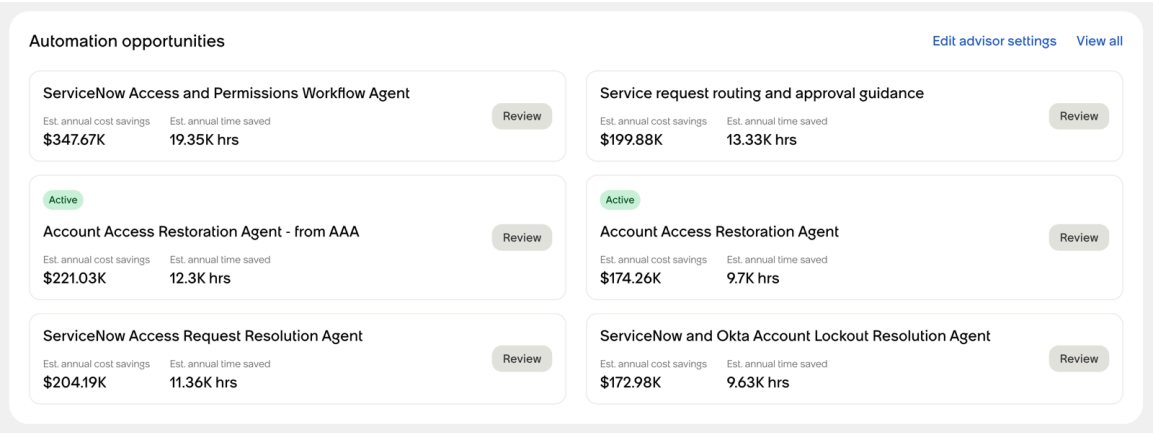
Automation opportunities

The **Automation opportunities** section shows the most relevant opportunities to automate actions or workflows in your instance using AI. The opportunities appear as actionable cards, each showing the results of an assessment performed by AI Agent Advisor.



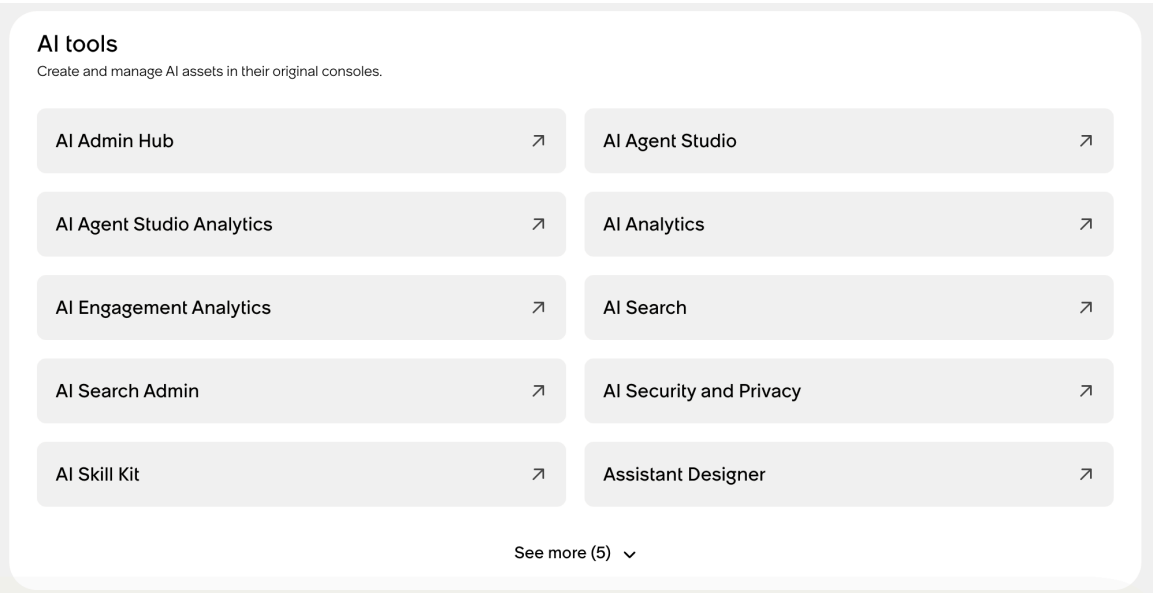
AI Agent Advisor analyzes your instance data to identify the leading AI opportunities, estimates the potential time and cost savings for each opportunity, and finds the AI agents needed to support the automation.

Select **View all** to see a list of all the opportunities identified by AI Agent Advisor. For more information, see Using AI Agent Advisor.

Select **Edit advisor settings** to configure the data source, filters, analysis schedule, and cost profile that AI Agent Advisor uses to identify the automation opportunities. For more information, see Set up a data source for analysis (Lux UI).

AI tools

The **AI tools** section shows other AI applications on the platform outside of AI Admin Center that can help you build, manage, and monitor your solutions.



Each application appears in a separate card. Select the card to open the application in a separate browser tab.

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ServiceNow Otto panel (Lux UI)

The ServiceNow Otto panel is the conversational interface where you can interact with the AI companion to perform setup, solution building, and question answering tasks.

The AI companion in the ServiceNow Otto panel uses generative AI to accomplish AI setup and configuration tasks on your instance based on your requests. Describe what you want to accomplish, and the AI companion guides you through the process, executes actions with your confirmation, and answers questions about your instance and the AI products.

Use the ServiceNow Otto panel to perform the following types of actions:

- Perform common administrator functions
- Implement the setup and configuration of AI solutions
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- Enable or disable native and machine translation
- Configure language support for supported language models
- View privacy policy details and guidance
- View data sharing details and guidance
- View data overflow processing details and guidance
- View policy and model providers with management guidance
- View active and deprecated AI model versions
- Discover and assign AI agents and agentic workflows that implement use cases

For more information, see Using the conversational experience in AI Admin Center.

Supporting information for AI Admin Center

Get a quick overview of the important information that is related to the AI Admin Center application.

Supported versions

AI Admin Center is supported starting with Australia general availability (Patch 2).

AI Admin Center v3.0

Supported user interfaces

The AI Admin Center application supports the Next Experience workspace and the Lux experience user interfaces.

AI Admin Center provides features that enable you to set up of your AI solutions in a unified experience without switching between separate AI applications.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

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Licensing requirements

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Application information

AI Admin Center (sn_na_center) is available as a plugin from the ServiceNow Store.

This store app has no dependencies.

For more information, see Configuring AI Admin Center.

Configuring AI Admin Center

Install and configure settings for AI Admin Center.

Confirm installation of AI Admin Center

Confirm the installation of the AI Admin Center application.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

Review the AI Admin Center application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

AI Admin Center installs and runs automatically as part of the standard ServiceNow Otto for Platform setup. No manual steps are required. After ServiceNow Otto panel for Platform is installed and configured, AI Admin Center will be present on your instance.

Follow these steps to confirm the installation of the AI Admin Center plugin.

Procedure

1. Confirm the AI Admin Center plugin is installed by navigating to **All** > **System Definition** > **Plugins** and selecting the **Installed** tab.
2. **Optional:** If the AI Admin Center plugin is not installed, perform the following steps to manually install it.
   a. Navigate to **All** > **System Definition** > **Plugins**.
   b. In the search box, type `AI Admin Center`.
   c. In the Store applications section under the Available for you tab, select the **AI Admin Center** card.

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d. Select **Install**.

e. Select a version from the list.

f. Review the installation details and select **Continue**.

g. Select an installation schedule option.

h. Select **Install**.
The AI Admin Center application will install at the selected time.

3. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center** to confirm the successful installation.

Result
The application is installed and available to the appropriate user roles.

Enable the ServiceNow Otto panel (Next Experience UI)

Enable the ServiceNow Otto panel to have your AI companion perform setup, configuration, and administrative tasks more quickly using natural language prompts.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin
Role required: sn_na_center.nac_admin

About this task
The ServiceNow Otto panel is turned on by default. If it is turned off, follow these steps to turn on the ServiceNow Otto panel.

The ServiceNow Otto panel must be enabled for administrators to use the conversational interface in AI Admin Center. When the panel is turned off, a banner appears on the home page notifying you that the conversational experience is unavailable, with a link to the settings page.

For more information on the capabilities of the ServiceNow Otto panel, see ServiceNow Otto panel.

Note: This topic describes the AI Admin Center feature based on the Next Experience UI. If you're using the Lux user experience for AI Admin Center, see the Lux UI version of this topic.

Procedure

1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)**.
2. Select **Admin** in the side navigation bar.
3. Under **AI Experiences** on the AI Admin Hub page, select **ServiceNow Otto Panel**.

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4. Select **Turn on** to enable the ServiceNow Otto panel.
5. Select **Turn on** again to confirm.

Result

The ServiceNow Otto panel is enabled and available globally via the ServiceNow Otto icon ( ) in the Next Experience Unified Navigation. The panel understands where users are in the application and can personalize responses accordingly, streamlining the completion of tasks.

Enable the ServiceNow Otto panel (Lux UI)

Enable the ServiceNow Otto panel to have your AI assistant perform setup, configuration, and administrative tasks more quickly using natural language prompts.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

Role required: sn_na_center.nac_admin

About this task

The ServiceNow Otto panel must be enabled for administrators to use the conversational interface in AI Admin Center. When the panel is turned off, a banner appears on the home page notifying you that the conversational experience is unavailable, with a link to the settings page.

For more information on the general capabilities of the ServiceNow Otto panel, see ServiceNow Otto panel (Lux UI).

Note: This topic describes the AI Admin Center feature based on the Lux user interface (UI). If you're using the Next Experience UI for AI Admin Center, see the Next Experience UI version of this topic.

Procedure

1. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center**.
2. Select **Settings** ( ) in the side navigation panel.
   The Settings page opens.
3. Under **ServiceNow Otto Experience** on the Settings page, select **ServiceNow Otto panel**.
4. Select **Turn on** to enable the ServiceNow Otto panel.
5. Select **Turn on** again to confirm.

Result

The ServiceNow Otto panel is enabled and available globally using the ServiceNow Otto icon ( ). The panel understands where users are in the application and can personalize responses accordingly, streamlining the completion of tasks.

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Using the conversational experience in AI Admin Center

Use the ServiceNow Otto panel to perform AI administration and setup tasks through a conversational interface directly in AI Admin Center.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

The ServiceNow Otto panel is enabled by default, and is accessible from every page in AI Admin Center. You can interact with your AI companion by typing questions and instructions in plain language.

For more information on the general capabilities of ServiceNow Otto panel, see ServiceNow Otto panel.

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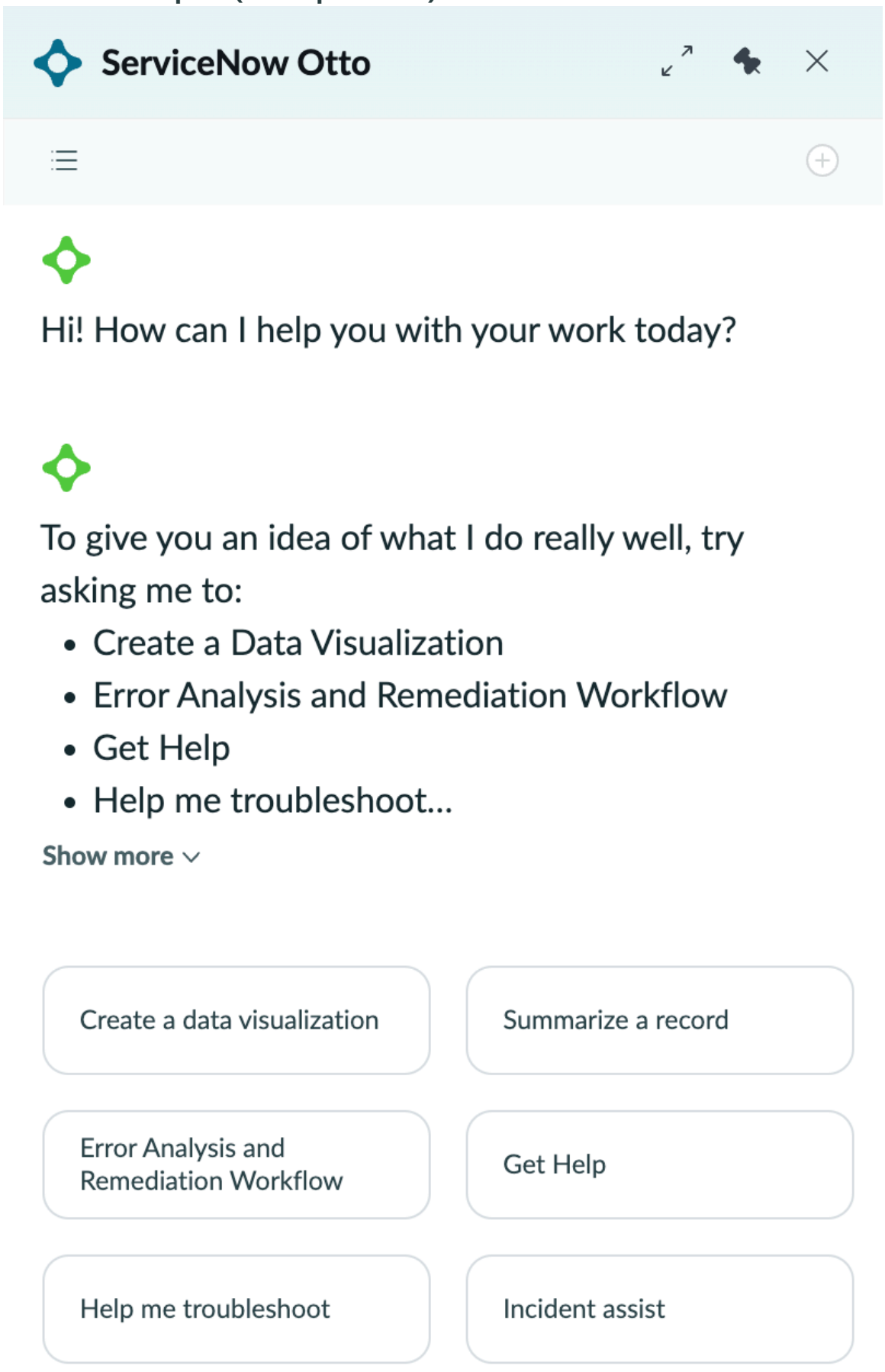
ServiceNow Otto panel (Next Experience UI)



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AI companion capabilities

Use the ServiceNow Otto panel to perform the following types of actions in AI Admin Center:

Setup and configuration

Start guided setup workflows for generative AI skills, AI Guardian settings, model configurations, multilingual service, data sharing and processing, integrations, and account details. The AI companion executes setup steps on your behalf and asks for your confirmation before any change takes effect.

Skill activation and deactivation

Activate or deactivate generative AI skills through conversation. The panel presents skill details and current state before requesting confirmation.

Instance and product details

Query configuration details about your instance including translation status, language configurations, data sharing settings, model providers, model versions, and integrations.

Create and manage intents

Create intent records and generate the name, description, example utterances, detection criteria, and resolution criteria for them. Use the conversation to find, update, activate, deactivate, or delete existing intents.

AI-assisted help

Ask questions about AI features, concepts, and admin tasks. The panel sources product documentation and training resources and returns answers with references and links to the source material.

After you enter your request in the chat, your AI companion generates a plan to implement your AI solution using the available AI assets. You can review the details of the solution, test it, and activate it, all in the conversation.

Self-service conversational troubleshooting

Depending on your chat request, the self-service conversational troubleshooting AI agents may be engaged to diagnose common AI administration issues.

Self-service conversational troubleshooting can help with issues such as:

- AI Admin Center configuration or setup problems
- Plugin installation or activation failures
- Missing or turned off AI application features
- Integration connectivity or credential problems
- Role or permission misconfigurations affecting access
- Feature flags or activation toggles in an unexpected state
- Compatibility conflicts between plugins or versions

For more information, see Self-service conversational troubleshooting.

AI Admin Center help

Based on your chat request, the help AI agent may be engaged to find answers to your AI admin questions based on ServiceNow documentation. The AI agent responses provide relevant descriptions, instructions, references, and links to source documents that support your product experience.

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For more information, see AI Admin Center help.

AI analytics Q and A

Based on your chat request, the AI Analytics Q and A AI agent may be engaged to provide answers about AI analytics in AI Admin Center including metrics, dashboard widgets, and calculations.

The AI Analytics Q and A AI agent can address topics such as:

- KPI definitions in AI analytics dashboards, such as CSAT, deflection rate, and so on.
- How a dashboard widget or metric is calculated
- Data flows and processing context for AI analytics
- Deflection log states and common deflection scenarios
- Changes to AI analytics dashboards between releases, such as updated or removed indicators and new dashboards

For more information, see AI Analytics Q and A agent.

Intent management

Based on your request, an AI agent may be engaged to helps create and update Natural Language Understanding (NLU) intents. Intent management can help you to:

- Create an intent.
- Update an existing intent identified by a specific intent name or sys_id.
- Delete an existing intent.
- Activate or deactivate an existing intent.
- Look up intents by name or sys_id.

Self-service conversational troubleshooting

Use the AI Admin Center conversational experience to diagnose common AI administration issues.

Self-service conversational troubleshooting overview

Self-service conversational troubleshooting is a diagnostic assistant in the AI Admin Center conversational experience. It interprets your issue description and classifies it against a library of known AI admin failure patterns. The AI agent presents a root cause hypothesis with a confidence level, enabling you to make informed decisions about how to resolve the issue.

Self-service conversational troubleshooting may work with other AI agents to accomplish tasks. For more information on AI agents, see Explore AI agents.

AI agent access

The AI agent runs every action as you and never elevates your privileges. It can't make a change that your roles don't permit.

Role required: sn_na_center.nac_admin

AI agent uses

Use self-service conversational troubleshooting to help with issues such as:

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- AI Admin Center configuration or setup problems
- Plugin installation or activation failures
- Missing or turned off Now Assist application features
- Integration connectivity or credential problems
- Role or permission misconfigurations affecting Now Assist access
- Feature flags or activation toggles in an unexpected state
- Compatibility conflicts between plugins or versions

For more information, see the troubleshooting issues described in KB article KB2330598 on Now Support.

AI agent actions

When used, the AI agent may attempt the following actions:

- Interpret the information provided by the user.
- Compare the information against documented issues.
- Present a root cause hypothesis with a confidence level.
- Recommend remediation actions after receiving user confirmation.
- Maintain issue context throughout the conversation.

How it works

1. Describe your issue in the conversational interface in AI Admin Center.
2. The AI agent interprets your description and matches it against known failure patterns.
3. The AI agent displays the possible root cause of the issue along with its degree of confidence that it is correct.
4. You review the hypothesis and confirm, adjust, or provide additional details about the issue.
5. After you confirm the diagnosis, the AI agent guides you toward a resolution.

   Depending on your issue, the agent may do one of the following:

   - Walk you through specific configuration steps.
   - Link you to relevant documentation or troubleshooting articles.
   - Suggest settings or statuses to verify.
   - Recommend escalation to support if the issue requires specialized help.
6. The AI agent retains your issue description, the diagnosis, and the confidence level throughout your session so you can ask follow-up questions without repeating context.

AI Admin Center help

Use AI Admin Center help in the conversational experience to find answers to your AI admin questions based on ServiceNow documentation.

AI Admin Center help overview

The AI Admin Center help AI agent is a product help assistant in the AI Admin Center conversational experience that uses all available ServiceNow documentation and training resources to answer your questions about the product. The AI agent responses provide relevant

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descriptions, instructions, references, and links to source documents that support your product experience.

The AI Admin Center help AI agent may work with other AI agents to accomplish tasks. For more information on AI agents, see Explore AI agents.

AI agent access

Role required: sn_na_center.nac_user

AI agent actions

When used, the AI agent may attempt the following actions.

- Search and index all available ServiceNow documentation and training resources.
- Generate a descriptive response to the question.
- Provide references and links to the source documents that informed the response.

How it works

1. Ask a question in the conversational interface in AI Admin Center.
2. The AI agent interprets your question and searches the available ServiceNow documentation and training resources for the answer.
3. The AI agent displays the answer in the conversation including any links to related source documents.
4. You review the answer. If necessary, provide additional details about the question for a more relevant answer.
5. The AI agent retains the conversation throughout your session so you can ask follow-up questions without repeating context.

AI Analytics Q and A agent

Use the AI Analytics Q and A agent to get answers about AI analytics metrics, dashboard widgets, and calculations by asking questions in the ServiceNow Otto® panel.

AI Analytics Q and A agent overview

The AI Analytics Q and A agent answers natural-language questions about AI analytics in AI Admin Center. When you ask an analytics-related question in the ServiceNow Otto panel or in ServiceNow Otto for Virtual Agent, the AI Analytics Q and A Workflow is triggered first. This LLM-controlled agentic workflow has a single step that calls the AI Analytics Q and A agent to generate a response.

Note: The AI Analytics Q and A agent is not listed in AI Admin Hub under AI skills. It is built into the ServiceNow Otto conversational experience and is not available for separate configuration. The agent does not consume any assists from your entitlements.

The AI Analytics Q and A agent may work with other AI agents to accomplish tasks. For more information on AI agents, see AI Agent Studio (legacy).

Responses from the AI Analytics Q and A agent are generated using AI and may be inaccurate or incomplete. Review a response before you act on it.

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Agent uses

Use the AI Analytics Q and A agent to ask about topics such as:

- KPI definitions in AI analytics dashboards, such as CSAT, deflection rate, and so on.
- How a dashboard widget or metric is calculated
- Data flows and processing context for AI analytics
- Deflection log states and common deflection scenarios
- Changes to AI analytics dashboards between releases, such as updated or removed indicators and new dashboards

Access requirements

Role required: sn_na_analytics.viewer

How it works

1. Ask a question about AI analytics dashboards using the panel or in ServiceNow Otto for Virtual Agent, for example, what a metric means or how a KPI is calculated.
2. The AI Analytics Q and A Workflow is triggered. This LLM-controlled agentic workflow evaluates your question and calls the AI Analytics Q and A agent.
3. The AI Analytics Q and A agent searches AI analytics content and displays a response.
4. Review the response. Ask follow-up questions to get more detail.

Increasing AI readiness in AI Admin Center

Use AI readiness assessments to help you find actionable items in your implementation preparation and direct links to improve those areas.

AI readiness overview

AI readiness assessments help you determine the readiness of your organization's instance to implement generative and agentic AI features. They enable you to assess whether updates, installations, or customizations of your instance could affect implementation.

The AI readiness assessments jobs automate assessment processes, evaluate data readiness, and provide actionable insights with links to help you more quickly prepare for AI adoption.

The AI readiness assessment evaluates and assesses the following areas of your instance for AI implementation readiness.

- AI agents and agentic workflows
  - Agentic AI for IT Service Management (ITSM)
  - Agentic AI for Customer Service Management (CSM)
  - Agentic AI for HR Service Delivery (HRSD)
- Generative AI capabilities
  - Generative AI for AI Search
  - Generative AI for Virtual Agent (VA)
  - Generative AI for IT Service Management (ITSM)

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- Generative AI for Customer Service Management (CSM)
- Generative AI for HR Service Delivery (HRSD)

Run the AI readiness assessment job in AI Admin Center (Next Experience UI)

Run the AI readiness assessment to analyze your instance and evaluate its readiness for AI adoption.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

Role required: sn_na_center.nac_admin

About this task

Follow these steps to run the AI readiness assessment job. The job performs an analysis of your instance data and produces readiness assessments. The assessments enable you to identify configuration gaps, measure readiness over time, and accelerate the path to AI implementation.

Note: This topic describes the AI Admin Center feature based on the Next Experience UI. If you're using the Lux user experience for AI Admin Center, see the Lux UI version of this topic.

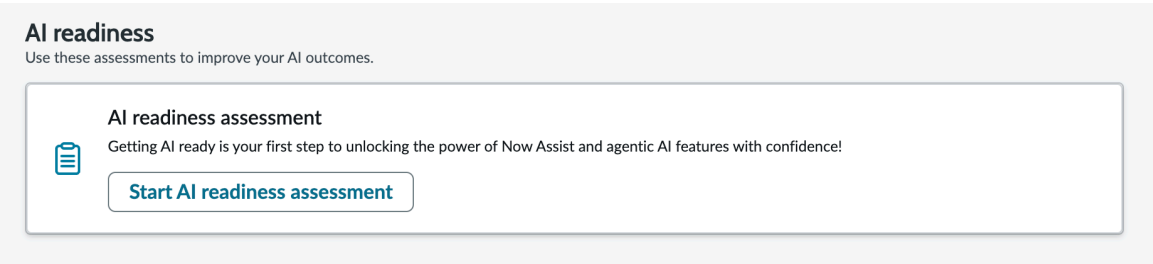
Procedure

1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)**.

   The AI Admin Center opens to the home page.

   The card in the AI readiness section displays a **Start AI readiness assessment** button if the assessment has not yet been run.

   AI readiness section

2. Select **Start AI readiness assessment** to run the assessment of your instance.

   The AI readiness assessment may take several minutes to run.

   After the assessment is complete, the results display in a card showing your overall AI readiness status.

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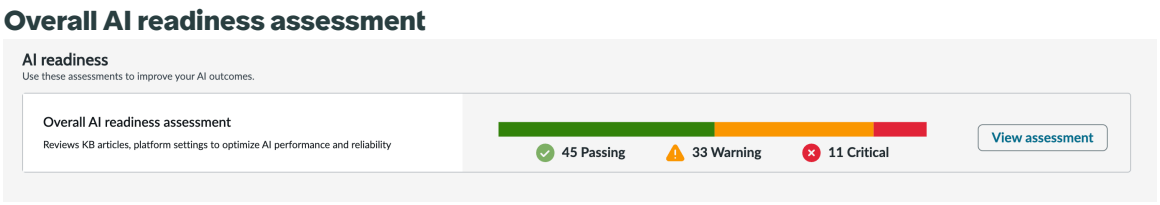
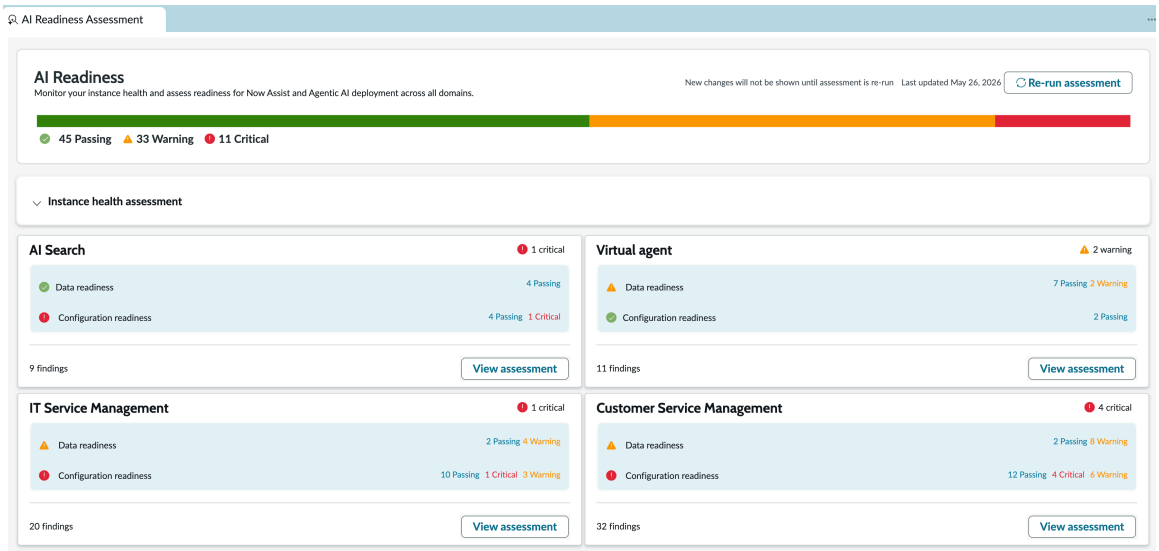


3. **Optional:** Re-run the overall AI readiness assessment at any time.

   a. Select AI readiness assessment ( ) in the side navigation bar.

   (Optional) The AI Readiness Assessment tab opens.



   b. Select **Re-run assessment**.

4. **Optional:** Re-run the individual AI readiness assessment for specified area of your instance at any time.

   a. Select AI readiness assessment ( ) in the side navigation bar.

   (Optional) The AI Readiness Assessment tab opens.

   b. Select **View assessment** in the card of an individual assessment.

   (Optional) The View Assessment tab opens showing the detailed results of a readiness assessment for the specified area of your instance.

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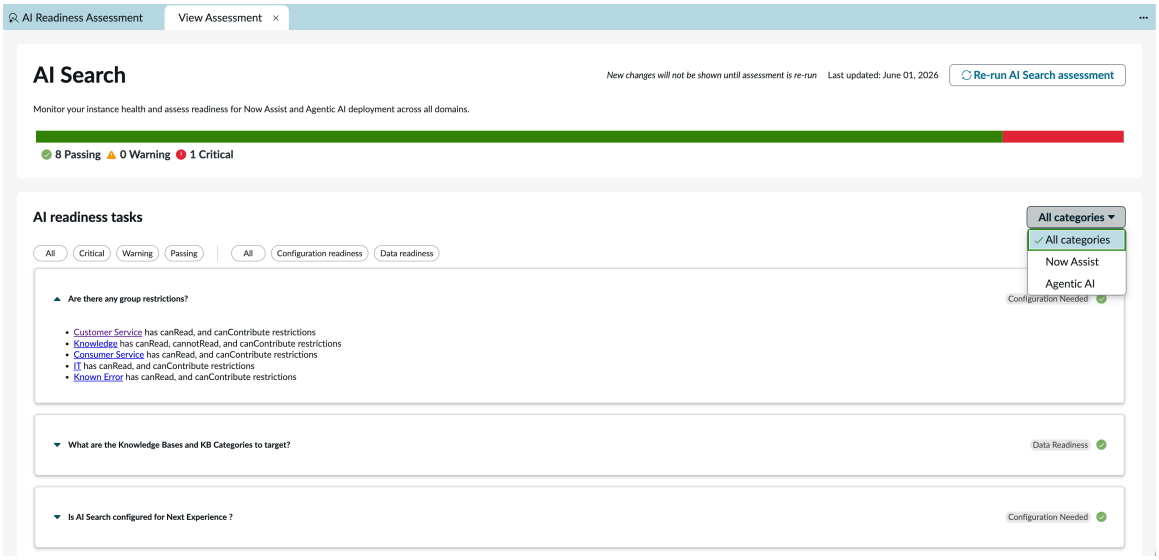

c. Select **Re-run assessment**.

Note: The label of the button includes the assessment name. In the example of running the assessment for AI Search, the button label is **Re-run AI Search assessment**.

What to do next

Review the readiness assessments results. For more information, see View an AI readiness assessment in AI Admin Center (Next Experience UI).

Run the AI readiness assessment job in AI Admin Center (Lux UI)

Run the AI readiness assessment to analyze your instance and evaluate its readiness for AI adoption.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

Role required: sn_na_center.nac_admin

About this task

Follow these steps to run the AI readiness assessment job. The job performs an analysis of your instance data and produces readiness assessments. The assessments enable you to identify configuration gaps, measure readiness over time, and accelerate the path to AI implementation.

Note: This topic describes the AI Admin Center feature based on the Lux user interface (UI). If you're using the Next Experience UI for AI Admin Center, see the Next Experience UI version of this topic.

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Procedure

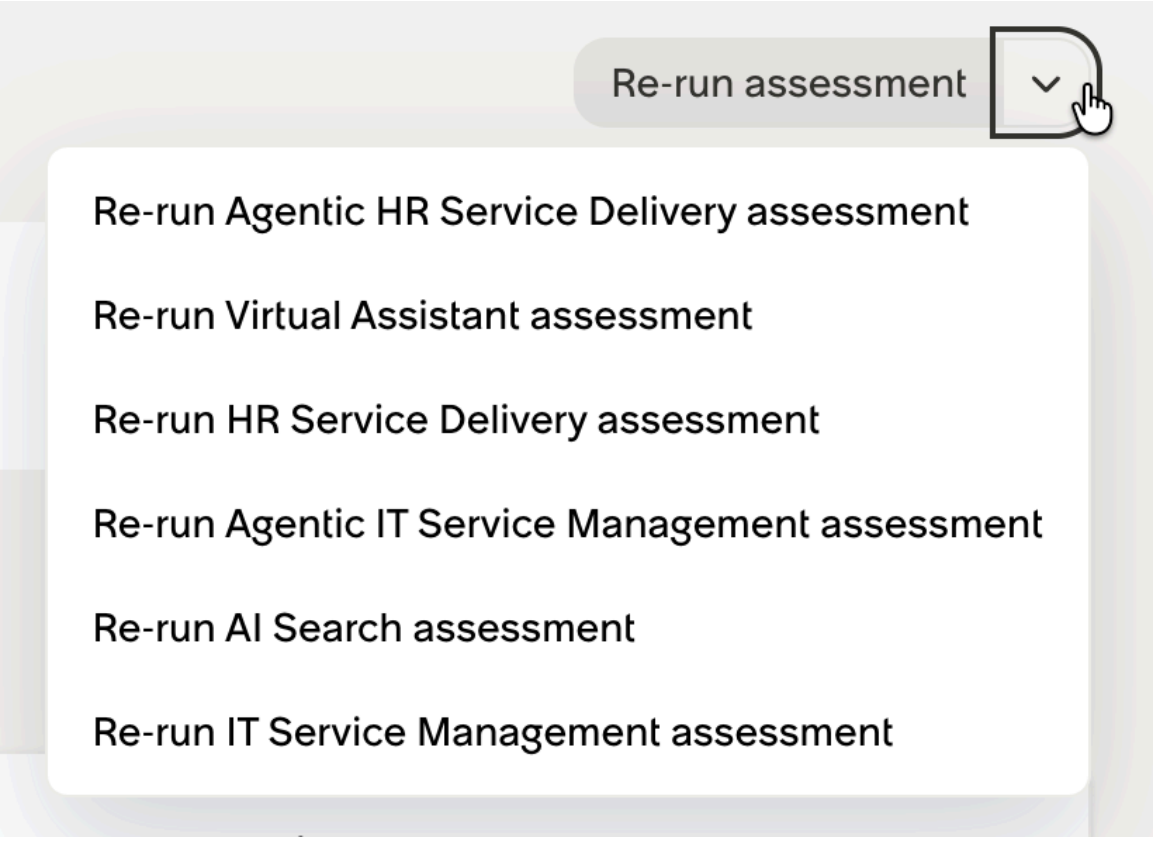
1. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center**.

   The AI Admin Center opens to the home page.

2. Select **Readiness** ( ) in the side navigation panel.
   The AI readiness page opens.
3. Select **Run assessment** or **Re-run assessment**.
4. **Optional:** Re-run the individual AI readiness assessment for a specified area of your instance at any time.

   a. Select the **Re-run assessment** drop-down button ( ).
   The re-run assessment list displays.

Run assessment on the AI readiness page



   b. Select an individual assessment.

What to do next

Review the readiness assessment results. For more information, see View your AI readiness in AI Admin Center (Lux UI).

View an AI readiness assessment in AI Admin Center (Next Experience UI)

Review the results of readiness assessments run for your instance.

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In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

Before you can review your readiness assessments in AI Admin Center, you must first run the AI readiness assessment job. For more information, see Run the AI readiness assessment job in AI Admin Center (Next Experience UI).

Role required: sn_na_center.nac_admin

About this task

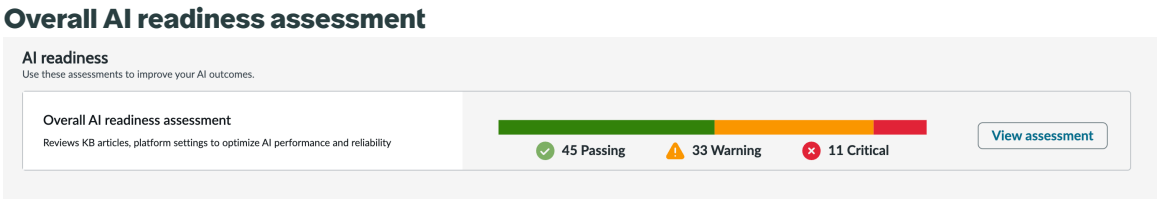
Follow these steps to review the AI readiness assessments based on your instance data.

Note: This topic describes the AI Admin Center feature based on the Next Experience UI. If you're using the Lux user experience for AI Admin Center, see the Lux UI version of this topic.

Procedure

1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)**.
2. Review the AI Readiness section of the home page to see the overall AI readiness assessment for the instance.

   The card displays a description of the assessment, the number of findings sorted by status, and a link to the AI Readiness Assessment page.



3. Select **View assessment** in the card or select AI readiness assessment ( ) in the side navigation bar to view the complete list of AI readiness assessments.

   The AI Readiness Assessment tab opens showing a general assessment summary and a list of assessments for individual product areas.

   Each card shows the number of assessment findings, the readiness status for each assessment category, and a link to view the assessment details.

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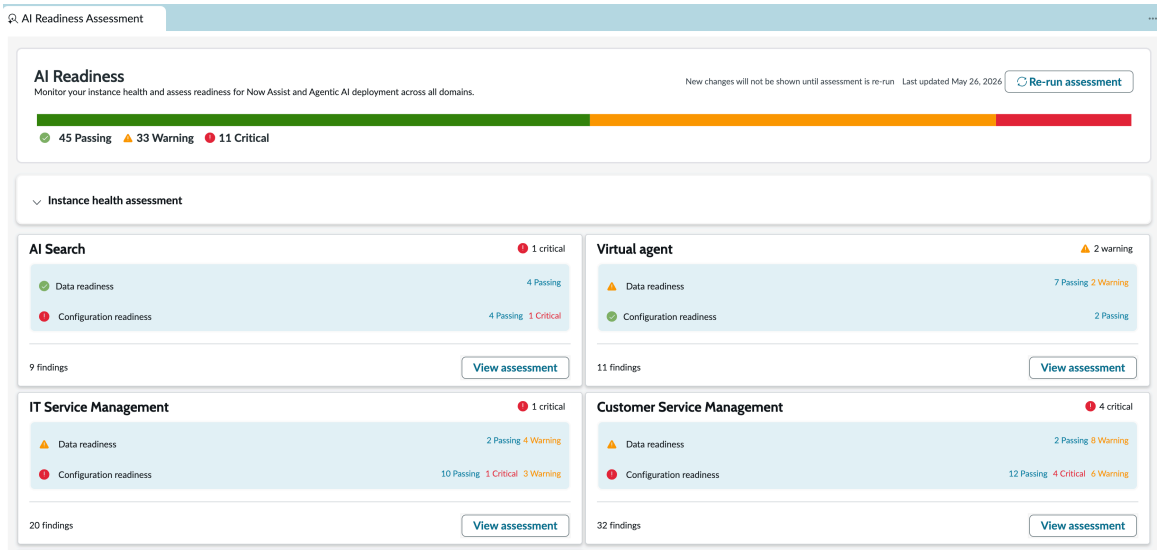
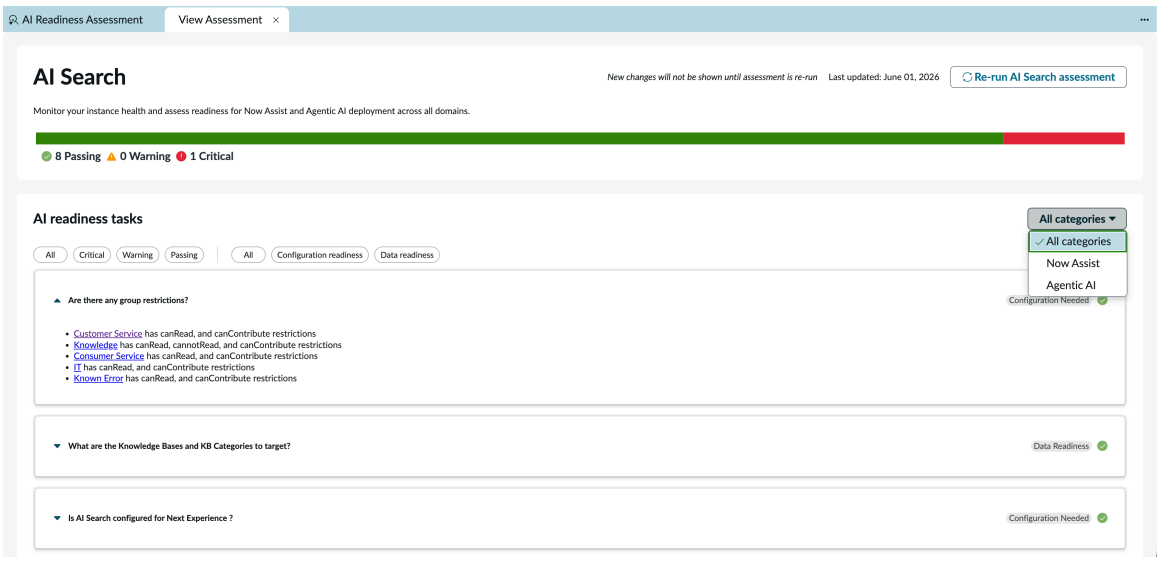


4. Select the **Instance health assessment** card to view information about your instance status.
5. Select **View assessment** in the card of an individual assessment.

   The View Assessment tab opens showing the detailed results of a readiness assessment for the specified area of your instance. It shows the summary results of the checks performed and lists the important tasks to achieve AI implementation readiness.



6. **Optional:** Filter the list of tasks as needed.
   - Select the category box and choose a category to filter by category.
   - Select any combination of the filter option buttons to filter by readiness status and task type.
7. Select the caret-down-outline icon (▼) to view the task details.

What to do next

Resolve the reported issues to improve AI implementation readiness.

View your AI readiness in AI Admin Center (Lux UI)

Review the results of readiness assessments run for your instance.

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Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

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In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

AI readiness assessments are run on your instance to produce the results that you can view in these steps. You can re-run an AI readiness assessment at any time to update the results. For more information, see Run the AI readiness assessment job in AI Admin Center (Lux UI).

Role required: sn_na_center.nac_admin

About this task

Follow these steps to review and evaluate the readiness of your instance for AI adoption.

Note: This topic describes the AI Admin Center feature based on the Lux user interface (UI). If you're using the Next Experience UI for AI Admin Center, see the Next Experience UI version of this topic.

Procedure

1. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center**.

   The AI Admin Center opens to the home page.

2. Review the **Readiness** section of the home page to see the overall AI readiness for the instance.

   The section displays data visualizations for overall instance health and data quality.

3. Select **View all** in the **Readiness** section or select **Readiness** ( ) in the side navigation panel to view the complete list of AI readiness checks.

   The AI readiness page opens showing tabs for **Instance health** and **Data quality**.

   Each tab shows a general assessment summary and a list of checks performed for individual product areas.

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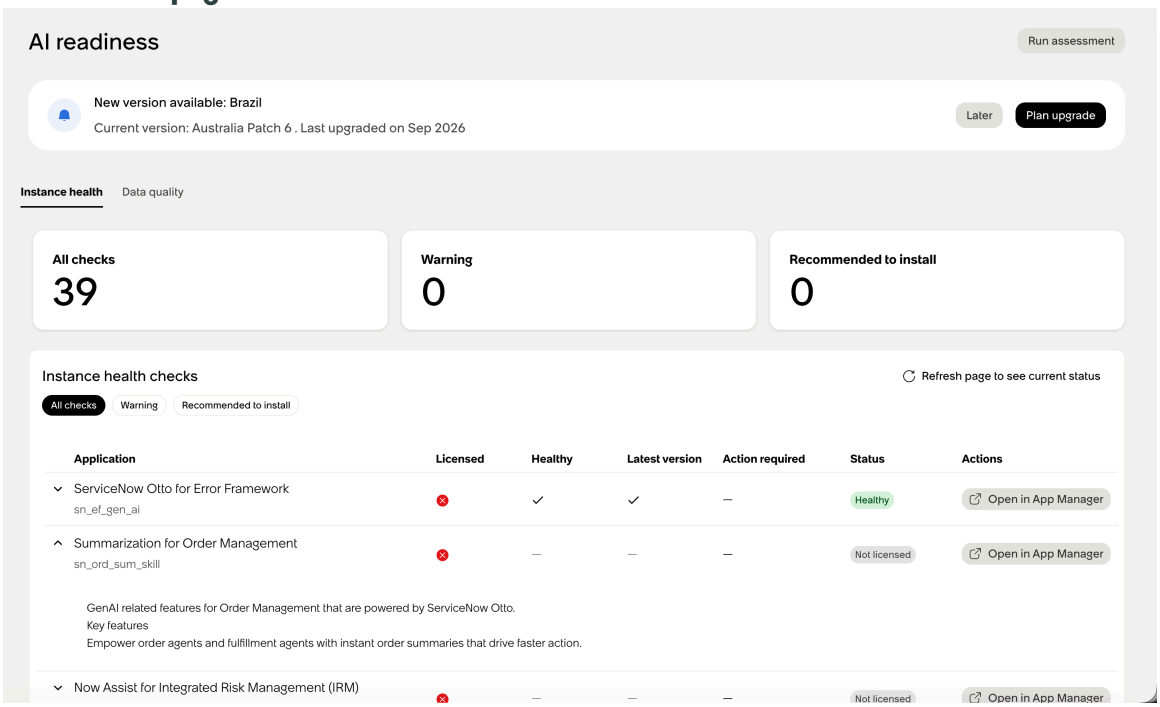
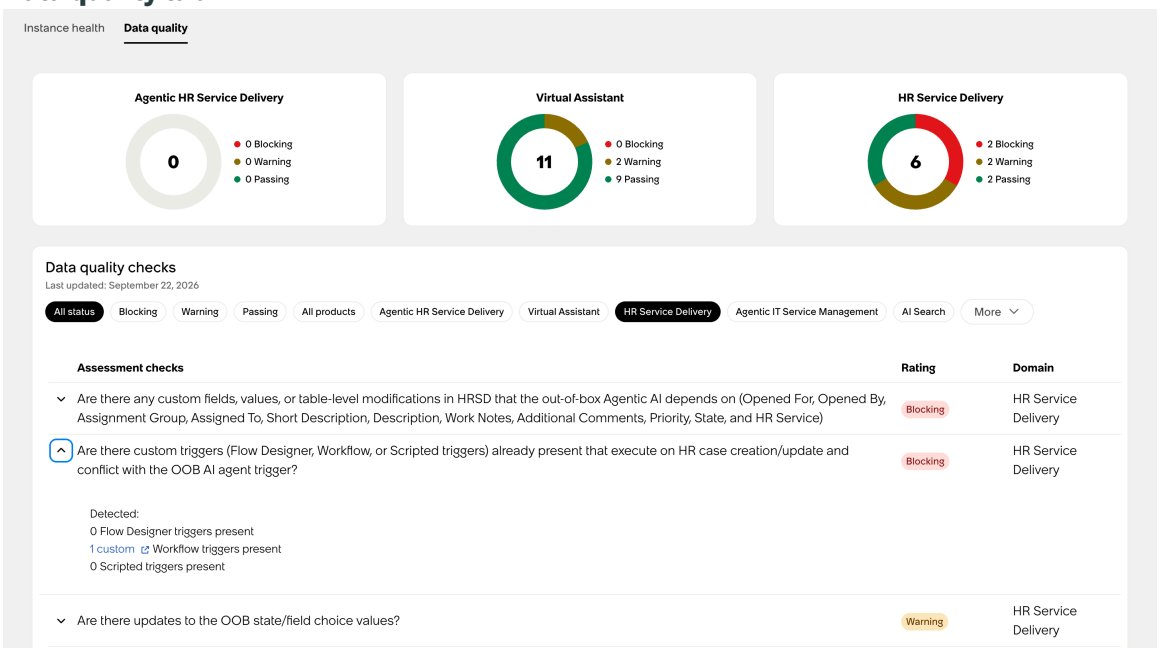
AI readiness page



4. Select a tab to view the check results.
   - Select the **Instance health** tab to view the results of checks performed for the applications installed on your instance.
   - Select the **Data quality** tab to view the results of checks performed for the data in your instance.

Data quality tab



5. **Optional:** Select a combination of the filter option buttons to filter by rating and product area.
6. Select the **Expand** icon (⌄) for a check to view the details.

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What to do next
Resolve the reported issues to improve AI implementation readiness.

Plan an instance upgrade (Lux UI)

Run an upgrade readiness pre-check and evaluate the current version against the target version to determine if you're ready to upgrade your instance.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin
You can select the LLM provider that generates the upgrade readiness pre-check results in the settings. For more information, see Manage model providers.

Role required: sn_na_center.nac_admin

About this task
Before upgrading your ServiceNow instance, run a pre-upgrade scan against a target release to identify how the upgrade will affect your AI plugin configurations and customizations.

The scan provides an impact report for your instance highlighting any potential risks from new features, deprecated features, customization issues, compatibility issues, and behavior changes. Use the impact report when planning remediation to help prevent the upgrade from breaking functionality.

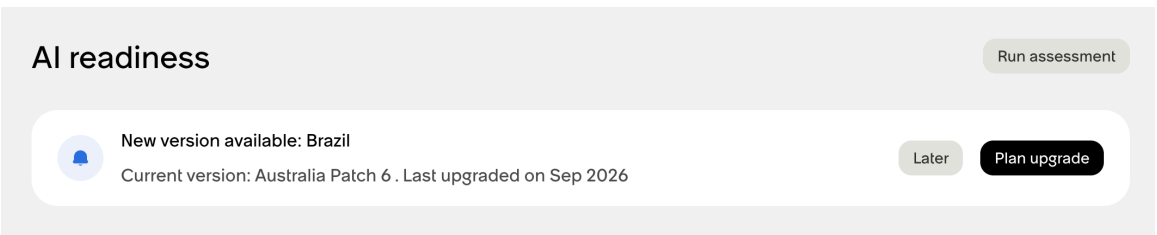
Each pre-upgrade scan and the resulting impact report reflects the configuration of the instance at that point in time. The system only retains the results of the current scan and the one immediately before it, so you can see what changed between them. Previous impact reports aren't permanently saved. You can download a copy of the impact report to save for reference.

Follow these steps to run the upgrade readiness pre-check and review the results.

Note: This topic describes the AI Admin Center feature based on the Lux user experience (UI). There is no Next Experience UI version of this topic.

Procedure
1. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center**.
2. Select **AI readiness** ( ) in the side navigation panel.
   The AI Readiness Assessment page opens.

   When a platform upgrade is available, a notification displays with a **Plan Upgrade** button.



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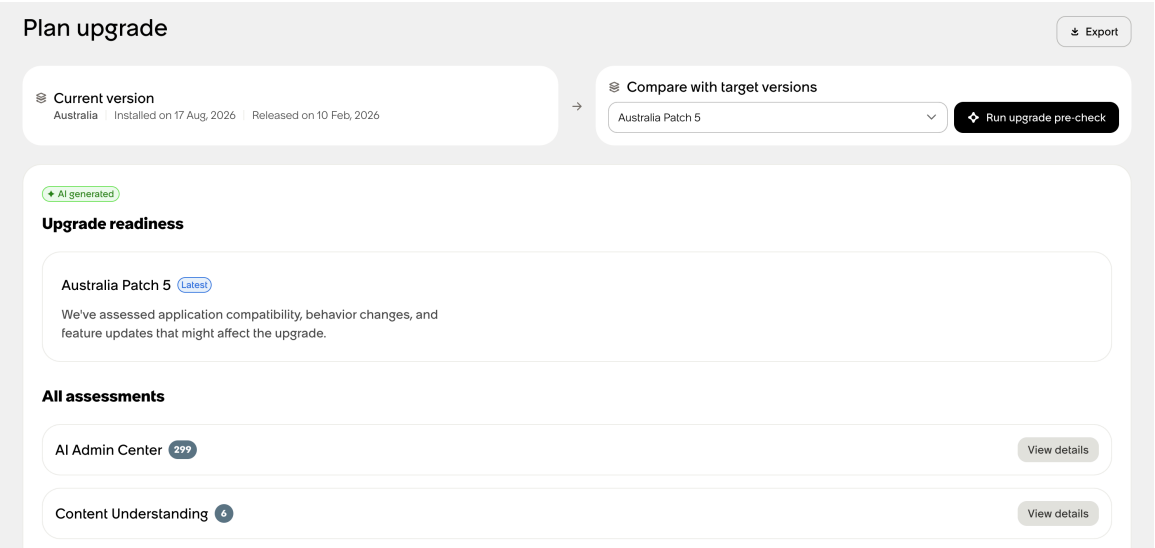
3. Select **Plan upgrade**.
   The Plan upgrade page opens showing the current version.

   The results of the last-run pre-check display, if applicable.

4. Select a target version for comparison.
   If your instance is on the latest version, there is no option to select.
5. Select **Run upgrade pre-check**.

   The results of the upgrade pre-check display in an **Upgrade readiness** list showing areas to address before upgrading.

Plan upgrade page with pre-check results



6. Select **View details** for each result in the list.

   The selected details open in a side panel, grouped by issue type.

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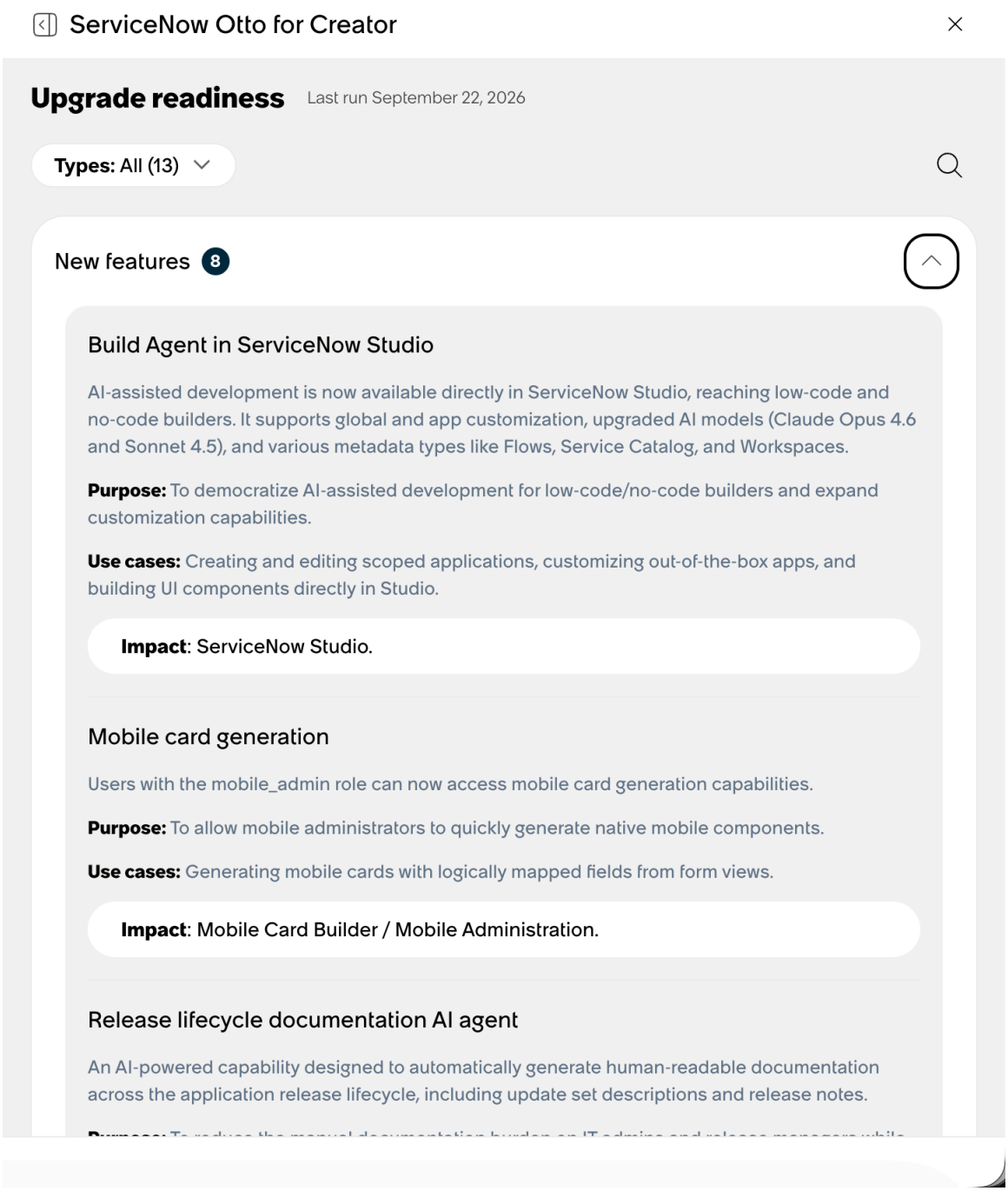
Pre-check result side panel



a. Optional: Use the search and filter options to refine the list.

- Type in the search box and select the **Search** icon ( ) to filter by search criteria.
- Select one or more options from the **Types** filter menu.

b. Select the **Expand** icon ( ) for an issue type to view the issue details.

c. Select the **Close** icon ( ) to close the side panel.

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7. **Optional:** Select **Export** to download a copy of the upgrade readiness report.
   The upgrade readiness report downloads as a .csv file.
8. **Optional:** Select **Proceed to upgrade in upgrade manager** to go to the Upgrade Console to manage your upgrade.
   For more information, see Guided upgrade.

What to do next

Plan remediation steps based on the results of the impact report and prepare your instance for the upgrade to the target release.

Setting up AI capabilities and configurations in AI Admin Center

Use AI Admin Center to set up AI solutions on your instance.

Activate actionable use cases

Actionable use cases are quick-start scenarios that help you rapidly adopt AI capabilities on your instance.

Discover automation opportunities and implement AI agents

Use AI Agent Advisor to automatically discover automation opportunities in your instance and deploy AI agents to implement the automations.

Configure AI admin settings

Use AI Admin Hub configuration features to configure AI settings and experiences.

Manage AI assets

Use the asset library to manage the AI assets on your instance. AI assets include agents, agentic workflows, skills, subflows, intents, actions, virtual assistants, and topics. They also include datasets, knowledge graphs, and catalog items.

Manage custom datasets

Use AI Data Kit features to add custom datasets to a data catalog and create collections for use in AI Skill Kit.

Configure AI guardrails

Use AI Guardian capabilities to configure safety and governance controls for AI-generated content.

Activating actionable use cases from AI Admin Center

Actionable use cases are quick-start scenarios that help you rapidly adopt AI capabilities on your instance.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Overview of actionable use cases

Actionable use cases are represented as top action items in the first section of the home page. Each item shows a supported and ready-to-activate AI solution for your instance, such as activating an AI skill for ITSM or configuring a safety setting through AI Guardian.

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Actionable use cases use generative AI to tailor the solution and guide setup. The system analyzes your instance profile, organizational context, license entitlements, installed products, and current AI enablement state to determine which use cases to display and in which order. Only use cases for products that you're entitled to use appear on the home page.

Types of actionable use cases

The following are some examples of actionable use cases that may appear on your home page:

- Let's get you set up (install essential AI plugins)
- Case summarization for CSM
- Chat summarization for CSM
- KB generation for CSM
- Resolution notes generation for CSM
- Chat summarization for ITSM
- Incident summarization for ITSM
- KB generation for ITSM
- Resolution notes generation for ITSM

Install and configure essential AI plugins using AI Admin Center

Install the plugins required to enable AI solutions on your instance before activating use cases.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

Role required: sn_na_center.nac_admin

About this task

Follow these steps to install essential AI plugins.

Note: This topic describes the AI Admin Center feature based on the Next Experience user interface (UI). There is no Lux UI version of this topic.

Procedure

1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)**.

   The first time you access AI Admin Center, a welcome message displays prompting you to get started by installing essential plugins. If you already have these plugins installed, the message simply introduces the benefits of AI Admin Center.

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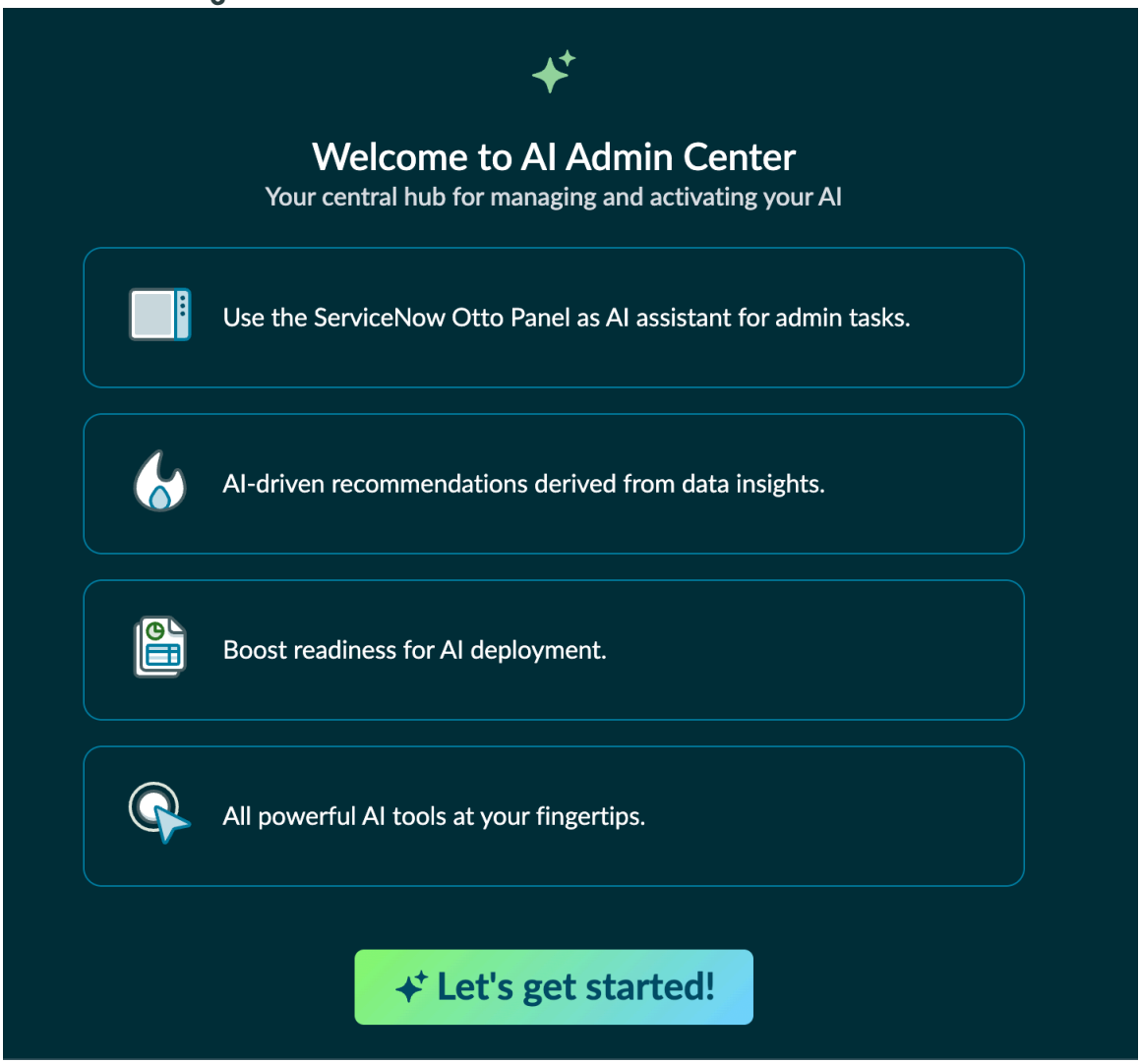
Welcome message



2. Select **Let's get started** to continue to the home page.

   The home page opens.

   If you don't have the essential plugins installed yet, the first section of the home page displays a **Let's get you set up** card.

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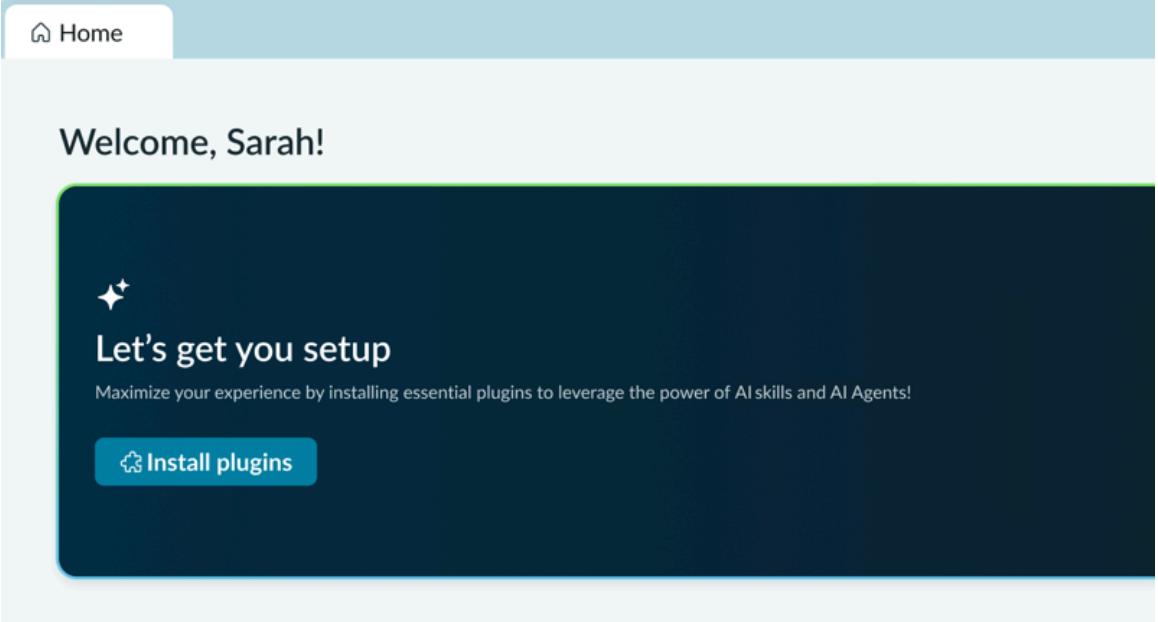

3. Select **Install plugins**.

   The Application Manager opens.

   AI Admin Center identifies which plugins are needed based on your license entitlements.

4. Follow the prompts to install the required plugins.
5. After installation completes, return to the AI Admin Center home page.

Result

The required plugins are installed on your instance.

Actionable use case cards tailored to your instance and entitlements now appear in the first section of the home page.

What to do next

To activate a use case, see View and activate actionable use cases in AI Admin Center (Next Experience UI).

View and activate actionable use cases in AI Admin Center (Next Experience UI)

View the top actions you can take right away to adopt AI capabilities on your instance.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

ServiceNow Otto panel must be enabled to activate the use cases. Actionable use cases work with the ServiceNow Otto panel to guide you through the setup in a chat conversation. For more information, see Enable the ServiceNow Otto panel (Next Experience UI).

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Required plugins must be installed. For more information, see Install and configure essential AI plugins using AI Admin Center.

Note: If a card displays a Model provider not approved warning, the model provider for that skill has not been approved in AI Guardian. Resolve this issue before attempting setup for the use case.

Role required: sn_na_center.nac_admin

About this task

Follow these steps to activate an actionable use case.

The actionable use cases section on the home page displays solution cards tailored to your instance. Each card represents a base-system AI solution you can activate with guided assistance from the ServiceNow Otto panel. The system determines which cards to display based on your license entitlements, installed products, instance version compatibility, and current AI enablement state.

If there are no actionable use cases, the section doesn't appear.

Note: This topic describes the AI Admin Center feature based on the Next Experience UI. If you're using the Lux user experience for AI Admin Center, see the Lux UI version of this topic.

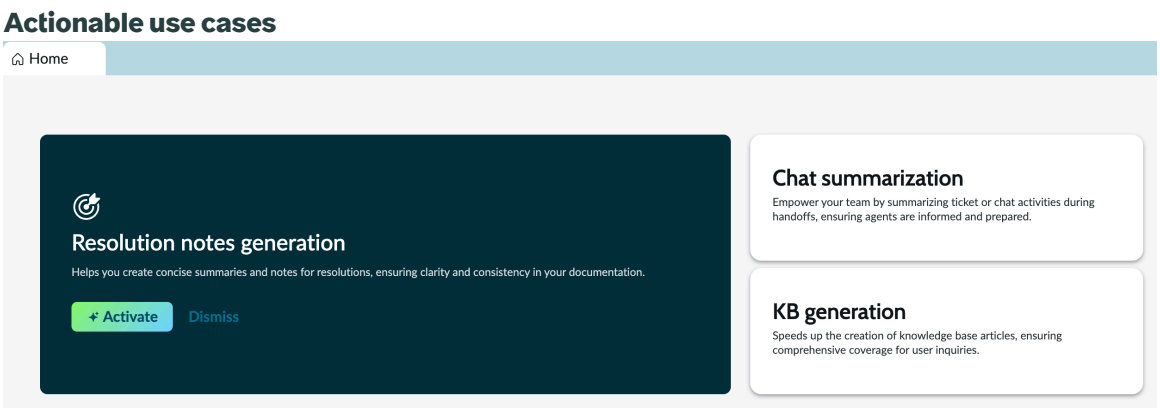
Procedure

1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)**.

   The AI Admin Center opens to the home page.

2. Review the actionable use case cards displayed in the first section of the home page.

   Each card shows the use case name and a brief description of the AI solution.



3. Select **Activate** on the card to begin.

   A conversation will open in the ServiceNow Otto panel.

   In the ServiceNow Otto panel, you can use natural language to have your AI companion implement the use case.

   Note: To remove a card permanently without activating it, select **Dismiss** on the card.

   Warning: Dismissed cards don't reappear in future sessions.

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4. In the ServiceNow Otto panel, review the information provided about the solution.
5. When the panel asks you to confirm, respond to proceed with the activation.
6. Follow any additional prompts in the panel to complete the setup.

Result
The AI solution is activated. A confirmation message appears at the top of the workspace.

After it is activated, the card disappears and the new solution appears under the Recently activated AI section of the home page.

What to do next
To monitor the performance of the activated solution, review the Recently activated AI section on the home page. For more information, see Monitor your recently activated AI solution in AI Admin Center (Next Experience UI).

View and activate your top actions in AI Admin Center (Lux UI)

View the top actions you can take right away to adopt AI capabilities on your instance.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin
The ServiceNow Otto panel must be enabled to activate a proposed solution. Action items work with the ServiceNow Otto panel to guide you through the setup in a chat conversation. For more information, see Enable the ServiceNow Otto panel (Lux UI).

Role required: sn_na_center.nac_admin

About this task
The **Top actions** section of the home page displays a series of AI-generated items that represent quick-start use cases. Each use case is tailored to your environment and proposed to help you implement AI adoption, best practices, and administrative setup on the platform.

Follow these steps to review and activate a proposed solution.

Note: This topic describes the AI Admin Center feature based on the Lux user interface (UI). If you're using the Next Experience UI for AI Admin Center, see the Next Experience UI version of this topic.

Procedure
1. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center**.

   The AI Admin Center opens to the home page.

   The **Top actions** section of the home page displays a list of any action items identified for your instance. If there are no action items, the section doesn't appear.

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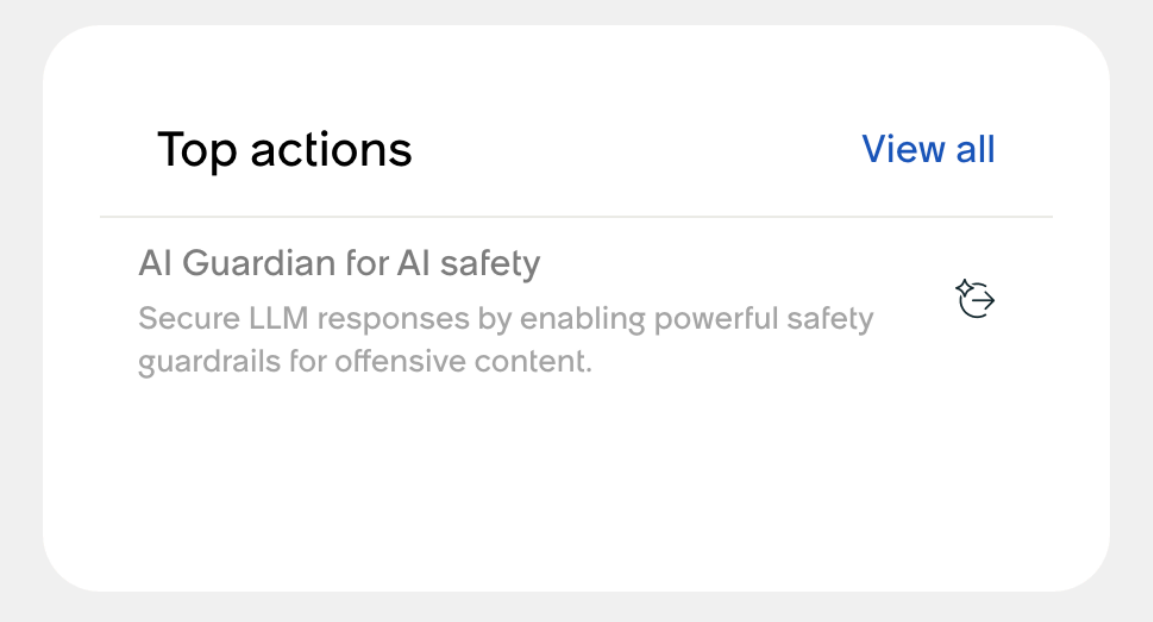
Top actions



2. **Optional:** Activate a proposed action item.

   a. Select the action item in the **Top actions** list.

      (Optional) The ServiceNow Otto panel starts a guided setup conversation. The panel describes the solution, confirms the current state, and asks you to confirm before making any change.

      Use natural language to have your AI companion implement the use case.

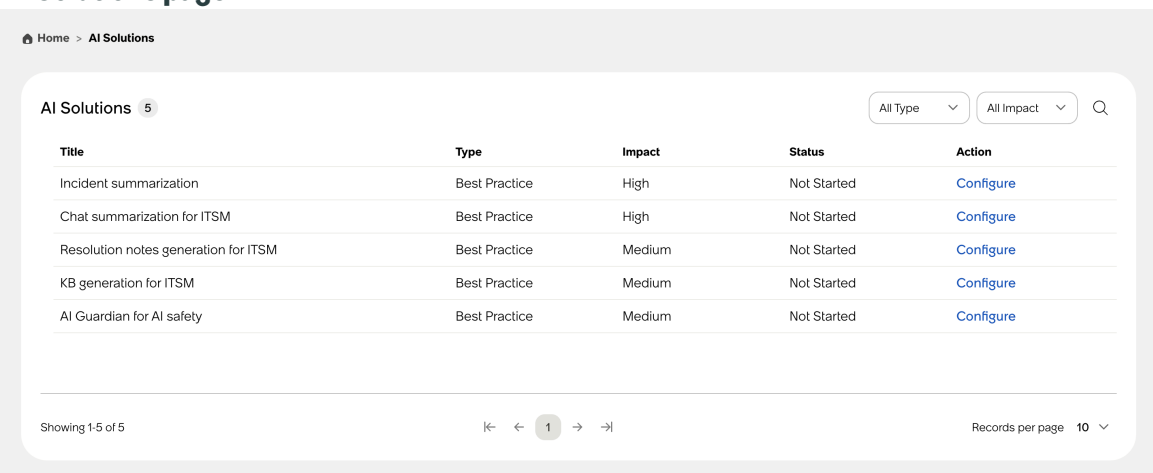
   b. Confirm the proposed action to implement it.

      (Optional) After you successfully activate a solution, the action disappears from the **Top actions** list and a confirmation message appears.

3. **Optional:** Select **View all** to see the list of proposed AI solutions.

   (Optional) The AI Solutions page opens.

AI Solutions page



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a. Use the search and filter options to refine the list.

- Type in the search box and select the **Search** icon ( ) to filter by search criteria.
- Select a combination of the filter options to filter by solution type and impact.

b. Select **Configure** to activate a proposed solution.
The related application opens depending on the solution type.

c. Activate the solution according to the application procedure.

(Optional) For example, follow the Activate an AI skill steps to use the AI Admin Hub.

Managing AI assets in AI Admin Center

The asset library lists the AI assets in your instance.

These assets include AI capabilities such as AI skills, AI agents, and AI agentic workflows. They also include conversational components that you can use to build an LLM conversation such as topics, subflows, actions, intents, and virtual assistants. You can also view your datasets, knowledge graphs, and catalog items.

View your AI assets in the asset inventory (Next Experience UI)

Use the asset library to view and manage the AI assets in your instance.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

Role required: sn_na_center.nac_admin

About this task

Follow these steps to view and manage the AI assets on your instance. AI assets include agents, agentic workflows, skills, subflows, actions, virtual assistants, and topics. They also include datasets, knowledge graphs, and catalog items.

Note: This topic describes the AI Admin Center feature based on the Next Experience UI. If you're using the Lux user experience for AI Admin Center, see the Lux UI version of this topic.

Procedure

1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)**.
2. Select **Asset inventory** ( ) in the side navigation bar.

The Asset inventory tab opens showing tabs for the various asset types.

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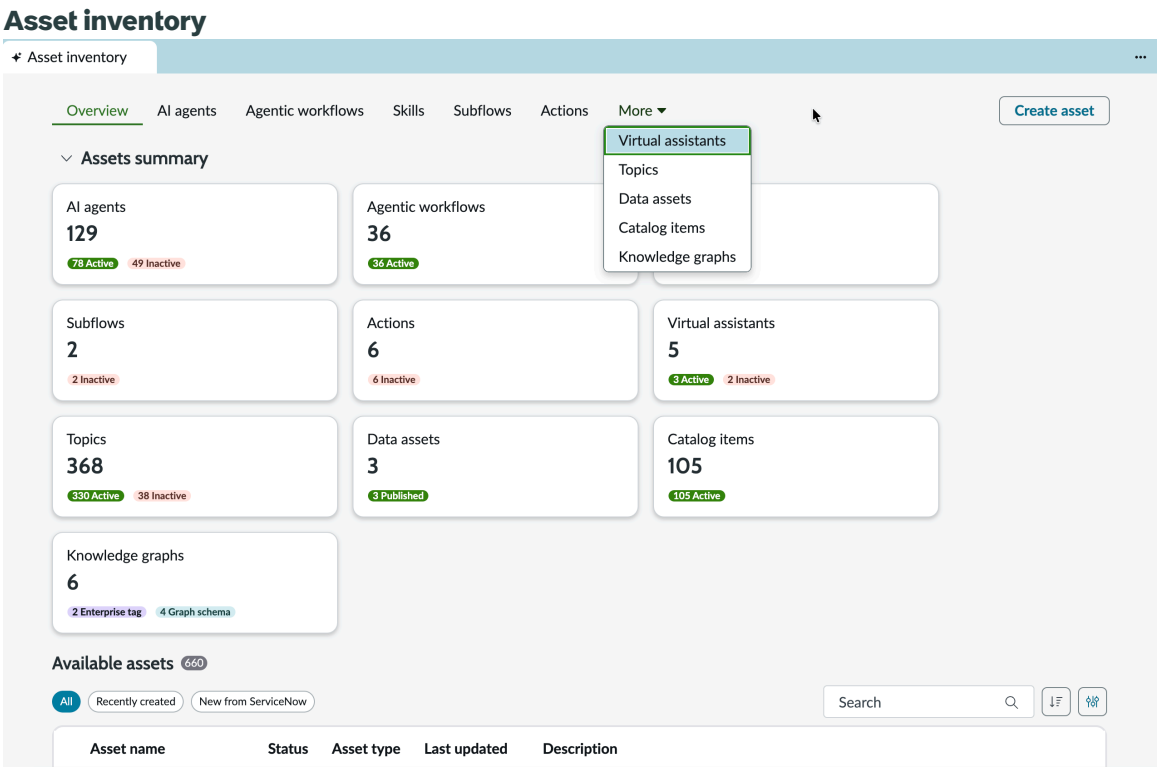

3. Select the tab to view your AI assets for that type.

   Select **More** to view and select additional tabs.

   The asset inventory contains the following tabs.

Asset inventory tabs

Tab	Description
Overview	Displays the total number of each asset type and a full list of all assets in your instance. Select the **Recently created** or **New from ServiceNow** filters in the Discover assets section to see new AI assets.
Agents	Displays a list of all AI agents. An AI agent is an autonomous digital worker that uses LLMs, tools, and workflows to complete tasks on behalf of users. They can reason, plan, and act independently or collaboratively.
Agentic workflows	Displays a list of all agentic workflows. An agentic workflow is a structured sequence of tasks executed by one or more AI agents

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Tab	Description
	with minimal human intervention to fulfill a business objective.
Skills	Displays a list of all generative AI skills. A generative AI skill is a capability that uses generative AI to perform tasks such as generating summaries, resolution notes, and so on. You can have base system skills or custom skills created in AI Skill Kit.
Subflows	Displays a list of all subflows. A subflow is an automated process that is part of a larger automated process. It consists of reusable actions and flow logic, data inputs, and outputs.
Actions	Displays a list of all actions. An action is a single step or task performed by an AI agent, a workflow, or a subflow.
Virtual assistants	Displays a list of all virtual assistants. A virtual assistant is the container for the end-to-end administrative configuration for a chat or voice conversation.
Topics	Displays a list of all topics. A conversational topic is used to structure back-and-forth conversations between the virtual agent and the end user.
Data assets	Displays a list of all datasets. A custom dataset and data collection in AI Data Kit is used for evaluations in AI Skill Kit.
Catalog items	Displays a list of all catalog items. A catalog item is used to publish a service to users in the Service Catalog.
Knowledge graphs	Displays a list of all knowledge graphs. A knowledge graph is a graphical representation of real-world entities (tables) and their relationships. It is used to add context and meaning to information to enable

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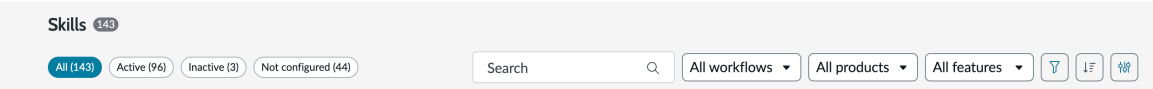
Tab	Description
	intelligent search, insights, and AI-driven experiences.

4. **Optional:** Select a combination of sort and filter options to refine the list.

   (Optional) The filters vary depending on the asset tab selected.

   Filter and sorting controls

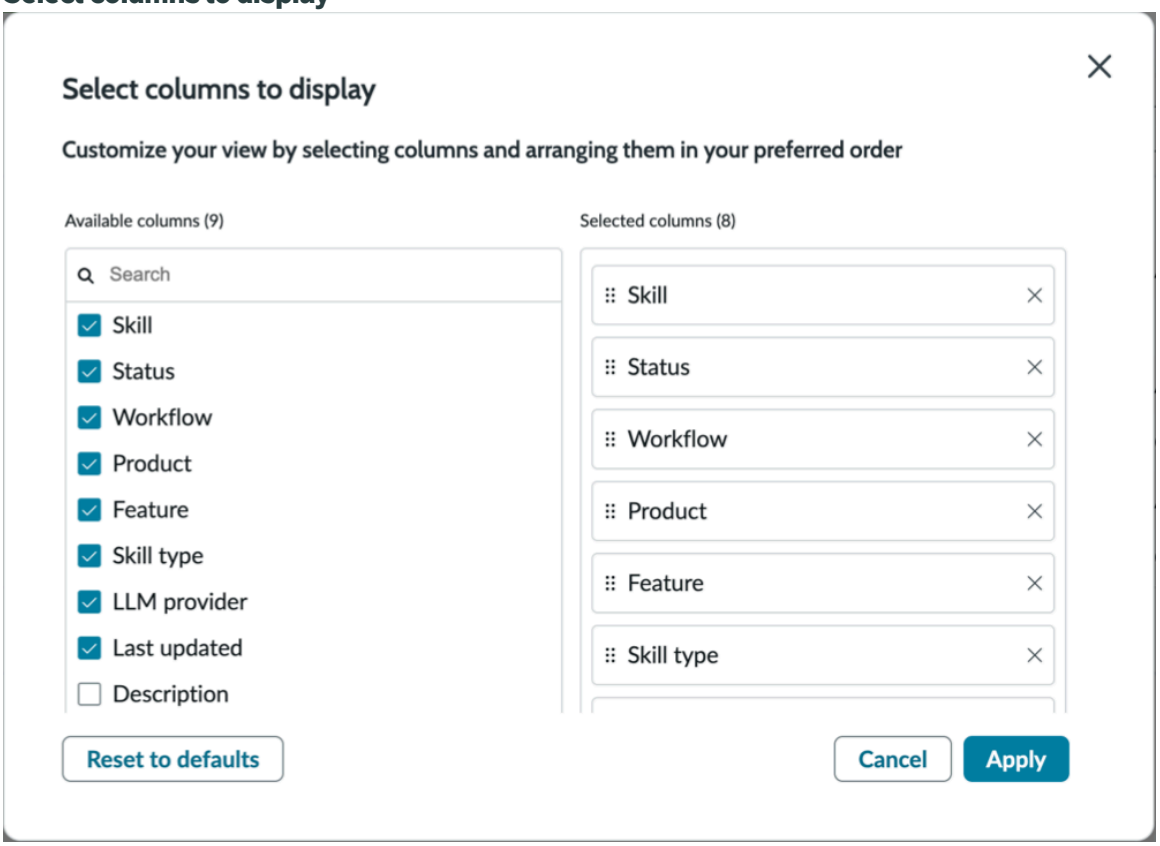
   - Select the **Sort by** button ( ) and select a sorting order.
   - Select a filter button.
   - Select an option from a filter menu.
   - Type in the search box and select the **Submit search** icon ( ) to filter by search criteria.

5. **Optional:** Change the columns that appear in the list table.

   a. Select the **Personalize columns** button ( ).

   (Optional) The **Select columns to display** box opens.

   Select columns to display

   b. Customize the columns as needed.

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- Select an option in the **Available columns** panel to add the column to your list. Deselect an option to remove it.
- Select the **Remove items** icon (✕) on an item in the **Selected columns** panel to remove it from your list.
- Drag one or more columns to a different location in the **Selected columns** panel to change the order in which they appear in your list.

  Columns ordered from top to bottom in the panel appear from left to right in the list table.
- Select **Reset to defaults** to restore the column configuration before your changes.

c. Select **Apply**.

6. **Optional:** In the Overview tab, use the Available assets section to find the new AI assets on your instance.
   - Select the **Recently created** filter to see all AI assets you created in the last 30 days.
   - Select the **New from ServiceNow** filter to see all base system assets provided by ServiceNow within the last 90 days.
7. **Optional:** Select the asset name in the list to view the asset details.

   (Optional) The asset details page may open on a separate workspace tab if the selected asset is managed using an application that is fully integrated in AI Admin Center. If it is managed in another application, the application opens to the asset details page.

View your AI assets in the asset library (Lux UI)

Use the asset library to view and manage the AI assets in your instance.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

Role required: sn_na_center.nac_admin

About this task

Follow these steps to view and manage the AI assets on your instance. AI assets include agents, agentic workflows, skills, subflows, actions, intents, virtual assistants, and topics. They also include datasets, knowledge graphs, and catalog items.

Note: This topic describes the AI Admin Center feature based on the Lux user interface (UI). If you're using the Next Experience UI for AI Admin Center, see the Next Experience UI version of this topic.

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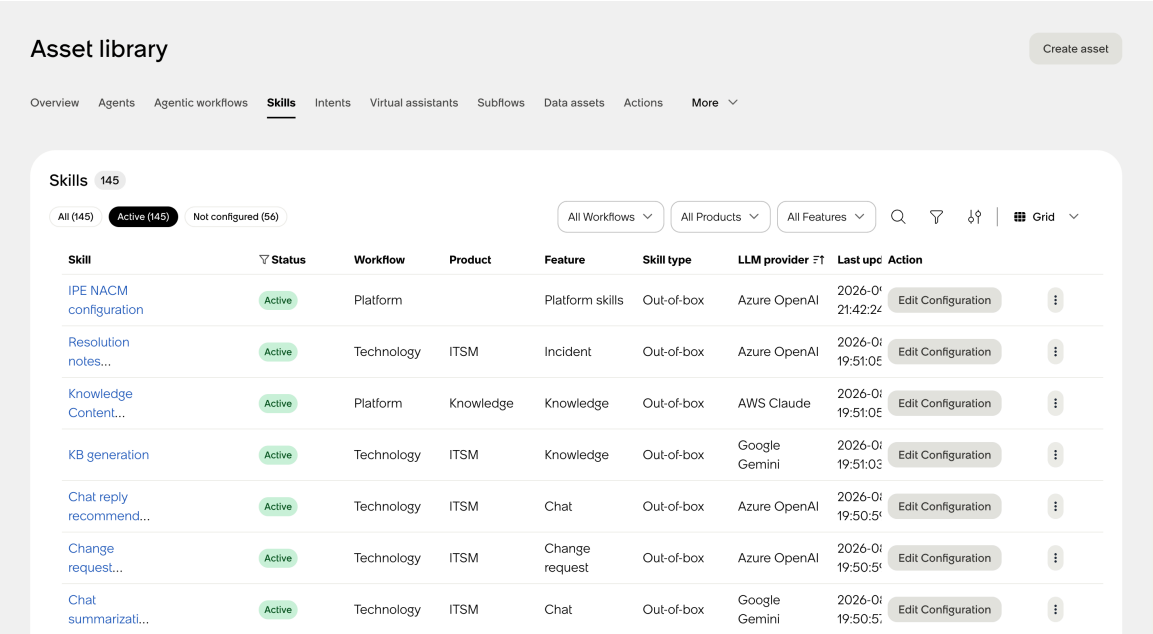
Procedure

1. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center**.
2. Select **Asset library** ( ) in the side navigation panel.

   The Asset library page opens showing tabs for the various asset types.

Asset library



3. Select the tab to view your AI assets for that type.

   Select **More** to view and select additional tabs.

   The asset library contains the following tabs.

Asset library tabs

Tab	Description
Overview	Displays the total number of each asset type and a full list of all assets in your instance. Select the **Recently created** or **New from ServiceNow** filters in the **Available assets** section to see new AI assets.
Agents	Displays a list of all AI agents. An AI agent is an autonomous digital worker that uses LLMs, tools, and workflows to complete tasks on behalf of users. They can reason, plan, and act independently or collaboratively.
Agentic workflows	Displays a list of all agentic workflows. An agentic workflow is a structured sequence of tasks executed by one or more AI agents with minimal human intervention to fulfill a business objective.
Skills	Displays a list of all generative AI skills. A generative AI skill is a capability that uses generative AI to perform tasks such as generating summaries and resolution notes. You can have base system skills or custom skills created in AI Skill Kit.
Intents	Displays a list of all intents. An intent is a data record that captures and defines what a user is trying to accomplish in a chat request. Intent

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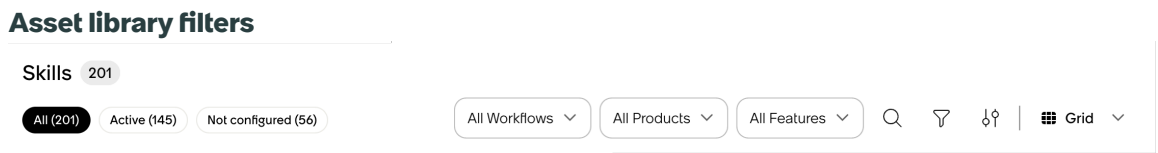
Tab	Description
	records help the system classify, understand, and route user input appropriately.
Virtual assistants	Displays a list of all virtual assistants. A virtual assistant is the container for the end-to-end administrative configuration for a chat or voice conversation.
Subflows	Displays a list of all subflows. A subflow is an automated process that is part of a larger automated process. It consists of reusable actions and flow logic, data inputs, and outputs.
Data assets	Displays a list of all datasets. A custom dataset and data collection in AI Data Kit is used for evaluations in AI Skill Kit.
Actions	Displays a list of all actions. An action is a single step or task performed by an AI agent, a workflow, or a subflow.
Topics	Displays a list of all topics. A conversational topic is used to structure back-and-forth conversations between the virtual agent and the end user.
Catalog items	Displays a list of all catalog items. A catalog item is used to publish a service to users in the Service Catalog.
Knowledge graphs	Displays a list of all knowledge graphs. A knowledge graph is a graphical representation of real-world entities (tables) and their relationships. It's used to add context and meaning to information to enable intelligent search, insights, and AI-driven experiences.

4. **Optional:** Select a combination of sort and filter options to refine the list.

   (Optional) The filters vary depending on the asset tab selected.

   a. Select a filter button.

   b. Select an option from a filter menu.

   c. Type in the search box and select the **Submit search** icon ( ) to filter by search criteria.

5. **Optional:** Change the columns that appear in the list table.

   a. Select the **Personalize columns** button ( ).

      (Optional) The **Personalize columns** box opens.

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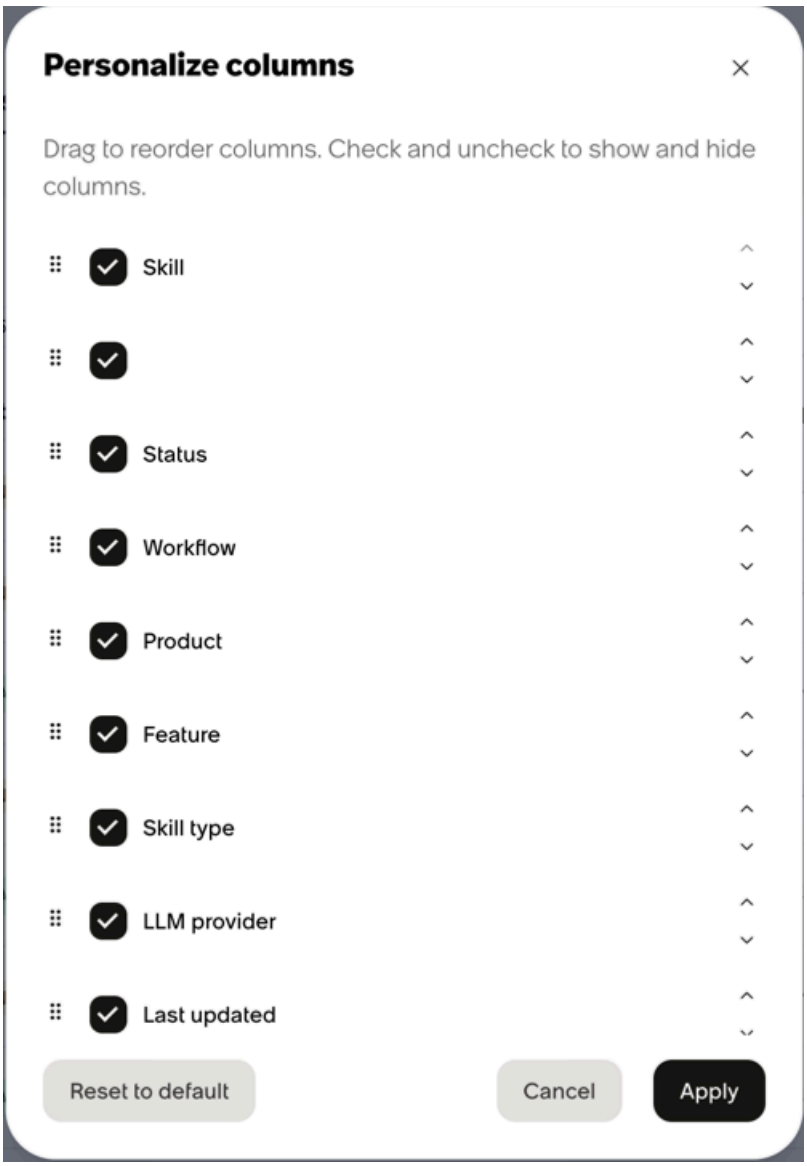
Personalize columns box



b. Customize the columns as needed.

- Select an option to add the column to your list. Clear an option to remove it.
- Drag one or more columns to a different location to change the order in which they appear in your list. Columns ordered from top to bottom in the panel appear from left to right in the list table.
- Select **Reset to default** to restore the column configuration before your changes.

c. Select **Apply**.

6. **Optional:** In the **Overview** tab, use the **Available assets** section to find the new AI assets on your instance.
   - Select the **Recently created** filter to see all AI assets you created in the last 30 days.
   - Select the **New from ServiceNow** filter to see all base system assets provided by ServiceNow within the last 90 days.

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7. **Optional:** Select the asset name in the list to view the asset details.

   (Optional) The asset details page opens in AI Admin Center if the selected asset is managed using an application that is fully integrated. If it is managed in another application, the application opens to the asset details page.

Create an asset in the AI asset inventory (Next Experience UI)

Use the asset inventory to create AI assets in your instance.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

Role required: sn_na_center.nac_admin

About this task

Follow these steps to create an AI asset.

From the asset inventory, asset types are created by opening their respective application.

- Create agents and agentic workflows with AI Agent Studio.

  For more information, see AI Agent Studio overview.

- Create assets with Assistant Designer, including topics, virtual assistants, subflows, and actions.

  For more information, see Assistant Designer.

- Create custom skills with AI Skill Kit.

  For more information, see AI Skill Kit.

- Create datasets with AI Data Kit.

  For more information, see AI Data Kit.

- Create catalog items with Catalog Builder.

  For more information, see Catalog Builder.

- Create knowledge graphs with Knowledge Graph Designer.

  For more information, see Knowledge Graph.

Note: This topic describes the AI Admin Center feature based on the Next Experience UI. If you're using the Lux user experience for AI Admin Center, see the Lux UI version of this topic.

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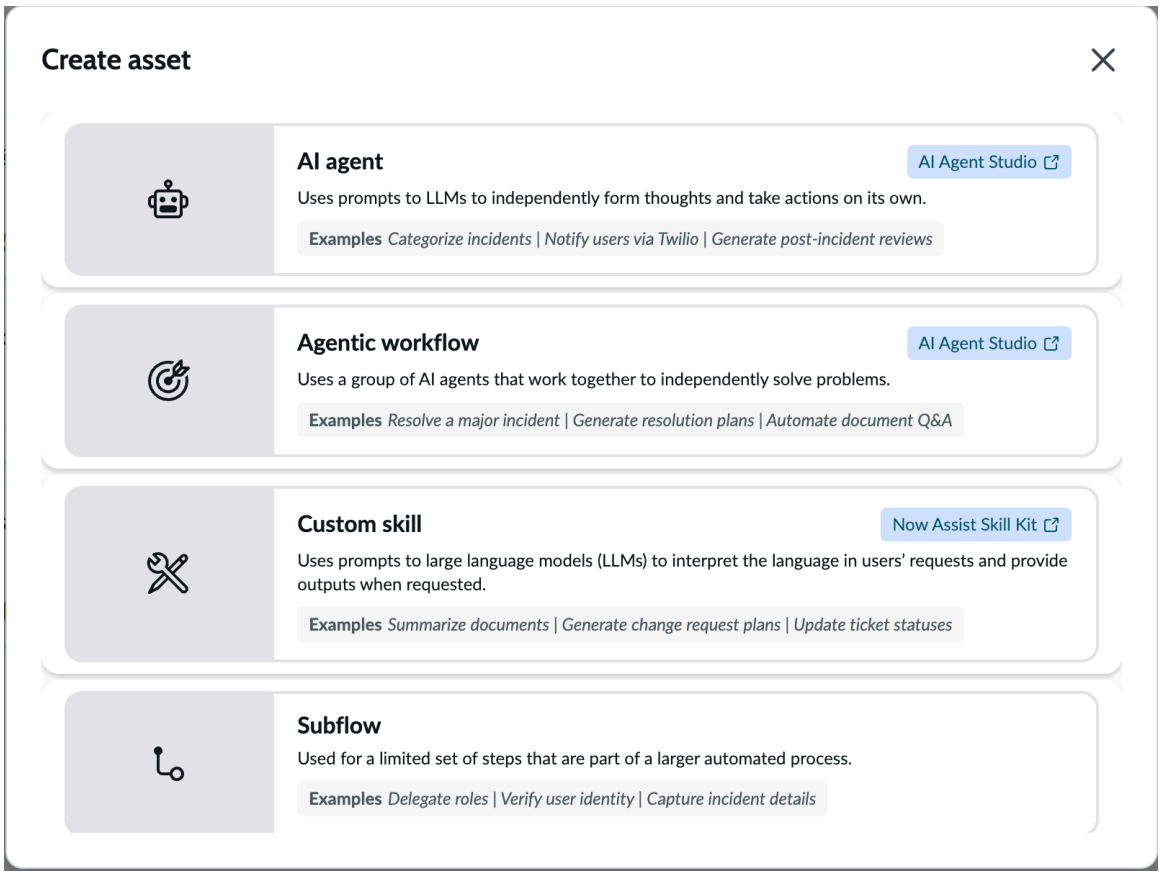
Procedure

1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)**.
2. Select **Asset inventory** ( ) in the side navigation bar.
   The Asset inventory tab opens.
3. Select the **Create asset** button.

   The Create asset box opens showing the following options for the asset type.



Options in the Create asset box

Asset type	Description
AI agent	Opens the New AI Agent form in AI Agent Studio. An AI agent is an autonomous digital worker that uses LLMs, tools, and workflows to complete tasks on behalf of users. They can reason, plan, and act independently or collaboratively. For more information on creating an AI agent in AI Agent Studio, see Create an AI agent.
Agentic workflow	Opens the New agentic workflow form in AI Agent Studio.

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Asset type	Description
	An agentic workflow is a structured sequence of tasks executed by one or more AI agents with minimal human intervention to fulfill a business objective. For more information on AI Agent Studio, see Create an agentic workflow.
Custom skill	Opens the AI Skill Kit home page. A skill is a self-contained unit of generative AI functionality that runs a prompt against a large language model (LLM) and returns a response. For more information, see Create a skill.
Subflow	Opens the New Subflow form in Assistant Designer. A subflow is an automated process that is part of a larger automated process. It consists of reusable actions and flow logic, data inputs, and outputs. For more information on creating an asset with the Assistant Designer asset library, see Build conversations in the Asset library in Assistant Designer.
Action	Opens the New Action form in Assistant Designer. An action is a single step or task performed by an AI agent, a workflow, or a subflow. For more information on creating an asset with the Assistant Designer asset library, see Build conversations in the Asset library in Assistant Designer.
Virtual assistant	Opens the Create an assistant page in Assistant Designer. A virtual assistant is the container for the end-to-end administrative configuration for a chat or voice conversation. For more information on creating a virtual assistant in Assistant Designer, see Assistants overview.

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Asset type	Description
Topic	Opens the Create a topic form in Assistant Designer. A conversational topic is used to structure back-and-forth conversations between the virtual agent and the end user. For more information on creating an asset with the Assistant Designer asset library, see Build conversations in the Asset library in Assistant Designer.
Catalog item	Opens the Catalog Builder. A catalog item is used to publish a service to users in the Service Catalog. For more information on creating a catalog item in Catalog Builder, see Catalog Builder.
Data asset	Opens a **Create data asset** box. Choose one of the following options. ○ **Import and create data** Opens the Create dataset form in AI Data Kit. ○ **Generate synthetic data** Opens the AI Data Kit home page. A custom dataset and data collection in AI Data Kit is used for evaluations in AI Skill Kit. For more information on creating a dataset in AI Data Kit, see Using AI Data Kit.
Knowledge Graph	Opens Knowledge Graph Designer home page. A knowledge graph is a graphical representation of real-world entities (tables) and their relationships. It is used to add context and meaning to information to enable intelligent search, insights, and AI-driven experiences. For more information on creating a knowledge graph in Knowledge Graph Designer, see Using Knowledge Graph Designer.

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4. Select the type of asset you want to create.

   Depending on your selection, the application will open in a separate browser tab.

5. Complete the form for the new asset and submit it.

Result
An asset is created and can be seen in the related asset inventory list.

Create an asset in AI Admin Center (Lux UI)

Use the asset library to create AI assets in your instance.

> **Important:** Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).
>
> The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).
>
> In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin
Role required: sn_na_center.nac_admin

About this task
Follow these steps to create an AI asset.

> **Note:** This topic describes the AI Admin Center feature based on the Lux user interface (UI). If you're using the Next Experience UI for AI Admin Center, see the Next Experience UI version of this topic.

From the asset library, asset types are created by opening their respective application.

- Create intents in AI Admin Center.
- Create agents and agentic workflows with AI Agent Studio.

  For more information, see AI Agent Studio overview.

- Create Virtual Agent assets with Assistant Designer, including topics, virtual assistants, subflows, and actions.

  For more information, see Assistant Designer.

- Create custom skills with AI Skill Kit.

  For more information, see AI Skill Kit.

- Create datasets with AI Data Kit or in AI Admin Center.

  For more information, see AI Data Kit.

- Create catalog items with Catalog Builder.

  For more information, see Catalog Builder.

- Create knowledge graphs with Knowledge Graph Designer.

  For more information, see Knowledge Graph.

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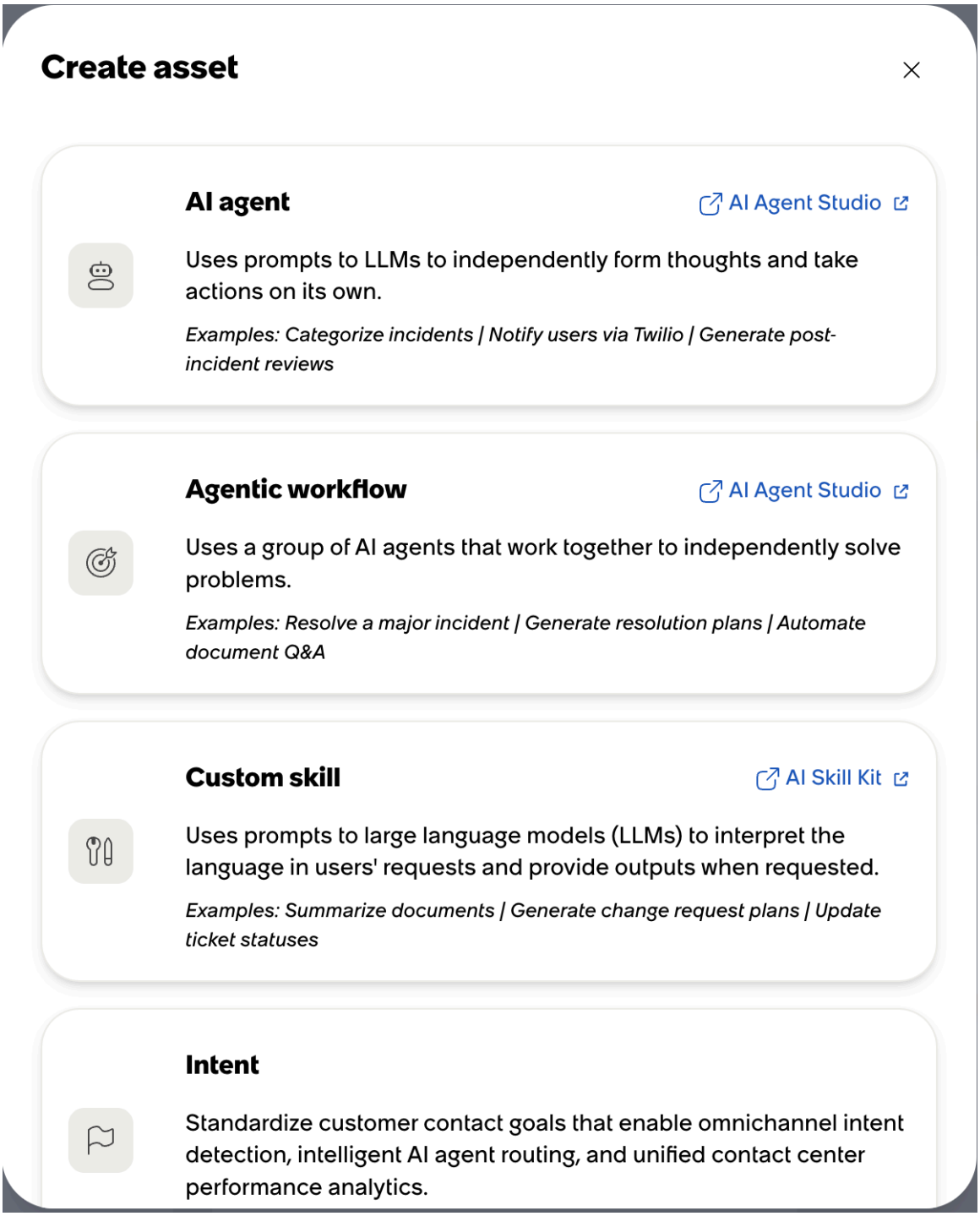
Procedure

1. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center**.
2. Select **Asset library** ( ) in the side navigation panel.
   The Asset library page opens showing tabs for the various asset types.
3. Select the **Create asset** button.

   The Create asset box opens showing the following options for the asset type.

Create asset box



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Options in the Create asset box

Asset type	Description
AI agent	Opens the New AI Agent form in AI Agent Studio. An AI agent is an autonomous digital worker that uses LLMs, tools, and workflows to complete tasks on behalf of users. They can reason, plan, and act independently or collaboratively. For more information on creating an AI agent in AI Agent Studio, see Create an AI agent.
Agentic workflow	Opens the New agentic workflow form in AI Agent Studio. An agentic workflow is a structured sequence of tasks executed by one or more AI agents with minimal human intervention to fulfill a business objective. For more information on AI Agent Studio, see Create an agentic workflow.
Custom skill	Opens the AI Skill Kit home page. A skill is a self-contained unit of generative AI functionality that runs a prompt against a large language model (LLM) and returns a response. For more information, see Create a skill.
Intent	Opens the New intent form in AI Admin Center. An intent is a data record that captures and defines what a user is trying to accomplish in a chat request. Intent records help the system classify, understand, and route user input appropriately. For more information, see Create an intent in AI Admin Center (Lux UI).
Subflow	Opens the New Subflow form in Assistant Designer. A subflow is an automated process that is part of a larger automated process. It consists of reusable actions and flow logic, data inputs, and outputs. For more information on creating an asset with the Assistant Designer asset library, see Build conversations in the Asset library in Assistant Designer.
Action	Opens the New Action form in Assistant Designer. An action is a single step or task performed by an AI agent, a workflow, or a subflow.

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Asset type	Description
	For more information on creating an asset with the Assistant Designer asset library, see Build conversations in the Asset library in Assistant Designer.
Virtual assistant	Opens the Create an assistant page in Assistant Designer. A virtual assistant is the container for the end-to-end administrative configuration for a chat or voice conversation. For more information on creating a virtual assistant in Assistant Designer, see Assistants overview.
Topic	Opens the Create a topic form in Assistant Designer. A conversational topic is used to structure back-and-forth conversations between the virtual agent and the end user. For more information on creating an asset with the Assistant Designer asset library, see Build conversations in the Asset library in Assistant Designer.
Catalog item	Opens the Catalog Builder. A catalog item is used to publish a service to users in the Service Catalog. For more information on creating a catalog item in Catalog Builder, see Catalog Builder.
Data asset	A custom dataset and data collection in AI Data Kit is used for evaluations in AI Skill Kit. Select **AI Data Kit** to go to the AI Data Kit home page. For more information on creating a dataset in AI Data Kit, see Using AI Data Kit. Select **Data asset** to create the asset in AI Admin Center. For more information on creating a dataset with AI Admin Center, see Create a data asset in AI Admin Center (Lux UI).
Knowledge graph	Opens Knowledge Graph Designer home page. A knowledge graph is a graphical representation of real-world entities (tables) and their relationships. It's used to add context and meaning to information to enable intelligent search, insights, and AI-driven experiences. For more information on creating a knowledge graph in Knowledge Graph Designer, see Using Knowledge Graph Designer.

4. Select the type of asset you want to create.

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Depending on your selection, the application opens in a separate browser tab.

5. Complete the form for the new asset and submit it.

Result
An asset is created and can be seen in the related asset library list.

Create an intent in AI Admin Center (Lux UI)

Create an intent record to standardize a customer input goal and enable multichannel intent detection, AI agent routing, and contact center analytics.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin
Role required: sn_na_center.nac_admin

About this task
An intent is a data record that captures and defines what a user is trying to accomplish in a chat request. Intent records help the system classify, understand, and route user input appropriately.

Intents are discovered and captured by AI Agent Advisor through scheduled analysis of multiple interaction channels. You can also create an intent using the conversational experience. Follow these steps to create an intent record manually.

Note: This topic describes the AI Admin Center feature based on the Lux user experience (UI). There is no Next Experience UI version of this topic.

Procedure

1. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center**.
2. Select **Asset library** ( ) in the side navigation panel.
   The Asset library page opens.
3. Select the **Create asset** button.
   The Create asset box opens showing options for the asset type.
4. Select **Intent**.
   The New intent form opens.
5. Complete the form.

   a. Enter a name for the intent in the **Intent name** field.

   b. Enter a description of the intent in the **Description** field.

   c. In the **Example utterance** field, enter training utterance examples that are relevant to the intent.

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Type the utterance and select the **Add** icon (⊕) to add the example.

d. In the **Detection criteria** tab, enter the conditions that determine when the intent applies to an utterance.

> **Tip:** Be specific about what the customer says or asks. Include two or three examples per bullet. Clarify what doesn't count as this intent to avoid confusion with similar intents.

e. In the **Resolution criteria** tab, enter the conditions that determine when the intent is considered resolved.

> **Tip:** Resolution requires concrete, observable outcomes, not effort. Number your conditions in logical order. Use "customer has," "confirmation was," or "system shows" to describe completed actions, not in-progress steps.

f. Turn the intent on or off by selecting the **Active** option.

6. Select **Save**.

Result
An intent is created and can be seen in the intents list on the Asset library page.

Edit an intent in AI Admin Center (Lux UI)

Edit the details and activation status of an intent record.

> **Important:** Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).
>
> The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).
>
> In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin
Role required: sn_na_center.nac_admin

About this task
Follow these steps to edit an intent record.

An intent is a data record that captures and defines what a user is trying to accomplish in a chat request. Intent records help the system classify, understand, and route user input appropriately.

Intents are discovered and captured by AI Agent Advisor through scheduled analysis of multiple interaction channels. You can create an intent manually in AI Admin Center. For more information, see Create an intent in AI Admin Center (Lux UI). You can also create, edit, or delete an intent using the conversational experience.

> **Note:** This topic describes the AI Admin Center feature based on the Lux user experience (UI). There is no Next Experience UI version of this topic.

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Procedure

1. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center**.
2. Select **Asset library** ( ) in the side navigation panel.
   The Asset library page opens.
3. Select the **Intents** tab.
4. In the row of the intent you want to edit, select the intent name or select the **Actions** icon ( ) and choose **View details**.
   The intent details page opens.
5. Select **Edit**.
   The intent editing form opens.
6. Update the form as needed.

   a. Enter a name for the intent in the **Intent name** field.

   b. Enter a description of the intent in the **Description** field.

   c. In the **Example utterance** field, enter training utterance examples that are relevant to the intent.

   Type the utterance and select the **Add** icon ( ) to add the example.

   Select the **Remove** icon ( ) to remove the utterance.

   d. In the **Detection criteria** tab, enter the conditions that determine when the intent applies to an utterance.

   Tip: Be specific about what the customer says or asks. Include two or three examples per bullet. Clarify what doesn't count as this intent to avoid confusion with similar intents.

   e. In the **Resolution criteria** tab, enter the conditions that determine when the intent is considered resolved.

   Tip: Resolution requires concrete, observable outcomes, not effort. Number your conditions in logical order. Use "customer has," "confirmation was," or "system shows" to describe completed actions, not in-progress steps.

   f. Turn the intent on or off by selecting the **Active** option.

7. Select **Save**.

Create a data asset in AI Admin Center (Lux UI)

Create a dataset, generate synthetic data, and publish data collections to evaluate skills and agents.

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Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin
Role required: sn_na_center.nac_admin

About this task
Follow these steps to create a data asset.

A custom dataset and data collection in AI Data Kit is used for evaluations in AI Skill Kit.

Note: This topic describes the AI Admin Center feature based on the Lux user experience (UI). There is no Next Experience UI version of this topic.

Procedure
1. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center**.
2. Select **Asset library** ( ) in the side navigation panel.
   The Asset library page opens.
3. Select the **Create asset** button.
   The Create asset box opens showing options for the asset type.
4. Select **Data asset**.
5. Choose the type of asset you want to create.

   Select one of the following:

   - **Create dataset**. Import data from instance tables or local files to create a dataset.
   - **Standard synthetic dataset**. Generate synthetic data using standard templates and configurations.
   - **Multi-table synthetic dataset**. Generate synthetic data across multiple related tables simultaneously.

   The create dataset form opens.
6. Complete the setup based on the selection.
   - For more information on importing data from a table or a local file as a dataset, see Add a dataset.
   - For more information on generating synthetic datasets, see Generate synthetic data.

Result
A dataset is created and can be seen in the data assets list on the Asset library page.

Managing assist consumption (Lux UI)

The Assist consumption page provides features that enable you to view the assists consumed on your instance.

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Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Note: This topic describes the AI Admin Center feature based on the Lux user experience (UI). There is no Next Experience UI version of this topic.

An assist is the unit of measurement for AI usage on the ServiceNow AI Platform. Assists are used to measure usage of generative AI skills through performed skill actions. Users consume assists when they execute skill actions.

Different skill actions consume different numbers of assists based on complexity. An assist is not a 1:1 ration with a user action. Each skill carries an assist ratio reflecting its relative cost, and total assists are calculated by multiplying the number of actions by the assist ratio. A simple summarization and a multi-step agentic execution consume very different amounts.

Three asset types consume assists: skills, conversational assistants, and AI agents and agentic workflows.

View your assist consumption in AI Admin Center (Lux UI)

View the AI assist consumption on your instance.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

Role required: sn_na_center.nac_admin

About this task

Follow these steps to view the AI assist consumption on your instance.

An assist is the unit of measurement for AI usage on the ServiceNow AI Platform. Assists are used to measure usage of generative AI skills through performed skill actions. Users consume assists when they execute skill actions.

Use the Assist consumption page to track total assist consumption and identify usage patterns across AI assets, departments, and users. For more information, see AI Admin Center Assist Consumption page.

Note: This topic describes the AI Admin Center feature based on the Lux user experience (UI). There is no Next Experience UI version of this topic.

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Procedure

1. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center**.
2. Select **Assist consumption** ( ) in the side navigation panel.
   The Assist consumption page opens to the **Overview** dashboard.

   For more information, see AI Admin Center Assist Consumption page.

AI Admin Center Assist Consumption page

Use the Assist Consumption page in AI Admin Center to monitor assist consumption trends and identify which AI assets are consuming the most assists across your organization.

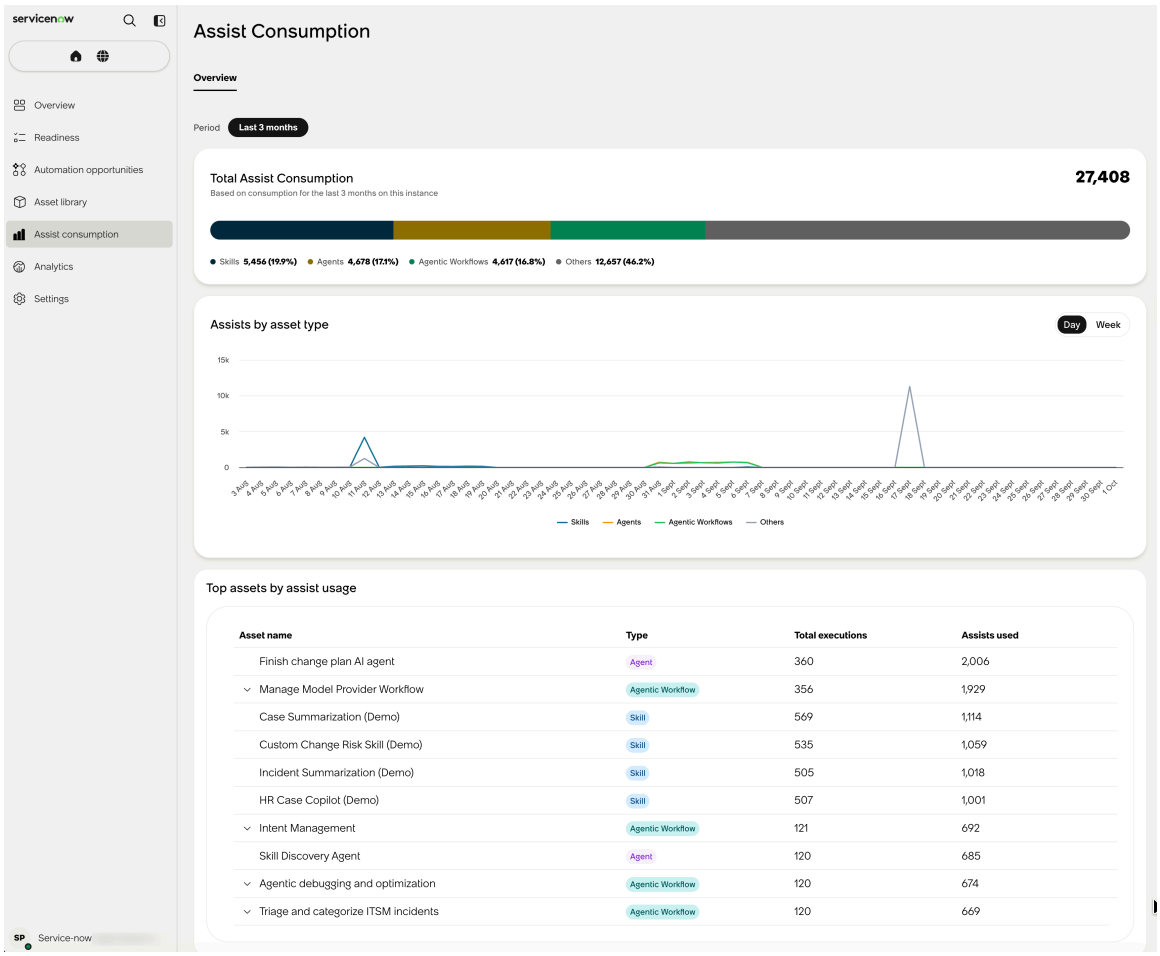
Assist Consumption page

The Assist Consumption page is accessible from the side navigation bar in AI Admin Center. Use the page to track total assist consumption and identify usage patterns across AI assets, departments, and users.

Use the date range filter at the top of the Overview tab to scope the data. The filter applies to the trend chart, the top assets table, and the top departments table. The default period is the previous three months.

The consumption band chart uses a fixed trailing 90-day window and does not respond to the date range filter.

Overview tab of the Assist Consumption page



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The Overview tab of the Assist Consumption page contains the following components:

Total Assist Consumption

This area of the page displays a bar chart with a legend summarizing assist consumption for the selected period, broken down by asset type. Use this area to assess overall consumption and compare spend across asset types.

Assists by asset type

This area of the page displays a trend chart showing assist consumption over time for the selected period. Each filled area in the chart represents an asset type: Skills, Agents, Agentic Workflows, or Others. The Others series represents assists not attributed to the other asset types. Select Day or Week to set the granularity of the chart, and select a series in the legend to show or hide it.

Top assets by assist usage

This area of the page displays a table ranking AI assets by assist consumption in descending order for the selected period.

Asset name

The name of the skill, agent, or agentic workflow.

Type

The asset type, displayed as a color-coded badge.

Total executions

The total number of executions for the asset in the selected period.

Assists used

The total number of assists consumed by the asset in the selected period.

For agentic workflow rows, select the expand icon next to the asset name to view the individual tools within the workflow and their assist consumption.

Users by Assist Consumption Band

This area of the page displays a chart showing the distribution of users across consumption bands over the trailing 90 days. A consumption band represents a range of assists consumed by a user per month: fewer than 10, 10 to 100, 100 to 1,000, or more than 1,000. Use this chart to identify the concentration of high-consumption users and track how usage patterns shift over time.

Top 10 departments by assist consumption

This area of the page displays a table listing the departments with the highest assist consumption for the selected period, with assists consumed broken down by day.

Department

The name of the department.

Assists

The total number of assists consumed by the department for the selected period.

Avg / day

The average number of assists consumed per day by the department for the selected period.

A column for each day in the selected period shows the number of assists the department consumed on that day. A Total row summarizes the values for all listed departments.

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Using other AI applications and features from AI Admin Center

Access other AI applications within AI Admin Center to configure and manage AI capabilities on your instance.

AI Admin Center is a unified administration experience that consolidates the capabilities in various AI applications into a single, guided, conversational environment.

Configure AI settings in AI Admin Center (Next Experience UI)

Use AI Admin Hub configuration features on the AI Admin Hub page in the AI Admin Center workspace.

Before you begin

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Role required: sn_na_center.nac_admin

About this task

Follow these steps to configure AI settings.

AI Admin Hub features from the Experiences and Settings sections are accessible on the AI Admin Hub page. The features are regrouped in AI Admin Center based on the type of action to perform.

Note: This topic describes the AI Admin Center feature based on the Next Experience UI. If you're using the Lux user experience for AI Admin Center, see the Lux UI version of this topic.

Procedure

1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)**.
2. Select **Admin** ( ) in the side navigation bar.

   The AI Admin Hub page opens.

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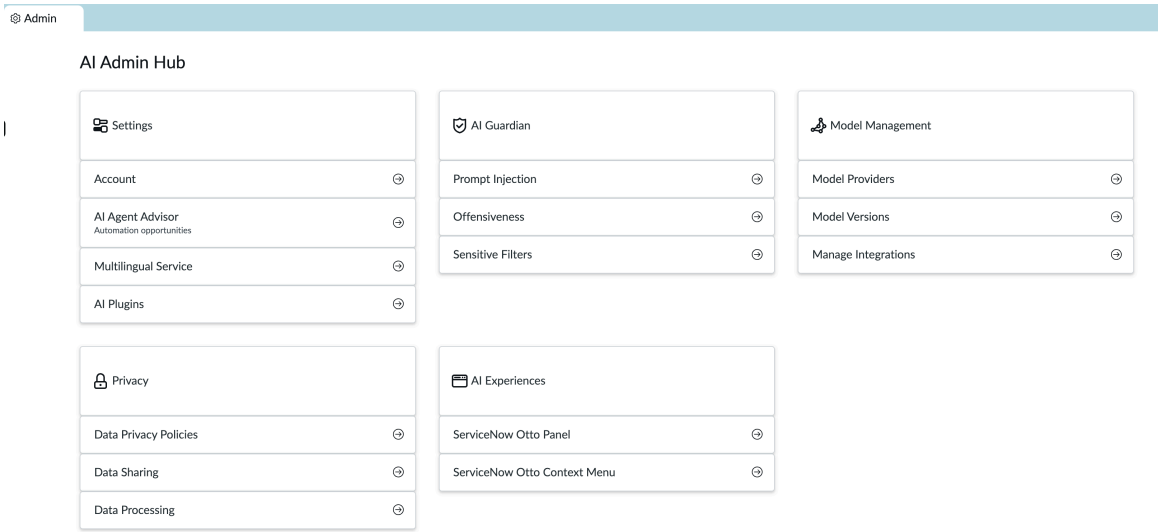

3. Select one of the options to on the AI Admin Hub page.

   The selection opens in a new tab in the AI Admin Center workspace.

   The following table lists the options on the AI Admin Hub page.

AI Admin Hub options

Option	Description
Account	Opens the Account page from AI Admin Hub. Review your ServiceNow AI license details to make sure that you're up to date on what's available to you. For more information, see Review Now Assist account.
Automation opportunities	Opens the Automation opportunities settings page. Configure the data source, filters, schedule, and cost profile that AI Agent Advisor uses to identify automation opportunities and provide savings estimates for them. For more information, see Set up a data source for analysis (Next Experience UI).
Multilingual Service	Opens the Multilingual Service page from AI Admin Hub. Turn on multilingual service for user-entered text with native translation or Dynamic Translation in AI applications.

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Option	Description
	For more information, see Configure multilingual service for ServiceNow Otto applications.
AI Plugins	Opens the Plugins page from AI Admin Hub. Install AI plugins to enable generative AI on your instance. For more information, see Install plugins for ServiceNow Otto.
Prompt Injection	Opens the Prompt Injection page from AI Admin Hub. Activate or deactivate prompt injection attack detection to protect all generative AI applications and AI-generated text and conversations on your instance from malicious inputs and unintended model behaviors. For more information, see Configure prompt injection attack protection.
Offensiveness	Opens the Offensiveness page from AI Admin Hub. Activate offensiveness detection to log or block offensive content generated by AI skills and workflows. For more information, see Activate offensiveness protection for generative AI.
Sensitive Filters	Opens the Filters page from AI Admin Hub. Set up filters in AI Guardian to redirect Virtual Agent users to a live agent or HR case when a sensitive subject is detected in a conversation. For more information, see Configure sensitive topic filters.
Model Providers	Opens the Manage model providers page from AI Admin Hub. Edit or customize the model provider for a skill or skill group at the instance level from the list of supported third-party model providers. You can also review the model

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Option	Description
	policy set by your organization and view the change history. For more information, see Manage model providers.
Model Versions	Opens the Manage model versions page from AI Admin Hub. Manage the version of the model providers across skills and instance levels. You can change and update versions for the base system and custom skills. For more information, see Manage version.
Manage Integrations	Opens the Manage Integration tab on the Manage model providers page from AI Admin Hub. Choose the preferred integration type for configuring the available model providers. There are two ways to configure a model provider in AI Admin Hub. You can select Original Equipment Manufacturer (OEM) or Bring Your Own Key (BYOK). For more information, see Manage Integration.
Data Privacy Policies	Opens the Privacy policies page from AI Admin Hub. Configure privacy policies to anonymize data in AI applications. For more information, see Configure Now Assist privacy policies.
Data Sharing	Opens the Data sharing page from AI Admin Hub. Data sharing improves ServiceNow AI products. You can opt out of data sharing from this page. For more information, see Opt out of data sharing for Now Assist.
Data Processing	Opens the Data overflow processing page from AI Admin Hub.

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Option	Description
	Configure where AI data is processed during periods of high traffic. For more information, see Configure Now Assist data overflow processing.
ServiceNow Otto Panel	Opens the ServiceNow Otto Panel page from AI Admin Hub. With the ServiceNow Otto panel, you can get assistance from generative AI experiences to solve customer issues faster. Use this conversational interface to summarize a chat, case, or incident, get help, or generate resolution notes so that you can get the context of this information more quickly. For more information, see ServiceNow Otto panel.
ServiceNow Otto Context Menu	Opens the ServiceNow Otto Context Menu page from AI Admin Hub. The ServiceNow Otto context menu uses generative AI to help agents summarize, create, and edit written content, thus streamlining their writing tasks. For more information, see ServiceNow Otto context menu.

Configure AI settings in AI Admin Center (Lux UI)

Use AI admin features on the Settings page in AI Admin Center to configure AI settings.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

Role required: sn_na_center.nac_admin

About this task

Follow these steps to configure AI settings.

AI Admin Hub experiences and settings features are accessible on the Settings page. The features are grouped in AI Admin Center based on the type of action to perform.

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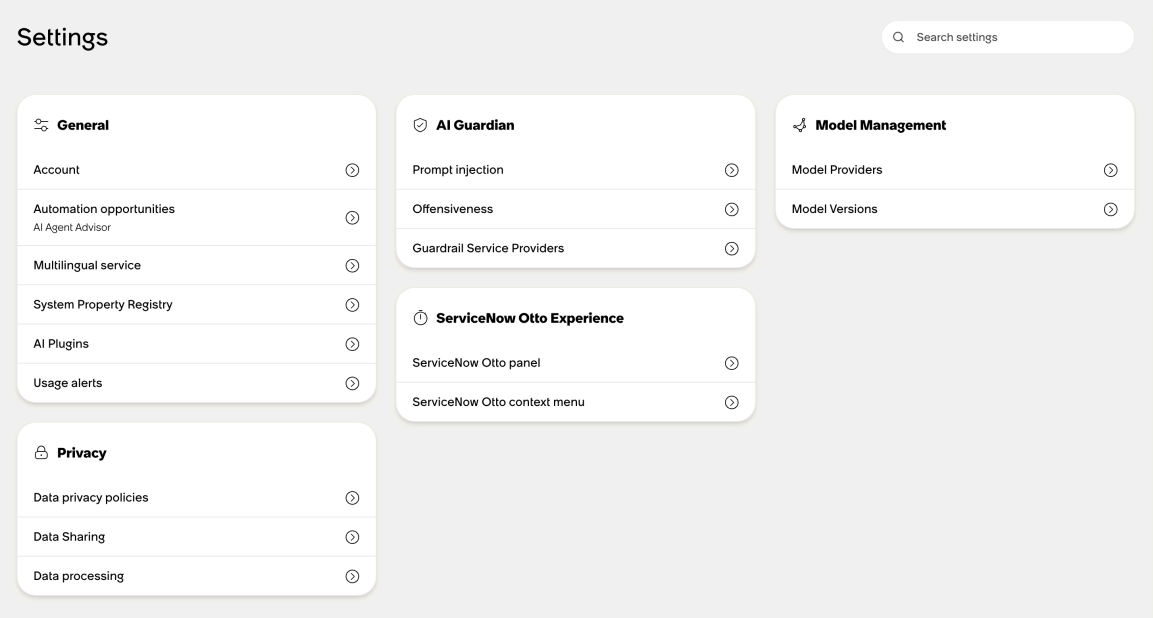
Note: This topic describes the AI Admin Center feature based on the Lux user interface (UI). If you're using the Next Experience UI for AI Admin Center, see the Next Experience UI version of this topic.

Procedure

1. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center**.
2. Select **Settings** ( ) in the side navigation panel.

   The Settings page opens.

Settings page



3. Select a settings option.

   The following table lists the options on the Settings page.

Settings

Option	Description
Account	Opens the Account page from AI Admin Hub. Review your ServiceNow AI license details to make sure that you're up to date on what's available to you. For more information, see Review Now Assist account.
Automation opportunities	Opens the Automation opportunities settings page. Configure the data source, filters, schedule, and cost profile that AI Agent Advisor uses to identify automation opportunities and provide savings estimates for them. For more information, see Set up a data source for analysis (Lux UI).

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Option	Description
Multilingual service	Opens the Multilingual Service page from AI Admin Hub. Turn on multilingual service for user-entered text with native translation or Dynamic Translation in AI applications. For more information, see Configure multilingual service for ServiceNow Otto applications.
System Property Registry	Opens the System property registry page. View and edit the system properties for the AI applications in your instance. For more information, see Manage system properties for AI applications in AI Admin Center (Lux UI).
AI Plugins	Opens the Plugins page from AI Admin Hub. Install AI plugins to enable generative AI on your instance. For more information, see Install plugins for ServiceNow Otto.
Usage alerts	Opens the Usage alerts page from AI Admin Hub. Create alert rules to track the usage of generative AI skills and notify you in the instance and by email when the set thresholds are reached.
Prompt Injection	Opens the Prompt Injection page from AI Admin Hub. Activate or deactivate prompt injection attack detection to protect all generative AI applications and AI-generated text and conversations on your instance from malicious inputs and unintended model behaviors. For more information, see Configure prompt injection attack protection.
Offensiveness	Opens the Offensiveness page from AI Admin Hub. Activate offensiveness detection to log or block offensive content generated by AI skills and workflows. For more information, see Activate offensiveness protection for generative AI.
Guardrail Service Providers	Opens the Guardrail service providers page from AI Admin Hub. Choose the default service provider for AI Guardian. This provider is used by Offensiveness and Prompt Injection.

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Option	Description
	For more information, see Configuring a Guardrail Service Provider.
Model Providers	Opens the Manage model providers page from AI Admin Hub. Edit or customize the model provider for a skill or skill group at the instance level from the list of supported third-party model providers. You can also review the model policy set by your organization and view the change history. For more information, see Manage model providers.
Model Versions	Opens the Manage model versions page from AI Admin Hub. Manage the version of the model providers across skills and instance levels. You can change and update versions for the base system and custom skills. For more information, see Manage version.
Data privacy policies	Opens the Privacy policies page from AI Admin Hub. Configure privacy policies to anonymize data in AI applications. For more information, see Configure Now Assist privacy policies.
Data Sharing	Opens the Data sharing page from AI Admin Hub. Data sharing improves ServiceNow AI products. You can opt out of data sharing from this page. For more information, see Opt out of data sharing for Now Assist.
Data processing	Opens the Data overflow processing page from AI Admin Hub. Configure where AI data is processed during periods of high traffic. For more information, see Configure Now Assist data overflow processing.
ServiceNow Otto panel	Opens the ServiceNow Otto Panel page from AI Admin Hub. With the ServiceNow Otto panel, you can get assistance from generative AI experiences to solve customer issues faster. Use this conversational interface to summarize a chat, case, or incident, get help, or generate resolution notes so that you can get the context of this information more quickly. For more information, see ServiceNow Otto panel.
ServiceNow Otto context menu	Opens the ServiceNow Otto Context Menu page from AI Admin Hub.

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Option	Description
	The ServiceNow Otto context menu uses generative AI to help agents summarize, create, and edit written content, thus streamlining their writing tasks. For more information, see ServiceNow Otto context menu.

Use AI Data Kit features in AI Admin Center (Next Experience UI)

Use AI Data Kit on the data page in the AI Admin Center workspace.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

The following applications must be installed before performing this task:

- AI Admin Center.

  For more information, see Confirm installation of AI Admin Center.

- AI Data Kit.

  For more information, see Install and configure essential AI plugins using AI Admin Center.

Role required: sn_na_center.nac_admin

About this task

Follow these steps to use AI Data Kit capabilities from AI Admin Center.

AI Data Kit enables you to add custom datasets to a data catalog and create collections for use in ServiceNow SDK. The curated data works with ServiceNow SDK to enable the AI skill development and evaluation.

In AI Admin Center, the integration of AI Data Kit includes multi-tabbing support for working with datasets without leaving the application context.

Note: This topic describes the AI Admin Center feature based on the Next Experience user interface (UI). There is no Lux UI version of this topic.

Procedure

1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)**.
2. Select **Data** ( ) in the side navigation bar.

   The Data tab opens showing the AI Data Kit home page.
3. Perform any of the tasks you would perform in the AI Data Kit application.

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Each action you take will open in a new tab in the AI Admin Center workspace.

For more information on AI Data Kit, see AI Data Kit.

Use AI Guardian features in AI Admin Center (Next Experience UI)

Use AI Guardian features in the AI Admin Center workspace to detect offensive content, prompt injection attacks, and sensitive topics in generative AI interactions.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

The following applications must be installed before performing this task:

- AI Admin Center

  For more information, see Confirm installation of AI Admin Center.

- AI Admin Hub

  For more information, see Install and configure essential AI plugins using AI Admin Center.

Role required: sn_na_center.nac_admin

About this task

Follow these steps to use AI Guardian capabilities from AI Admin Center.

AI Guardian provides safety and governance controls for AI-generated content. It monitors AI interactions for potentially harmful, offensive, or policy-violating content.

In AI Admin Center, the integration of AI Guardian includes multi-tabbing support for working with safety and governance controls without leaving the application context.

For more information on AI Guardian, see AI Guardian.

Note: This topic describes the AI Admin Center feature based on the Next Experience UI. If you're using the Lux user experience for AI Admin Center, see the Lux UI version of this topic.

Procedure

1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)**.
2. Select **Admin** ( ) in the side navigation bar.

   The Admin tab opens showing AI Admin Hub options.
3. Select one of the options under **AI Guardian** to configure.

   AI Guardian provides three guardrails. Each guardrail has a different scope.

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Guardrail	Description
Prompt injection detection	This guardrail attempts to override LLM in structions or expose restricted information. It applies to all generative AI applications and features. Select **Prompt injection** to open the Prompt injection tab. For more information on how to configure this guardrail, see Configure prompt injection at tack protection.
Offensiveness detection	This guardrail detects offensive or harmful content in AI inputs and outputs. It applies to specific generative AI skills and workflows. Select **Offensiveness** to open the Offensive ness tab. For more information on how to configure this guardrail, see Activate offensiveness protec tion for generative AI.
Sensitive topic filters	This guardrail filters subjects not suited for AI responses, such as workplace safety or employee compensation. It applies to Virtual Agent conversational skills only (available for HR Service Delivery and Customer Service Management). Select **Sensitive Filters** to open the Filters tab. For more information on how to configure this guardrail, see Configure sensitive topic filters.

Set up AI guardrails in AI Admin Center (Lux UI)

Use AI guardrails to detect offensive content, prompt injection attacks, and sensitive topics in generative AI interactions.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

Role required: sn_na_center.nac_admin

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About this task

Follow these steps to set up AI guardrails in AI Admin Center.

AI guardrails provide safety and governance controls for AI-generated content. They monitor AI interactions for potentially harmful, offensive, or policy-violating content.

For more information on AI Guardian, see AI Guardian.

Note: This topic describes the AI Admin Center feature based on the Lux user interface (UI). If you're using the Next Experience UI for AI Admin Center, see the Next Experience UI version of this topic.

Procedure

1. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center**.
2. Select **Settings** ( ) in the side navigation panel.
   The Settings page opens.
3. Select one of the options under **AI Guardian** to configure.

   AI Guardian provides three guardrails. Each guardrail has a different scope.

Guardrail	Description
Prompt injection detection	This guardrail detects attempts to override LLM instructions or ex pose restricted information. It applies to all generative AI applications and features. Select **Prompt injection** to open the Prompt injection page. For more information on how to configure this guardrail, see Configure prompt injection attack protection.
Offensiveness detection	This guardrail detects offensive or harmful content in AI inputs and outputs. It applies to specific generative AI skills and workflows. Select **Offensiveness** to open the Offensiveness page. For more information on how to configure this guardrail, see Activate offensiveness protection for generative AI.
Sensitive topic filters	This guardrail filters subjects not suited for AI responses, such as workplace safety or employee compensation. It applies to Virtual Agent conversational skills only (available for HR Service Delivery and Customer Service Management). Select **Sensitive Filters** to open the Filters page. For more information on how to configure this guardrail, see Configure sensitive topic filters.

Manage system properties for AI applications in AI Admin Center (Lux UI)

Use the system property registry to view and edit the system properties for the AI applications in your instance.

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Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

Role required: sn_na_center.nac_admin

An elevated role may be required to perform some of the actions in this task. You must also have the role for the capability that the system property belongs to.

About this task

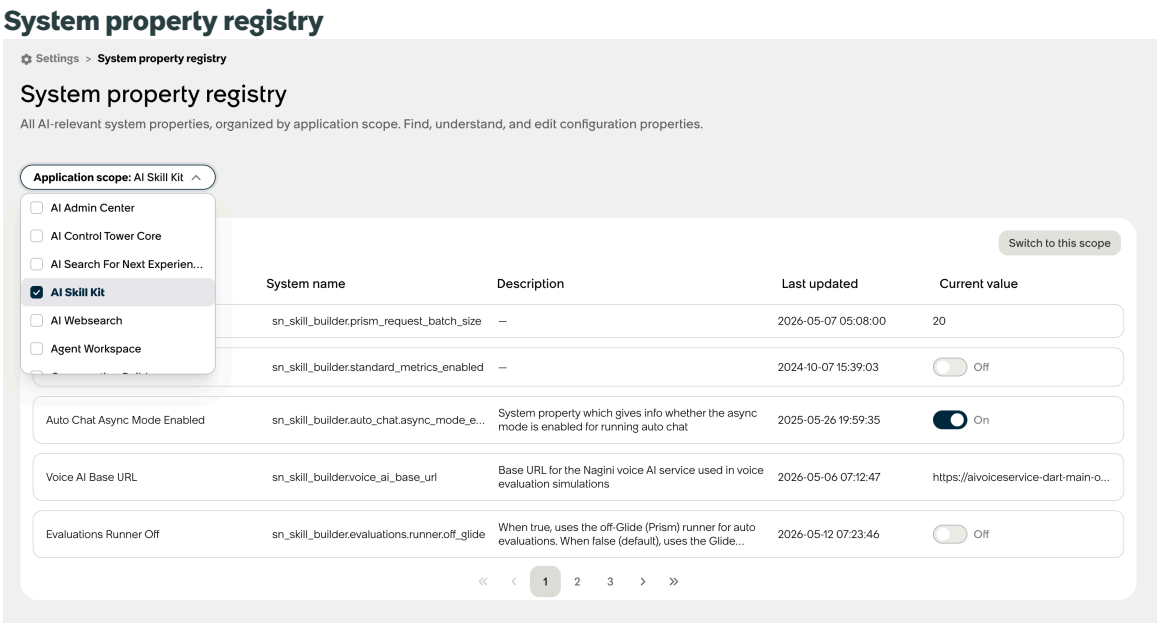
Follow these steps to view and edit the system properties for the AI applications in your instance.

For more information on system properties, see Available system properties.

Note: This topic describes the AI Admin Center feature based on the Lux user experience (UI). There is no Next Experience UI version of this topic.

Procedure

1. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center**.
2. Select **Settings** ( ) in the side navigation panel.
   The Settings page opens.
3. Select **System Property Registry** under the **General** heading.
   The System Property Registry page opens showing a list of all AI-related system properties grouped by application scope.



4. **Optional:** Select one or more options from the **Application scope** filter to refine the list.
5. **Optional:** Edit the system properties as needed.

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a. Go to the selected application scope.

(Optional) Editing is enabled only for the selected application scope. Select **Switch to this scope** to enable editing for properties in a different scope.

The scope panel displays **Editing enabled**.

b. Select the system property to edit.
The system property panel opens showing the property details.

c. Edit the value in the configuration box based on the value type.

- Type a new value within the stated restrictions.
- Toggle the **On-Off** option to a different value.

d. Select **Save changes**.

AI Agent Advisor

The AI Agent Advisor automatically discovers automation opportunities in your instance based on actual operational data and helps you to deploy AI agents to implement them.

Get started

Explore Learn about AI Agent Advisor concepts and features.	**Configure** Set up AI Agent Advisor to get started.
Use Use AI Agent Advisor to discover and implement AI automations.	**Reference** Get details about AI Agent Advisor properties and components.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

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Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

Troubleshoot and get help

- Additional resources for AI products and solutions.
- ServiceNow Community on AI and Intelligence.
- Access real-time courses, self-paced training, and career resources at ServiceNow University.
- Search the Known Error Portal for known error articles.
- Contact Customer Service and Support.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. In addition, this application will collect information extracted from documents. Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

Exploring AI Agent Advisor

AI Agent Advisor automatically discovers automation opportunities in your instance and helps you to deploy AI agents to implement them.

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AI Agent Advisor overview

AI Agent Advisor analyzes your instance data to identify the most frequent and impactful opportunities for efficiency gains in your workflows. For each identified opportunity, it proposes AI agents that can automate the solution, and generates new agents when no existing match is available.

This gives the AI administrator a data-driven starting point for AI adoption, eliminating the guesswork of deciding where to apply automation.

AI Agent Advisor users

The following table lists the primary users of AI Agent Advisor.

Users

User	Description
AI Administrators	AI administrators responsible for organization-wide AI deployment and management
Platform administrators	Platform administrators overseeing enterprise AI governance
AI builders and practitioners	AI practitioners building and deploying custom AI solutions across ServiceNow workflows

AI Agent Advisor workflow

The following diagram shows the AI Agent Advisor workflow.

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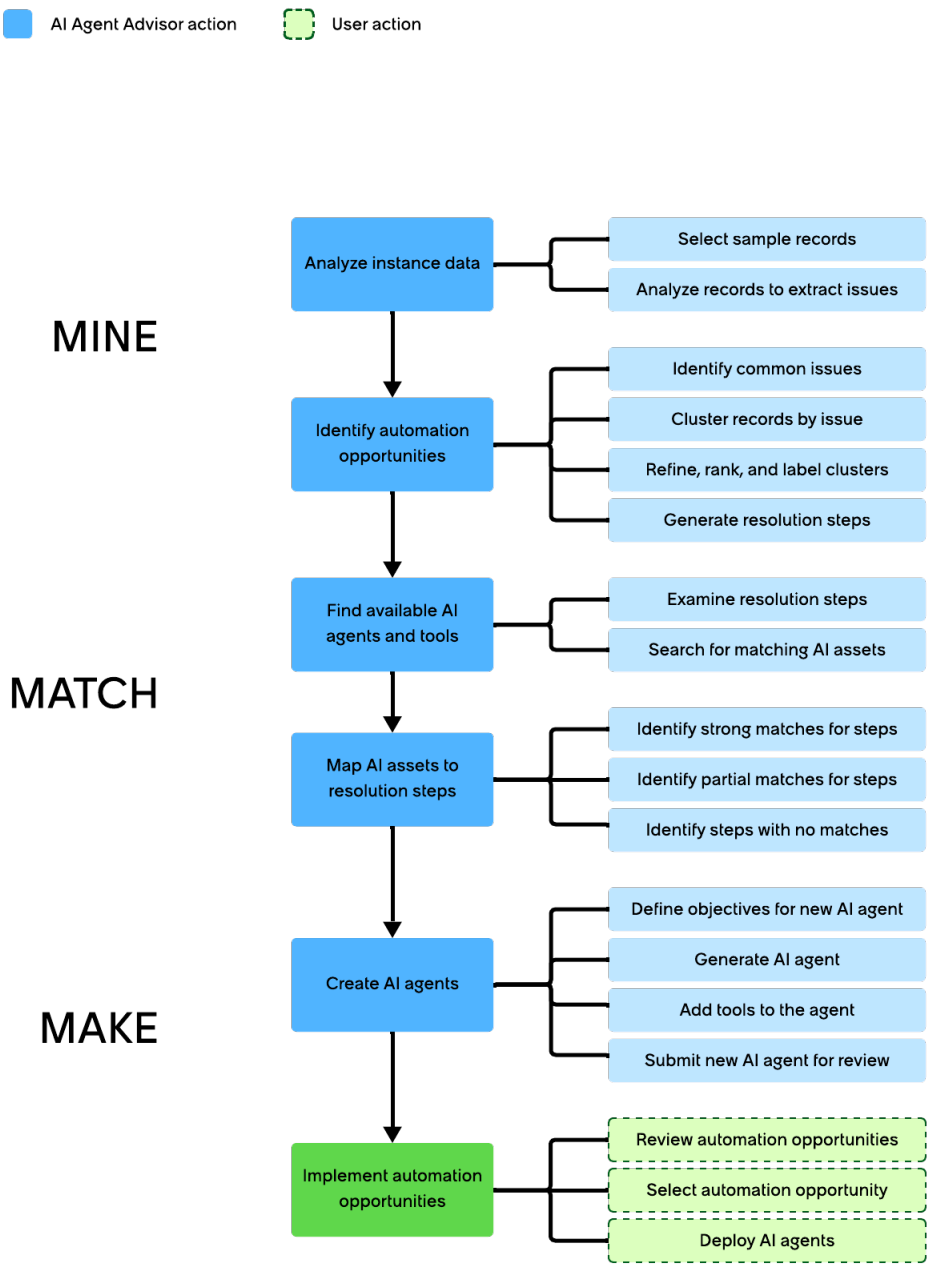
AI Agent Advisor workflow



AI Agent Advisor operates through three sequential phases:

Mine

The system analyzes the records in your instance (for example, incident and case records) on a scheduled basis to identify recurring problems that are candidates for automation.

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You can configure the data sources, filters, and schedule to target the most relevant records for your organization.

Match

For each identified opportunity, the system maps the resolution steps to existing AI agents, tools, and agentic workflows already available on your platform.

Make

When no existing agent is a strong match for a resolution step, the system generates a new AI agent tailored to that specific problem.

The result is a prioritized list of automation opportunities. Each opportunity displays the estimated time and cost savings, number of records analyzed, and available AI assets. AI Agent Advisor generates the resolution steps using the data from existing records on your instance. You can use this list to decide which opportunities to act on first.

AI Agent Advisor benefits

AI Agent Advisor provides the following benefits.

Benefits of AI Agent Advisor

Benefit	Feature	User
Quickly discover automation opportunities for your instance. AI Agent Advisor analyzes actual instance data to identify and propose AI automations that provide the greatest efficiency gains.	Automation discovery with AI Agent Advisor	AI administrator
Matches identified automation opportunities to existing AI agents on the platform and supports automated creation and deployment of new agents, shortening the path from insight to action.	AI agent matching and automated deployment	AI administrator AI developer

What to explore next

To learn more about configuring and using AI Agent Advisor, see:

- Configuring AI Agent Advisor
- Using AI Agent Advisor
- AI Agent Advisor reference

Supporting information for AI Agent Advisor

Get a quick overview of the important information that is related to the AI Agent Advisor application.

Supported versions

AI Agent Advisor v1.0 is supported starting with Australia general availability (Patch 2) and Zurich (Patch 9).

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Supported user interfaces

The AI Agent Advisor application is supported in the Next Experience workspace and the Lux experience user interfaces of AI Admin Center.

AI Admin Center provides features that enable you to set up of your AI solutions in a unified experience without switching between separate AI applications.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Licensing requirements

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Application information

AI Agent Advisor (sn_agent_miner) is available as a plugin from the ServiceNow Store.

This store app has the following dependencies.

Required applications

Plugin name	Plugin ID	Version	Type
AI Agent Advisor	sn_agent_miner	0.2.1	App
Insights Clustering Utils	sn_icu	2.0.2	App
Group-Action Framework	sn_gaf	6.0.5	App
AI Search			
AI Admin Hub	sn_nowassist_admin	8.0.7	App
Now Assist Troubleshooting	sn_nowassist_diagn	4.0.2	App
Admin Experience Framework	sn_ace	5.2.0	App
Platform AI Agents and Skills	sn_uxc_gen_ai	12.0.12	App
Generative AI Controller	sn_generative_ai	13.0.3	App
Predictive Intelligence		Platform version	Plugin

For more information, see Configuring AI Agent Advisor.

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Configuring AI Agent Advisor

Configure settings for AI Agent Advisor.

Confirm installation of AI Agent Advisor

Confirm the installation of the AI Agent Advisor application.

> **Important:** Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).
>
> The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).
>
> In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

All required plugins must be installed before attempting to run AI Agent Advisor. For a list of dependencies, see Supporting information for AI Agent Advisor.

Role required: AI Agent Advisor admin [sn_agent_miner.app_admin]

About this task

AI Agent Advisor installs and runs automatically as part of the standard ServiceNow Otto setup. No manual steps are required. After ServiceNow Otto is installed and configured, AI Agent Advisor will be present on your instance and will begin analysis automatically.

Follow these steps to confirm the installation of the AI Agent Advisor plugin.

Procedure

1. Confirm the AI Agent Advisor plugin is installed by navigating to **System Definition** > **Plugins** and selecting the **Installed** tab.
2. **Optional:** If the AI Agent Advisor plugin is not installed, perform the following steps to manually install it.
   a. Navigate to **System Definition** > **Plugins**.
   b. In the search box, type `AI Agent Advisor`.
   c. In the Store applications section under the Available for you tab, select the **AI Agent Advisor** card.
   d. Select **Install**.
   e. Select a version from the list.
   f. Select an installation schedule option.
   g. Select **Install**.
   The AI Agent Advisor application will install at the selected time.
3. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center** to confirm the successful installation.

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The AI Admin Center home page opens.

Confirm the following:

- Automation opportunities appear on the AI Admin Center home page.
- All AI Agent Advisor dependencies are installed.

  Navigate to **System Definition** > **Plugins** and select the **Installed** tab to confirm all required plugins are installed.

- Scheduled jobs are installed.

  Navigate to **System Definition** > **Scheduled Jobs** to confirm that the Agent Miner jobs for incidents, cases, and cluster matching are included in the list.

Result
The AI Agent Advisor application is installed and available to the appropriate user roles.

Setting up automation opportunity discovery in AI Admin Center

Configure the data sources, filters, and schedule that AI Agent Advisor uses to analyze your instance and identify automation opportunities.

AI Agent Advisor runs a scheduled analysis of your instance records to discover automation opportunities. Follow these steps to specify which base system or custom data sources to include, apply filters to focus the analysis, and set the frequency and timing of the analysis.

Set up a data source for analysis (Next Experience UI)

Create and activate a scheduled analysis of your instance records to discover automation opportunities.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin
You must have access to an ACL-protected table to run the analysis for it.

For AI Agent Advisor to configure a successful analysis, the data source must contain a minimum of 500 records.

Role required: sn_na_center.nac_admin

About this task
Follow these steps to configure the data source, filters, schedule, and cost profile that AI Agent Advisor uses to identify the automation opportunities and provide savings estimates for them.

In the event an error occurs when performing these steps, see the troubleshooting steps described in KB article KB2931703 on Now Support.

Note: This topic describes the AI Admin Center feature based on the Next Experience UI. If you're using the Lux user experience for AI Admin Center, see the Lux UI version of this topic.

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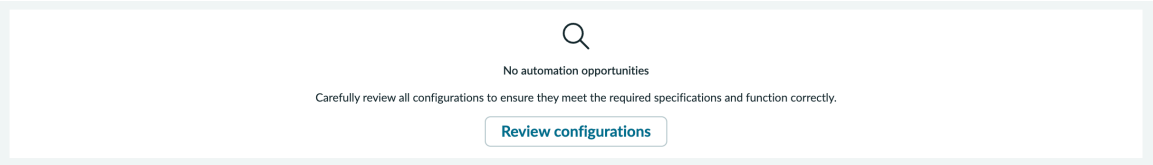
Procedure

1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)**.

   The home page opens.

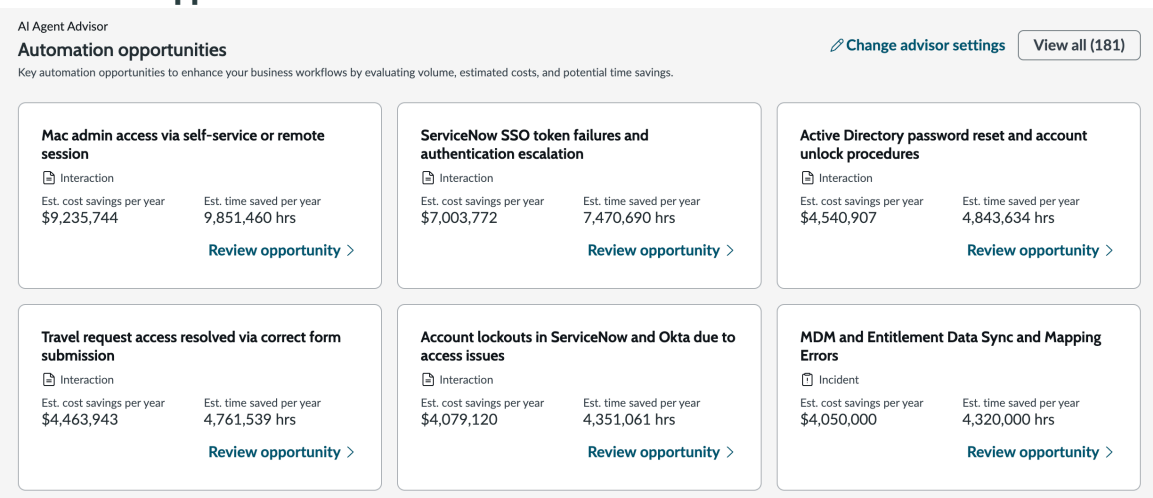
   The automation opportunities section displays only a **Review configurations** button If no opportunities are identified or if opportunity discovery is not yet set up.

   Empty automation opportunities section

   The automation opportunities section displays the top automation opportunities in separate cards if discovery is set up and opportunities are identified. The section also displays a **Change advisor settings** link to edit the discovery data sources.

   Automation opportunities section

2. Select **Review configurations** or **Change advisor** settings to open the AI Agent Advisor setup page.

   You can also select **Admin** ( ) in the side navigation bar and select **AI Agent Advisor** under **Settings** on the AI Admin Hub page.

   The AI Agent Advisor setup page opens.

   If there are any data sources set up, a separate card displays for each data source.

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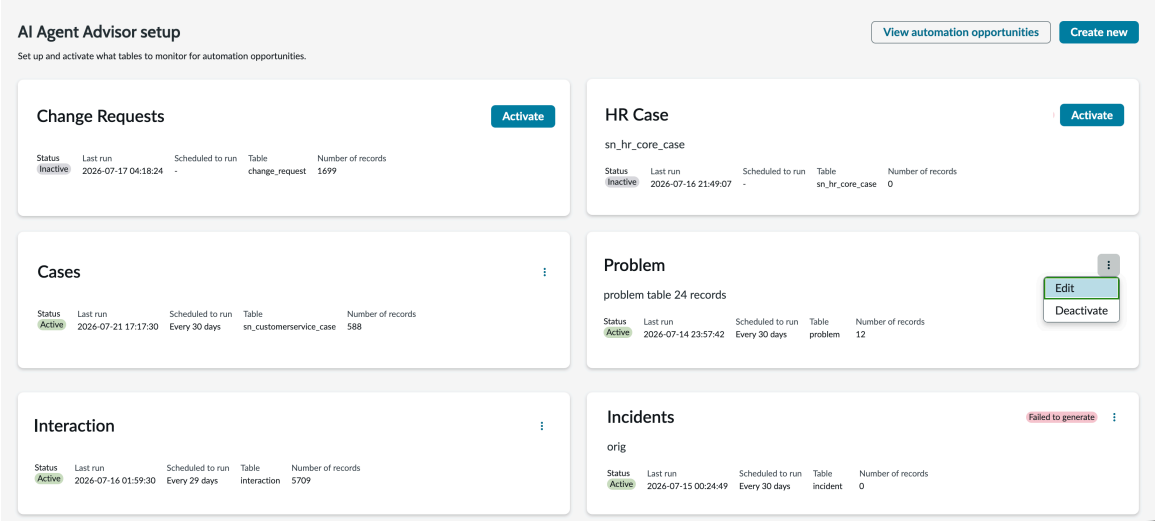
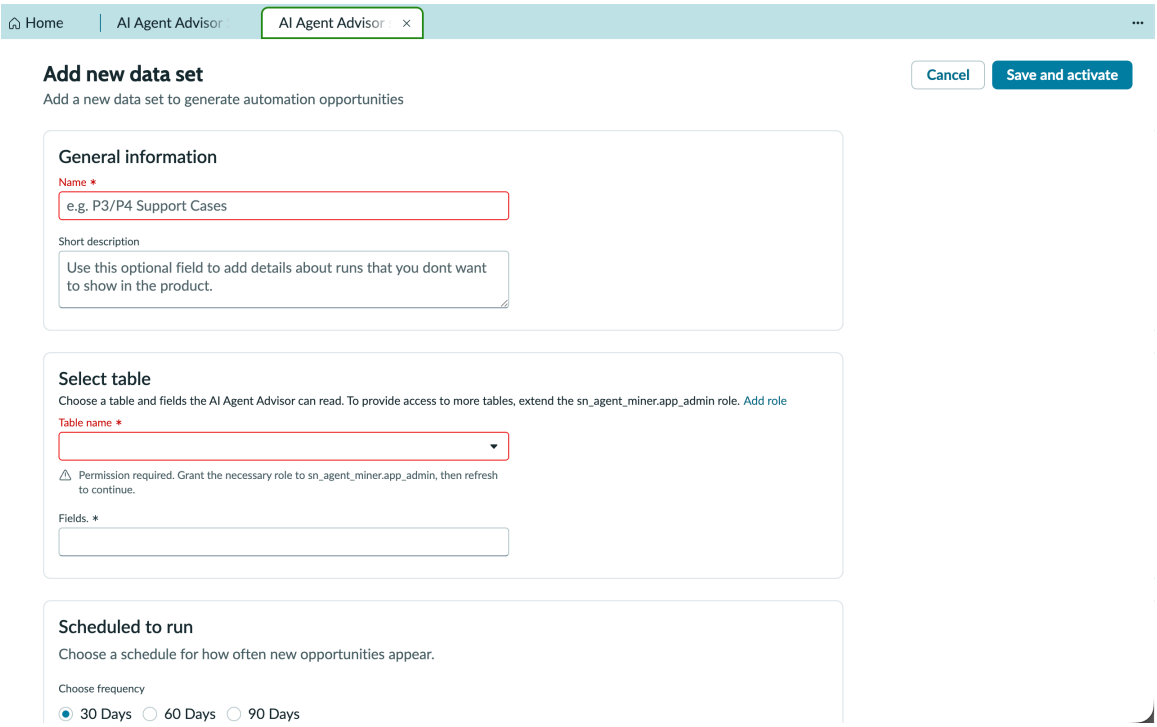


3. Select **Create new**.
   The Add new data set page opens.



4. Complete the **General information** section.
   a. Enter a name for the analysis configuration in the **Name** field.
   b. Enter a description in the **Short description** field.
5. Choose the data source in the **Select table** section.
   a. Select **Add role** if permission is required for AI Agent Advisor to access the table; then add the required role to the sn_agent_miner.app_admin role and return to the Add new data set page.

      For more information, see Add a role to an existing role.

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b. Select a table from the **Table name** menu.

c. Select one or more fields from the **Fields** menu.

6. Select the frequency of the analysis schedule in the **Scheduled to run** section.
   - Select the 30, 60, or 90 day option.
   - Toggle the **On-Off** option to `Off` to stop AI Agent Advisor from running the recurring analysis and identifying opportunities.

     If the scheduled run is turned off, new opportunities for the data source won't appear until a new run is scheduled or triggered manually.

7. Apply filters to refine the scope of the analysis.

   a. Use conditions to select certain properties as a filter.

   For more information on how conditions work, see OR conditions.

   Note: A filter for the **Created** field is required.

   b. Select **Add condition set** to add conditions.

8. Create a cost profile to calculate the estimated time and cost savings from using the automation.

   a. Enter the hourly labor cost.

   b. Enter the active handling time rate.

   The percentage of a record's total open time that represents actual hands-on effort by a human agent.

9. Select **Save and activate**.

Result

AI Agent Advisor runs the analysis according to the configured filters and schedule. After the analysis completes, automation opportunities appear on the AI Admin Center home page and on the Automation opportunities page.

What to do next

View your automation opportunities on the home page. For more information, see View your automation opportunities (Next Experience UI).

Set up a data source for analysis (Lux UI)

Create and activate a scheduled analysis of your instance records to discover automation opportunities.

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Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

You must have access to an ACL-protected table to configure the analysis for it.

For AI Agent Advisor to run a successful analysis, the data source must contain a minimum of 500 records.

Role required: sn_na_center.nac_admin

About this task

Follow these steps to configure the data source, filters, schedule, and cost profile that AI Agent Advisor uses to identify the automation opportunities and provide savings estimates for them.

In the event an error occurs when performing these steps, see the troubleshooting steps described in KB article KB2931703 on Now Support.

Note: This topic describes the AI Admin Center feature based on the Lux user interface (UI). If you're using the Next Experience UI for AI Admin Center, see the Next Experience UI version of this topic.

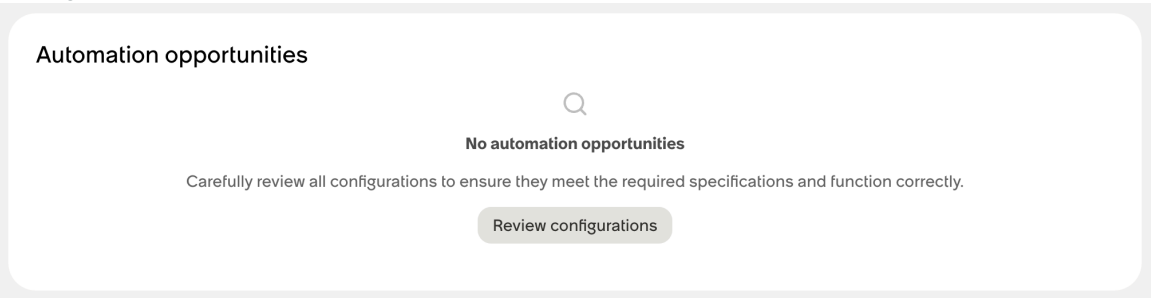
Procedure

1. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center**.

   The home page opens.

   The **Automation opportunities** section displays only a **Review configurations** button if no opportunities are identified or if opportunity discovery isn't yet set up.

   Empty automation opportunities section

   The **Automation opportunities** section displays the top automation opportunities in separate cards if discovery is set up and opportunities are identified. The section also displays an **Edit advisor settings** link to edit the discovery data sources.

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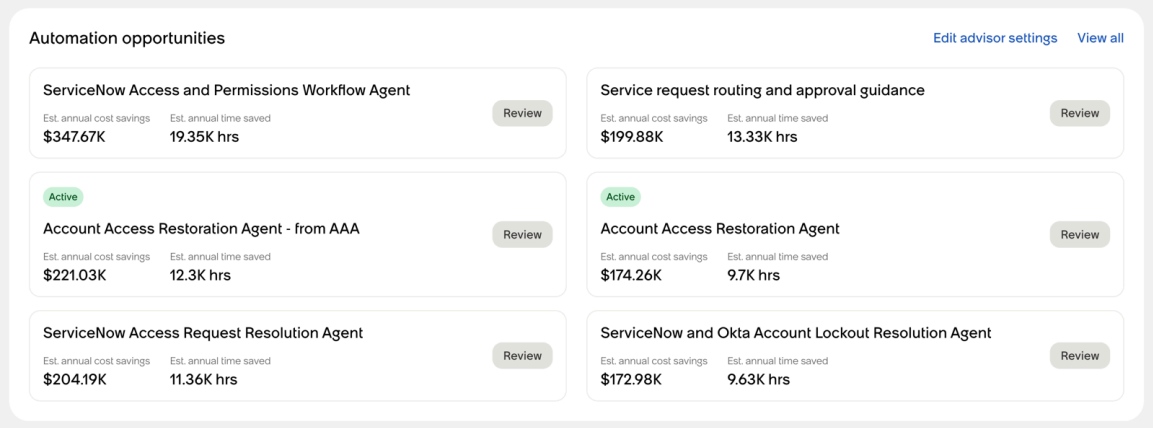
Automation opportunities section

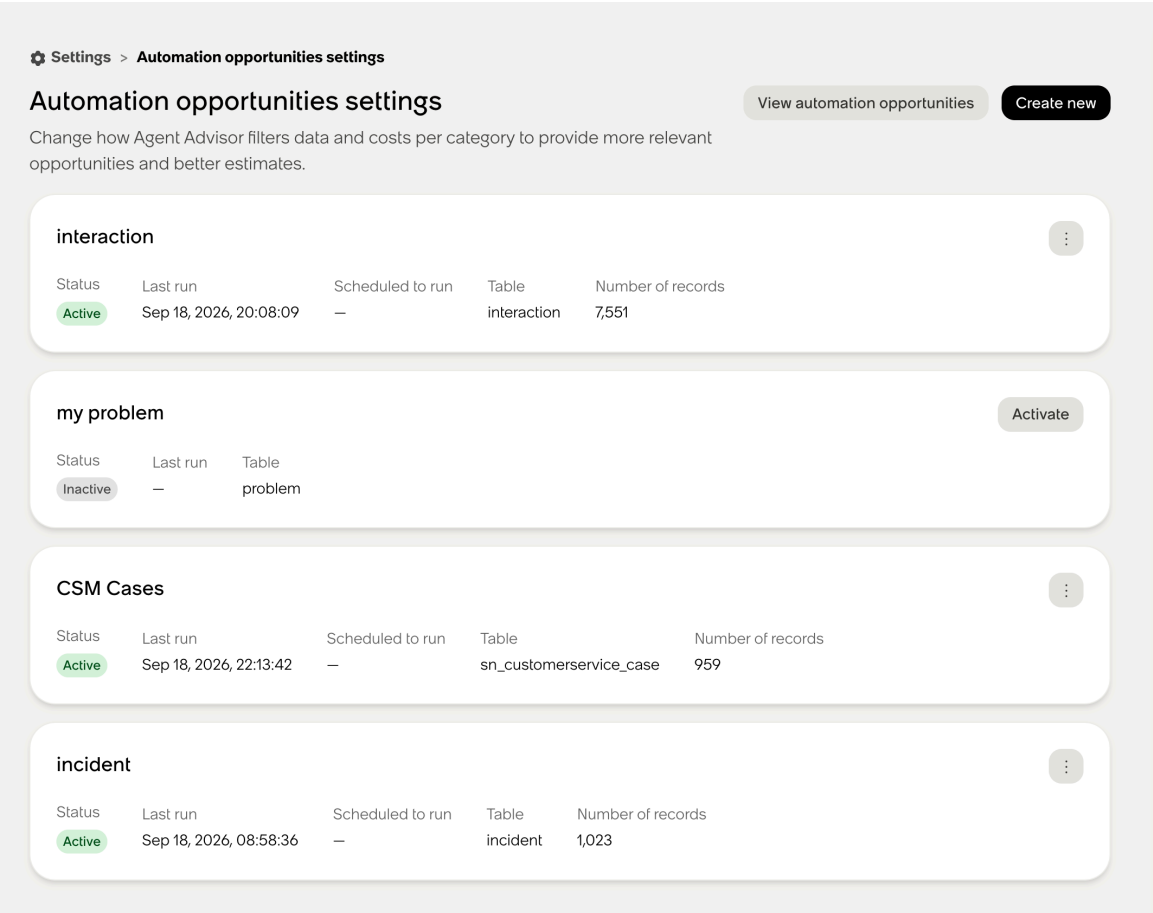


2. Select **Review configurations** or **Edit advisor settings** to open the Automation opportunities settings page.

   You can also select **Settings** ( ) in the side navigation panel and select **Automation opportunities** under **General** on the Settings page.

   The Automation opportunities settings page opens. If there are any data sources set up, a separate card displays for each data source.

Automation opportunities settings page



3. Select **Create new**.

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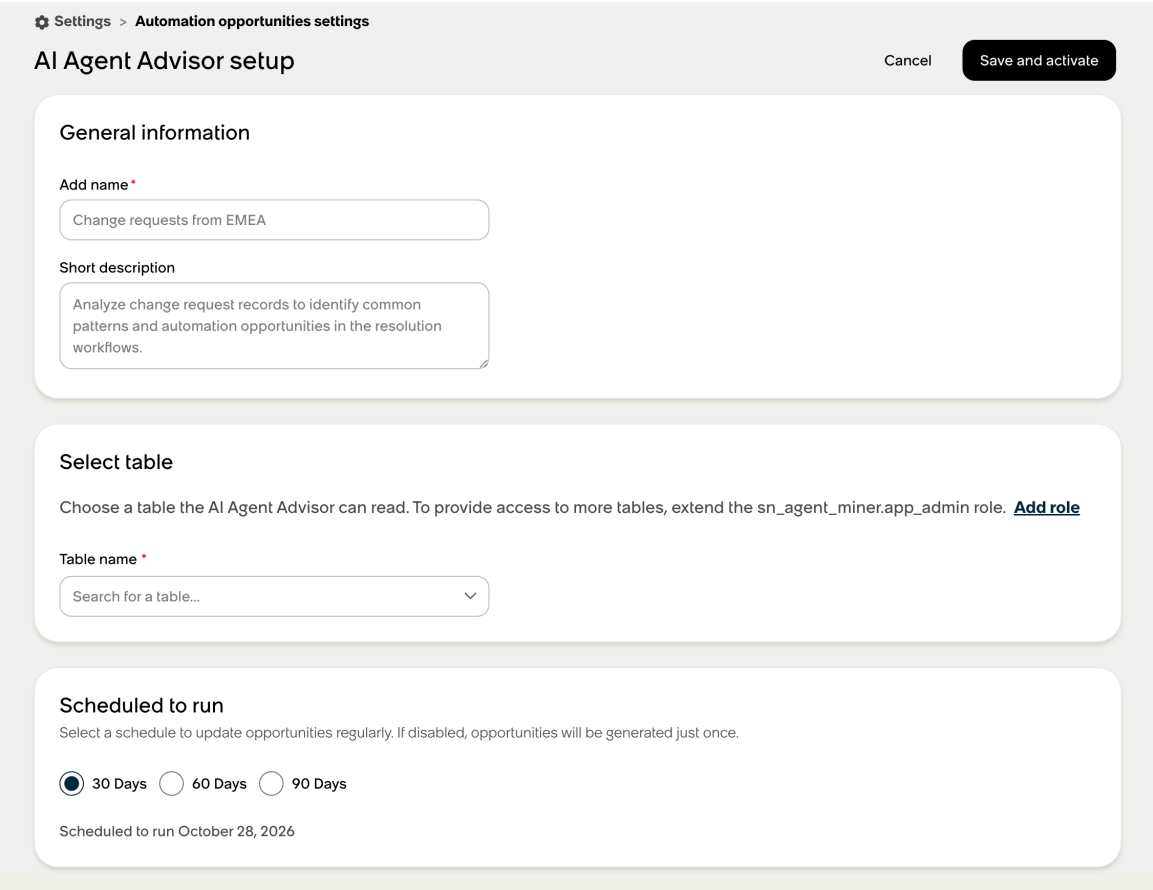
The AI Agent Advisor setup page opens.

AI Agent Advisor setup page



4. Complete the **General information** section.
   a. Enter a name for the analysis configuration in the **Add name** field.
   b. Enter a description in the **Short description** field.
5. Choose the data source in the **Select table** section.

   a. If permission is required for AI Agent Advisor to access the table, select **Add role**. Then add the required role to the sn_agent_miner.app_admin role and return to the Add new data set page.

      For more information, see Add a role to an existing role.

   b. Select a table from the **Table name** menu.

   c. Select one or more fields from the **Fields** menu.

6. Select the frequency of the analysis schedule in the **Scheduled to run** section.
   - Select the 30, 60, or 90 day option.
   - Toggle the **On-Off** option to `Off` to stop AI Agent Advisor from running the recurring analysis and identifying opportunities.

     If the scheduled run is turned off, new opportunities for the data source won't appear until a new run is scheduled or triggered manually.

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7. Apply filters to refine the scope of the analysis.

   a. Use conditions to select certain properties as a filter.

      For more information on how conditions work, see OR conditions.

      Note: A filter for the **Created** field is required.

   b. Select **Add group** to add more conditions.

8. Create a cost profile to calculate the estimated time and cost savings from using the automation.

   a. Enter the hourly labor cost.

   b. Enter the active handling time rate.

      The percentage of a record's total open time that represents actual hands-on effort by a human agent.

9. Select **Save and activate**.

Result
AI Agent Advisor runs the analysis according to the configured filters and schedule. After the analysis completes, automation opportunities appear on the AI Admin Center home page and on the Automation opportunities page.

What to do next
View your automation opportunities. For more information, see View your automation opportunities (Lux UI).

Edit an analysis data source

Edit a scheduled analysis of your instance records.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin
You must have access to an ACL-protected table to configure the analysis for it.

For AI Agent Advisor to run a successful analysis, the data source must contain a minimum of 500 records.

Role required: sn_na_center.nac_admin

About this task
Follow these steps to change the configuration of the data source, filters, schedule, and cost profile that AI Agent Advisor uses to identify the automation opportunities.

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You can only edit an active analysis data source. To edit a deactivated analysis data source, you must first reactivate it. For more information, see Activate a deactivated analysis data source.

In the event an error occurs when performing these steps, see the troubleshooting steps described in KB article KB2931703 on Now Support.

Procedure

1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)** for the legacy AI Admin Center workspace.

   Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center** for the Lux UI experience.

   The home page opens.

2. Select **Admin** ( ) in the side navigation bar in the legacy AI Admin Center workspace.

   Select **Settings** ( ) in the side navigation panel in the Lux UI experience.

3. Select **Automation opportunities** under **General** or **AI Agent Advisor** under **Settings**.

   The AI Agent Advisor setup page opens showing a separate card for each data source configuration.

4. Select **More options** ( ) on the data source analysis you want to edit.
5. Select **Edit**.
   The AI Agent Advisor setup page opens showing the configuration details.
6. Review the completed fields and edit as needed.
7. Select **Save**.
8. **Optional:** Select **Execute now** to run the analysis.

Result

AI Agent Advisor runs the analysis according to the configured filters and schedule. After the analysis completes, automation opportunities appear on the AI Admin Center home page and on the Automation opportunities page.

What to do next

View your automation opportunities on the home page. For more information, see View your automation opportunities (Next Experience UI).

Deactivate an analysis data source

Deactivate a data source analysis that you no longer want to run for automation opportunity discovery.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

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Before you begin
You must have access to an ACL-protected table to configure the analysis for it.

Role required: sn_na_center.nac_admin

Procedure
1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)** for the legacy AI Admin Center workspace.

   Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center** for the Lux UI experience.

   The home page opens.

2. Select **Admin** ( ) in the side navigation bar in the legacy AI Admin Center workspace.

   Select **Settings** ( ) in the side navigation panel in the Lux UI experience.

3. Select **Automation opportunities** under **General** or **AI Agent Advisor** under **Settings**.

   The AI Agent Advisor setup page opens showing a separate card for each data source configuration.

   An active data source analysis displays an Active status and a **More options** button ( ).

4. Select **More options** ( ) on the data source analysis you want to deactivate.
5. Select **Deactivate**.

Result
AI Agent Advisor ceases to run the scheduled analysis of the data source.

Delete an analysis data source

Delete a data source analysis that you no longer want to run for automation opportunity discovery.

> **Important:** Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).
>
> The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).
>
> In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin
You must have access to an ACL-protected table to delete the analysis for it.

Role required: sn_na_center.nac_admin

About this task
Follow these steps to delete the analysis configuration of a data source that AI Agent Advisor uses to identify automation opportunities.

You can only delete the analysis configuration for a custom data source.

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Procedure

1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)** for the legacy AI Admin Center workspace.

   Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center** for the Lux UI experience.

   The home page opens.

2. Select **Admin** ( ) in the side navigation bar in the legacy AI Admin Center workspace.

   Select **Settings** ( ) in the side navigation panel in the Lux UI experience.

3. Select **Automation opportunities** under **General** or **AI Agent Advisor** under **Settings**.

   The AI Agent Advisor setup page opens showing a separate card for each data source configuration.

   An active data source analysis displays an Active status and a **More options** button ( ).

4. Select **More options** ( ) on the data source analysis you want to delete.
5. Select **Delete**.
6. Select **Delete** in the confirmation box.
   The custom data source configuration is deleted and no longer visible on the AI Agent Advisor setup page.

Activate a deactivated analysis data source

Reactivate a previously deactivated data source analysis.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

You must have access to an ACL-protected table to configure the analysis for it.

Role required: sn_na_center.nac_admin

Procedure

1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)** for the legacy AI Admin Center workspace.

   Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center** for the Lux UI experience.

   The home page opens.

2. Select **Admin** ( ) in the side navigation bar in the legacy AI Admin Center workspace.

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Select **Settings** ( ) in the side navigation panel in the Lux UI experience.

3. Select **Automation opportunities** under **General** or **AI Agent Advisor** under **Settings**.

   The AI Agent Advisor setup page opens showing a separate card for each data source configuration.

   A deactivated data source analysis displays an Inactive status and an **Activate** button.

4. Select **Activate** on the data source analysis you want to reactivate.
   The AI Agent Advisor setup page opens showing the configuration details.
5. Review the completed fields and edit as needed.
6. Select **Save and activate**.
7. **Optional:** Select **Execute now** to run the analysis.

Result

AI Agent Advisor runs the analysis according to the configured filters and schedule. After the analysis completes, automation opportunities appear on the AI Admin Center home page and on the Automation opportunities page.

What to do next

View your automation opportunities on the home page. For more information, see View your automation opportunities (Next Experience UI).

Using AI Agent Advisor

Use AI Agent Advisor to automatically discover automation opportunities in your instance and deploy AI agents to implement the automations.

AI Agent Advisor is the back-end engine that finds and proposes AI automation opportunities for your instance. It must be installed with AI Admin Center for the full experience.

AI Agent Advisor in AI Admin Center

Use AI Agent Advisor in AI Admin Center to automatically discover automation opportunities in your instance and deploy AI agents to implement the automations.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

AI Admin Center enables you to perform the following activities using AI Agent Advisor:

- View your automation opportunities (Next Experience UI)

  View your automation opportunities (Lux UI)

  Review the automation opportunities that AI Agent Advisor has identified for your instance.

- Implement an automation opportunity from AI Admin Center (Next Experience UI)

  Implement an automation opportunity (Lux UI)

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Deploy a matched AI agent or a new agent to automate a resolution for an identified automation opportunity.

- Edit an AI agent from an automation opportunity (Next Experience UI)

  Edit an AI agent from an automation opportunity (Lux UI)

  Edit an AI agent that was created for an automation opportunity.

View your automation opportunities (Next Experience UI)

Review the automation opportunities that AI Agent Advisor has identified for your instance.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

Automation discovery must be set up and an analysis run must be completed. For more information, see Setting up automation opportunity discovery in AI Admin Center.

Role required: sn_na_center.nac_admin

About this task

After AI Agent Advisor completes an analysis, it produces a prioritized list of automation opportunities based on your instance data. Follow these steps to review the identified opportunities and assess which ones to act on.

Note: This topic describes the AI Admin Center feature based on the Next Experience UI. If you're using the Lux user experience for AI Admin Center, see the Lux UI version of this topic.

Procedure

1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)**.
2. Review the Automation opportunities section of the home page to see the top automation opportunities.

   Each card displays the estimated time and cost savings.

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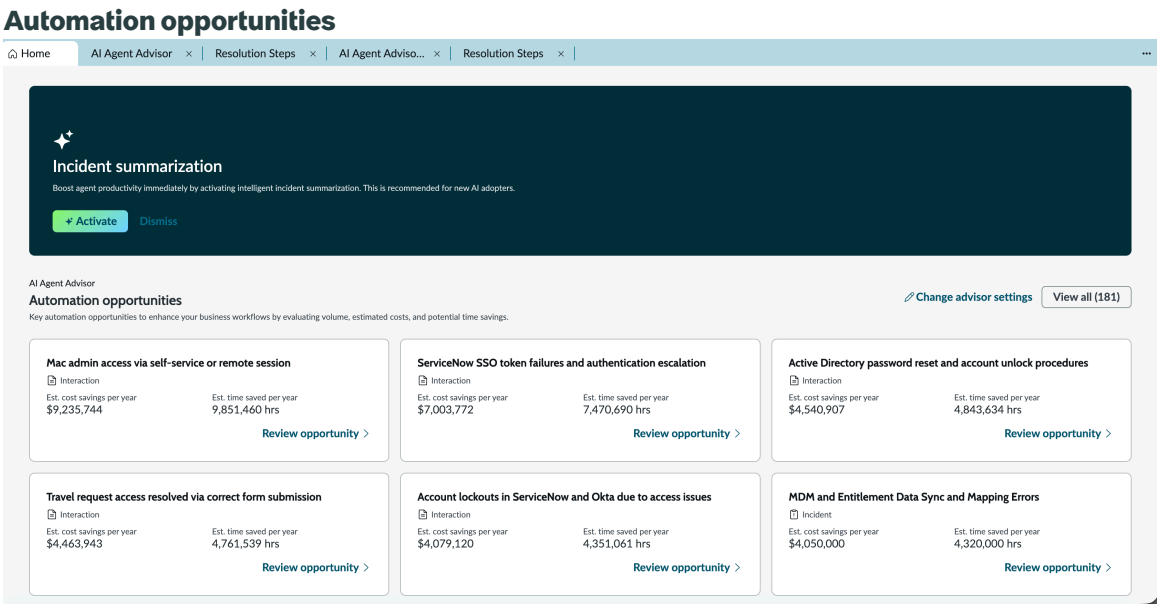
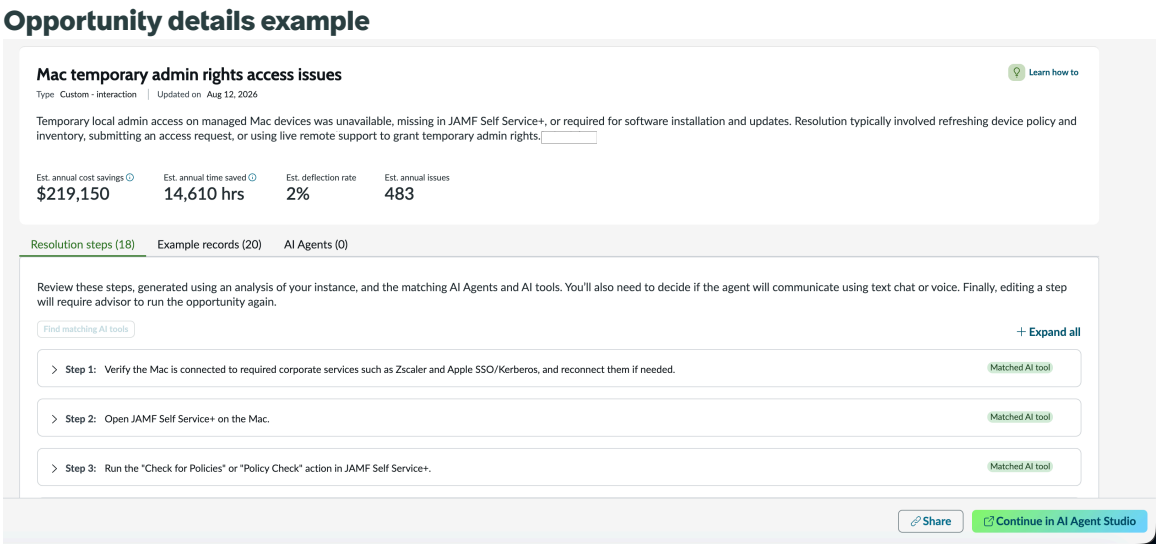


3. Do one of the following:

a. Select **Review opportunity** in a card to view its details.

The Resolution Steps tab opens showing the opportunity details.

AI Agent Advisor generates the resolution steps using the data from existing records on your instance.



b. Select **View all** to view the complete list of automation opportunities.

The Automation opportunities tab opens showing a searchable list of all automation opportunities.

Use the search field or the filter and sort controls to adjust the list.

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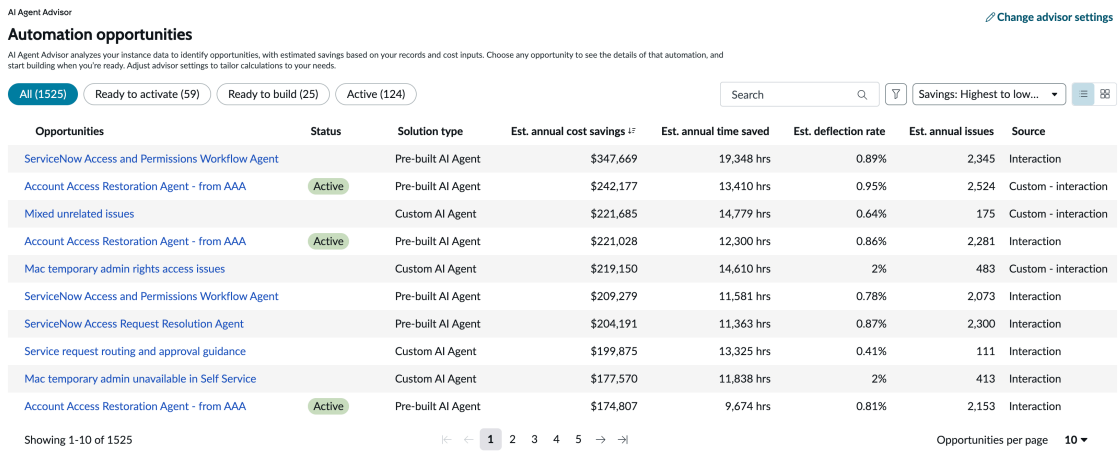
Automation opportunities list



The status of the opportunity displays in the **Status** column.

Automation opportunity statuses

Status	Description
Requires installation	The instance requires installation of a plugin to get a base-system AI agent for this opportunity. No other prebuilt AI agents are available.
Ready to build	All resolution steps for the opportunity are matched to AI tools.
Ready to activate	There is a prebuilt AI agent available to activate for the opportunity.
Active	There is an activated AI agent for the opportunity.
(Empty)	The status is empty for an opportunity that has at least one step requiring an AI tool.

c. Optional: Select a combination of sort, filter, and display options to refine the list.

- Select a status filter option.
- Type in the search box and select the **Submit search** icon ( ) to filter by search criteria.
- Select the filter button ( ), choose one or more filters, and select **Apply**.
- Select an option from a sort menu.
- Select the **List layout** ( ) to display the opportunities in a list or **Grid layout** ( ) to show them as stacked cards.

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What to do next
Implement an automation opportunity. For more information, see Implement an automation opportunity from AI Admin Center (Next Experience UI).

View your automation opportunities (Lux UI)

Review the automation opportunities that AI Agent Advisor has identified for your instance.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin
Automation discovery must be set up and an analysis run must be completed. For more information, see Set up a data source for analysis (Lux UI).

Role required: sn_na_center.nac_admin

About this task
After AI Agent Advisor completes an analysis, it produces a prioritized list of automation opportunities based on your instance data. Follow these steps to review the identified opportunities and assess which ones to act on.

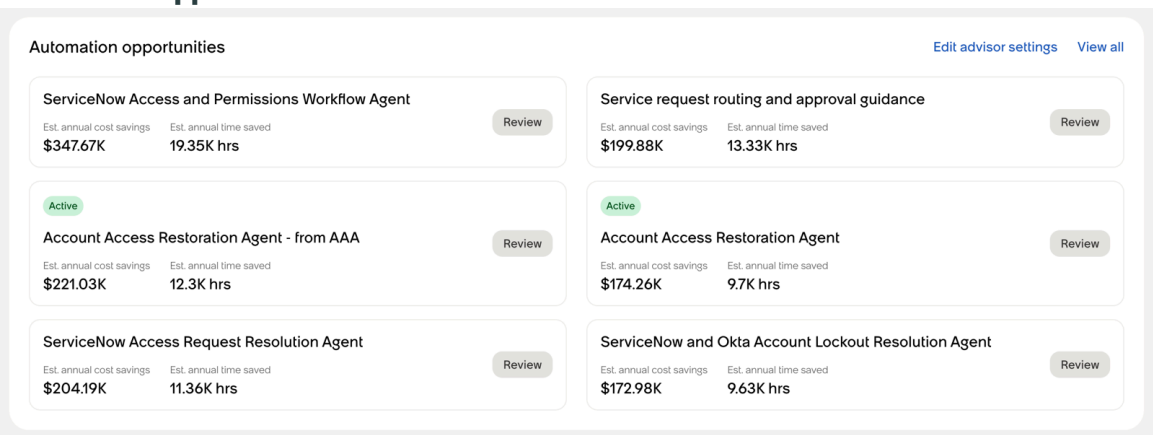
Note: This topic describes the AI Admin Center feature based on the Lux user interface (UI). If you're using the Next Experience UI for AI Admin Center, see the Next Experience UI version of this topic.

Procedure

1. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center**.
2. Review the **Automation opportunities** section of the home page to see the top automation opportunities.

   Each card displays the estimated time and cost savings.

Automation opportunities



3. Do one of the following:

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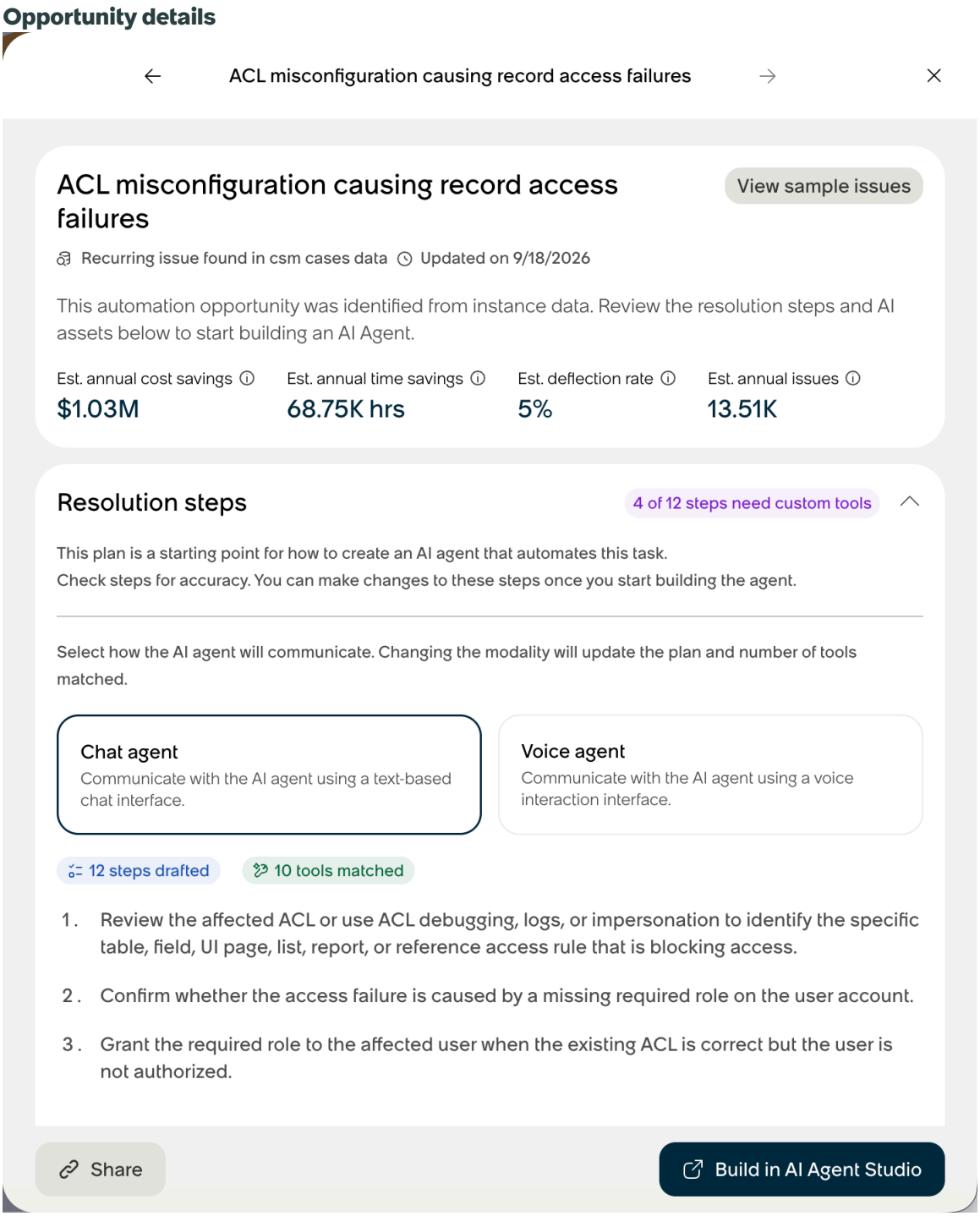
- Select **Review** in a card to view its details.

  The opportunity opens in a side panel showing the opportunity details. AI Agent Advisor generates the resolution steps using the data from existing records on your instance.



- Select **View all** to view the complete list of automation opportunities.

  The Automation opportunities page opens showing a searchable list of all automation opportunities. Use the search field or the filter and sort controls to adjust the list.

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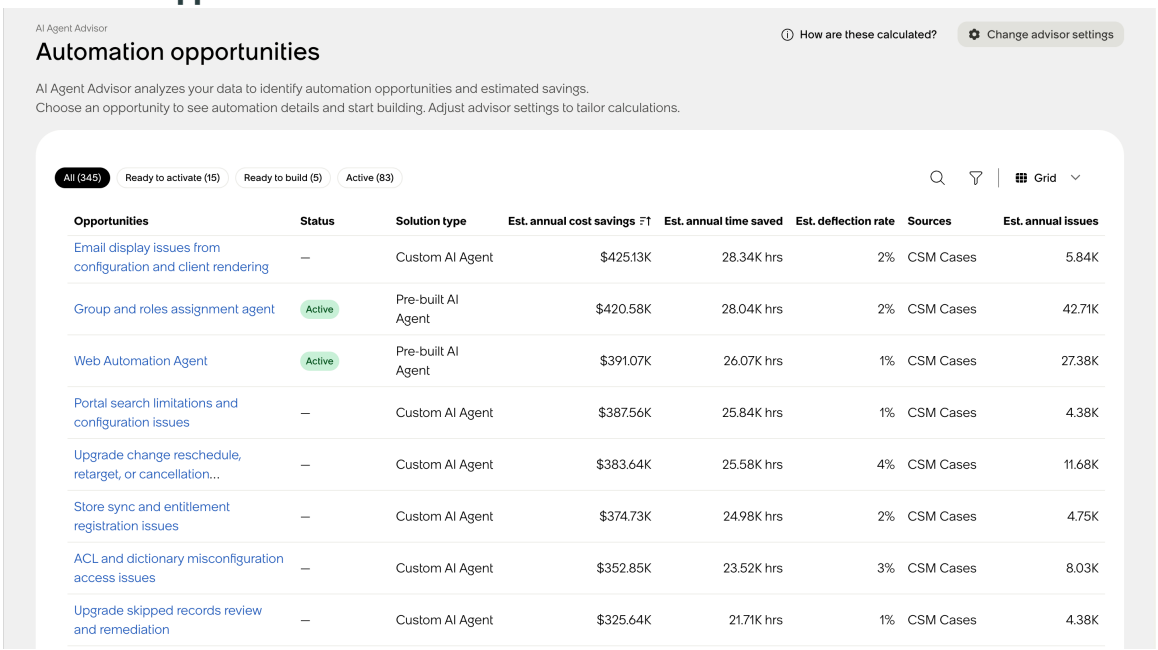
Automation opportunities list



The status of the opportunity displays in the **Status** column.

Opportunity status

Status	Description
Requires installation	The instance requires installation of a plugin to get a base system AI agent for this opportunity. No other prebuilt AI agents are available.
Ready to build	All resolution steps for the opportunity are matched to AI tools.
Ready to activate	There is a prebuilt AI agent available to activate for the opportunity.
Active	There is an activated AI agent for the opportunity.
(Empty)	The status is empty for an opportunity that has at least one step requiring an AI tool.

4. **Optional:** Select a combination of sort, filter, and display options to refine the list.
   - Select a status filter option.
   - Type in the search box and select the **Submit search** icon ( ) to filter by search criteria.
   - Select the filter button ( ), choose one or more filters, and select **Apply**.
   - Select the **Grid layout** ( ) to display the opportunities in a list or **Gallery layout** ( ) to show them as stacked cards.

What to do next

Implement an automation opportunity. For more information, see Implement an automation opportunity (Lux UI).

Implement an automation opportunity from AI Admin Center (Next Experience UI)

Deploy a matched AI agent or a new agent to automate a resolution for an identified automation opportunity.

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Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

Role required: sn_na_center.nac_admin

About this task

Follow these steps to implement an automation opportunity with AI Agent Advisor.

Each automation opportunity includes a set of recommended resolution steps that describe how to automate the identified opportunity. AI Agent Advisor also maps each resolution step to an existing AI agent on your platform when a match is available. Review the details of an opportunity before deciding whether to deploy an agent for it.

Note: This topic describes the AI Admin Center feature based on the Next Experience UI. If you're using the Lux user experience for AI Admin Center, see the Lux UI version of this topic.

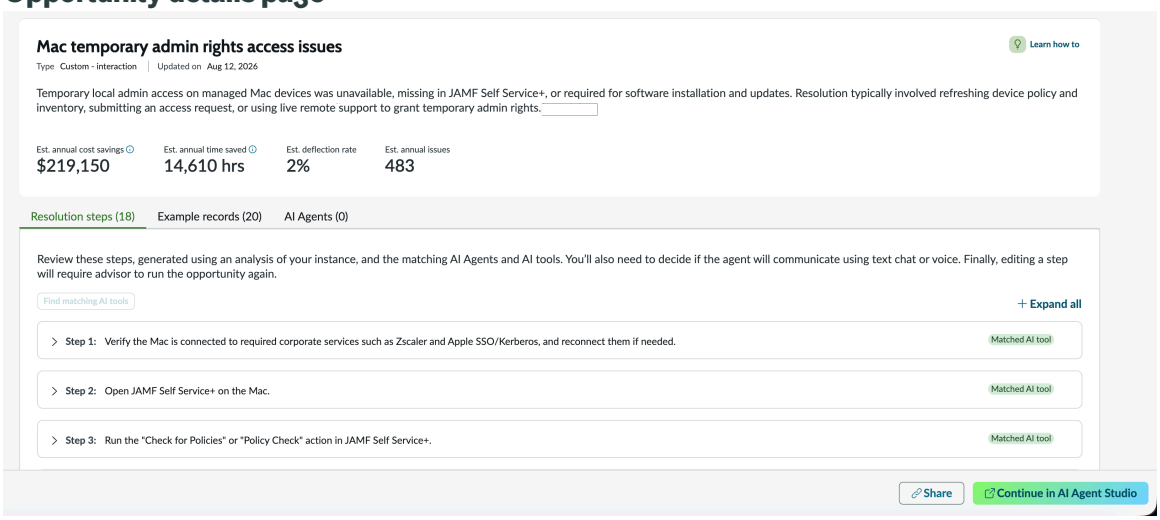
Procedure

1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)**.
2. In the Automation opportunities section of the home page or in the automation opportunities list tab, select an automation opportunity to view its details.

   The Resolution Steps tab opens showing the opportunity details.

   The page displays summary information for the opportunity, a **Resolution steps** tab with editable implementation steps, and an **Example records** tab with example records from the data source. It also displays an **AI Agents** tab showing the agents created from the automation opportunity.

Opportunity details page



   For an opportunity that has a matching prebuilt AI agent, the page displays the agent name and description.

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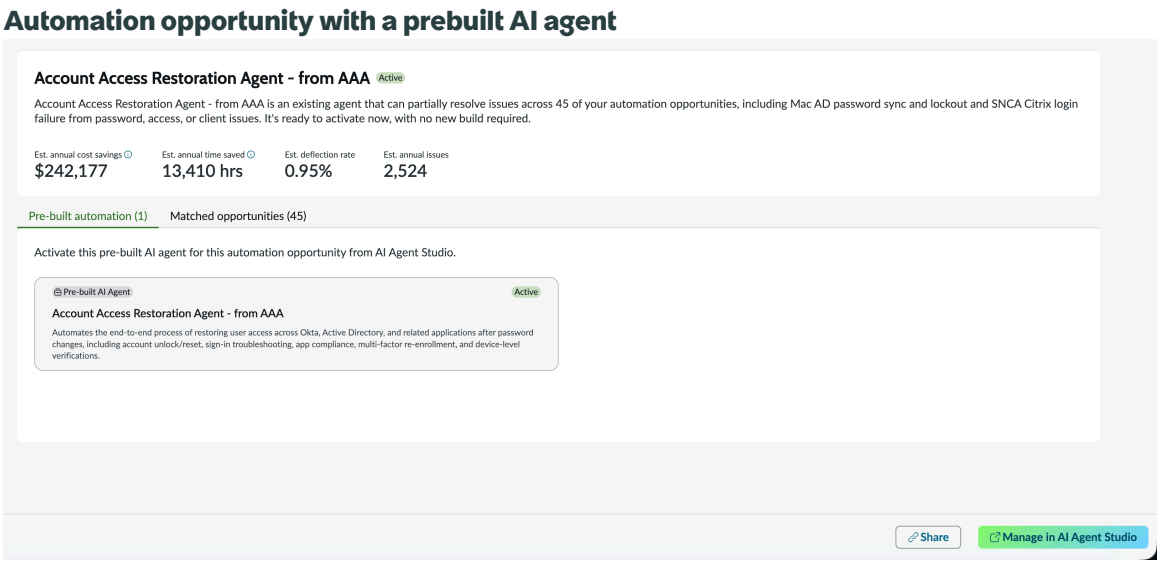

For more information on finding an automation opportunity, see View your automation opportunities (Next Experience UI).

3. **Optional:** Select the **Example Records** tab to review records from the source table.

   (Optional) Select a record number to open the record and view its details.

4. **Optional:** Select the **AI Agents** tab to view AI agents created from the automation opportunity.
5. Select the **Matched opportunities** tab for a prebuilt AI agent to view the automation opportunities that the AI agent can support.
   Select an opportunity to open it in a separate workspace tab.
6. In the **Resolution Steps** tab, review the steps for accuracy and completeness in planning your AI agent.

   The **Resolution Steps** tab shows the implementation steps and the matched AI agents for each step.

7. **Optional:** Adjust the steps as needed.

Option	Description
Add a step	**a.** Select **Add new step** under the steps. **b.** Enter the text and select **Save**.
Edit a step	**a.** Select the **Edit** icon ( ). **b.** Change the text as needed and select **Save**.
Delete a step	**a.** 1. Select the **Delete** icon ( ). **b.** 2. Select **Delete** to confirm.

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Option	Description
Reorder steps	(Optional) Select the **Up** icon (↑) or **Down** icon (↓) to move the step in the list.
Restore all	(Optional) Select **Revert all** to restore the original steps before changes.
Expand all	(Optional) Select **Expand all** to see the available assets for each step. In each applicable step, the description provides the tool name, context, confidence level, and rationale for matching the asset to the step. Select **Collapse all** to hide the details.

8. When the steps are ready to implement for a custom AI agent, select **Continue in AI Agent Studio**.

   For an opportunity that has a matching prebuilt AI agent, select **Manage in AI Agent Studio**. Skip ahead to step 11.

   The Continue building AI agent box opens.

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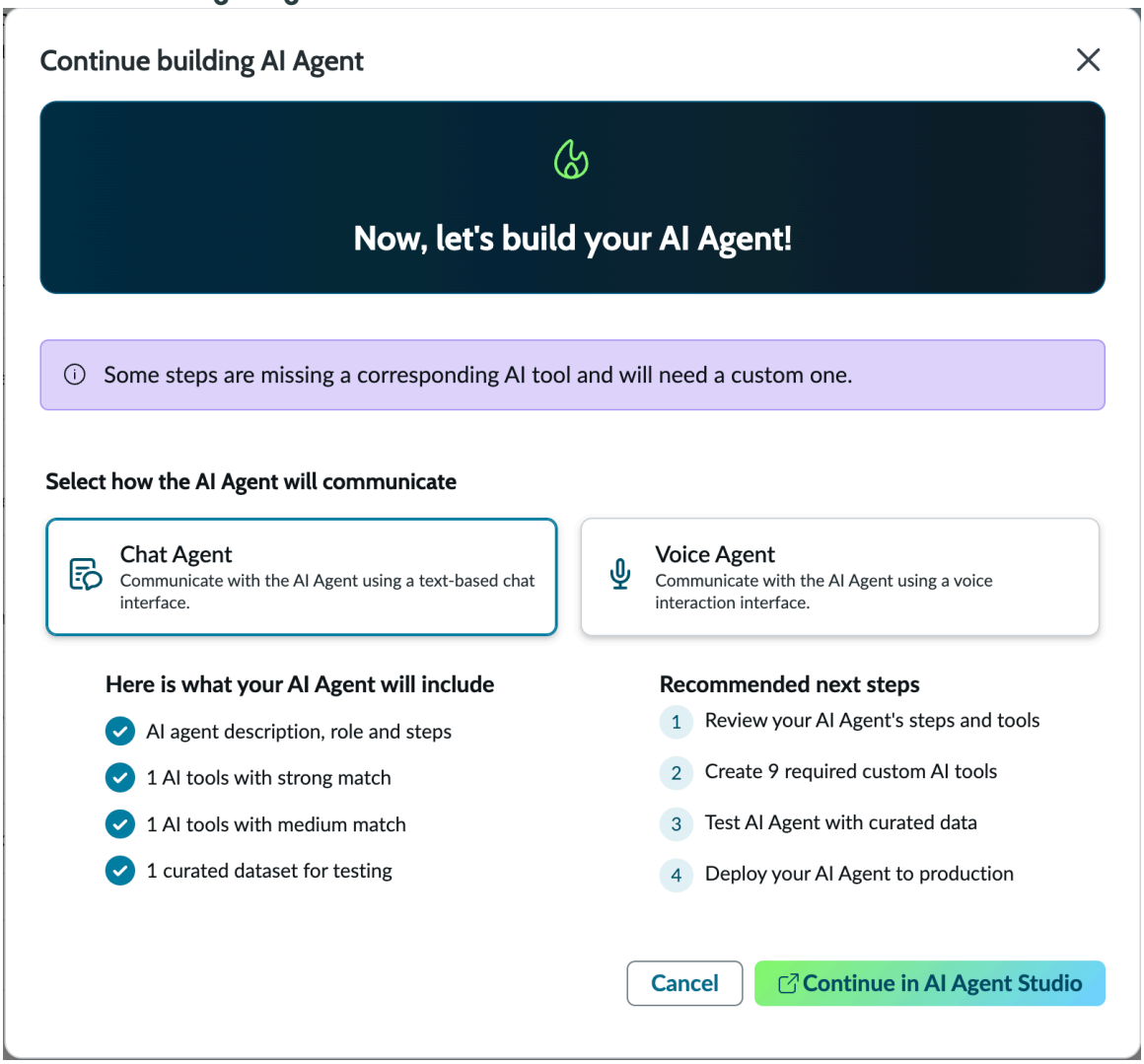
Continue building AI agent box



9. Choose whether the AI agent will communicate as a **Chat Agent** or **Voice Agent**.
10. Select **Continue in AI Agent Studio**.

    The Agent guided setup tab opens.

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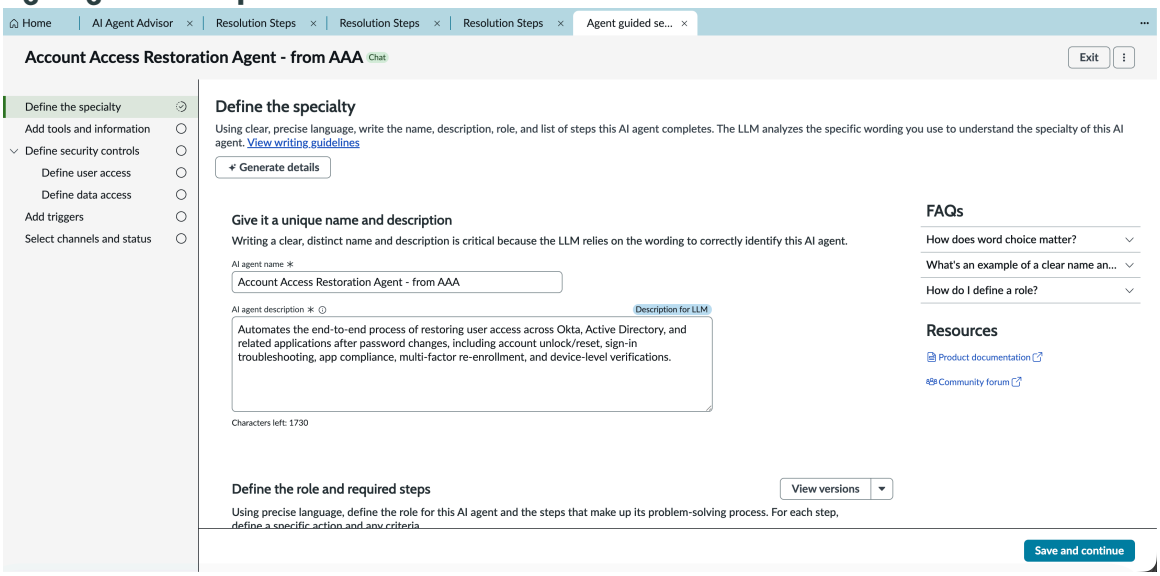
Agent guided setup tab



11. Complete the development of the AI agent in the Agent guided setup tab using AI Agent Studio capabilities.

    The resolution steps are mapped to the set of instructions and added as tools for the AI agent.

    For more information, see Create an AI agent.

Implement an automation opportunity (Lux UI)

Deploy a matched AI agent or a new agent to automate a resolution for an identified automation opportunity.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

Role required: sn_na_center.nac_admin

About this task

Follow these steps to implement an automation opportunity with AI Agent Advisor.

Each automation opportunity includes a set of recommended resolution steps that describe how to automate the identified opportunity. AI Agent Advisor also maps each resolution step to an existing AI agent on your platform when a match is available. Review the details of an opportunity before deciding whether to deploy an agent for it.

Note: This topic describes the AI Admin Center feature based on the Lux user interface (UI). If you're using the Next Experience UI for AI Admin Center, see the Next Experience UI version of this topic.

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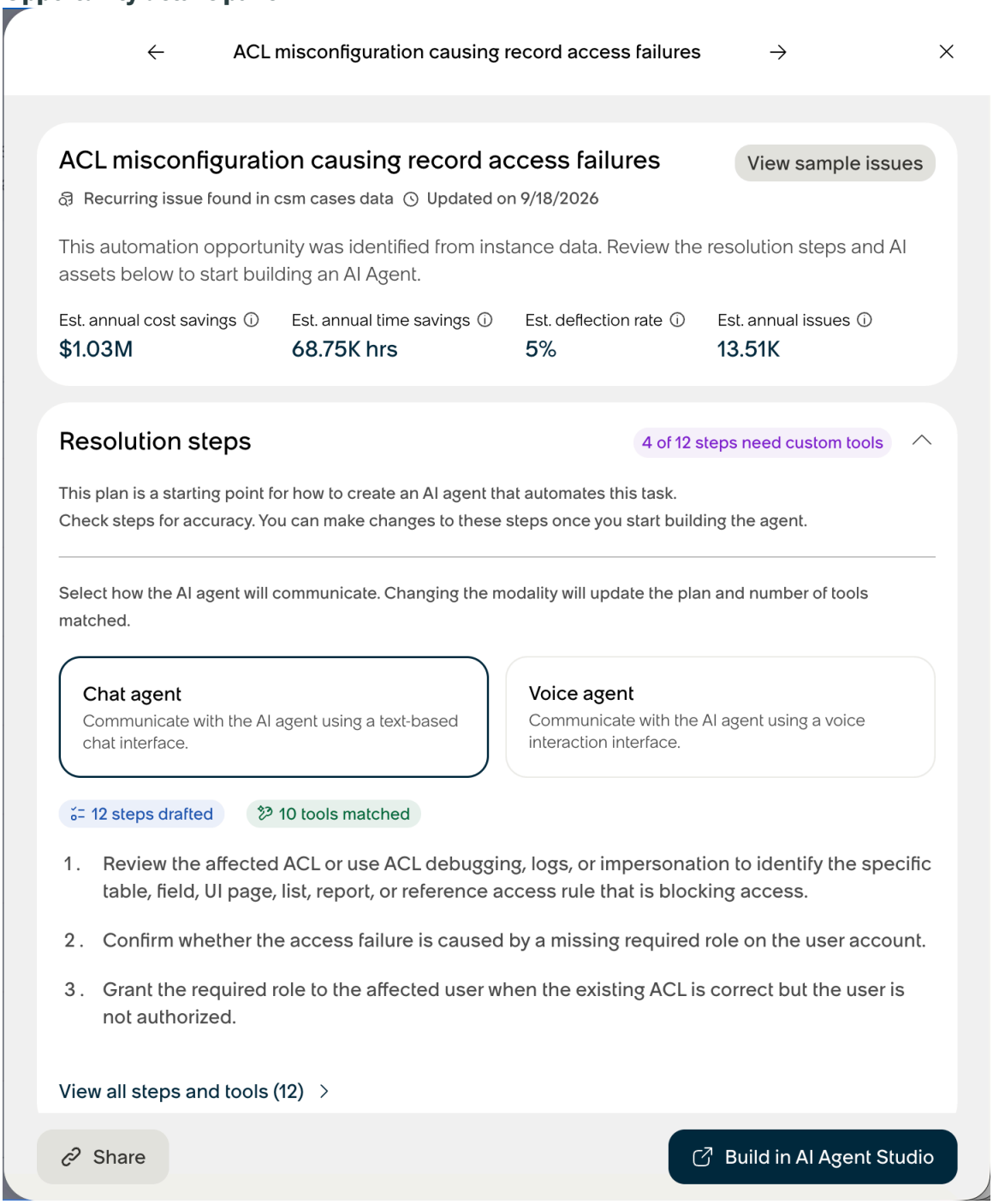
Procedure

1. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center**.
2. In the **Automation opportunities** section of the home page or on the Automation opportunities page, select an automation opportunity to view its details.

   The opportunity opens in a side panel showing the opportunity details. The panel displays summary information for the opportunity along with any resolution steps, example records, and matching agents, depending on the opportunity.

Opportunity details panel



For an opportunity that has a matching prebuilt AI agent, the panel displays the agent description and the matched automation opportunities that the AI agent can support. You can select a matched opportunity to view its description.

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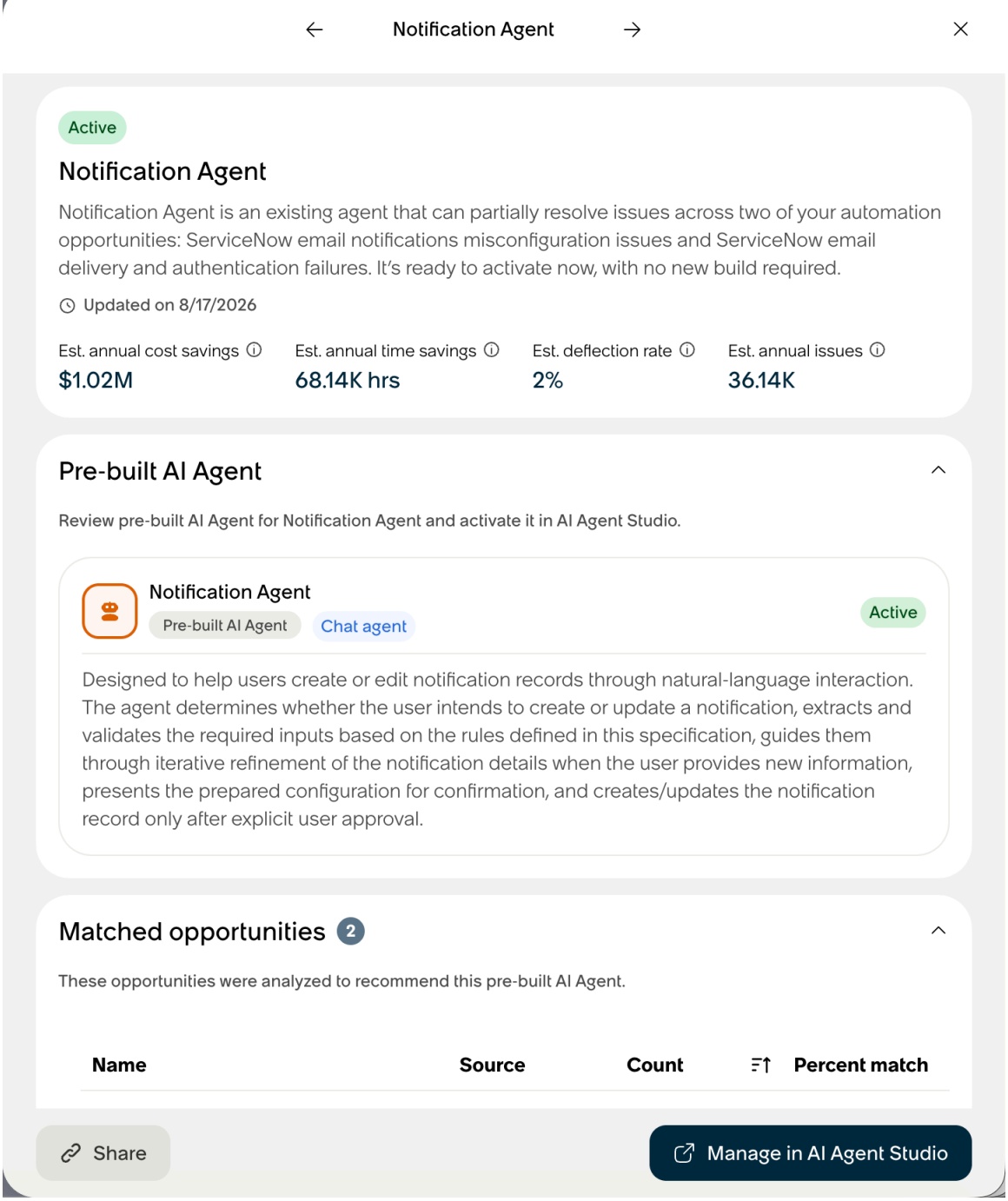
Opportunity with a matching AI agent



For more information on finding an automation opportunity, see View your automation opportunities (Lux UI).

3. **Optional:** Select **View sample issues** to review records from the source table.

   (Optional) Select a record number to open the record and view its details.

4. Expand the **Resolution steps** section to review and edit the steps for accuracy and completeness in planning your AI agent.
5. Choose whether the AI agent will communicate as a **Chat Agent** or **Voice Agent**.
6. Select **View all steps and tools** to see all the resolution steps.

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The **Resolution steps** screen shows the implementation steps and the matched AI tools for each step.

7. When the steps are ready to implement for a custom AI agent, select **Build in AI Agent Studio**.

   For an opportunity that has a matching prebuilt AI agent, select **Manage in AI Agent Studio**.

   AI Agent Studio opens.

8. Complete the development of the AI agent using AI Agent Studio capabilities.

   The resolution steps are mapped to the set of instructions and added as tools for the AI agent.

   For more information, see Create an AI agent.

Edit an AI agent from an automation opportunity (Next Experience UI)

Edit a custom AI agent that was created for an automation opportunity.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

An AI agent must be created for the automation opportunity. For more information, see Implement an automation opportunity from AI Admin Center (Next Experience UI).

Role required: sn_na_center.nac_admin

About this task

Follow these steps to edit a custom AI agent for an automation opportunity.

Note: This topic describes the AI Admin Center feature based on the Next Experience UI. If you're using the Lux user experience for AI Admin Center, see the Lux UI version of this topic.

Procedure

1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)**.
2. In the Automation opportunities section of the home page, do one of the following.
   - Select **Review opportunity** in a card to view its details.
   - Select **View all** to view the complete list of automation opportunities and select an automation opportunity to view its details.

   The Resolution Steps tab opens showing the opportunity details.

   For more information on finding an automation opportunity, see View your automation opportunities (Next Experience UI).

3. Select the **AI Agents** tab to view AI agents created from the automation opportunity.

   The page displays the agents created from the automation opportunity on the **AI Agents** tab.

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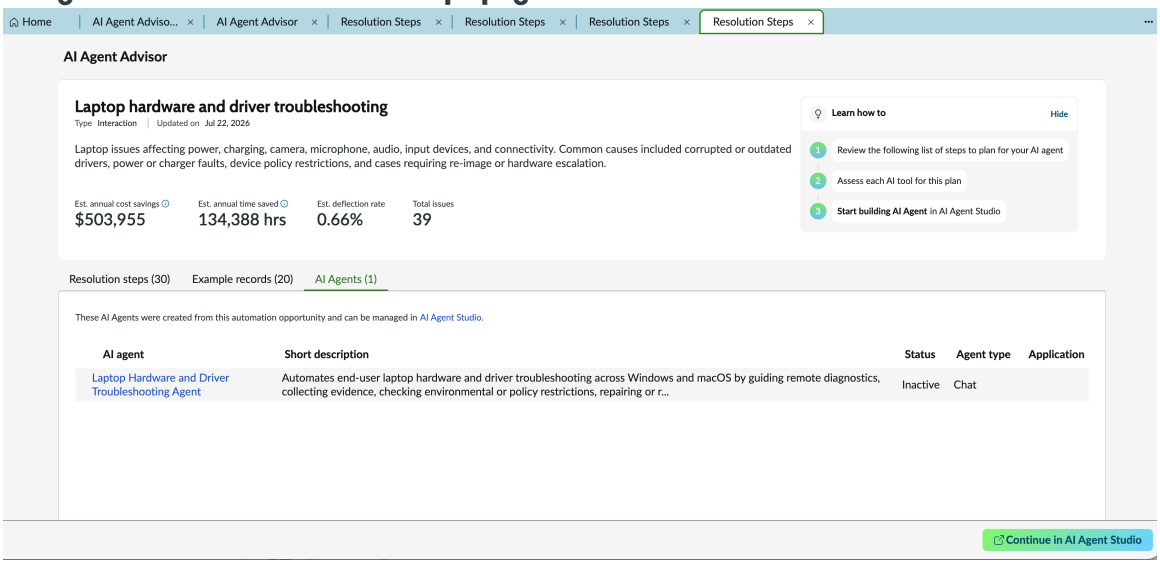
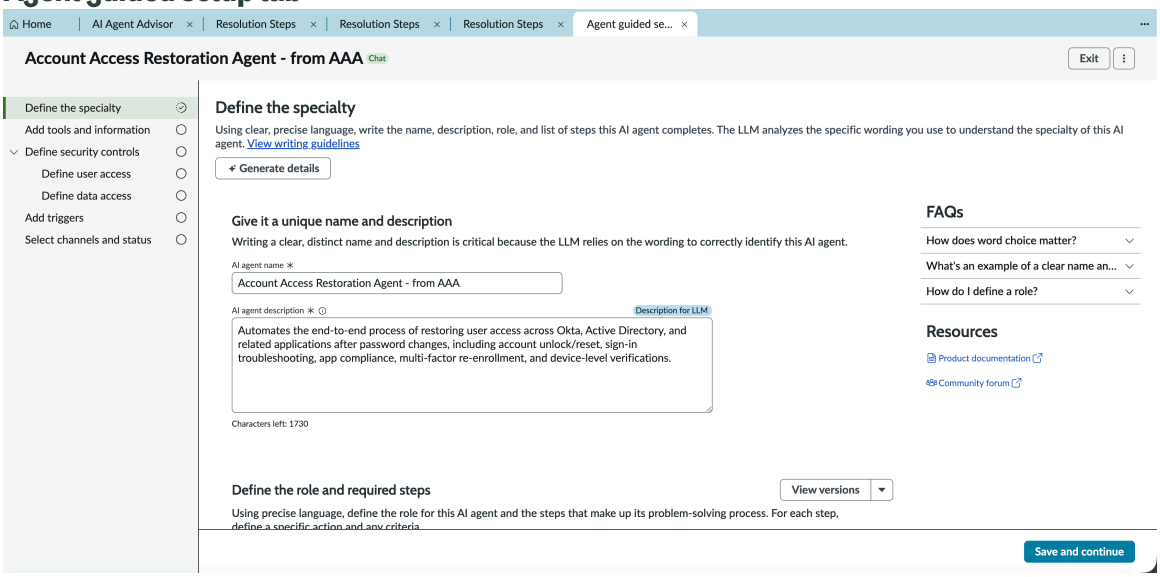
AI Agents tab on the resolution steps page



4. Select an AI agent to open it in Agent guided setup tab.
   The Agent guided setup tab opens showing the AI agent details.

Agent guided setup tab



5. Edit the AI agent in the Agent guided setup tab using AI Agent Studio capabilities.

   Select **Save and continue** to progress through the forms.

   For more details on the guided setup forms, see Create an AI agent.

Edit an AI agent from an automation opportunity (Lux UI)

Edit a custom AI agent that was created for an automation opportunity.

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Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

An AI agent must be created for the automation opportunity. For more information, see Implement an automation opportunity (Lux UI).

Role required: sn_na_center.nac_admin

About this task

Follow these steps to edit a custom AI agent for an automation opportunity.

Note: This topic describes the AI Admin Center feature based on the Lux user interface (UI). If you're using the Next Experience UI for AI Admin Center, see the Next Experience UI version of this topic.

Procedure

1. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center**.
2. View an opportunity with an AI agent.

   In the **Automation opportunities** section of the home page, do one of the following:

   - Select **Review opportunity** in a card to view its details.
   - Select **View all** to view the complete list of automation opportunities on the Automation opportunities page and select an automation opportunity.

   The opportunity opens in a side panel showing the opportunity details.

   For an opportunity that has an AI agent, the panel displays the agent description and the matched automation opportunities that the AI agent can support. You can select a matched opportunity to view its description.

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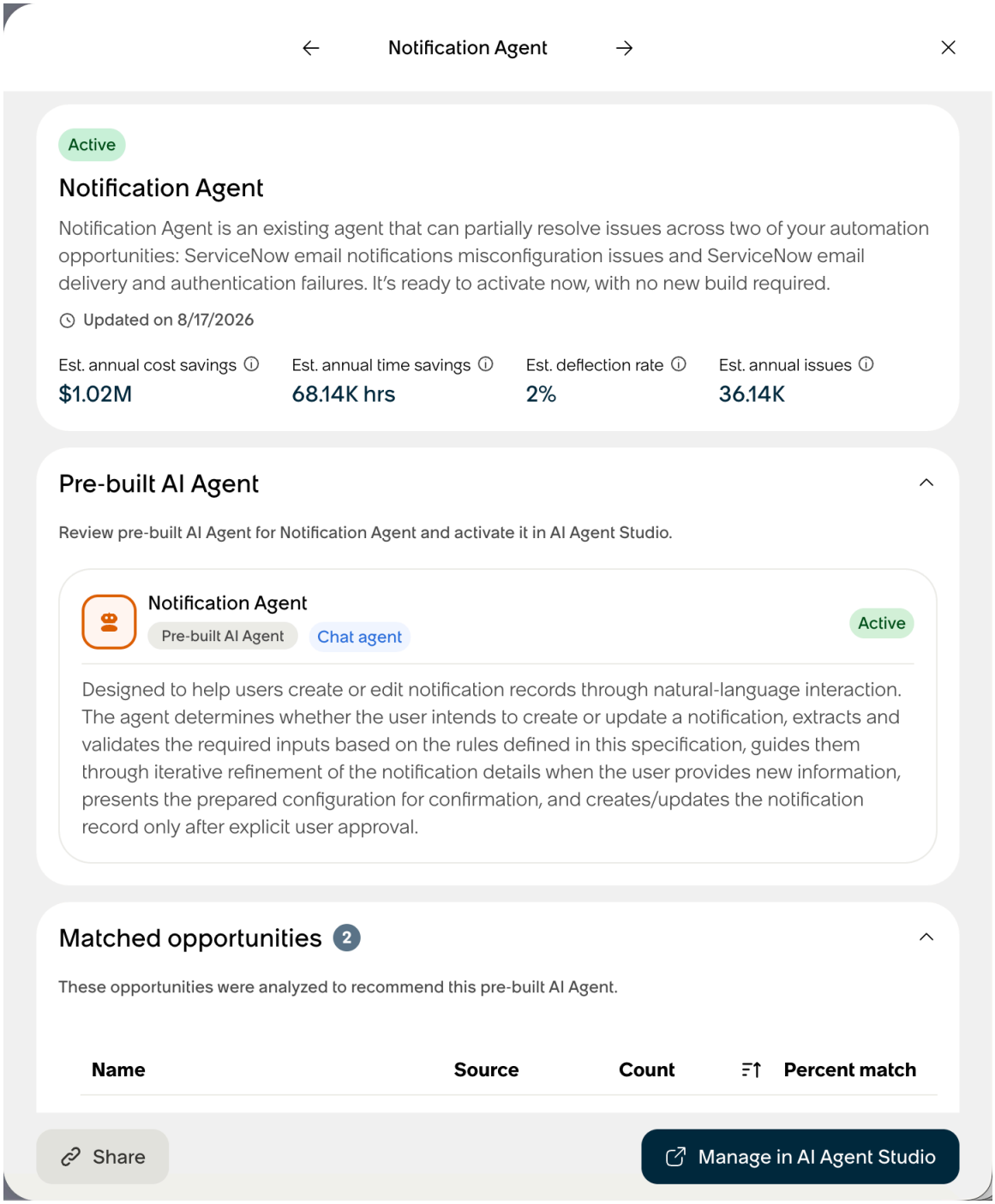

For more information on finding an automation opportunity, see View your automation opportunities (Lux UI).

3. Select **Manage in AI Agent Studio**.
   The AI agent editing page opens in AI Agent Studio.
4. Edit the AI agent using AI Agent Studio capabilities.

   For more details on the guided setup forms, see Modify an AI agent.

AI Agent Advisor in AI Control Tower

View your top automation opportunities from AI Agent Advisor as actionable recommendations in AI Control Tower.

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The integration with AI Control Tower activates automatically on installation of AI Agent Advisor and AI Admin Center. As AI Agent Advisor completes each recurring scheduled analysis of your instance records to discover automation opportunities, the highest-value recommendations display in AI Control Tower.

Select the recommendation to open the Automation details in AI Admin Center, where you can set up and deploy an AI agent to automate the solution.

For more information, see Recommendations and AI insights.

AI Agent Advisor in AI Agent Studio

Use AI Agent Studio to view and edit the prebuilt AI agents matched to each automation opportunity from AI Agent Advisor.

AI Agent Advisor pregenerates an AI agent for each automation opportunity it discovers. The AI agent has a **Pre-built AI Agent** solution type and includes a name, description, resolution steps, recommended tools, recommended skills, example records, and projected savings.

The AI Agent Advisor home page displays the AI agents pregenerated by AI Agent Advisor. As AI Agent Advisor completes each recurring scheduled analysis of your instance records to discover automation opportunities, pregenerated agents are updated to reflect the resolution plan and AI agent matches.

Select the AI agent to open it on the editing page in AI Agent Advisor, where you can refine AI agent as needed to automate the solution. The AI agent status then changes from **Recommended** to **Built** and resides in your agent inventory.

For more information, see AI Agent Studio overview.

AI Agent Advisor reference

The following topics provide additional information about the features and properties installed with AI Agent Advisor.

Components installed with AI Agent Advisor

Several components are installed with the AI Agent Advisor application.

Roles installed

The following roles are installed with AI Agent Advisor.

- AI Agent Advisor admin [sn_agent_miner.app_admin]
- AI Agent Advisor UI [sn_agent_miner.app_ui]
- AI Agent Advisor read only [sn_agent_miner.app_read_only]

For information on the roles installed with AI Agent Advisor, see AI Agent Advisor roles.

Tables installed

The following tables are installed with AI Agent Advisor.

- AI Agent Advisor Agent Match [sn_agent_miner_agent_match]
- AI Agent Advisor Agent Rank [sn_agent_miner_agent_rank]
- AI Agent Advisor Artifact Dataset [sn_agent_miner_artifact_dataset]
- AI Agent Advisor Clusters [sn_agent_miner_clusters]
- AI Agent Advisor Configs [sn_agent_miner_configs]

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- AI Agent Advisor Created Automation [sn_agent_miner_created_automation]
- AI Agent Advisor Dataset [sn_agent_miner_dataset]
- AI Agent Advisor Executions [sn_agent_miner_executions]
- AI Agent Advisor Existing Automation [sn_agent_miner_existing_automation]
- AI Agent Advisor Resolution Steps [sn_agent_miner_resolution_steps]
- AI Agent Advisor Scheduled Jobs [sn_agent_miner_sysauto_script]
- AI Agent Advisor Tool Match [sn_agent_miner_tool_match]

Domain separation and AI Agent Advisor

Domain separation is not supported for AI Agent Advisor.

Domain separation allows you to separate data, processes, and administrative tasks into logical groupings called domains. You can then control several aspects of this separation, including which users can see and access data.

Support level: No Support

- The domain field may exist on data tables but there is no business logic to manage the data.
- This level is not considered domain-separated.

For more information on support levels, see Application support for domain separation.

AI Agent Advisor roles

AI Agent Advisor is installed with these roles.

AI Agent Advisor admin [sn_agent_miner.app_admin]

This role has full access to the AI Agent Advisor application and can access AI Agent Advisor tables.

Contains Roles

List of roles contained within the role.

- *sn_icu_insights_clustering_read_write*
- *sn_aia.admin*
- *sn_customerservice.case_write_granular*

Groups

List of groups this role is assigned to by default.

None.

Special considerations

None.

AI Agent Advisor UI [sn_agent_miner.app_ui]

Perform read and write actions in AI Agent Advisor.

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Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

None.

AI Agent Advisor read only [sn_agent_miner.app_read_only]

Gain read-only access to AI Agent Advisor.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

None.

Monitoring in AI Admin Center

Monitor AI readiness, usage, and performance using AI Admin Center.

Monitor your recently activated AI solution in AI Admin Center (Next Experience UI)

View performance metrics on your most recently activated AI solutions on the AI Admin Center home page.

> **Important:** Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).
>
> The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).
>
> In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin
Role required: sn_na_center.nac_admin

About this task
Follow these steps to view your most recently activated AI solutions.

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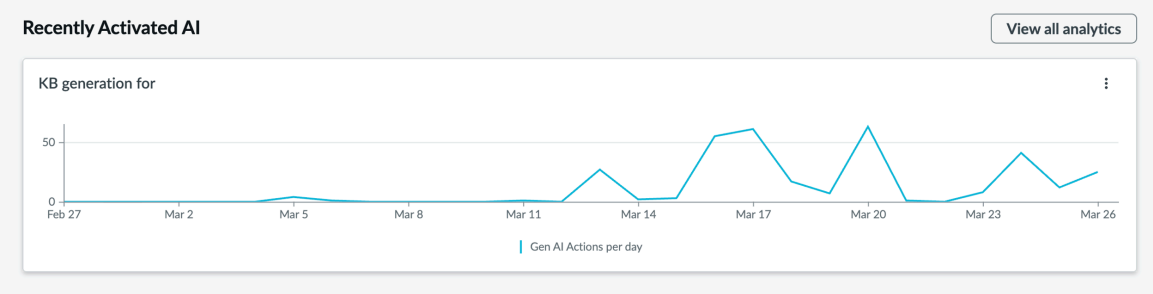
Note: This topic describes the AI Admin Center feature based on the Next Experience user interface (UI). There is no Lux UI version of this topic.

Procedure

1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)**.
2. Select **Home** ( ) in the side navigation bar.
3. Review the Recently activated AI section of the home page to see the performance metrics on your most recently activated AI solutions.

Recently activated AI section of the home page



4. Select **View all analytics** to see a complete list of performance metrics on the Analytics tab.

   The Analytics page opens.

   For more information, see View AI assets usage and performance in AI Admin Center (Next Experience UI).

View AI assets usage and performance in AI Admin Center (Next Experience UI)

Use AI Admin Center to view dashboards showing the usage and performance of your AI assets.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

Role required: sn_na_center.nac_admin

About this task

Follow these steps to view AI usage and performance dashboards.

Note: This topic describes the AI Admin Center feature based on the Next Experience UI. If you're using the Lux user experience for AI Admin Center, see the Lux UI version of this topic.

Procedure

1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)**.
2. Select **Monitor** ( ) in the side navigation bar.

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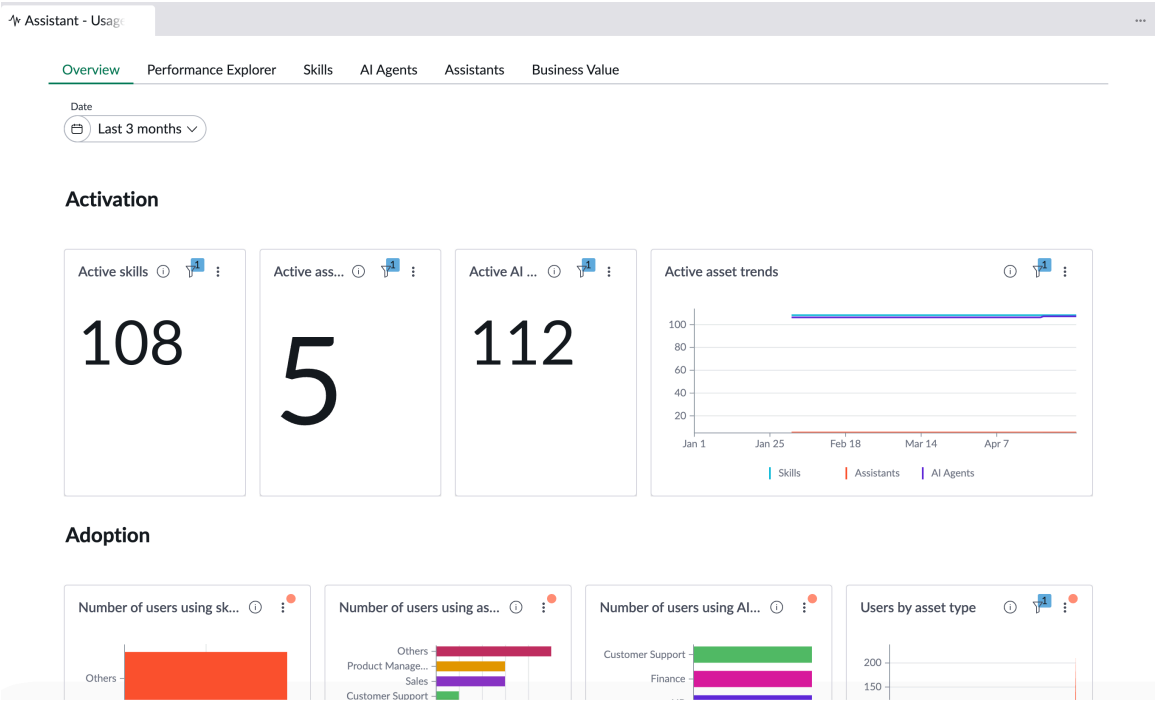
The Analytics page opens showing tabs for the different dashboards.

Dashboards and data visualizations are derived from various AI features and are grouped by asset type.



3. Select the tab for the dashboard you want to view.

   Some tabs contain another set of tabs for viewing the various usage, performance, and governance properties of the asset type.

4. Select the tab for the data visualizations you want to view.

   The Overview tab displays a summary of AI asset activation, adoption, and usage across your organization. Use the dashboard to monitor the state of your AI assets and track user engagement across departments. For more information, see AI Admin Center Overview dashboard (Next Experience UI).

   The Performance Explorer tab displays execution-level details for assistants and AI agents. Use the dashboard to investigate individual executions, analyze performance For more information, see AI Admin Center Performance Explorer dashboard (Next Experience UI).

   The Business Value dashboard displays a consolidated view of the business value generated by AI assets across your organization. Use the dashboard to monitor total executions, time saved, and cost saved across skills, AI agents, and agentic workflows. For more information, see AI Admin Center Business Value dashboard (Next Experience UI).

   The Skills tab provides dashboards showing usage and performance metrics for generative AI skills. The dashboards are featured in the Performance section of the AI Admin Hub. For more information, see Analyzing AI performance.

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Dashboards under the Skills tab

Tab	Description
Usage Summary	The Usage summary dashboard page includes indicators on total and daily ServiceNow Otto actions, skill distribution and engagement trend, and daily unique users who have engaged with ServiceNow Otto. For more information, see Usage and adoption.
Offensiveness	The Offensive content dashboard page helps you monitor and evaluate the effectiveness of AI Guardian guardrails in tracking and analyzing requests sent to large language models (LLM) and their responses. For more information, see AI Guardian analytics.
Context Menu	The ServiceNow Otto context menu dashboard page helps you to evaluate the effectiveness of context menu actions in assisting agents with summarizing, creating, and editing emails and chat replies. For more information, see ServiceNow Otto context menu analytics.
Adoption	The Adoption dashboard page tracks the departments with the highest AI usage, comparison of actions by department, and feedback and error details. For more information, see Usage and adoption.
Skill Performance	The Skills performance dashboard page contains indicators that help you analyze the usage and performance of active skills. For more information, see Skills performance.
Prompt Injection	The Prompt Injection dashboard page helps you monitor and evaluate the effectiveness of AI Guardian guardrails in tracking and analyzing requests sent to large language models (LLM) and their responses.

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Tab	Description
	For more information, see AI Guardian analytics.
User Search Analyser	The User search analyzer dashboard page contains indicators that help you understand the effectiveness of search in enhancing the self-service experience. For more information, see User search analyzer.

The Auto Eval tab displays evaluation coverage, benchmark results, and assist consumption for AI assets on the instance. Use the dashboard to identify assets that are active but have not been evaluated, review benchmark results by asset, and track evaluation history over time. For more information, see .

The AI Agents tab provides dashboards showing usage and performance metrics for AI agents. The dashboards are featured on the AI Agent Analytics page of the AI Agent Studio. For more information, see AI Agent Analytics dashboard.

Dashboards under the AI Agents tab

Tab	Description
Overview	The Overview dashboard page provides summary indicators for the usage, performance, and efficiency of AI agents.
Status	The Status dashboard page provides an operational view of the AI agent deployment on the instance. It displays the current activation state of agentic workflows and AI agents and gives you a quick health check without having to navigate to individual asset records.
Insights	The Insights dashboard page shows deeper analytical findings about how AI agents are being used in practice. It helps you spot recurring problems by tracking errors over time and identify patterns in agent behavior.
Assist Consumption	The Assist Consumption dashboard page displays indicators for assist consumption and consumption trends on agentic executions so you can track spend against entitlements.
Performance	The Performance dashboard page helps you identify which agents, tools, or workflow

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Tab	Description
	steps are introducing delays, and supports the optimization of multi-step agentic processes.
Troubleshooting	The Troubleshooting dashboard page provides diagnostics for failed or degraded AI agent executions. It shows error counts, failed tool calls, and failed agent calls across the instance, and helps you identify the scope and pattern of failures.
Security	The Security dashboard page displays metrics and status information related to security controls for AI agents and agentic workflows.

The Assists tab provides a dashboard for monitoring assist consumption trends and identifying the AI assets consuming the most assists across your organization. For more information, see AI Admin Center Assist Consumption page.

To ask natural-language questions about AI Analytics dashboards and metrics, use the AI Analytics Q and A agent from the ServiceNow Otto panel. For more information, see AI Analytics Q and A agent.

The Assistants tab provides dashboards showing usage and performance metrics for AI assistants. The dashboards are featured on the Analytics feature of the Assistant Designer. For more information, see Analyzing assistants.

Dashboards under the Assistants tab

Tab	Description
Overview	The Overview dashboard page provides high-level summary of assistant activity, assist usage, user engagement and overall customer satisfaction (CSAT) score. For more information, see Overview page in Assistant analytics.
Usage	The Usage dashboard page aggregates key metrics related to assistant usage, including the total number of conversations by assistant, conversations by channel, citations associated with the results, and the flow of conversation states. For more information, see Usage page in Assistant analytics.
Adoption & Engagement	The Adoption & Engagement dashboard page aggregates metrics related to user

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Tab	Description
	adoption and engagement, including average active users, new user growth, conversation volume trends, assist-to-execution trend, and channel distribution. For more information, see Adoption and Engagement page in Assistant analytics.
Self Solved	The Self-Solve Performance dashboard page aggregates metrics related to self-solved events (instances where assistants resolved user queries), deflection rates, live agent transfers, and user effort. The deflection rate shown for each assistant is based on the custom metric active for that assistant. To customize how deflection is measured, create custom metrics. For more information, see Custom metrics in AI Admin Center. For more information, see Self-Solve Performance page in Assistant analytics.
Sentiment	The Sentiment dashboard page aggregates metrics related to user satisfaction, emotional feedback, empathy levels, and conversation outcomes. These metrics enable you to monitor inferred CSAT, track transfers and escalations, analyze empathy distribution, and review negative emotion trends. For more information, see Sentiment page in Assistant analytics.
Assists	The Assists dashboard page aggregates metrics related to conversational assists, including total assists consumed, usage breakdown by assistant, usage trends, and features which used the most number of assists. For more information, see Assists page in Assistant analytics.

AI Admin Center Overview dashboard (Next Experience UI)

Use the AI Admin Center Overview dashboard to monitor key metrics for AI asset activation, adoption, and usage across your organization.

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In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

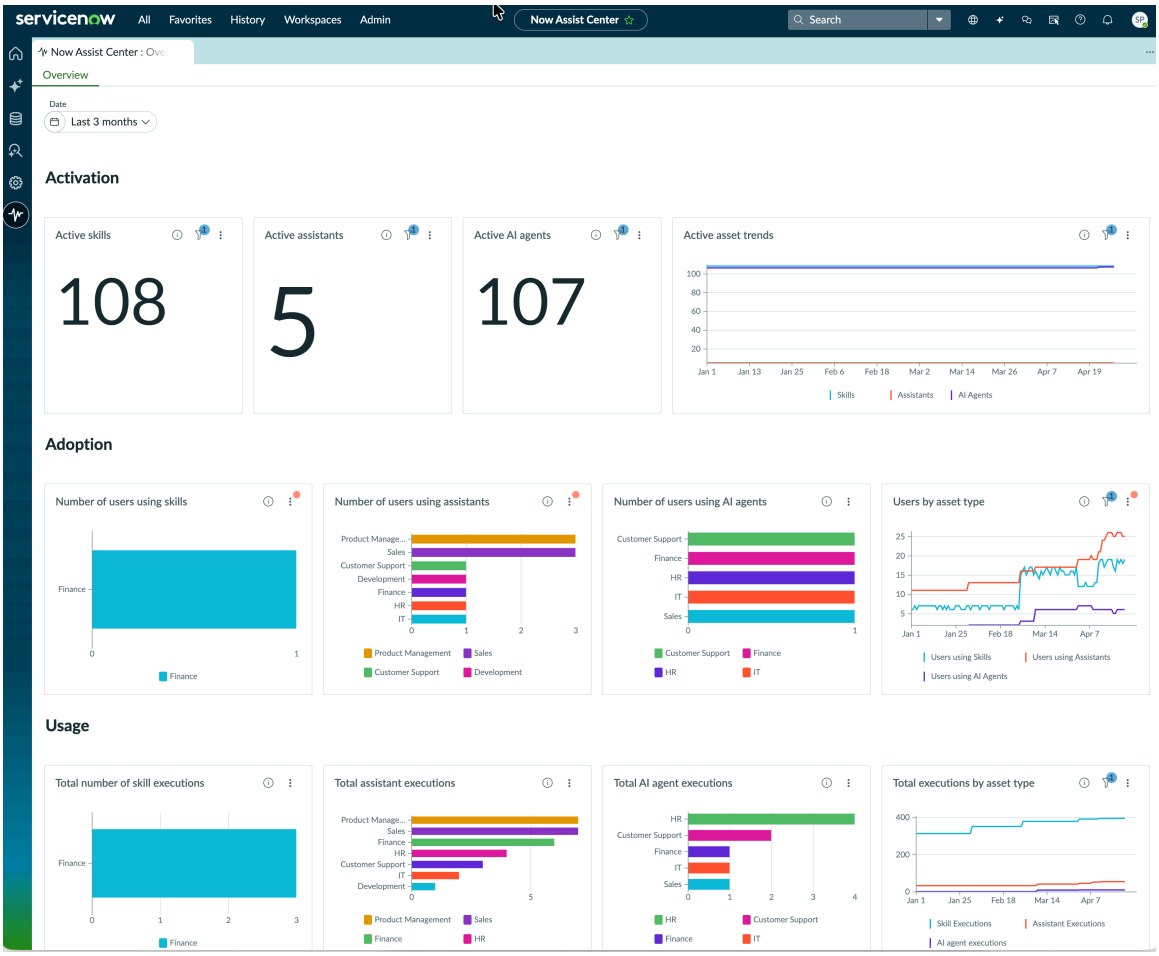
Note: This topic describes the AI Admin Center feature based on the Next Experience UI. If you're using the Lux user experience for AI Admin Center, see the Lux UI version of this topic.

AI Admin Center Overview dashboard

The AI Admin Center Overview dashboard displays a summary of AI asset activation, adoption, and usage across your organization. Use the dashboard to monitor the state of your AI assets and track user engagement across departments.

Use the **Date** filter at the top of the Overview dashboard to set the time range for all metrics on the page. The default time range is **Last 3 months**.

AI Admin Center Overview dashboard



Activation

The Activation section displays the current number of active AI assets and their trends over the selected time range.

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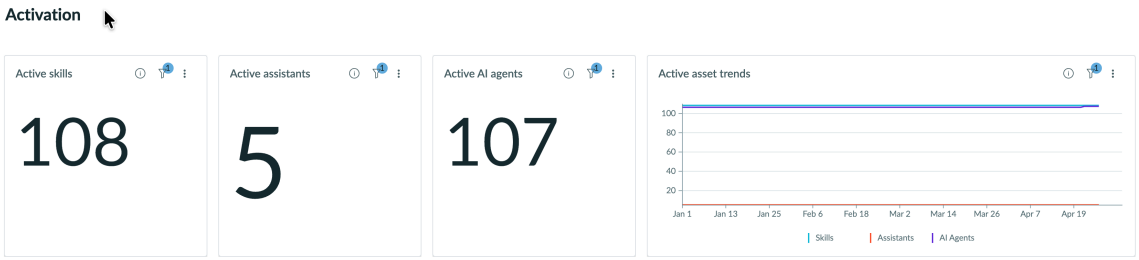
Activation section of the AI Admin Center Overview dashboard



Active skills

This area of the dashboard displays the total number of skills that are currently active in your instance. Use this count to understand the scale of your deployed skill library.

Active assistants

This area of the dashboard displays the total number of assistants that are currently active in your instance. Use this count to track the scale of your deployed assistant configurations.

Active AI agents

This area of the dashboard displays the total number of AI agents that are currently active in your instance. Use this count to understand the scope of your active AI agent deployments.

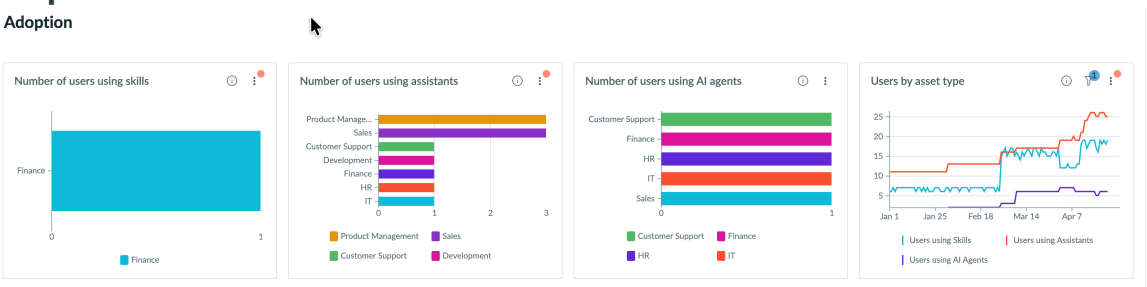
Active asset trends

This area of the dashboard displays a trend line chart showing the count of active skills, assistants, and AI agents over the selected time range. Use the trend lines to monitor how your active asset inventory has changed over time and identify periods of growth or reduction across asset types.

Adoption

The **Adoption** section shows how users across departments are engaging with AI assets over the selected time range.

Adoption section of the AI Admin Center Overview dashboard



Number of users using skills

This area of the dashboard displays the number of users who used skills in the selected time range, grouped by department. Use this visualization to identify which departments have the highest skill adoption and which may benefit from further enablement.

Number of users using assistants

This area of the dashboard displays the number of users who used assistants in the selected time range, grouped by department. Use this visualization to compare assistant adoption levels across departments and identify engagement patterns.

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Number of users using AI agents

This area of the dashboard displays the number of users who used AI agents in the selected time range, grouped by department. Use this visualization to track AI agent adoption across your organization and identify departments with strong or limited engagement.

Users by asset type

This area of the dashboard displays a trend line chart showing the number of users per asset type (skills, assistants, and AI agents) over the selected time range. Use the trend lines to compare adoption levels across asset types and identify shifts in user preferences over time.

Usage

The **Usage** section displays the total number of executions for each AI asset type, grouped by department and asset type, over the selected time range.

Usage section of the AI Admin Center Overview dashboard

Total number of skill executions

This area of the dashboard displays the total number of times skills were executed in the selected time range, grouped by department. Use this visualization to understand which departments are driving the most skill usage and identify high-volume execution patterns.

Total assistant executions

This area of the dashboard displays the total number of assistant executions in the selected time range, grouped by department. Use this visualization to identify departments with the highest assistant usage and compare execution volumes across your organization.

Total AI agent executions

This area of the dashboard displays the total number of AI agent executions in the selected time range, grouped by department. Use this visualization to track AI agent usage patterns across departments and identify areas of high or low engagement.

Total executions by asset type

This area of the dashboard displays a trend line chart showing the total executions for skills, assistants, and AI agents over the selected time range. Use the trend lines to compare usage volumes across asset types and monitor changes in execution patterns over time.

AI Admin Center Performance Explorer dashboard (Next Experience UI)

Use the AI Admin Center Performance Explorer dashboard to review and analyze the execution details of assistants and AI agents across your organization.

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AI Admin Center Performance Explorer dashboard

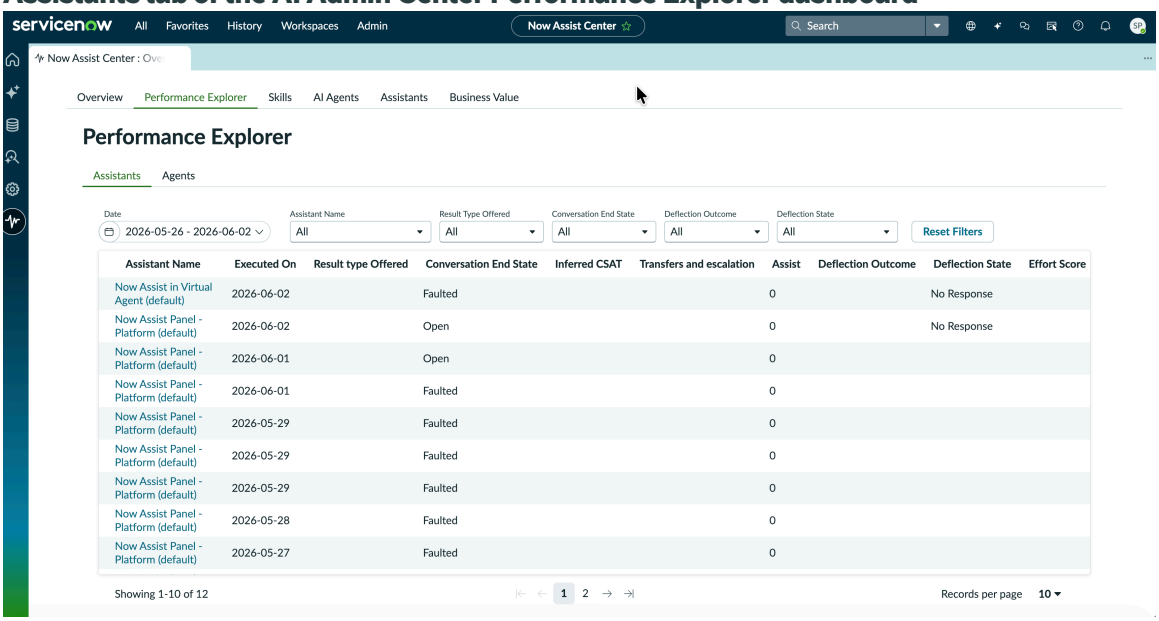
The AI Admin Center Performance Explorer dashboard displays execution-level details for assistants and AI agents. Use the dashboard to investigate individual executions, analyze performance metrics, and identify patterns across your AI asset deployments.

The Performance Explorer dashboard includes two sub-tabs: **Assistants** and **Agents**. Each sub-tab displays a table of individual executions for the selected asset type.

Assistants

The **Assistants** tab displays a list of individual assistant executions. Use the **Date**, **Assistant Name**, **Result Type Offered**, **Conversation End State**, **Deflection Outcome**, and **Deflection State** filters to narrow results. Select **Reset Filters** to clear all applied filters.

Assistants tab of the AI Admin Center Performance Explorer dashboard



Assistant Name

The name of the assistant that was executed. Select the assistant name to view the full execution record.

Executed On

The date on which the assistant execution occurred.

Result type Offered

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The type of result that the assistant offered during the execution, such as an answer, a deflection, or a transfer.

Conversation End State

The state of the conversation at the end of the execution, such as Open or Faulted.

Inferred CSAT

The inferred customer satisfaction score for the execution, calculated based on conversation signals.

Transfers and escalation

Indicates whether the conversation was transferred or escalated to a live agent during the execution.

Assist

The number of assist actions performed by the assistant during the execution.

Deflection Outcome

The outcome of the deflection attempt, indicating whether the conversation was successfully deflected.

Deflection State

The state of the deflection for the execution, such as deflected or not deflected.

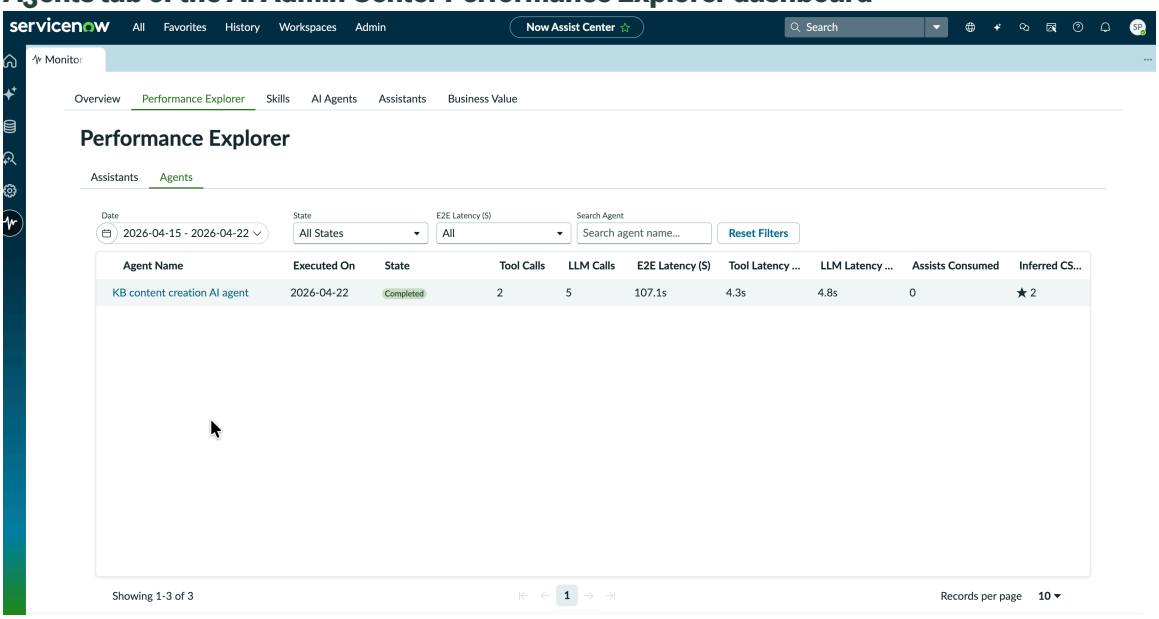
Effort Score

A score reflecting the level of effort required by the user to complete the interaction, based on conversation signals.

Agents

The **Agents** tab displays a list of individual AI agent executions. Use the **Date**, **State**, and **E2E Latency (S)** filters, or the **Search Agent** field, to narrow results. Select **Reset Filters** to clear all applied filters.

Agents tab of the AI Admin Center Performance Explorer dashboard



Agent Name

The name of the AI agent that was executed.

Executed On

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The date on which the AI agent execution occurred.

State

The state of the AI agent execution, such as Completed or Terminated.

Tool Calls

The total number of tool calls made by the AI agent during the execution.

LLM Calls

The total number of large language model (LLM) calls made by the AI agent during the execution.

E2E Latency (S)

The end-to-end latency of the execution, in seconds, measured from the start to the completion of the AI agent run.

Tool Latency

The cumulative latency contributed by tool calls during the execution.

LLM Latency

The cumulative latency contributed by LLM calls during the execution.

Assists Consumed

The number of assist credits consumed by the AI agent during the execution.

Inferred CSAT

The inferred customer satisfaction score for the execution, calculated based on interaction signals. See Exploring Conversation Insights for more information.

AI Admin Center Business Value dashboard (Next Experience UI)

Use the AI Admin Center Business Value dashboard to monitor the business value generated by AI assets across your organization, including total executions, time saved, and cost saved.

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AI Admin Center Business Value dashboard

The AI Admin Center Business Value dashboard displays a consolidated view of the business value generated by AI assets across your organization. Use the dashboard to monitor total executions, time saved, and cost saved across skills, AI agents, and agentic workflows.

Use the **Date** filter at the top of the Business Value dashboard to set the time range for all metrics on the page.

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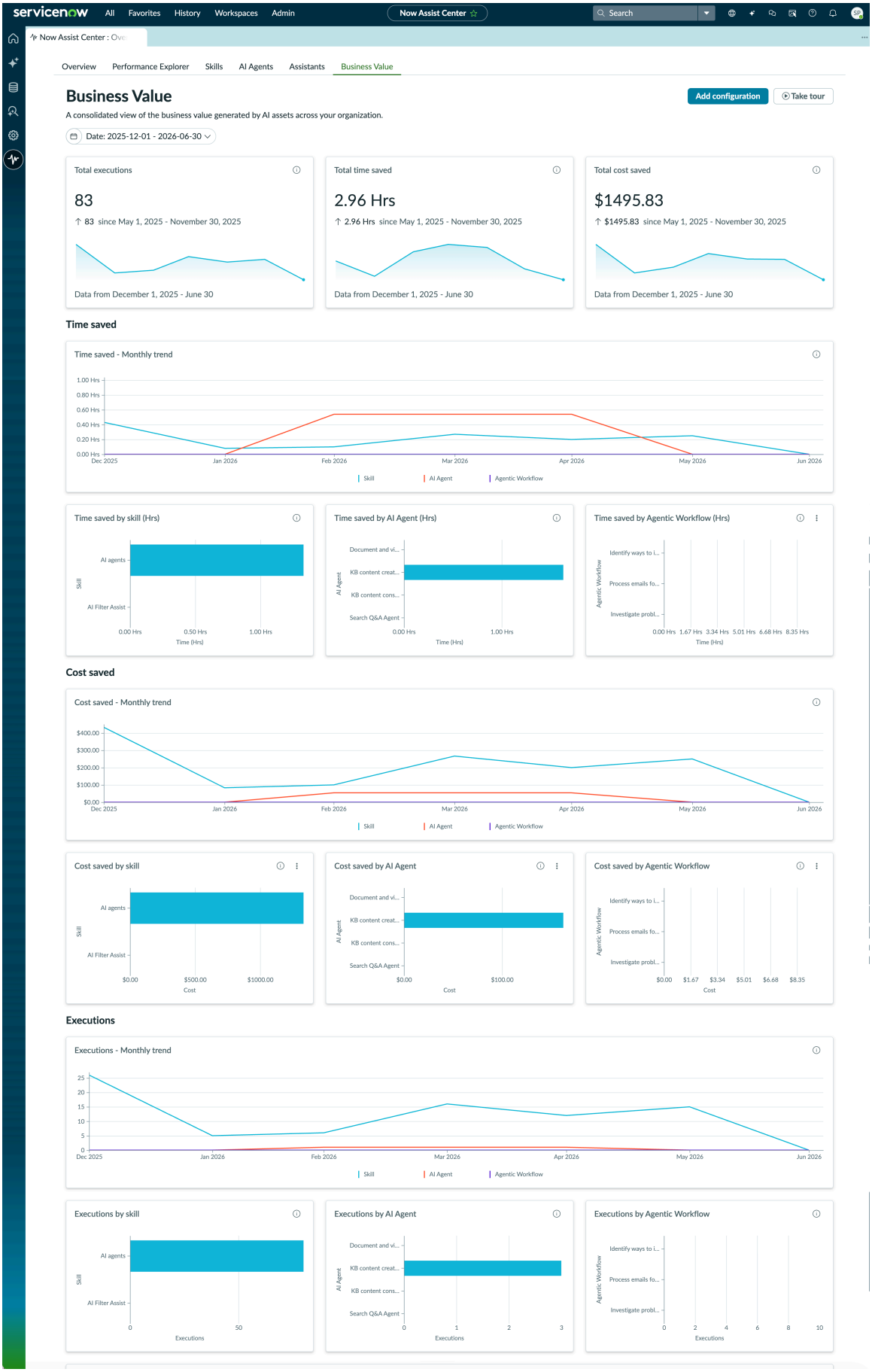
AI Admin Center Business Value dashboard



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Total executions

This area of the dashboard displays the total number of times AI assets were executed in the selected time range. Use this count to understand the overall scale of AI asset usage across your organization.

Total time saved

This area of the dashboard displays the total amount of time saved by AI asset executions in the selected time range. Use this metric to quantify the productivity impact of your AI asset deployments.

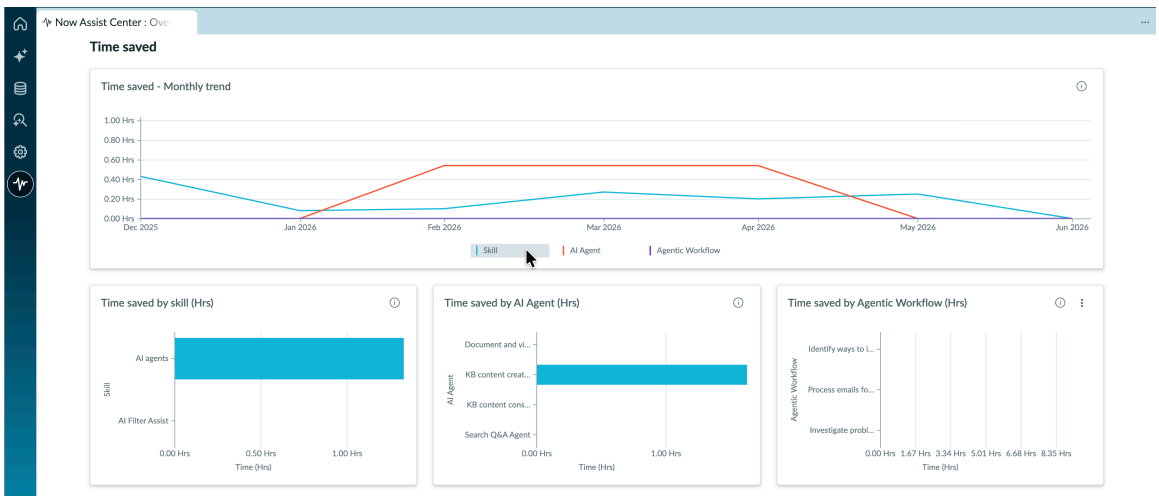
Total cost saved

This area of the dashboard displays the total cost savings generated by AI asset executions in the selected time range. Use this metric to assess the financial value delivered by your AI assets.

Time saved

The **Time saved** section displays the total time saved by AI asset executions, broken down by asset type and shown as a monthly trend over the selected time range.

Time saved section of the AI Admin Center Business Value dashboard



Time saved - Monthly trend

This area of the dashboard displays a trend line chart showing the total time saved by skills, AI agents, and agentic workflows each month over the selected time range. Use the trend lines to monitor changes in time saved across asset types and identify periods of higher or lower productivity impact.

Time saved by skill (Hrs)

This area of the dashboard displays a bar chart showing the total time saved by each skill in the selected time range. Use this visualization to identify which skills are delivering the greatest time savings in your organization.

Time saved by AI Agent (Hrs)

This area of the dashboard displays a bar chart showing the total time saved by each AI agent in the selected time range. Use this visualization to compare time savings across AI agents and identify your highest-impact deployments.

Time saved by Agentic Workflow (Hrs)

This area of the dashboard displays a bar chart showing the total time saved by each agentic workflow in the selected time range. Use this visualization to evaluate the time savings delivered by your agentic workflow configurations.

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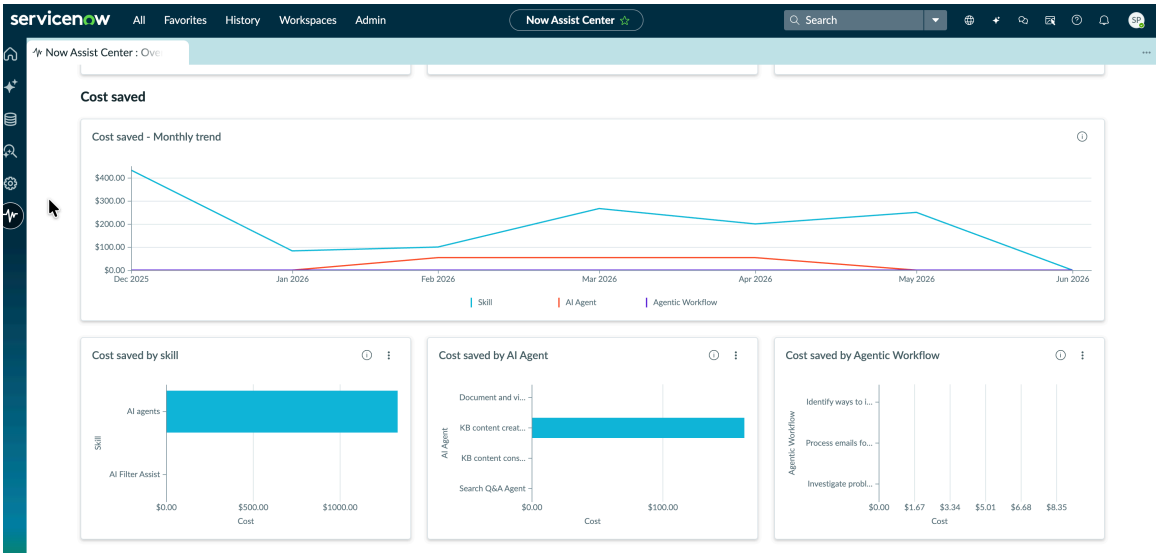
Cost saved

The **Cost saved** section displays the total cost savings generated by AI asset executions, broken down by asset type and shown as a monthly trend over the selected time range.

Cost saved section of the AI Admin Center Business Value dashboard



Cost saved - Monthly trend

This area of the dashboard displays a trend line chart showing the total cost saved by skills, AI agents, and agentic workflows each month over the selected time range. Use the trend lines to track changes in cost savings over time and identify periods of higher or lower financial impact.

Cost saved by skill

This area of the dashboard displays a bar chart showing the total cost saved by each skill in the selected time range. Use this visualization to identify which skills are generating the greatest cost savings across your organization.

Cost saved by AI Agent

This area of the dashboard displays a bar chart showing the total cost saved by each AI agent in the selected time range. Use this visualization to compare cost savings across AI agents and identify your highest-value deployments.

Cost saved by Agentic Workflow

This area of the dashboard displays a bar chart showing the total cost saved by each agentic workflow in the selected time range. Use this visualization to evaluate the financial value delivered by your agentic workflow configurations.

Executions

The **Executions** section displays the total number of executions for each AI asset type, shown as a monthly trend and broken down by individual asset over the selected time range.

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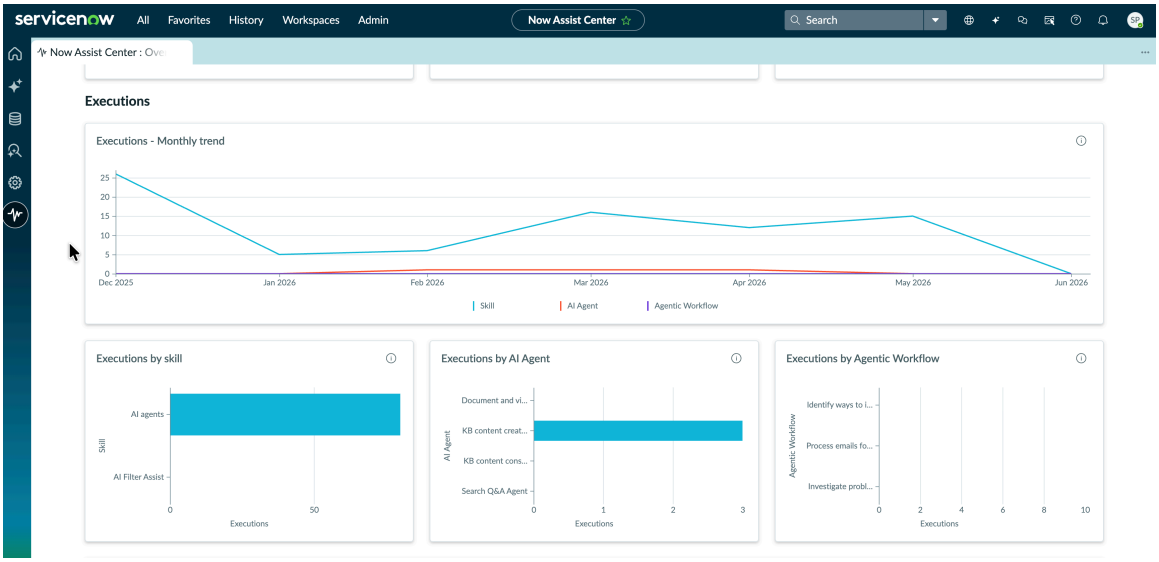
Executions section of the AI Admin Center Business Value dashboard



Executions - Monthly trend

This area of the dashboard displays a trend line chart showing the total number of executions for skills, AI agents, and agentic workflows each month over the selected time range. Use the trend lines to monitor changes in execution volume across asset types over time.

Executions by skill

This area of the dashboard displays a bar chart showing the total number of executions for each skill in the selected time range. Use this visualization to identify which skills are used most frequently and understand usage patterns across your skill library.

Executions by AI Agent

This area of the dashboard displays a bar chart showing the total number of executions for each AI agent in the selected time range. Use this visualization to compare execution volumes across AI agents and identify your most actively used deployments.

Executions by Agentic Workflow

This area of the dashboard displays a bar chart showing the total number of executions for each agentic workflow in the selected time range. Use this visualization to track which agentic workflows are running most frequently and evaluate engagement patterns.

Business value configuration

The **Business value configuration** table lists all configured AI assets and the values used to calculate business value metrics. Use this table to review and manage the configuration for each asset.

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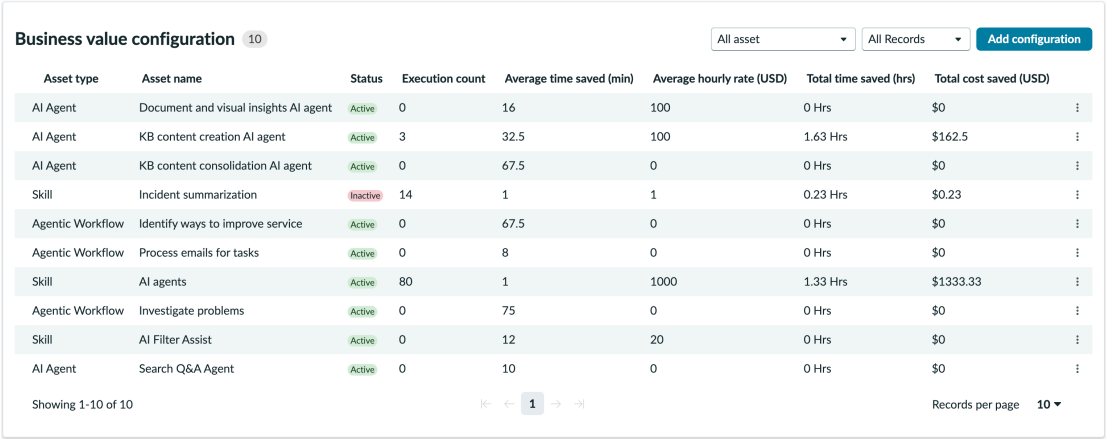
Business value configuration table in the AI Admin Center Business Value dashboard



Asset type

The category of the AI asset, such as AI Agent, Skill, or Agentic Workflow.

Asset name

The name of the individual AI asset as configured in your instance.

Status

The current status of the AI asset, such as Active or Inactive.

Execution count

The total number of times the AI asset has been executed.

Average time saved (min)

The average amount of time, in minutes, saved per execution of the AI asset. This value is used to calculate the total time saved metric.

Average hourly rate

The average hourly rate used to calculate the cost saved by the AI asset. This value represents the estimated cost of the time saved per execution.

Total time saved (hrs)

The total amount of time saved by all executions of the AI asset, calculated from the execution count and average time saved values.

Total cost saved

The total cost saved by all executions of the AI asset, calculated from the total time saved and average hourly rate values.

Add a value configuration in the AI Admin Center Business Value dashboard (Next Experience UI)

Add a value configuration to define the business value metrics calculated for an AI asset, including average time saved per execution and average hourly rate.

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Before you begin
Role required: sn_na_center.nac_admin

About this task
Value configurations define the data used to calculate business value metrics for each AI asset on the Business Value dashboard. Each configuration specifies the asset, average time saved per execution, and average hourly rate, which are used to calculate the total time saved and total cost saved displayed on the dashboard.

Note: This topic describes the AI Admin Center feature based on the Next Experience UI. If you're using the Lux user experience for AI Admin Center, see the Lux UI version of this topic.

Procedure
1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)**.

   The home page opens.

2. Select **Monitor** ( ) in the side navigation bar.
3. Select the **Business Value** tab.
4. Select **Add configuration**.
   The **Add value configuration** modal opens.
5. Select an **Asset type**.
6. Select an **Asset name**.

   The **Execution count (Last 7 days)** field is automatically populated based on the selected asset's execution history and is read-only.

   The **Currency** field displays the currency configured for your instance. To change the currency, update your instance configuration.

7. Enter a value in **Average time saved per execution (min)**.
8. Enter a value in **Average hourly rate**.

   The **Total time saved (hrs)** and **Total cost saved** fields are calculated automatically based on the execution count, average time saved per execution, and average hourly rate values.

9. Select **Add**.

Result
A **Benchmark created successfully** confirmation banner appears. The value configuration is added to the **Business value configuration** table and the Business Value dashboard metrics are updated to reflect the new configuration.

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View AI assets usage and performance in AI Admin Center (Lux UI)

Use AI Admin Center to view dashboards showing the usage and performance of your AI assets.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

Role required: sn_na_center.nac_admin

About this task

Follow these steps to view AI usage and performance dashboards.

Note: This topic describes the AI Admin Center feature based on the Lux user interface (UI). If you're using the Next Experience UI for AI Admin Center, see the Next Experience UI version of this topic.

Procedure

1. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center**.

   The AI Admin Center opens to the home page.

2. Select **Analytics** ( ) in the side navigation panel.

   The Analytics page opens showing tabs for the different dashboards.

   Dashboards and data visualizations are derived from various AI features and are grouped by asset type.

3. Select the tab and any subtab for the dashboard you want to view.

   Some tabs contain another set of tabs for viewing the various usage, performance, and governance properties of the asset type.

   - The Overview dashboard displays a summary of AI asset activation, adoption, and usage across your organization. Use the dashboard to monitor the state of your AI assets and track user engagement across departments. For more information, see Overview dashboard in AI Admin Center (Lux UI).
   - The Performance Explorer tab displays the individual activity executions of your AI skills, agents, and assistants. Use this dashboard to analyze and optimize the performance of your AI assets. For more information, see Performance Explorer dashboard in AI Admin Center (Lux UI).
   - The Business Value tab displays the value generated by AI assets across your organization. Use the dashboard to justify continued investment, communicate ROI, or identify which AI integrations are delivering the most value. For more information, see Business Value dashboard in AI Admin Center (Lux UI).

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Overview dashboard in AI Admin Center (Lux UI)

Use the Overview dashboard on the Analytics page to monitor key metrics for AI asset activation, adoption, and usage across your organization.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

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In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

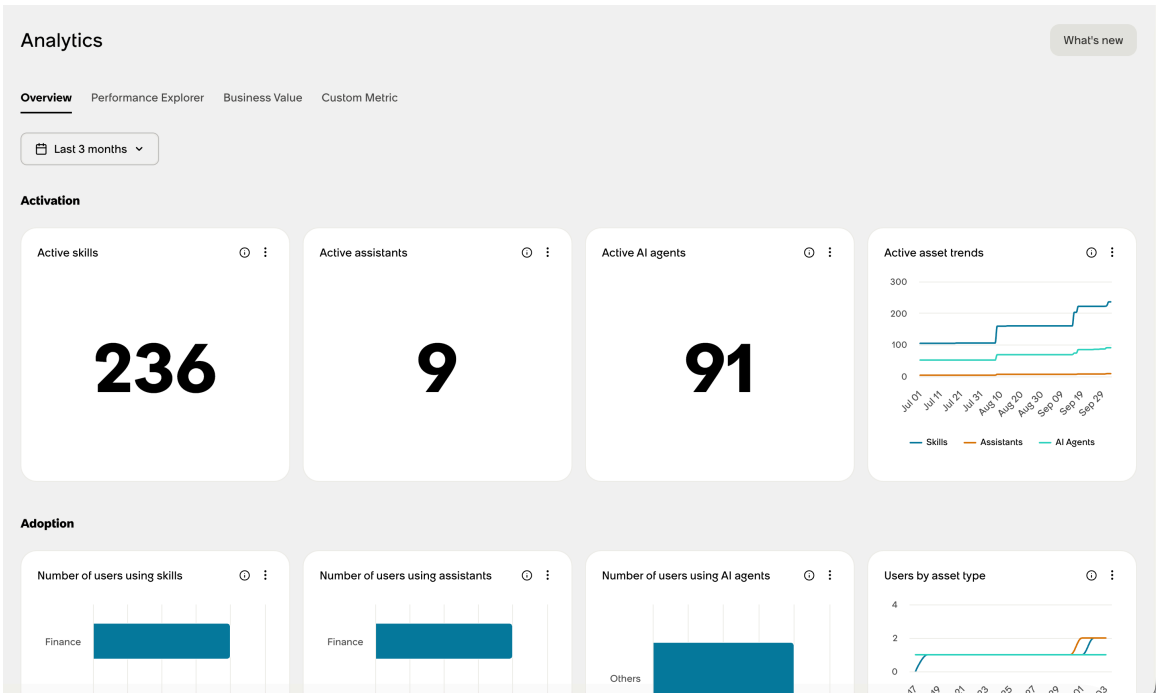
Note: This topic describes the AI Admin Center feature based on the Lux user interface (UI). If you're using the Next Experience UI for AI Admin Center, see the Next Experience UI version of this topic.

Overview dashboard

The Overview dashboard displays a summary of AI asset activation, adoption, and usage across your organization. Use the dashboard to monitor the state of your AI assets and track user engagement across departments.

Use the **Date** filter at the top of the Overview dashboard to set the time range for all metrics on the page. The default time range is **Last 3 months**.

Overview dashboard



Activation

The Activation section displays the current number of active AI assets and their trends over the selected time range.

Active skills

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This area of the dashboard displays the total number of skills that are currently active in your instance. Use this count to understand the scale of your deployed skill library.

Active assistants

This area of the dashboard displays the total number of assistants that are currently active in your instance. Use this count to track the scale of your deployed assistant configurations.

Active AI agents

This area of the dashboard displays the total number of AI agents that are currently active in your instance. Use this count to understand the scope of your active AI agent deployments.

Active asset trends

This area of the dashboard displays a trend line chart showing the count of active skills, assistants, and AI agents over the selected time range. Use the trend lines to monitor how your active asset inventory has changed over time and identify periods of growth or reduction across asset types.

Adoption

The **Adoption** section shows how users across departments are engaging with AI assets over the selected time range.

Number of users using skills

This area of the dashboard displays the number of users who used skills in the selected time range, grouped by department. Use this visualization to identify which departments have the highest skill adoption and which may benefit from further enablement.

Number of users using assistants

This area of the dashboard displays the number of users who used assistants in the selected time range, grouped by department. Use this visualization to compare assistant adoption levels across departments and identify engagement patterns.

Number of users using AI agents

This area of the dashboard displays the number of users who used AI agents in the selected time range, grouped by department. Use this visualization to track AI agent adoption across your organization and identify departments with strong or limited engagement.

Users by asset type

This area of the dashboard displays a trend line chart showing the number of users per asset type (skills, assistants, and AI agents) over the selected time range. Use the trend lines to compare adoption levels across asset types and identify shifts in user preferences over time.

Usage

The **Usage** section displays the total number of executions for each AI asset type, grouped by department and asset type, over the selected time range.

Total number of skill executions

This area of the dashboard displays the total number of times skills were executed in the selected time range, grouped by department. Use this visualization to understand which departments are driving the most skill usage and identify high-volume execution patterns.

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Total assistant executions

This area of the dashboard displays the total number of assistant executions in the selected time range, grouped by department. Use this visualization to identify departments with the highest assistant usage and compare execution volumes across your organization.

Total AI agent executions

This area of the dashboard displays the total number of AI agent executions in the selected time range, grouped by department. Use this visualization to track AI agent usage patterns across departments and identify areas of high or low engagement.

Total executions by asset type

This area of the dashboard displays a trend line chart showing the total executions for skills, assistants, and AI agents over the selected time range. Use the trend lines to compare usage volumes across asset types and monitor changes in execution patterns over time.

Performance Explorer dashboard in AI Admin Center (Lux UI)

Use the Performance Explorer dashboard on the Analytics page to review and analyze the execution details of assistants and AI agents across your organization.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

The Next Experience AI Admin Center workspace is being prepared for deprecation in the November store release and will no longer be supported. For more information on the Next Experience UI, see AI Admin Center workspace (Next Experience UI).

In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Note: This topic describes the AI Admin Center feature based on the Lux user interface (UI). If you're using the Next Experience UI for AI Admin Center, see the Next Experience UI version of this topic.

AI Admin Center Performance Explorer dashboard

The Performance Explorer dashboard displays execution-level details for AI agents, skills, and assistants. Use the dashboard to investigate individual executions, analyze performance metrics, and identify patterns across your AI asset deployments.

The Performance Explorer dashboard includes the following sub-tabs: **Skills**, **Assistants**, and **Agents**. Each sub-tab displays a table of individual executions for the selected asset type.

Skills

The **Skills** tab displays a list of individual generative AI skill executions. Use the **Date**, **Type**, and **Product** filters, or the **Search name** field, to narrow results. Select **Reset Filters** to clear all applied filters.

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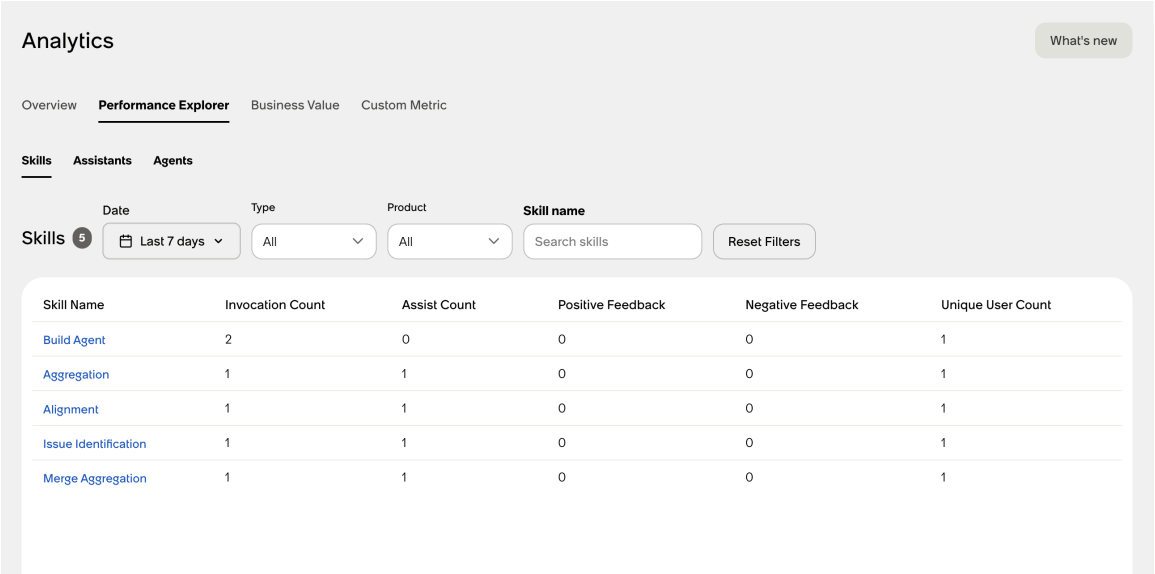
Skills tab of the Performance Explorer dashboard



Skill Name

The name of the AI skill that was executed.

Invocation Count

The number of invocations made to the skill.

Assist Count

The number of assist credits consumed by the skill during the execution.

Positive Feedback

The total number of positive feedback records received for the skill execution.

Negative Feedback

The total number of negative feedback records received for the skill execution.

Unique User Count

The number of unique users during the execution.

Assistants

The **Assistants** tab displays a list of individual assistant executions. Use the **Date** filter to narrow results.

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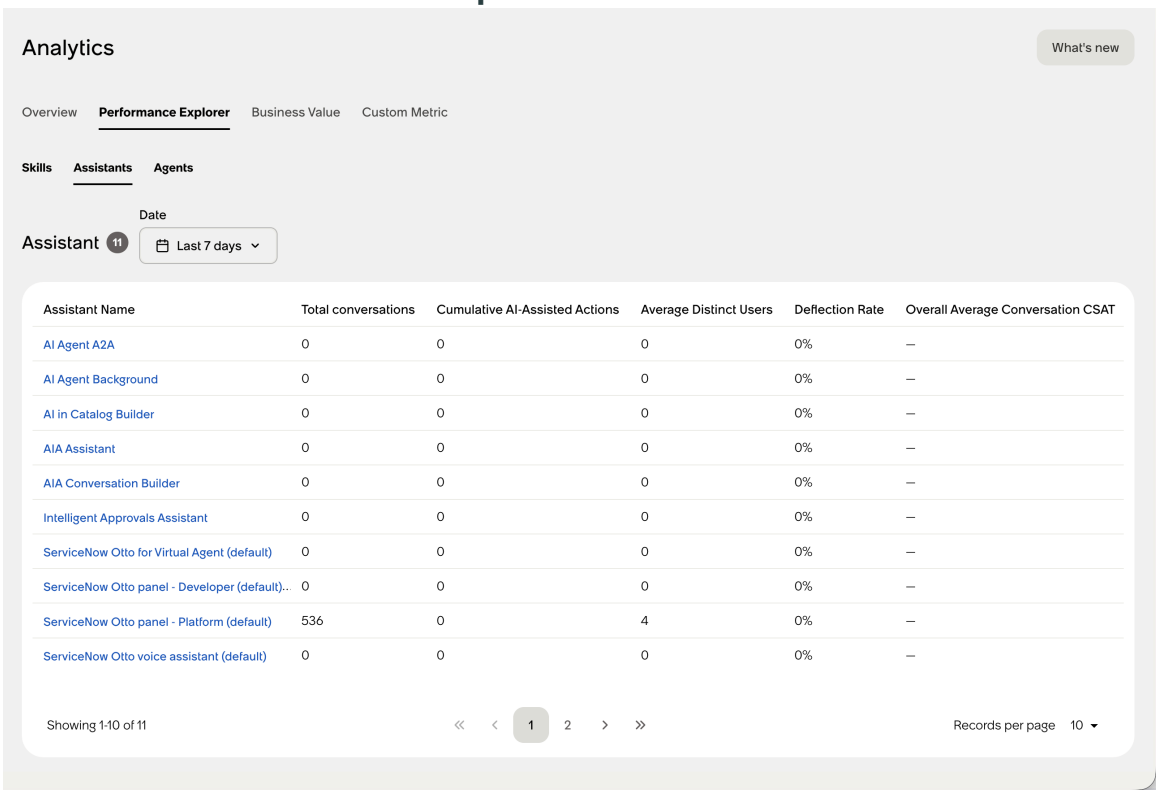
Assistants tab of the Performance Explorer dashboard



Assistant Name

The name of the assistant that was executed. Select the assistant name to view the full execution record.

Total conversations

The total number of conversations where the assistant was executed.

Cumulative AI-Assisted Actions

The number of all AI-assisted actions performed by the assistant during the execution.

Average Distinct Users

The average number of distinct users during the execution.

Deflection Rate

The rate of deflection success for the execution.

Overall Average Conversation CSAT

The average customer satisfaction score for the conversation, calculated based on conversation signals.

Total Assist Usage

The number of assist credits consumed by the assistant during the execution.

Agents

The **Agents** tab displays a list of individual AI agent executions. Use the **Date**, **Type**, **Source**, and **Agent Type** filters, or the **Agent Name** field, to narrow results. Select **Reset filter** to clear all applied filters.

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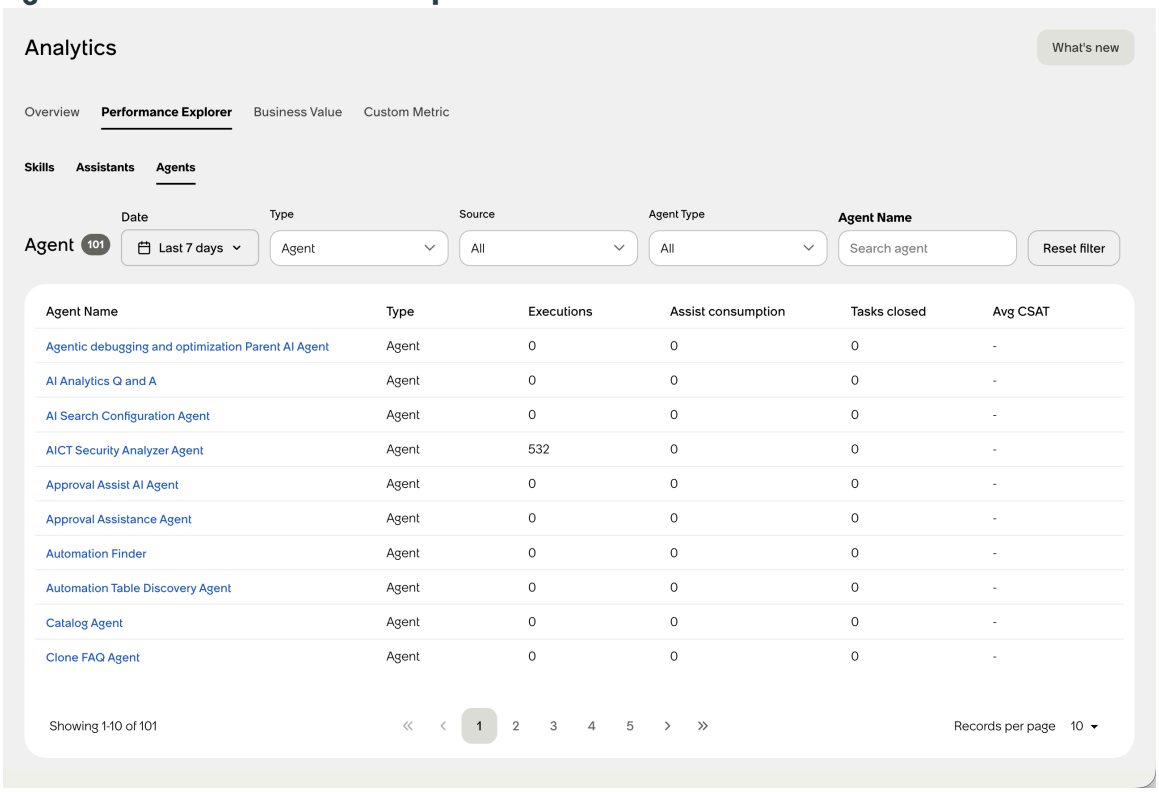
Agents tab of the Performance Explorer dashboard



Agent Name

The name of the AI agent that was executed.

Type

The type of agentic AI asset, agent or agentic workflow.

Executions

The total number of executions made by the agentic AI asset.

Assist consumption

The number of assist credits consumed by the agentic AI asset during the execution.

Tasks closed

The number of tasks closed resulting from the execution.

Avg CSAT

The average customer satisfaction score for the execution, calculated based on interaction signals.

Business Value dashboard in AI Admin Center (Lux UI)

Use the Business Value dashboard on the Analytics page to monitor the business value generated by AI assets across your organization, including total executions, time saved, and cost saved.

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Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

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In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Note: This topic describes the AI Admin Center feature based on the Lux user interface (UI). If you're using the Next Experience UI for AI Admin Center, see the Next Experience UI version of this topic.

Business Value dashboard

The Business Value dashboard displays a consolidated view of the business value generated by AI assets across your organization. Use the dashboard to monitor total executions, time saved, and cost saved across skills, AI agents, and agentic workflows.

Use the **Date** filter at the top of the Business Value dashboard to set the time range for all metrics on the page.

Total executions

This area of the dashboard displays the total number of times AI assets were executed in the selected time range. Use this count to understand the overall scale of AI asset usage across your organization.

Total time saved

This area of the dashboard displays the total amount of time saved by AI asset executions in the selected time range. Use this metric to quantify the productivity impact of your AI asset deployments.

Total cost saved

This area of the dashboard displays the total cost savings generated by AI asset executions in the selected time range. Use this metric to assess the financial value delivered by your AI assets.

Time saved

The **Time saved** section displays the total time saved by AI asset executions, broken down by asset type and shown as a daily trend over the selected time range.

Time saved - Daily trend

This area of the dashboard displays a trend line chart showing the total time saved by skills, AI agents, and agentic workflows each day over the selected time range. Use the trend lines to monitor changes in time saved across asset types and identify periods of higher or lower productivity impact.

Time saved (Hrs) by Skill

This area of the dashboard displays a bar chart showing the total time saved by each skill in the selected time range. Use this visualization to identify which skills are delivering the greatest time savings in your organization.

Time saved (Hrs) by AI Agent

This area of the dashboard displays a bar chart showing the total time saved by each AI agent in the selected time range. Use this visualization to compare time savings across AI agents and identify your highest-impact deployments.

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Time saved by (Hrs) Agentic Workflow

This area of the dashboard displays a bar chart showing the total time saved by each agentic workflow in the selected time range. Use this visualization to evaluate the time savings delivered by your agentic workflow configurations.

Cost saved

The **Cost saved** section displays the total cost savings generated by AI asset executions, broken down by asset type and shown as a daily trend over the selected time range.

Cost saved - Daily trend

This area of the dashboard displays a trend line chart showing the total cost saved by skills, AI agents, and agentic workflows each day over the selected time range. Use the trend lines to track changes in cost savings over time and identify periods of higher or lower financial impact.

Cost saved by Skill

This area of the dashboard displays a bar chart showing the total cost saved by each skill in the selected time range. Use this visualization to identify which skills are generating the greatest cost savings across your organization.

Cost saved by AI Agent

This area of the dashboard displays a bar chart showing the total cost saved by each AI agent in the selected time range. Use this visualization to compare cost savings across AI agents and identify your highest-value deployments.

Cost saved by Agentic Workflow

This area of the dashboard displays a bar chart showing the total cost saved by each agentic workflow in the selected time range. Use this visualization to evaluate the financial value delivered by your agentic workflow configurations.

Executions

The **Executions** section displays the total number of executions for each AI asset type, shown as a daily trend and broken down by individual asset over the selected time range.

Executions - Daily trend

This area of the dashboard displays a trend line chart showing the total number of executions for skills, AI agents, and agentic workflows each day over the selected time range. Use the trend lines to monitor changes in execution volume across asset types over time.

Executions by Skill

This area of the dashboard displays a bar chart showing the total number of executions for each skill in the selected time range. Use this visualization to identify which skills are used most frequently and understand usage patterns across your skill library.

Executions by AI Agent

This area of the dashboard displays a bar chart showing the total number of executions for each AI agent in the selected time range. Use this visualization to compare execution volumes across AI agents and identify your most actively used deployments.

Executions by Agentic Workflow

This area of the dashboard displays a bar chart showing the total number of executions for each agentic workflow in the selected time range. Use this

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visualization to track which agentic workflows are running most frequently and evaluate engagement patterns.

Business value configuration

The **Business value configuration** table lists all configured AI assets and the values used to calculate business value metrics. Use this table to review and manage the configuration for each asset.

Asset type

The category of the AI asset, such as AI Agent, Skill, or Agentic Workflow.

Asset name

The name of the individual AI asset as configured in your instance.

Status

The current status of the AI asset, such as Active or Inactive.

Execution count

The total number of times the AI asset has been executed.

Average time saved (min)

The average amount of time, in minutes, saved per execution of the AI asset. This value is used to calculate the total time saved metric.

Average hourly rate

The average hourly rate used to calculate the cost saved by the AI asset. This value represents the estimated cost of the time saved per execution.

Total time saved (hrs)

The total amount of time saved by all executions of the AI asset, calculated from the execution count and average time saved values.

Total cost saved

The total cost saved by all executions of the AI asset, calculated from the total time saved and average hourly rate values.

Add a value configuration in the Business Value dashboard (Lux UI)

Add a value configuration to define the business value metrics calculated for an AI asset, including average time saved per execution and average hourly rate.

Important: Lux is the new user experience for AI Admin Center. For more information on the Lux experience, see AI Admin Center user experience (Lux UI).

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In AI Admin Center version 6.1, the Next Experience and Lux user interfaces are both available.

Before you begin

Role required: sn_na_center.nac_admin

About this task

Value configurations define the data used to calculate business value metrics for each AI asset on the Business Value dashboard. Each configuration specifies the asset, average time saved per execution, and average hourly rate, which are used to calculate the total time saved and total cost saved displayed on the dashboard.

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Note: This topic describes the AI Admin Center feature based on the Lux user interface (UI). If you're using the Next Experience UI for AI Admin Center, see the Next Experience UI version of this topic.

Procedure

1. Navigate to **All** > **AI Admin Center** > **Home** or **Admin** > **AI Admin Center**.

   The home page opens.

2. Select **Analytics** ( ) in the side navigation panel.
3. Select the **Business Value** tab.
4. Select **Add configuration**.
   The **Add value configuration** modal opens.
5. Select an **Asset type**.
6. Select an **Asset name**.

   The **Execution count (Last 7 days)** field is automatically populated based on the selected asset's execution history and is read-only.

   The **Currency** field displays the currency configured for your instance. To change the currency, update your instance configuration.

7. Enter a value in **Average time saved per execution (min)**.
8. Enter a value in **Average hourly rate**.

   The **Total time saved (hrs)** and **Total cost saved** fields are calculated automatically based on the execution count, average time saved per execution, and average hourly rate values.

9. Select **Add**.

Result

A confirmation banner appears. The value configuration is added to the **Business value configuration** table and the Business Value dashboard metrics are updated to reflect the new configuration.

Custom metrics in AI Admin Center

Create custom metrics to define the criteria for measuring AI assistant performance, including custom deflection rates based on event-based condition logic.

Custom Metrics

The Custom Metrics section in AI Admin Center allows you to define custom metrics for measuring AI assistant performance. A custom deflection metric determines the criteria for counting an AI assistant interaction as deflected. A deflected interaction is one in which the assistant resolved the user's need without escalation to a human agent.

The platform includes a system-provided default metric. You can create custom metrics that reflect your organization's specific deflection criteria. Each AI assistant can be mapped to one active metric at a time.

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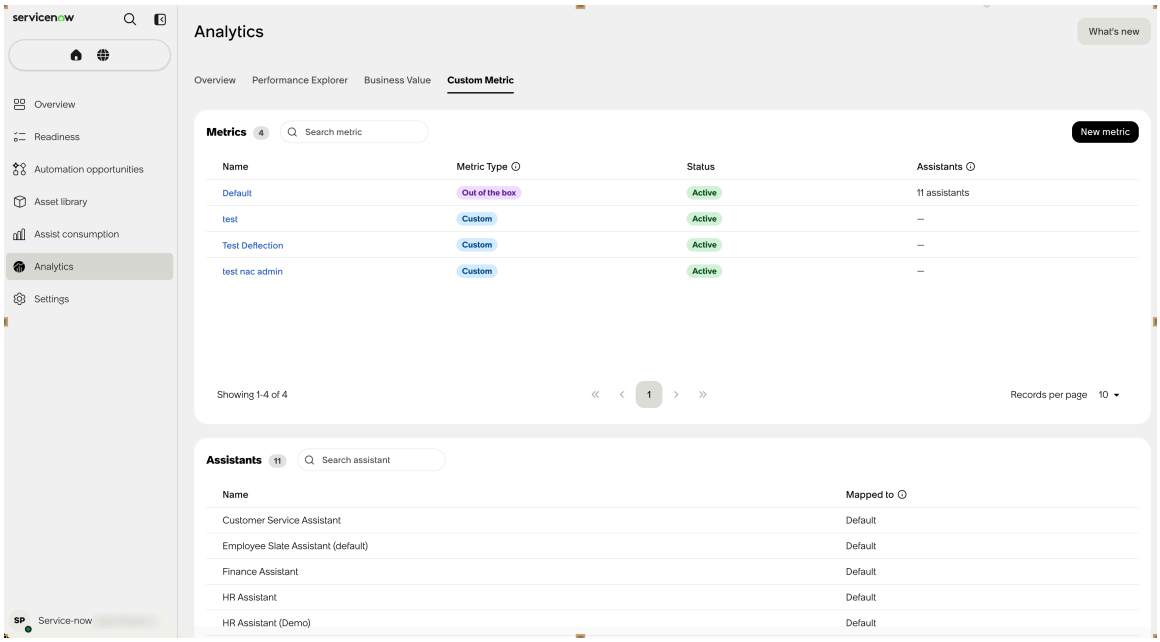
Important:

Set the `sn_nowassist_va.analytics.persistence_strategy` system property to `both` so that granular feedback and event data write to the ServiceNow Otto for Virtual Agent event tables that the condition builder evaluates. This data doesn't include events from other AI surfaces, such as AI Search or in-product skills. Custom metrics built on Feedback or Event type conditions require this data to return results.

Custom metrics list

The Custom Metrics page lists all metrics available in your organization. System-provided metrics and custom metrics are visually distinguished in the list. Select **New metric** to create a metric; for steps, see Create a custom metric in AI Admin Center. Use the search field above the list to filter metrics by name.

Custom Metric tab



Name

This area of the page displays the name of the custom metric.

Metric type

This area of the page displays the type of metric as a badge, either **Out of the box** for the system-provided default metric or **Custom** for a metric that you create.

Status

This area of the page displays whether the metric is active or inactive.

Assistants

This area of the page displays the number of AI assistants currently mapped to this metric.

Hover over the **Metric Type** and **Assistants** column headers for a description of each field.

Assistant mapping

Each AI assistant can be mapped to one custom metric at a time. When a custom metric is active for a mapped assistant, the deflection card on the assistant's Performance view shows the active

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metric name. For steps to map an assistant to a metric, see Edit a custom metric in AI Admin Center.

The Custom Metrics page also lists all AI assistants in an Assistants table below the metrics list. This table shows each assistant's name and the metric it is currently mapped to, in the **Mapped to** column. Use the search field above the table to filter assistants by name.

Create a custom metric in AI Admin Center

Create a custom metric by specifying event-based condition logic and testing it against live data before saving.

Before you begin

Role required: `ai_engmt_admin`

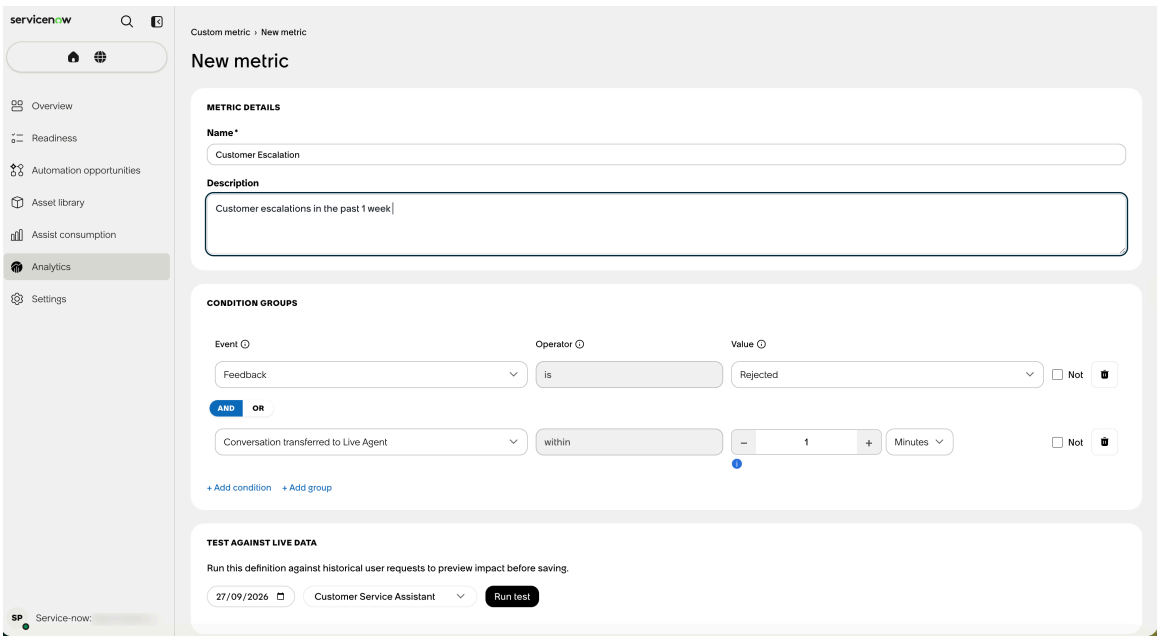
About this task

Custom metrics let you specify the event criteria that count as a deflected assistant interaction in your organization. After creating a metric, edit it to map it to one or more AI assistants and activate it.

Procedure

1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)**.
2. Select **Analytics** in the side navigation bar.
3. Select the **Custom Metric** tab.
4. Select **New metric**.
   The Custom Metric editor opens.

Custom Metric editor



5. Enter a **Name** for the metric.
6. **Optional:** Enter a **Description**.
7. Build the condition logic in the condition builder.

   Add events and connect them with AND, OR, or NOT operators. Groups can be nested to form recursive logic. Each condition specifies an event type, a reference point, and an optional time window.

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Select from the following event types when building conditions: Response provided, Feedback, Event type, Conversation transferred to Live Agent, Request, and Response.

For time-based conditions, select the unit (Seconds, Minutes, or Hours) from the duration unit picker next to the duration field. The picker defaults to the largest unit that the stored duration value divides evenly into.

Hover over a column header in the condition builder for a description of that field.

8. **Optional:** Select **Test against live data** to validate the condition logic before saving.

   (Optional) Select a date and an assistant, then select **Run test**. The results show the number of requests that matched the metric's criteria for the selected day (matching count). The results also show the number of those requests counted as deflected under the metric (deflected count).

9. Select **Save**.

Result

The custom metric is added to the Custom Metrics list. To map the metric to AI assistants and activate it, see Edit a custom metric in AI Admin Center.

Edit a custom metric in AI Admin Center

Update a custom metric's condition logic, map AI assistants to it, and activate or deactivate it.

Before you begin

Role required: `ai_engmt_admin`

About this task

Edit a custom metric to change its condition logic, update which AI assistants are mapped to it, or activate or deactivate it.

Procedure

1. Navigate to **All** > **AI Admin Center** > **AI Admin Center (Legacy)**.
2. Select **Analytics** in the side navigation bar.
3. Select the **Custom Metric** tab.
4. Select the name of the metric that you want to edit.
   The Edit metric page opens.

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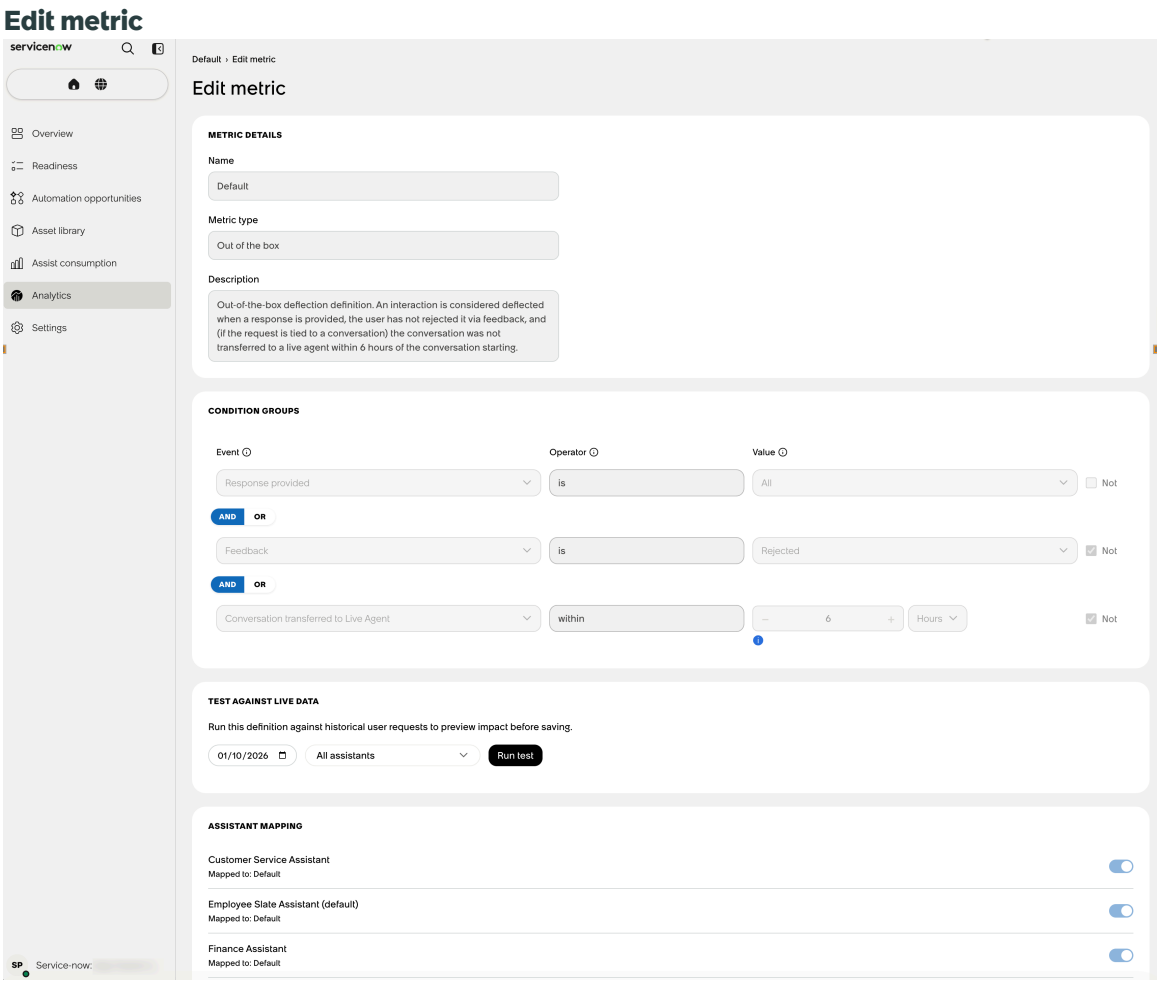

5. Update the **Name**, **Metric type**, or **Description** as needed.

   For a system-provided (**Out of the box**) metric, the metric details and condition logic are read-only. You can still update assistant mapping. System-provided metrics are active by default and can't be deactivated.

6. Update the condition logic in the condition builder as needed.

   Add, remove, or update condition groups, and connect them with AND, OR, or NOT operators. Groups can be nested to form recursive logic. Hover over a column header in the condition builder for a description of that field.

   If the metric is active and mapped to one or more AI assistants, your changes apply to deflection calculations going forward after you save. Deflection rates already calculated under the previous condition logic aren't recalculated.

7. **Optional:** Select **Test against live data** to validate your changes before saving.

   (Optional) Select a date and an assistant, then select **Run test**. The results show the number of requests that matched the updated criteria for the selected day (matching count), and how many of those requests count as deflected under the updated logic (deflected count).

   Testing is especially useful when the metric is already mapped to one or more assistants, so you can confirm your changes produce the expected results before they affect live deflection scoring.

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8. In the **Assistant mapping** section, enable or disable the toggle next to each AI assistant to map or unmap it from this metric.

   Each assistant can be mapped to one metric at a time. Enabling the toggle for an assistant here replaces any metric that assistant was previously mapped to. Disabling the toggle unmaps the assistant from this metric and reassigns it to the system-provided default metric.

9. Select **Save**.
10. To activate or deactivate the metric, select **Activate** or **Deactivate** and confirm.

    Activate a metric to make it eligible for deflection rate calculations. Deactivate a metric to remove it from scoring. When you deactivate a metric, all assistants mapped to it are remapped to the system-provided default metric. System-provided metrics cannot be deactivated.

Result
The custom metric reflects your updated condition logic and assistant mapping. If you activated the metric, the deflection rate shown on each mapped assistant's Performance view is calculated using this metric.

AI Admin Center reference

The following topics provide additional information about the features and properties installed with AI Admin Center.

Components installed with AI Admin Center

Several components are installed with the AI Admin Center application.

Roles installed

The following roles are installed with AI Admin Center.

- AI Admin Center admin [sn_na_center.nac_admin]
- AI Admin Center user [sn_na_center.nac_user]

For information on the roles installed with AI Admin Center, see AI Admin Center roles.

Tables installed

The following tables are installed with AI Admin Center.

AI Admin Center tables

Label	Name
AI Admin Center Feature Flow Job	nac_feature_flow_job
AI Admin Center Upgrade Readiness Assessment	nac_upgrade_readiness_assessment
AI Tool	nac_aitool
Answer	nac_assessment_answer
Assessment	nac_assessment
Assessment Run	nac_assessment_run

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AI Admin Center tables (continued)

Label	Name
Code Starting Points	nac_sha_starting_points
NAC SHA Execution Run	nac_sha_execution_run
Navigation Item	nac_navigation_item
Now Assist Center Feature Flow	nac_feature_flow
Now Assist Center Promoted Skill	nac_promoted_skill
Now Assist Center Promoted Skills State	nac_promoted_skill_state
Now Assist KB Section	nac_kb_section
Question	nac_assessment_question
Self Heal Restriction	nac_self_heal_restriction

Domain separation and AI Admin Center

Domain separation is supported for AI Admin Center.

Domain separation allows you to separate data, processes, and administrative tasks into logical groupings called domains. You can then control several aspects of this separation, including which users can see and access data.

Support level: Standard

- Business logic: Ensure data goes into the proper domain for the application's service provider (SP) use cases.
- In the application, the user interface, cache keys, reporting, rollups, aggregations, and so on, all use domain at production run time.
- The owner of the instance must be able to set up the application to function across multiple tenants.

For more information on support levels, see Application support for domain separation.

Domain separation uses in AI Admin Center

- The system supports domain separation for skills and instructions.
- Ability to view domain-based skills in the actionable use cases on the home page.
- Ability to duplicate skills for different domains.
- AI Admin Center analytics data contains records from multiple domains.

Tables

The following AI Admin Center tables contain domain-separated fields:

- nac_promoted_skill
- nac_promoted_skill_state

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Fields

The following domain-separated fields are supported:

- sys_domain

  Associates the state record with a specific domain.

- sys_domain_path

  Manages domain hierarchy relationships.

- sys_overrides

  Enables child domain state records to override parent domain states.

AI Admin Center roles

AI Admin Center is installed with these roles.

AI Admin Center admin [sn_na_center.nac_admin]

Use the AI Admin Center workspace to access and set up Now Assist solutions, perform administrative tasks, and monitor performance. This role has full access to the AI Admin Center application, and can access AI Admin Center tables.

Contains Roles

List of roles contained within the role.

- *sn_data_kit.admin*
- *sn_na_center.nac_user*
- *sn_agent_miner.app_ui*
- *sn_aia.admin*
- *sn_nowassist_admin.nsa_admin*

Groups

None.

Special considerations

None.

AI Admin Center user

Perform read actions in AI Admin Center workspace.

Contains Roles

List of roles contained within the role.

- *sn_nowassist_admin.user*
- *sn_data_kit.analyst*
- *now_assist_panel_user*

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Groups

None.

Special considerations

None.

Assessing your AI readiness

Assessing readiness across your data, applications, and overall instance surfaces the gaps and dependencies that affect using AI on the ServiceNow AI Platform. Addressing these checks early helps your team avoid mid-implementation rework.

Get started

AI Readiness Evaluation	Data readiness	Application readiness
Evaluate your instance against built-in readiness checks for generative and agentic AI.	Learn how to prepare your instance data for AI.	Learn how to prepare your applications for AI.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for

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accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

AI Readiness Evaluation

The AI Readiness Evaluation app helps prepare your organization for implementing agentic AI for ITSM and CSM, and five other jobs.

Important: The AI Readiness Evaluation store application is being prepared for deprecation. The readiness assessment capability is now available as a native in-platform feature within the AI Admin Center application. For more information, see AI Admin Center (formerly Now Assist Center).

Choose one of these tiles to get started.

Explore	Configure	Use
Learn about the AI Readiness Evaluation app.	Run scheduled jobs and configure the app through the AI Readiness Evaluation guided setup.	Learn about how to use the AI Readiness Evaluation dashboards and assessments to prepare for implementing AI.

Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

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AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

Related topics

- AI Admin Hub
- AI Agent Studio (legacy)

Exploring AI Readiness Evaluation

The AI Readiness Evaluation app automates assessment processes, evaluates data readiness impacting implementation, and provides actionable insights to promote adopting AI quickly. The app enables you to assess whether updates, installations, or customizations of your instance could affect implementation. The assessments provide direct hyperlinks to improve any issues found.

Important: The AI Readiness Evaluation store application is being prepared for deprecation. The readiness assessment capability is now available as a native in-platform feature within the AI Admin Center application. For more information, see AI Admin Center (formerly Now Assist Center).

AI Readiness Evaluation overview

The AI Readiness Evaluation app is a solution designed to simplify and automate the agentic AI and Now Assist implementation assessment process. The app helps to determine whether your organization's instance is ready to implement generative and agentic AI features in Now Assist. Previously, manually assessing your organization's instance readiness was time consuming and took significant effort. Now, you can use the AI Readiness Evaluation app to automate gathering, processing, and analyzing instance data so that you can review your instance readiness more quickly. The app provides results within seconds, helping to reduce manual effort and promoting rapid and reliable assessments. The app includes assessment information for AI by separating agentic AI solutions and generative AI solutions by tabs. Agentic AI solution information appears in the agentic_AI tab and generative AI solution information appears in the tab.

The following list details what agentic solutions are evaluated and assessed after the necessary scheduled jobs have run.

Agentic AI for ServiceNow Otto for IT Service Management (ITSM)

Evaluates whether customizations on ITSM-related parent tables (such as Incident and Task) may interfere with AI agent behavior, task execution, or decision-making. Two use cases are available to select: **Categorize Incidents** and **Generate Change Request Plans**. The assessment identifies and flags high-risk customizations to help promote seamless agent operations and stable instance performance. Each

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finding includes interactive hyperlinks to the impacted records, enabling you to review, validate, and address potential issues without navigating away from the dashboard.

Agentic AI for ServiceNow Otto for Customer Service Management (CSM)

Assesses whether customizations on CSM-specific tables (such as Case and Interaction) impact AI agent functionality. The assessment evaluates data completeness, field modifications, and scripting issues that may hinder agent-driven tasks and offers targeted estimated remediation to maintain agent efficacy. Each assessment finding includes interactive hyperlinks to the affected records, enabling you to navigate, validate, and resolve issues directly from the dashboard.

The following list details what generative AI Now Assist products are evaluated and assessed after the necessary scheduled jobs have run.

ServiceNow Otto for AI Search

This feature provides insights into the status and configuration of AI Search, such as active or inactive profiles, widget versions, and estimated remediation efforts. The assessment also evaluates Knowledge Management by assessing article counts, categories, group restrictions, and top searches or articles viewed. Additionally, the assessment highlights areas for improvement, offering actionable feedback to enhance knowledge quality and hygiene.

ServiceNow Otto for Virtual Agent

This feature checks if Virtual Agent is live, tracks active topics and catalog items, and identifies barriers to conversational functionality. The assessment highlights opportunities to convert non-conversational items to conversational ones and tracks automation in catalog items, along with estimated remediation efforts.

ServiceNow Otto for IT Service Management (ITSM)

This feature reviews customizations and configurations in the Incident and Task tables, such as fields, UI actions, and scripts. The assessment highlights changes made, tracks data completeness, and provides key metrics to improve accuracy and consistency in ITSM processes. The assessment also specifies the estimated remediation effort required and reports the language used in the instance.

ServiceNow Otto for Customer Service Management (CSM)

This feature reviews customizations in the Case and Task tables, tracks changes to fields, and monitors data completeness for key fields. The assessment provides insights into past cases and field-filling percentages, helping improve data accuracy in Customer Service Management. The assessment also reports the estimated remediation effort needed and the language used in the instance.

ServiceNow Otto for HR Service Delivery (HRSD)

This feature analyzes customizations in the HR Core Case and Task tables, tracking field-level changes and promoting data completeness for critical fields. The assessment provides insights into historical HR Core cases, including field population percentages, to enhance data accuracy in HRSD processes. Additionally, the feature identifies estimated remediation efforts required and reports the languages used within the instance.

Note: Additional configuration is needed to run the HRSD assessment successfully. For more information, see Configure the AI Readiness Evaluation guided setup.

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AI Readiness Evaluation users

Users

User	Description
Admin	Admins use the AI Readiness Evaluation app to prepare for implementing generative and agentic AI features.

AI Readiness Evaluation benefits

AI Readiness Evaluation benefits

Benefit	Feature	Users
Run scheduled jobs for applicable agentic and generative AI products from a single assessment job.	Run the GenAI/ AgenticAI Assessment scheduled job	Admins
Review an overall dashboard of your issues before implementing agentic and generative AI.	Using AI Readiness Evaluation dashboard	Admins
View your overall go or no-go status to implement generative AI skills or agentic AI agents, and view the go or no-go status' issues categorized by percentage.	Assessing readiness status	Admins
Review summary information of overall implementation readiness.	Reviewing your AI assessment and Reviewing your Agentic AI assessment	Admins
Improve the gaps for implementation by using the hyperlinks found in the assessments to fix issues. Direct hyperlinks to records and tables make it easier to validate, investigate, or act without switching contexts.	Reviewing your AI assessment and Reviewing your Agentic AI assessment	Admins
Receive an estimated remediation effort of development work days to fix issues before implementation.	Reviewing your AI assessment and Reviewing your Agentic AI assessment	Admins

What to explore next

To learn more about configuring and using the Now Assist Readiness Evaluation app, see:

- Configuring AI Readiness Evaluation
- Using AI Readiness Evaluation

Configuring AI Readiness Evaluation

Run the scheduled jobs and complete the AI Readiness Evaluation guided setup configuration steps before viewing the generative AI and agentic AI assessment results.

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Important: The AI Readiness Evaluation store application is being prepared for deprecation. The readiness assessment capability is now available as a native in-platform feature within the AI Admin Center application. For more information, see AI Admin Center (formerly Now Assist Center).

Configuration overview

Before configuring the AI Readiness Evaluation app, confirm that it is installed. Navigate to **All** > **System Definition** > **Plugins**, and search for either the app name, `AI Readiness Evaluation`, or app ID, `sn_assess`, to confirm.

1. Run the GenAI/AgenticAI Assessment scheduled job

   Run the GenAI/AgenticAI Assessment scheduled job so that agentic and generative AI assessment results populate in **Workspaces** > **AI Readiness Evaluation**.

2. Configure the AI Readiness Evaluation guided setup

   Complete the configuration for the five AI jobs. Additional configuration is required to work with the ServiceNow Otto for HRSD assessment.

Run the GenAI/AgenticAI Assessment scheduled job

Before you can view the agentic AI or generative AI assessment results, you must first run the GenAI/AgenticAI Assessment scheduled job.

Important: The AI Readiness Evaluation store application is being prepared for deprecation. The readiness assessment capability is now available as a native in-platform feature within the AI Admin Center application. For more information, see AI Admin Center (formerly Now Assist Center).

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Set the Scheduled Jobs filter to `Application is AI Readiness Evaluation`, and then select **Run**.

   Tip: If the Application column isn't displayed in your ServiceNow instance, personalize the column settings using the Update Personalized List icon from the list header.

3. Select **GenAI/Agentic AI Assessment** from the Name column.
4. Select **Execute Now**.
   This action begins the scheduled job for the agentic and generative AI assessments found in **Workspaces** > **AI Readiness Evaluation**.

What to do next

If you must rerun all the scheduled jobs, or specifically, the agentic AI scheduled jobs for ITSM and CSM, repeat these steps.

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Note: You must complete the additional steps in the AI Readiness Evaluation guided setup if you want to work with the ServiceNow Otto for HRSD product. If you don't complete the additional guided setup steps for the ServiceNow Otto for HRSD product, the assessment continuously fails. For more information about completing the AI Readiness Evaluation guided setup, see Configure the AI Readiness Evaluation guided setup.

Run individual assessment scheduled jobs

Use individual scheduled jobs to assess readiness for generative and agentic AI implementations across your instance.

Before you begin

Important: The AI Readiness Evaluation store application is being prepared for deprecation. The readiness assessment capability is now available as a native in-platform feature within the AI Admin Center application. For more information, see AI Admin Center (formerly Now Assist Center).

Role required: admin

About this task

The ServiceNow AI Platform provides scheduled jobs that assess your instance readiness for generative and agentic AI. The following individual scheduled jobs are available:

- AI Assessment - Virtual Agent
- AI Assessment - ITSM
- AI Assessment - HRSD
- AI Assessment - CSM
- AI Assessment - AI Search
- AgenticAIHRSDAssessment
- AgenticAICSMAssessment
- agentic AI Assessment - ITSM - Change Request

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Filter the list by setting **Application** to `AI Readiness Evaluation`.
3. Select the job that you want to run.
4. Select **Execute Now**.

What to do next

Important:

For the Virtual Agent assessment to yield results, the following plugins must be active on your instance:

- Virtual Agent (com.glide.cs.chatbot)
- Catalog Conversational Coverage (sn_catalog_con_cov)

The Virtual Agent assessment requires the Catalog Conversational Coverage (sn_catalog_con_cov) plugin required for the assessment to run. For more information on Now Assist in Conversational Catalog Request, see AI in Conversational Catalog Request.

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Configure the AI Readiness Evaluation guided setup

Before you can review the Now Assist assessments in **Workspaces** > **AI Readiness Evaluation**, you must first complete the configuration for the five HRSD jobs.

Important: The AI Readiness Evaluation store application is being prepared for deprecation. The readiness assessment capability is now available as a native in-platform feature within the AI Admin Center application. For more information, see AI Admin Center (formerly Now Assist Center).

Before you begin

Before completing this guided setup, you must first run the generative AI and agentic AI scheduled jobs. For more information, see Run the GenAI/AgenticAI Assessment scheduled job.

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. In the search bar, search for `AI Readiness Evaluation`.
3. Select the Installed tab to view the installed store application **AI Readiness Evaluation** App id: sn_assess.
4. Select **AI Readiness Evaluation**.
5. In the Get started area, select **Configure**.
6. Review the Want to know how it works? screen, and then select **Continue**.
   You're redirected to the Agentic AI Assessment Guided Setup.

   Tip: You can also access the Agentic AI Assessment Guided Setup screen by navigating directly to **All** > **AI Readiness Evaluation** > **Guided Setup**.

   Three sections appear: Scheduled Jobs, Restricted Caller Access Privileges, and System Properties. The Restricted Caller Access Privileges and System Properties sections are only applicable if you want to work with ServiceNow Otto for HR Service Delivery (HRSD).
7. Select **Start** in the Scheduled Jobs section.
   You're redirected to the five scheduled generative AI jobs.

   Note: You're unable to run agentic AI scheduled jobs from this guided setup. To run agentic AI scheduled jobs, you must do so through the GenAI/AgenticAI Assessment scheduled job. For more information on running the agentic AI scheduled job, see Run the GenAI/AgenticAI Assessment scheduled job.
8. Select the link to the specific scheduled job to have that job open in a new browser tab.
   For example, if you select the Now Assist Assessment - AI Search link, that scheduled job appears in a new browser tab.
9. Select **Execute Now** to begin that job.
   The job begins and you're redirected back to the guided setup.
10. Select **Next** in the guided setup.
11. Repeat steps 8-10 until you have run the scheduled jobs for the five assessments.
    You have completed the assessment jobs. If you ran the HRSD job, continue to the following optional steps.
12. **Optional:** If you have run the job for HRSD, select the **Change The State to Allowed for the following records** link on the Restricted Caller Access Privileges screen.

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Note: The following sub-steps can only be completed when in the Human Resources: Core application scope. For more information on changing application scopes, see Select an application from the application picker.

a. Change the Status column from `Requested` to `Allowed` on the Restricted Caller Access Privileges table, and then go back to the guided setup.

b. Select **Next** on the Restricted Caller Access Privileges screen.

c. Select the **Configure System Properties** link on the System Properties screen to review the system properties.

d. Select **Mark Complete**.

13. Select **Close**.

Result

You have completed configuration for the assessments.

What to do next

You can navigate to **Workspaces** > **AI Readiness Evaluation** to review your assessment results.

Using AI Readiness Evaluation

The AI Readiness Evaluation app helps you find actionable items in your implementation preparation and provides direct hyperlinks to improve upon those gaps.

Important: The AI Readiness Evaluation store application is being prepared for deprecation. The readiness assessment capability is now available as a native in-platform feature within the AI Admin Center application. For more information, see AI Admin Center (formerly Now Assist Center).

Overview of AI Readiness Evaluation

Use the AI Readiness Evaluation app to help you prepare to launch generative AI, agentic AI, or both for your organization. The following list is a high-level overview of the documentation topics in this section that you can refer to on how to use and interpret the AI Readiness Evaluation results.

- Using AI Readiness Evaluation dashboard

  View an overall dashboard of your assessments' findings divided up into percentages and bar chart visuals.

- Assessing readiness status

  View an overall dashboard of readiness and issue categorization before implementing AI.

- Reviewing your AI assessment

  View the AI assessment report results for the five available products.

- Reviewing your Agentic AI assessment

  View the agentic AI assessment report results for IT Service Management (ITSM) and Customer Service Management (CSM).

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Using AI Readiness Evaluation dashboard

The AI Readiness Evaluation dashboard comes with two dashboard tabs: **Agentic AI - Assessment** and **AI Assessment**.

Important: The AI Readiness Evaluation store application is being prepared for deprecation. The readiness assessment capability is now available as a native in-platform feature within the AI Admin Center application. For more information, see AI Admin Center (formerly Now Assist Center).

Navigate to **Workspaces** > **AI Readiness Evaluation** to access the AI Readiness Evaluation dashboard. The AI Readiness Evaluation dashboard is the first tab you see.

The AI Readiness Evaluation dashboard is a powerful product feature that accelerates generative and agentic AI readiness by delivering automated, data-driven insights.

Note: The **Remediation properties** tab may also appear on the AI Readiness Evaluation dashboard. This tab only appears if the *sn_assess.effort_visibility* system property is set to true. For more information about this system property, see AI Readiness Evaluation system properties.

After reviewing the dashboard and making the suggested assessment changes, rerun your scheduled jobs to see how your results improve.

Agentic AI - Assessment dashboard tab

The AI Readiness Evaluation dashboard's **Agentic AO AI - Assessment** tab helps determine agentic AI readiness for IT Service Management (ITSM) and Customer Service Management (CSM) by delivering automated, data-driven insights.

Note: For results to appear in this dashboard, confirm that you have completed the configuration steps first. For more information on configuration, see Configuring AI Readiness Evaluation.

The following list describes details of the **agentic AI - Assessment** dashboard tab.

Total Estimated Effort (Days)

This area of the dashboard shows the total estimated work effort in development days.

Remediation Effort by Category

This area of the dashboard shows the estimated work effort needed to correct the findings for each product, depending on the findings category, in a bar chart.

Estimated Effort- Trends

This area of the dashboard shows the trends over time in a bar chart for each products' estimated work effort.

Assessment Findings

This area of the dashboard shows the number of assessment items that need attention.

Findings by Category

This area of the dashboard shows the percentage of each assessment finding category for each product in a bar chart.

Finding Trends

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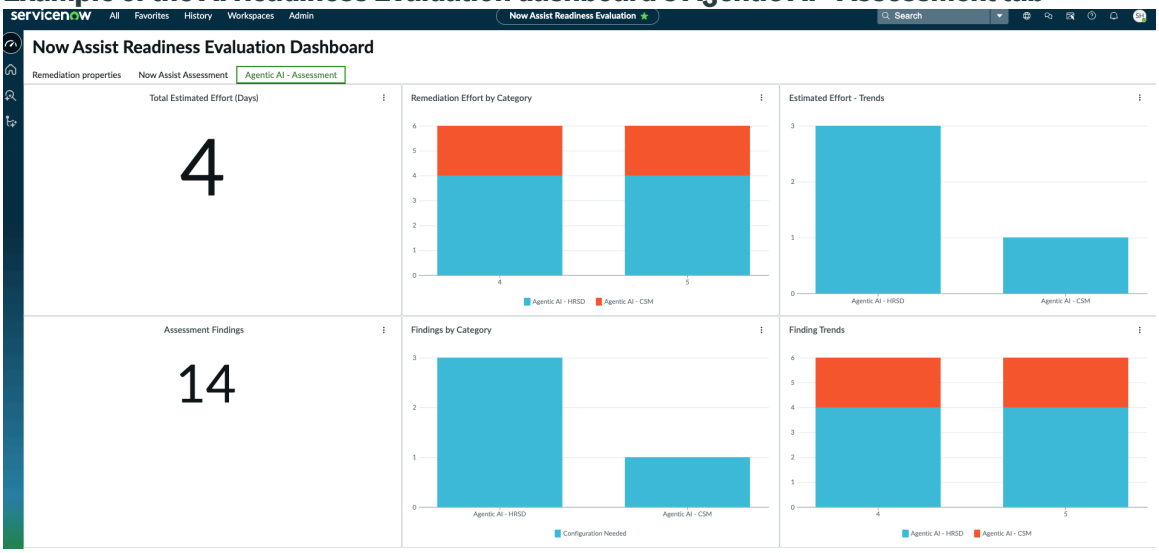
This area of the dashboard shows the trends over time in a bar chart for the products that need the most attention before implementation.

You can select each widget on the dashboard to have that table data open in a separate tab.

Example of the AI Readiness Evaluation dashboard's Agentic AI - Assessment tab



Note: This tab displays the Total Estimated Effort (Days), Remediation Effort by Category, and Estimated Effort – Trends cards when the *sn_assess.effort_visibility* system property is set to `true`. For more information, see AI Readiness Evaluation system properties.

AI Assessment dashboard tab

The AI Readiness Evaluation dashboard's AI Assessment dashboard tab helps determine generative AI readiness by delivering automated, data-driven insights.

Note: For results to appear in this dashboard, verify that you have completed the configuration steps first. For more information on configuration, see Configuring AI Readiness Evaluation.

The following list describes details of the AI Assessment dashboard tab.

Total Estimated Effort (Days)

This area of the dashboard shows the total estimated work effort in development days.

Remediation Effort by Category

This area of the dashboard shows the estimated work effort needed to correct the findings for each product, depending on the findings category, in a bar chart.

Estimated Effort- Trends

This area of the dashboard shows the trends over time in a bar chart for each products' estimated work effort.

Assessment Findings

This area of the dashboard shows the number of assessment items that need attention.

Findings by Category

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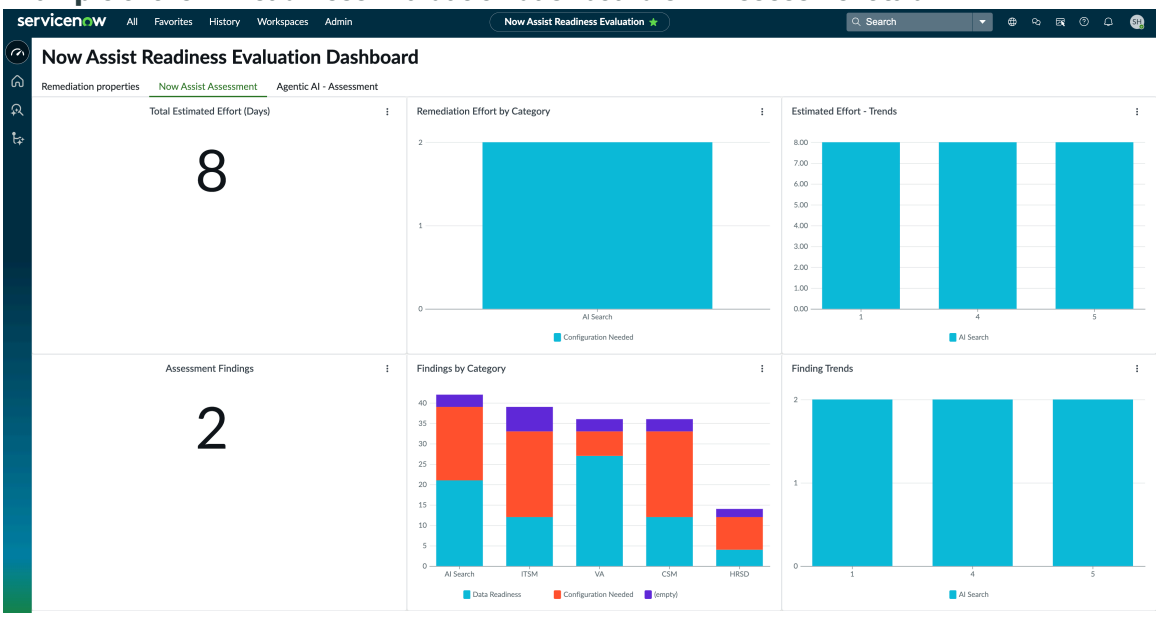
This area of the dashboard shows the percentage of each assessment finding category for each product in a bar chart.

Finding Trends

This area of the dashboard shows the trends over time in a bar chart for the products that need the most attention before implementation.

You can select each widget on the dashboard to have that table data open in a separate tab.

Example of the AI Readiness Evaluation dashboard's AI Assessment tab



Note: This tab displays the Total Estimated Effort (Days), Remediation Effort by Category, and Estimated Effort – Trends cards when the *sn_assess.effort_visibility* system property is set to **true**. For more information, see AI Readiness Evaluation system properties.

Assessing readiness status

The AI Readiness Evaluation app shows you a high-level overview of your go or no-go status for your organization's readiness to implement agentic AI, generative AI, or both.

Important: The AI Readiness Evaluation store application is being prepared for deprecation. The readiness assessment capability is now available as a native in-platform feature within the AI Admin Center application. For more information, see AI Admin Center (formerly Now Assist Center).

Navigate to **Workspaces** > **AI Readiness Evaluation** and select the Home icon to review your assessments' home page.

An overall ready or action-required status is determined by percentage rules. A green **Ready** button appears if over 75% of your instance is ready to implement agentic AI, generative AI, or both.A yellow **Action Required** button appears if 75% or less of your instance is determined to be ready to implement agentic AI, generative AI, or both. Each finding is broken down and automatically tagged as a product, data, or configuration issue. Having issues categorized lets you know whether you should open a Now Support case, cleanse data, or adjust platform settings.

The AI Assessment Home Page tab details the Ready or Action Required for agentic AI in ITSM and CSM.

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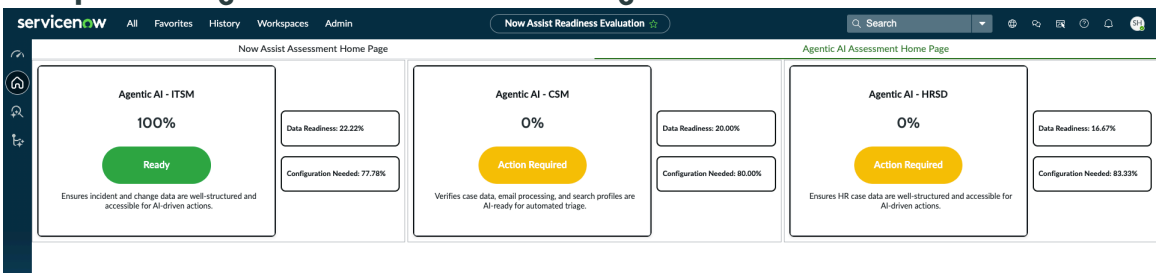
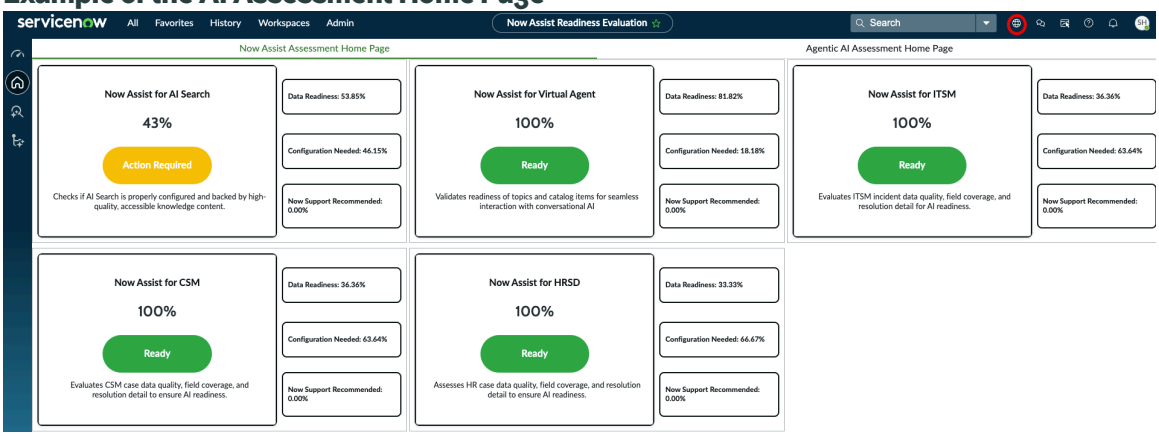
Example of the Agentic AI Assessment Home Page



The AI Assessment Home Page tab details the go or no-go status for AI products and features, including:

- ServiceNow Otto for AI Search
- ServiceNow Otto for Virtual Agent
- ServiceNow Otto for IT Service Management (ITSM)
- ServiceNow Otto for Customer Service Management (CSM)
- ServiceNow Otto for HR Service Delivery (HRSD)

Example of the AI Assessment Home Page



Select the assessment feature's tile on the home page to be redirected to that assessment tab's report results.

To impact these percentages, rerun your scheduled jobs after making your suggested assessment fixes.

Reviewing your AI assessment

This automated assessment process evaluates potential implementation impacts and provides actionable insights for your AI products.

Important: The AI Readiness Evaluation store application is being prepared for deprecation. The readiness assessment capability is now available as a native in-platform feature within the AI Admin Center application. For more information, see AI Admin Center (formerly Now Assist Center).

Navigate to **Workspaces** > **AI Readiness Evaluation** and select the assessment icon to review your AI assessment.

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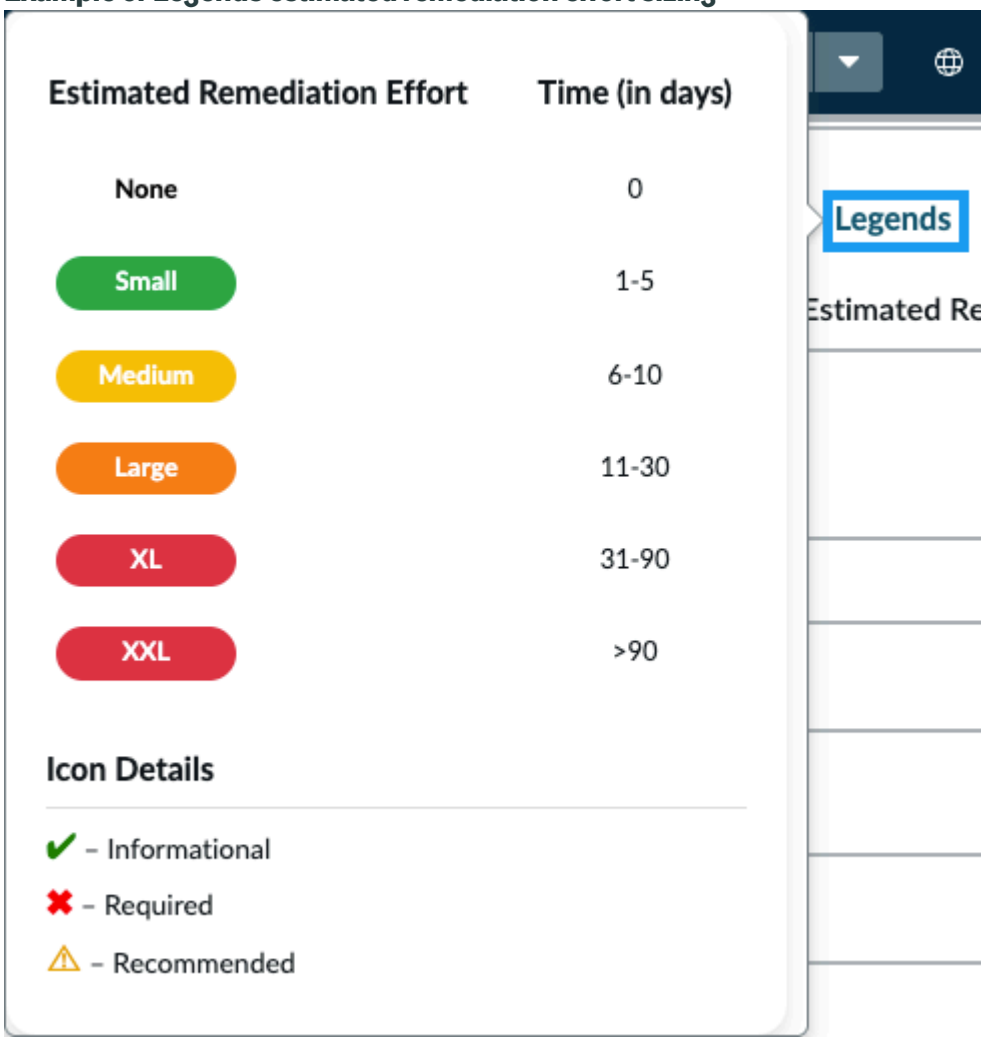
Note: Before viewing your AI assessments, you must first have run the scheduled jobs to get the assessment results. If you haven't run your scheduled jobs, you are prompted to do so on an individual job level. For more information on running scheduled jobs, see Run the GenAI/AgenticAI Assessment scheduled job and Configure the AI Readiness Evaluation guided setup.

The summary tab provides a consolidated summary of features, including AI capabilities across AI Search, Virtual Agent (VA), IT Service Management (ITSM), Customer Service Management (CSM), and HR Service Delivery (HRSD), as well as their corresponding estimated remediation efforts. The results shown are estimates. You should evaluate results provided by AI Readiness Evaluation for accuracy and appropriateness for your use case.

To understand the estimated remediation effort, select the **Legends** button. The legend shows the estimated remediation effort using sizing verbiage and colors, along with an estimated timeline of remediation in development days. The legend also includes descriptions of the icons found next to the assessment questions.

Example of Legends estimated remediation effort sizing



After reviewing the summary, select the individual assessment links to be redirected to that specific assessment in a new browser tab. The questions for each AI assessment differs. For example, the questions and answers on the ServiceNow Otto for AI Search assessment are different than the questions and answers on the ServiceNow Otto for Virtual Agent assessment.

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Note: The assessments gather information from tables. To view any of the tables' available questions, answers, assessments, or assessment run successes or failures, search for the applicable table in the navigation filter:

- Questions [sn_assess_question] table
- Answers [sn_assess_answer] table
- Assessment [sn_assess_assessment] table
- Assessment Run [sn_assess_assessment_run] table

For more information about how to search for tables in the navigation filter, see Navigate directly to a table.

The assessments include visual indicators to guide you on non-blocker and blocker results. The following list details the descriptions of the assessment's visual indicators:

- ✓: Informational area and no further action needed.
- ✗: Further action is needed to resolve findings before implementation. These required areas include estimated remediation efforts.
- ⚠: Recommended area warning, but the finding should be evaluated before implementation. These recommendations are observations that should be reviewed prior to implementation but no estimated remediation effort is provided.

You can select **Download Report** to export the entire assessment report in PDF format from the Summary tab. The exported report still includes hyperlinks to the specific individual assessments. Selecting **Download Report** on an individual assessment downloads only that report in PDF format. After selecting a hyperlink in the PDF, that record or table opens in a separate browser tab.

Note: You don't have to select **Download Report** to work directly with the problematic records or tables found in the assessment. Each assessment includes hyperlinks to the records or tables that need attention. Selecting a hyperlink opens the record or table in a separate browser tab.

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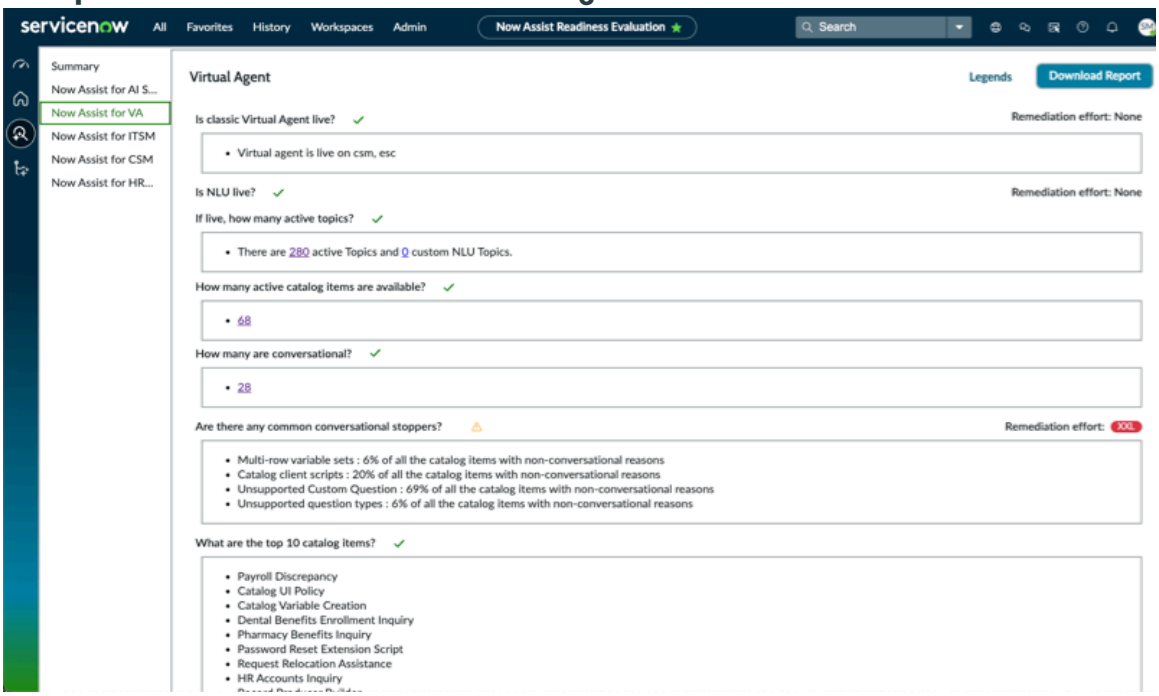
Example of the ServiceNow Otto for Virtual Agent assessment



After reviewing the assessment and making the suggested assessment changes, rerun your scheduled jobs to see how your results improve. For more information on rerunning a specific job or all jobs, see Run the GenAI/AgenticAI Assessment scheduled job.

Reviewing your Agentic AI assessment

This automated assessment process evaluates potential implementation impacts and provides actionable insights for agentic AI in ServiceNow Otto for IT Service Management (ITSM) and ServiceNow Otto for Customer Service Management (CSM).

Important: The AI Readiness Evaluation store application is being prepared for deprecation. The readiness assessment capability is now available as a native in-platform feature within the AI Admin Center application. For more information, see AI Admin Center (formerly Now Assist Center).

Navigate to **Workspaces** > **AI Readiness Evaluation** and select the agentic AI assessment icon to review your agentic AI assessment.

Note: Before viewing your agentic AI assessments, you must first have run the scheduled job to get the assessment results. If you haven't run your scheduled jobs, you are prompted to do so on an individual job level. For more information on running scheduled jobs, see Run the GenAI/AgenticAI Assessment scheduled job.

The summary tab provides a consolidated summary of overall findings along with summarization and resolution notes for ITSM and CSM. The results shown are estimates. You should evaluate results provided by AI Readiness Evaluation for accuracy and appropriateness for your use case.

To better understand the estimated remediation effort, select the **Legends** button. The legend shows the estimated remediation effort using sizing verbiage and colors, along with an estimated timeline of remediation in development days. The legend also includes descriptions of the icons found next to the assessment questions.

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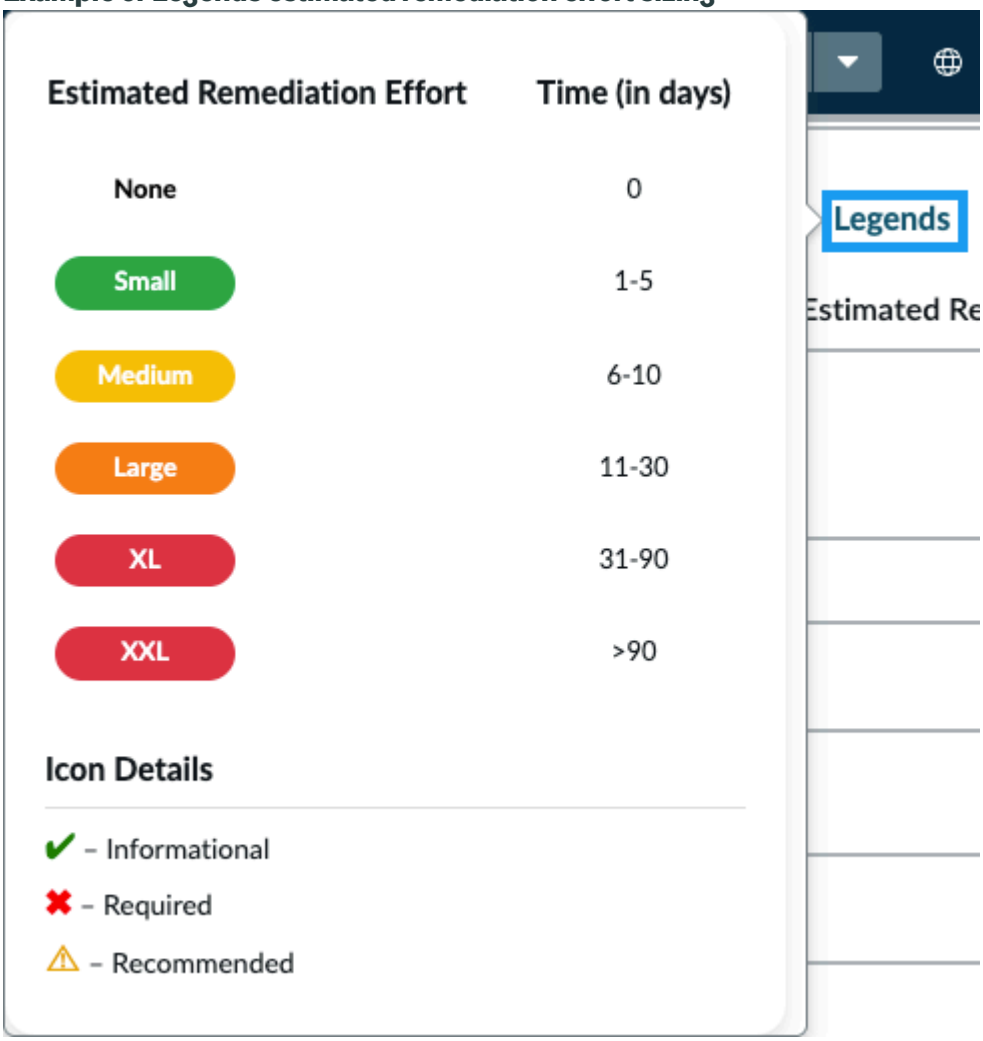
Example of Legends estimated remediation effort sizing



After reviewing the summary, select the individual assessment tabs to review those specific assessments. The questions for each assessment differ. For example, the questions and answers on the **Agentic AI - ITSM** assessment are different than the questions and answers on the **Agentic AI - CSM** assessment.

Note: The assessments gather information from tables. To view any of the tables' available questions, answers, assessments, or assessment run successes or failures, search for the applicable table in the navigation filter:

- Questions [sn_assess_question] table
- Answers [sn_assess_answer] table
- Assessment [sn_assess_assessment] table
- Assessment Run [sn_assess_assessment_run] table

For more information about how to search for tables in the navigation filter, see Navigate directly to a table.

The assessments include visual indicators to guide you on non-blocker and blocker results. The following list details the descriptions of the assessment's visual indicators:

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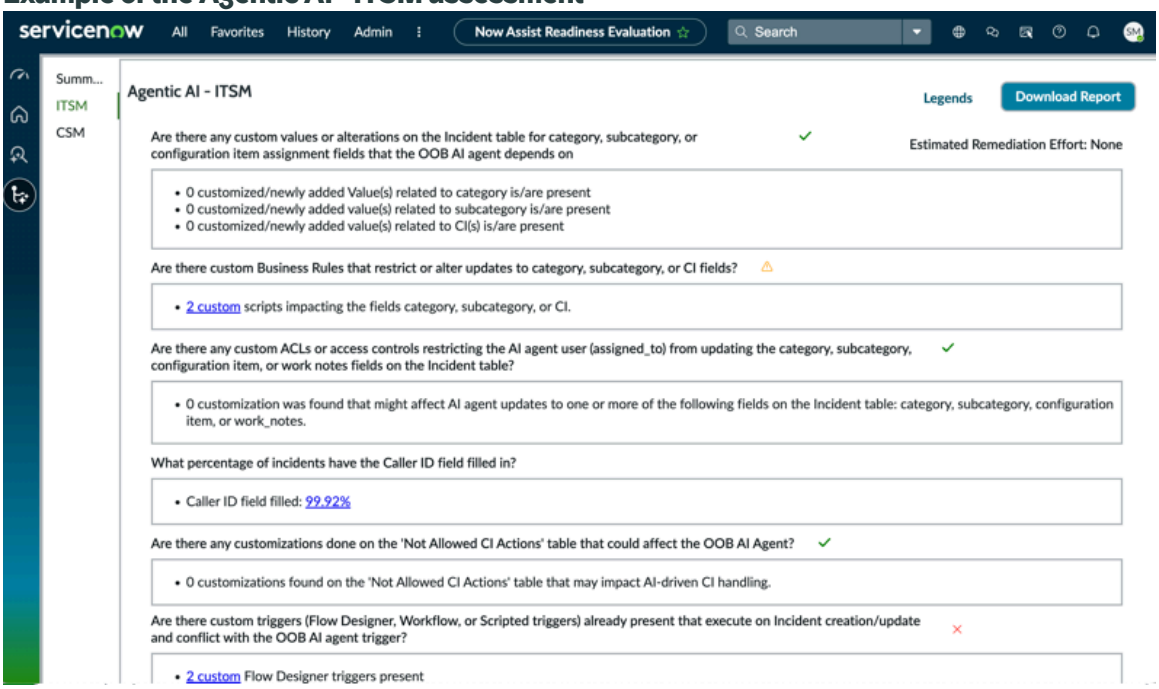
- ✓: Informational area and no further action needed.
- ✗: Further action is needed to resolve findings before implementation. These required areas include estimated remediation efforts.
- ⚠: Recommended area warning, but the finding should be evaluated before implementation. These recommendations are observations that should be reviewed prior to implementation but no estimated remediation effort is provided.

You can select **Download Report** to export the entire agentic assessment report in PDF format from the Summary tab. The exported report still includes hyperlinks to the specific individual assessments. Selecting **Download Report** on an individual assessment downloads only that report in PDF format. After selecting a hyperlink in the PDF, that record or table opens in a separate browser tab.

Note: You don't have to select **Download Report** to work directly with the problematic records or tables found in the assessment. Each assessment includes hyperlinks to the records or tables that need attention. Selecting a hyperlink opens the record or table in a separate browser tab.

Example of the Agentic AI - ITSM assessment



After reviewing the assessment and making the suggested assessment changes, rerun your scheduled jobs to see how your results improve. For more information on rerunning a specific job or all jobs, see Run the GenAI/AgenticAI Assessment scheduled job.

AI Readiness Evaluation reference

AI Readiness Evaluation admins and implementers can work with select system properties for additional customization.

Important: The AI Readiness Evaluation store application is being prepared for deprecation. The readiness assessment capability is now available as a native in-platform feature within the AI Admin Center application. For more information, see AI Admin Center (formerly Now Assist Center).

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AI Readiness Evaluation system properties

Use system properties to customize your readiness assessment results. Access these properties from the System Property [sys_properties] table.

Important: The AI Readiness Evaluation store application is being prepared for deprecation. The readiness assessment capability is now available as a native in-platform feature within the AI Admin Center application. For more information, see AI Admin Center (formerly Now Assist Center).

AI Readiness Evaluation system properties

Property	Description
sn_assess.assessment_limit	Reduce performance issues when a large volume of data is assessed. Adjust this system property, if needed, so that the job can run successfully. The default value is 10000.
sn_assess.effort_visibility	Control whether remediation effort estimates appear on the AI Readiness Evaluation.The default value is false. When this system property is set to **true**, both assessment tabs display effort cards and finding cards. The **Remediation properties** tab appears on the dashboard where you can customize estimated remediation efforts. All input values represent estimated remediation efforts in days. After making changes to the estimated remediation efforts, select **Save**, and then re-run the assessments to see the updated remediation efforts reflected.
sn_assess.va	Enables or disables the scheduled job for the AI Assessment - Virtual Agent. Set to **true** to enable, or **false** to disable. The default value is true. If set to **false**, the scheduled job will not run and no Virtual Agent assessment data will be generated. For the Virtual Agent assessment to run, the following prerequisites must all be met: • Virtual Agent (com.glide.cs.chatbot) must be enabled on the instance. • Catalog Conversational Coverage (sn_catalog_con_cov) must be active. This plugin is installed with ServiceNow Otto for Conversational Catalog Request (sn_now_assist_cr), which is included with ServiceNow Otto for Platform (sn_genai_platform).
sn_assess.itsm	Enables or disables the scheduled job for the AI Assessment - ITSM. The default value is true. If set to **false**, the scheduled job will

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AI Readiness Evaluation system properties (continued)

Property	Description
	not run and no ITSM assessment data will be generated.
sn_assess.csm	Enables or disables the scheduled job for the AI Assessment - CSM. The default value is true. If set to **false**, the scheduled job will not run and no CSM assessment data will be generated.
sn_assess.hrsd	Enables or disables the scheduled job for the AI Assessment - HRSD. The default value is true. If set to **false** the scheduled job will not run and no HRSD assessment data will be generated.
sn_assess.ai_search	Enables or disables the scheduled job for the AI Assessment - AI Search. The default value is true. If set to **false**, the scheduled job will not run and no AI Search assessment data will be generated.
sn_assess.Threshold	Defines the percentage threshold used to evaluate assessment results on the AI Readiness Evaluation home page, determining whether the status is displayed as *Good* or *Action Required*. The default value is 75% for all modules (ITSM, AI Search, CSM, Virtual Agent, and HRSD). If not set correctly, status indicators may be inaccurate.
sn_assess.TShirtMetric	Assigns numeric effort values to specific issue types and customizations, which power the remediation effort calculations displayed throughout the application. The default value is a JSON configuration. If modified, effort calculations will reflect updated values after the next assessment run. Review sn_assess.TShirtSize at the same time — if the two are out of sync, displayed effort estimates can may be inconsistent. If this property is not set, the system can't calculate remediation effort.
sn_assess.TShirtSize	Maps T-shirt size labels to effort in days. The default values are: *Small = 5 days*, *Medium = 10 days*, *Large = 30 days*, *XL = 90 days*, and *XXL = 180 days*. These mappings appear in effort pills and the Legends in the AI

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AI Readiness Evaluation system properties (continued)

Property	Description
	Readiness Evaluation dashboard. Review sn_assess.TShirtMetric at the same time when customizing. If not set correctly, effort pills will not display accurate effort in days and the Legends may show incorrect or missing information.
sn_assess.task_limit	Decides the maximum number of records to process for the ITSM assessment. The default value is 50. Be cautious about setting a higher limit or leaving the value empty because that would fetch all active records which could impact performance.

Data readiness for implementing AI on the ServiceNow AI Platform

High-quality data that is complete, accurate, and contextually relevant is the foundation for delivering precise, meaningful, and trustworthy AI responses.

AI requires high-quality data

To unlock the full potential of AI on your instance, the quality of your data is paramount. For AI to deliver accurate, context-aware, and actionable outputs, it must be trained and operate on high-quality data that is complete, consistent, and structured. When your data is well-prepared, AI can process user queries with greater accuracy, enabling faster resolutions and more effective self-service experiences.

Whether it's summarizing complex incidents, generating resolution notes, or creating knowledge articles, AI requires detailed records that reflect the full lifecycle of a task. Short or incomplete cases often lack the depth needed for meaningful AI processing, which can result in vague or unhelpful responses. The importance of data readiness extends beyond technical accuracy—it directly impacts user trust and adoption.

Clean, ready data also accelerates implementation. It minimizes the need for rework, reduces deployment friction, and helps AI features like summarization, recommendations, and workflow guidance operate reliably from the start. This leads to more consistent outcomes, helping teams focus on strategic tasks.

Moreover, high-quality data fosters trust in AI outputs. When users consistently receive reliable and context-aware responses, their confidence in the system grows—driving adoption. Ultimately, data quality supports user satisfaction and AI performance.

Follow these tips to assess your organization's data readiness:

- Audit task records for completeness and clarity, and ensure resolution fields are consistently filled out with clear summaries.
- Avoid using vague or generic language in task descriptions and updates.
- Maintain a clean and structured knowledge base and ensure that knowledge articles are linked to resolved cases.

  For details, see Knowledge Base readiness for AI on the ServiceNow AI Platform.

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- Audit Service Catalog items.

  For details, see Service Catalog readiness for AI on the ServiceNow AI Platform.

- Use the AI Readiness Evaluation app to assess catalog, case, and knowledge data.
- Use the AI Data Kit to curate and cleanse data sources.
- Align stakeholders (data owners, product managers, and engineers) around shared standards for AI-ready data.

  For details, see AI governance on the ServiceNow AI Platform.

For more information, see Data Readiness Checklist.

AI Readiness Evaluation app

Data readiness assessments can be time-consuming and manual, especially when evaluating whether catalog items are conversational or if knowledge articles are embedded in inaccessible formats like PDFs. The AI Readiness Evaluation app helps automate this process by analyzing service catalog entries, cases, and incidents, and then providing actionable recommendations to prepare data for AI use. It also enables you to assess whether updates, installations, or customizations of your instance could affect implementation. The assessments provide direct hyperlinks to improve any issues found.

For more information, see AI Readiness Evaluation.

Install AI Readiness Evaluation by requesting it from the ServiceNow Store. Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

AI Data Kit

If the base system generative AI skills don't fit your needs, use the AI Data Kit to curate, cleanse, and manage data for AI evaluations. You can create custom datasets and data collections that can be used in AI Skill Kit for evaluation. For more information, see AI Data Kit.

Application readiness for AI on the ServiceNow AI Platform

ServiceNow Otto uses the ServiceNow AI Platform to deliver AI solutions. Ensure that your instance is ready to use AI capabilities by preparing Platform applications, such as Service Catalog and AI Search.

Installing a product such as ServiceNow Otto for IT Service Management (ITSM) gives you access to AI capabilities in Platform applications and capabilities specific to your product workflow. Ensure that the appropriate Platform applications are ready for AI. To prepare your instance, review the following topics:

- Knowledge Base readiness for AI on the ServiceNow AI Platform
- Service Catalog readiness for AI on the ServiceNow AI Platform
- AI Search readiness for AI on the ServiceNow AI Platform
- ServiceNow Otto for Virtual Agent readiness on the ServiceNow AI Platform

After ensuring that your AI policy, your data, and your applications are ready, you can implement AI.

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1. Ensure entitlement for at least one ServiceNow Otto application. For a list of available applications, see Exploring AI Admin Hub.

   Note: Some ServiceNow Otto products may require other entitlements.

2. In the ServiceNow Store, check version compatibilities and dependencies for ServiceNow Otto apps.

   For more information, see Evaluating version requirements and dependencies.

3. Install ServiceNow Otto products from the AI Admin Hub console.

   For more information, see Install plugins for ServiceNow Otto.

Customization and AI

Customizing your ServiceNow instance is often necessary to meet unique business needs, but it can introduce unintended consequences for AI features. Changes to field names, UI actions, workflows, or table structures may disrupt how generative AI skills and agents operate. For example, modifying field states or labels can interfere with skill conditions and input mapping, while altering default UI actions may prevent agents from triggering correctly. Custom resolution workflows might conflict with the logic embedded in native skills, and table-level variations can affect where and how ServiceNow Otto functions across workflows. These customizations can also create upgrade friction, requiring additional testing, rework, or reconfiguration to confirm compatibility with new platform releases.

To mitigate these risks, you can use tools like the AI Readiness Evaluation app to identify high-impact customizations and plan for remediation before deploying or upgrading AI features. For more information, see AI Readiness Evaluation.

To maintain compatibility with ServiceNow Otto while accommodating custom configurations, several mitigation strategies are available:

- Duplicate skills before adapting them.
- Adjust skill inputs and role conditions to reflect organizational processes.
- Add input sources, such as related tables or emails.

For more advanced needs, build custom generative AI skills tailored to your unique business requirements, enabling deeper integration without compromising core functionality.

For more information about customizing AI solutions, see How to approach building custom generative AI solutions using Now Assist in the ServiceNow Community.

Knowledge Base readiness for AI on the ServiceNow AI Platform

The knowledge base enables ServiceNow Otto to deliver intelligent, accurate, and context-aware responses across AI Search, Q&A Genius Results, and other AI-powered experiences.

When users ask questions, ServiceNow Otto searches your knowledge articles to generate answers that reflect your organization's expertise and policies. This means the quality, clarity, and structure of your knowledge content directly influence the effectiveness of AI responses. Outdated, inconsistent, or poorly written articles can lead to incorrect outputs and user frustration. That's why maintaining a clean, well-organized knowledge base is critical—not just for documentation, but for enabling reliable AI performance.

The Knowledge Management Overview dashboard helps assess AI readiness. It provides key usage metrics such as article views, helpfulness ratings, and feedback trends, helping content

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owners identify high-performing articles and prioritize updates to low-usage or outdated content. For more information, see Knowledge Management Overview dashboard.

High-level checklist

1. Review existing KB articles and knowledge bases

Get the total count of published KB articles and the number of active knowledge bases.

Why? To scope clean-up and identify high-priority content.

See: Knowledge Management Overview dashboard

2. Review the structural formatting of KB articles

Check for consistent template use (KCS-based, Q&A, Issue-Cause-Resolution, etc.). Verify that the Knowledge Management Advanced plugin is active.

If you're using custom templates, determine whether they follow a consistent format. Also ensure that key steps are clearly defined and consistently populated.

Why? Using templates consistently improves LLM understanding and summarization.

See:

- Knowledge article templates
- Activate the Knowledge Management Advanced plugin

3. Ensure metadata completeness in KB articles

Make sure that fields such as **Meta**, **Meta Description**, **Category**, **Author**, and **Validity** are populated.

Why? This practice enables precise AI filtering and targeting.

See:

- Create a knowledge article
- Knowledge article guidelines for generative AI (ServiceNow Community)

4. Perform maintenance audits

Flag KB articles that have not been updated in a year or more, that have no metadata, are duplicates, or are about to expire.

Why? Outdated content degrades user trust and AI performance.

See:

- Knowledge Management Overview dashboard
- Retire a knowledge article
- Identify and review duplicate Knowledge articles (requires ServiceNow Otto for Knowledge Management)

5. Review top searched queries

Identify search queries and articles for optimization, and limit Now Assist Q&A functionality to high-quality, optimized KB articles.

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Why? This prevents low-value content from surfacing in answers.

See: Knowledge Management dashboard

Service Catalog readiness for AI on the ServiceNow AI Platform

A well-structured Service Catalog is essential to supporting AI capabilities. As the backbone of many self-service workflows, the catalog enables ServiceNow Otto to interpret user requests accurately, present the right options, and reduce complexity for users.

When catalog items are clearly defined and conversationally enabled, ServiceNow Otto for Virtual Agent can surface them more effectively, which can increase self-service rates and reduce escalations.

However, catalogs that are cluttered, inconsistent, or overly complex make it difficult for AI to parse and respond appropriately. That's why auditing your existing catalog is a critical first step. By identifying which items are AI-ready and optimizing those that aren't, you confirm that ServiceNow Otto can deliver intelligent, context-aware responses.

High-level checklist

1. Activate the Catalog Conversational Coverage (sn_catalog_con_cov) plugin

This plugin gives you access to the conversational catalog overview dashboard.

See: Install an application or plugin

2. Review your catalog inventory

Use the conversational catalog overview dashboard to review all active catalog items. From this list, determine which are most requested and the percentage that are conversational.

Why? To focus improvement efforts on the catalog items with the highest impact.

See:

- Catalog Conversational Coverage
- Conversational catalog overview dashboard

3. Determine which catalogs can be made conversational

Identify catalog items with fewer than 15 variables. (Items with more than 15 variables are better suited to be submitted as pop-up links to forms.)

> **Note:** Conversational catalog items require ServiceNow Otto for Virtual Agent. For details, see ServiceNow Otto for Virtual Agent readiness on the ServiceNow AI Platform.

Why? These are easier to convert and provide early AI improvements.

See: Service catalog variables

4. Analyze catalog item metadata

Ensure catalog items have clear, user-friendly names, tooltips, metadata, and categories. Using templates can help with this as well.

Why? This prevents large language model (LLM) misinterpretation and improves conversational flow.

See:

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- Service Catalog properties
- Edit a catalog item in Catalog Builder
- Create a catalog item using a template

5. Review advanced configurations

Review UI policies, client scripts, and user criteria.

Why? User criteria determines who can request an item, but policies and scripts are not processed by Virtual Agent.

See:

- Service catalog UI policy
- Set security for items and categories
- Create a user criteria record in Service Catalog
- Create a Service Catalog client script

Tips

- Use ServiceNow Otto for Catalog Builder to generate catalog items.
- Limit the number of variables. Fewer variables improve conversational accuracy.
- For form-based requests, select the Make item non-conversational in VA check box.
- Provide clear context for the LLM with distinct names, labels, and tooltips.
- Minimize the use of custom variable types. Use the service catalog variables included on the platform instead.
- Limit client-side scripting and use regular expressions for validation.
- Avoid complex dependencies. Simplify variable relationships to ensure a smooth conversation flow.
- Test and iterate: make changes based on feedback.

For more information about conversational catalogs in AI, see the following ServiceNow Community articles:

- Guidance for making catalog items conversational
- How to request catalog items in ServiceNow Otto for Virtual Agent

AI Search readiness for AI on the ServiceNow AI Platform

ServiceNow Otto for AI Search is built directly on the foundation of ServiceNow® AI Search. AI Search provides the underlying infrastructure that enables ServiceNow Otto to retrieve and rank enterprise content—such as knowledge articles, records, and documentation—based on relevance and access permissions.

Because AI Search adheres to ServiceNow security models, responses are grounded in content the user is authorized to access. Additionally, AI Search admin tools give you control over relevancy tuning, allowing you to refine how content is surfaced and verify that ServiceNow Otto delivers relevant results.

Every AI-generated answer includes citations and references, allowing users to see exactly where the information came from. Citations and references let users verify the source of information, helping to ground outputs in your organization's actual content.

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Activate AI Search before implementing AI more broadly. After activation, it powers actionable Q&A through Genius Results cards in global search, Service Portal, Employee Center, and Virtual Agent.

High-level checklist

1. Verify AI Search status

Verify that AI Search is active on your instance. To check status, navigate to **All** > **AI Search** > **AI Search Status**. If AI Search is not active, select the **Request AI Search** button to initiate activation.

See:

- Configuring AI Search
- Enable AI Search in supported ServiceNow AI Platform® applications

2. Review search sources

Configure search sources to determine what data will be searched by user queries.

See:

- Control access to searchable content using search sources
- Create a search source for AI Search

3. Configure search sources for external content

Enables Q&A search to include external content.

See:

- Indexing and searching external content in AI Search
- Create an indexed source
- Configuring External Content Connectors

4. Enable AI Search on one or more portals

Display AI Search results in the portals on your instance.

See:

- Search application configurations
- Enabling and configuring AI Search in ServiceNow AI Platform® applications

5. Install ServiceNow Otto for AI Search

Install a ServiceNow Otto product in the AI Admin Hub console.

See: Install ServiceNow Otto for AI Search

6. Enable Q&A Genius Results in AI Search portals

Specify the Genius Result types you want to make available in each of your AI Search portals. Multi-Content Response Genius Results use an LLM to generate search and chat responses that synthesize information from knowledge articles, Service Catalog items, and other available content types. Answers are presented in Q&A format.

See:

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- Enable ServiceNow Otto for AI Search Genius Results in AI Search portals and mobile applications
- Knowledge base articles Genius Results

7. Verify AI Search widget customizations

Customized AI Search widgets may not correctly show Q&A search results even when configured for ServiceNow Otto, since customizations get skipped during upgrades.

See:

The ServiceNow AI Platform® offers a variety of search tools, which may return different answers for the same or similar searches. This disparity in results is expected. For more information, see Search result disparities between AI Search and ServiceNow Otto® search features.

For more information, see ServiceNow Otto for AI Search FAQ in ServiceNow Community.

ServiceNow Otto for Virtual Agent readiness on the ServiceNow AI Platform

ServiceNow Otto for Virtual Agent has AI-driven capabilities that interpret natural language, guide users through complex tasks, and deliver high-confidence answers without relying on rigid keyword matching or manual configurations.

ServiceNow Otto for Virtual Agent provides the following features:

- AI asset discovery

  ServiceNow Otto for Virtual Agent uses LLMs to automatically discover and match user intents to Virtual Agent topics and other AI assets, including generative AI skills, AI agents and agentic workflows, and subflows and actions.

- Simplified deployment

  Using LLM-powered Virtual Agent topics, teams can accelerate rollout and improve conversation quality.

- AI Search Genius Results

  Users receive curated, actionable responses via Genius cards, which contain summarized knowledge with direct actions such as **Request this item**.

- Conversational catalog ordering

  Users can request Service Catalog items using natural conversation. Virtual Agent asks clarifying questions and confirms the user's intent before completing the request.

  Note: Service Catalog items must be marked as conversational to work with Virtual Agent. For details, see Catalog item conversational details page overview.

- Multi-turn Q&A

  Follow-up questions are handled automatically, allowing users to refine their queries and get better answers.

Setting up Now Assist in Virtual Agent requires customizing or creating a new LLM assistant. You can assign an assistant to one or more portals. If LLM Virtual Agent topics aren't associated with an LLM assistant, they aren't discoverable.

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High-level checklist

1. Install ServiceNow Otto for Virtual Agent

You can install it from the Conversational Interfaces admin console after you install an AI product such as ServiceNow Otto for IT Service Management (ITSM).

To set up ServiceNow Otto for Virtual Agent, you configure an assistant.

See: Assistants overview

2. Review your Virtual Agent topic inventory

Review your topics and identify high-volume user queries. You can use Assistant Analytics to monitor, evaluate, and optimize the performance of your AI-powered assistants.

Why? This helps you identify the top self-solve opportunities in Virtual Agent.

See:

- (Legacy) Conversational Analytics dashboard in Platform Analytics experience
- Create an Automation Discovery report

3. Review your knowledge base

Identify KB articles that can self-serve any of the top intents you identified.

Why? This simplifies topic management and enables self-service.

See: Knowledge Base readiness for AI on the ServiceNow AI Platform

4. Migrate NLU topics to LLM

Use the topic migration tool in Virtual Agent to convert NLU topics to LLM.

Why? Use existing Virtual Agent topics with minimal effort.

See: Migrating NLU/keyword Virtual Agent topics to LLM topics

5. Review Service Catalog items

Identify self-serve catalog items that can be replaced with existing LLM topics.

Why? To avoid redundancy and eliminate the need to create new Virtual Agent topics.

See: Service Catalog readiness for AI on the ServiceNow AI Platform

6. Review LLM Virtual Agent topics

Use these LLM topics as a starting point for Virtual Agent topic creation.

Why? New LLM versions of older NLU Virtual Agent topics reduce rework.

See: ITSM Virtual Agent pre-built LLM topics

Tips

- When migrating legacy NLU topics, optimize topic descriptions so that the topic is clearly described and aligned with the intent and expected results.

  For details, see LLM description and instruction guidelines for Virtual Agent topics.

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- You can customize the look of your assistant and the chat experience during guided setup.

  For details, see Brand and personalize an assistant.

- You can choose the chat experience you want for each assistant:
  - Standard chat
  - Enhanced chat
  - Premium chat
- You can integrate ServiceNow Otto for Virtual Agent with Microsoft Teams.

  For details, see Integrating ServiceNow® Otto for Virtual Agent with Microsoft Teams.

For more information about conversational catalogs in AI, see the following information from ServiceNow Community and YouTube:

- How to request catalog items in ServiceNow Otto for Virtual Agent
- AI Academy: Enhanced chat experience with ServiceNow Otto for Virtual Agent

Establishing AI governance

Define policies, assign roles, and configure guardrails for responsible AI deployment across your organization.

Establish the governance framework that keeps AI deployments responsible, secure, and aligned with your organizational policies before activating AI capabilities across your organization. Governance is not a one-time setup; it is an ongoing discipline that grows alongside your AI adoption.

AI governance

AI governance on the ServiceNow AI Platform encompasses the policies, roles, and technical guardrails that control how AI solutions behave, who oversees them, and how you maintain accountability. Define your organization's AI usage policies: which use cases are approved, what data AI can access, and how outputs should be reviewed before action is taken.

To learn more about AI policy considerations and AI policy stakeholders see AI governance on the ServiceNow AI Platform.

AI Control Tower

AI Control Tower brings the teams responsible for AI across your organization into a single workspace, so they can expand AI adoption while maintaining oversight. The Home page gives governance leaders a portfolio-level view at a glance — the highest-priority work to act on, the makeup of the AI inventory, governance posture across quality, safety, security, compliance, and risk, regulatory risk classification, and the value AI assets deliver. From the same workspace, teams plan AI strategy, discover and inventory AI assets, govern risk and compliance, monitor AI in production, and measure value.

As AI activity grows, AI Control Tower surfaces the work that matters instead of leaving teams to search for it. Recommendations and AI insights flag the highest-priority governance issues and opportunities, ordered by role, severity, and confidence. Monitoring scores your AI systems for quality and safety, adds AI-generated insights, and tracks trends so regressions surface before they reach users. When an issue calls for judgment, a conversational assistant works through it

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with you in the workspace, proposing actions you can accept, refine, or reject, while routine fixes can run hands-off through an automated agent.

To inventory your AI, monitor its quality and safety, track risk and compliance, and measure the value it delivers from one workspace, see AI Control Tower.

AI Risk and Compliance

For organizations in regulated industries or subject to frameworks such as the EU AI Act, the AI Risk and Compliance application helps you manage AI capabilities ethically, mitigate AI risks, and maintain compliance. Map AI solutions to regulatory requirements and maintain audit-ready documentation.

To map AI solutions to regulatory requirements such as the EU AI Act and keep audit-ready documentation, see AI Risk and Compliance.

AI Guardian

AI Guardian is built on the ServiceNow Small Language Model (SLM) and monitors generative AI interactions to detect offensive content, prompt injection attacks, and sensitive topics. Because LLM outputs are probabilistic and human interactions are unpredictable, Guardian provides a real-time safety layer that operates independently of the underlying language models.

To add a real-time safety layer that detects offensive content, prompt injection attacks, and sensitive topics in your generative AI interactions, see AI Guardian.

AI security

Strengthening your overall security posture, including access controls, data handling policies, and solution-level permissions, is critical for responsible AI deployment. Review and configure the platform security settings that apply to AI capabilities on your instance.

Note: Governance policies should be established before activating generative AI skills or deploying AI agents. This approach subjects every AI interaction on your instance to your organizational controls from day one.

To review and configure the access controls, data handling policies, and solution-level permissions that apply to AI on your instance, see .

AI governance on the ServiceNow AI Platform

As organizations increasingly adopt AI to drive efficiency, innovation, and customer experience, AI governance becomes essential to ensure responsible use, regulatory compliance, and alignment with enterprise goals. The ServiceNow AI Platform provides a comprehensive governance framework through key roles and applications that work together to manage AI across its life cycle.

AI policy considerations

The following policy considerations shape how AI is deployed, monitored, and maintained across the enterprise.

Data security and privacy

AI systems must comply with strict data handling protocols to protect sensitive information. This includes the following:

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- Data classification rules for personally identifiable information, protected health information, and financial data.
- Encryption standards for data in transit and at rest.
- Data residency and sovereignty restrictions, which determine where data can be stored and processed.
- Retention and deletion policies that govern how long data is kept and when it must be purged.

Admins can configure ServiceNow Otto for Data Privacy to mask sensitive fields and control what is shared with third-party models. For details, see Data Privacy for ServiceNow Otto.

Compliance and regulations

AI deployments must adhere to a range of regulatory frameworks, including:

- HIPAA, PCI DSS, GDPR, CCPA, and FedRAMP, depending on the industry and geography.
- Third-party/vendor risk management, especially when external models or services are used.
- Logging and traceability requirements help ensure accountability in AI decisions.

Legal reviews are often required before publishing documentation or releasing features, particularly when consolidating overlapping control objectives or addressing model transparency.

Responsible AI use

To ensure ethical and effective AI, organizations should enforce the following:

- Model approval and usage guidelines, including naming conventions and branding policies for AI agents.
- Bias and fairness safeguards, with AI Stewards evaluating risks like hallucination or exposure of sensitive data.
- Human oversight requirements, ensuring AI augments rather than replaces human judgment.
- Transparency obligations, such as disclosing the use of third-party models like Azure OpenAI in product documentation.

Governance and change management

AI governance is supported by structured oversight and change control processes:

- Definition, review, and approval of enterprise-wide guardrails and new use cases.
- Change control and rollout processes ensure that AI features are deployed safely and predictably.
- Incident response and escalation plans are in place to address issues such as data breaches or model failures.

AI policy stakeholders

The following groups set and execute AI policy in an organization:

Policy setters

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The Chief Information Officer (CIO) or Chief Technology Officer (CTO) sets the overall technology strategy, ensuring AI initiatives align with enterprise architecture and innovation goals. The Chief Information Security Officer (CISO) establishes data security and encryption standards to safeguard sensitive information across AI workflows. The Chief Data Officer (CDO) oversees data usage and governance, ensuring that AI systems handle data ethically and in accordance with organizational policies. Meanwhile, the Chief Privacy Officer and legal teams are responsible for regulatory compliance, ensuring that AI deployments meet requirements such as GDPR, HIPAA, and other jurisdictional or industry-specific standards. Together, these leaders form the foundation of AI governance, guiding implementation teams and administrators in deploying AI responsibly and securely.

Internal governance and oversight

Governance and oversight of AI is led by structured groups that define and enforce responsible use. An AI Governance Committee and Data Governance Council set enterprise-wide guardrails for AI, including standards for privacy, fairness, and compliance, and are responsible for reviewing and approving new AI use cases. Supporting these bodies, the AI Steward ensures that AI is used responsibly across workflows, overseeing data quality, managing risks such as bias or data exposure, and monitoring adherence to regulatory requirements. Additionally, AI Stewards monitor regulatory compliance, assess performance and user feedback, and work with admins and developers to optimize AI automation while minimizing risk.

Implementation and operations

Implementation and operations teams are responsible for securely deploying and managing AI features in alignment with governance policies. The Now Assist admin configures and manages AI capabilities, ensuring that AI features are properly mapped to workflows and governed according to enterprise standards. Platform owners and ServiceNow admins oversee the deployment process, making sure that all configurations comply with established policies and technical requirements. Meanwhile, AI developers build, extend, and integrate AI features into business workflows, working closely with admins and platform teams to deliver scalable, compliant, and effective AI solutions. Together, these roles translate governance policies into secure, functional AI implementations.

For more information about AI governance user roles, see AI Risk and Compliance roles and Assign the data steward role.

For more resources about AI governance, see the following best practices topics:

- AI Governance White Paper
- Technical Governance Foundation Template
- Governance in operational phase: Roles and responsibilities

AI governance tools

AI governance is specified in the following tools:

AI Control Tower

The AI Control Tower functions as the central hub for AI strategy, governance, and analytics. It offers enterprise-wide visibility into AI assets, usage patterns, and compliance status, enabling organizations to maintain oversight and accountability. Through automated discovery and inventory of approved AI assets, it streamlines asset management while embedding governance checks and compliance alerts to ensure that all AI deployments remain secure and aligned with organizational policies.

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For more information, see AI Control Tower.

AI Admin Hub

The AI Admin Hub is key to managing AI governance by configuring policies, enforcing data handling rules, and ensuring compliance with security and privacy standards. Admins oversee provider policies at the skill level, track usage analytics like success rates and adoption, and collaborate with AI stewards and business SMEs to align AI with organizational goals. They also connect governance committees with technical teams to support smooth policy execution.

For more information, see Overview tab in AI Admin Hub.

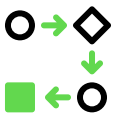
AI Control Tower

Gain visibility into your organization's AI footprint, manage the lifecycle of AI investments, govern risk and compliance, and measure the business impact of AI with AI Control Tower.

https://player.vimeo.com/video/1223416464?h=a5f21e9771&badge=0&autopause=0&player_id=0&%E2%80%A6

Watch this short video to learn more about the AI Control Tower application.

Get started

Explore Learn what AI Control Tower can do for your organization and how it supports your AI governance strategy.	**Configure** Set up AI Control Tower for your organization.	**Plan your AI strategy** Define strategic priorities, set goals, and track AI-related planning items.
Discover and manage AI assets Build and manage your inventory and work with individual AI assets.	**Govern AI assets**  Manage AI risk, compliance, security, and privacy across your portfolio.	**Monitor AI assets** Evaluate AI quality and safety with automated scoring and trend analysis.

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Measure AI impact	Address action items	Reference
Track the value, adoption, and engagement of AI across your organization.	Track and resolve the governance work and AI-generated recommendations waiting for you in Activity Center.	Look up roles, tables, data model attributes, and form field details.

Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Note: We have controls in place to enable/disable the data collection and data processing.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

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Exploring AI Control Tower

Learn how AI Control Tower provides centralized visibility and governance across your organization's AI portfolio, connecting strategic planning, asset discovery, monitoring, compliance, and value measurement in a single workspace.

AI Control Tower overview

As your organization deploys AI systems across business units, from generative AI assistants and agentic workflows to classical machine learning models, the challenge shifts from building AI to governing it. AI Control Tower addresses this by providing a centralized workspace where cross-functional teams can manage the full AI lifecycle.

- Maintain a complete, current inventory of AI systems, models, prompts, and tools across ServiceNow and external platforms including AWS, Azure, and Google Cloud.
- Detect quality and safety regressions before they escalate, using automated scoring and trend analysis for AI interactions in production.
- Track compliance posture against frameworks like NIST AI RMF and EU AI Act across your AI assets.
- Quantify the business value of AI investments with productivity, cost savings, and adoption metrics tied to individual AI systems.
- Coordinate governance work across cross-functional teams with lifecycle playbooks, approval routing, and AI-generated recommendations.

AI Control Tower users

Users

User	Description
AI steward	Oversees the state of AI across all inventory, including value and adoption insights. Reviews quality and safety scores, monitors risk and compliance posture, investigates cases and inquiries, and coordinates with AI system owners to maintain governance standards.
Administrator	Activates and configures AI Control Tower plugins, manages data sharing and multi-instance settings, configures AI model providers and data routing, sets up playbook templates, and maintains users and roles.
Workspace administrator	Tailors AI Control Tower pages for the organization by configuring the widgets on them, so that each page presents the terminology, level of detail, and records that teams work with. Widget configurations apply to all users on the instance.
AI asset owner / Product owner	Manages the AI assets they own, views value and adoption metrics for their systems, tracks lifecycle status, and creates or responds to AI cases and approval requests.
Risk and compliance user	Monitors risk classifications, reviews compliance posture against authority documents and policies, manages risk assessments, and helps track regulatory changes affecting AI assets.

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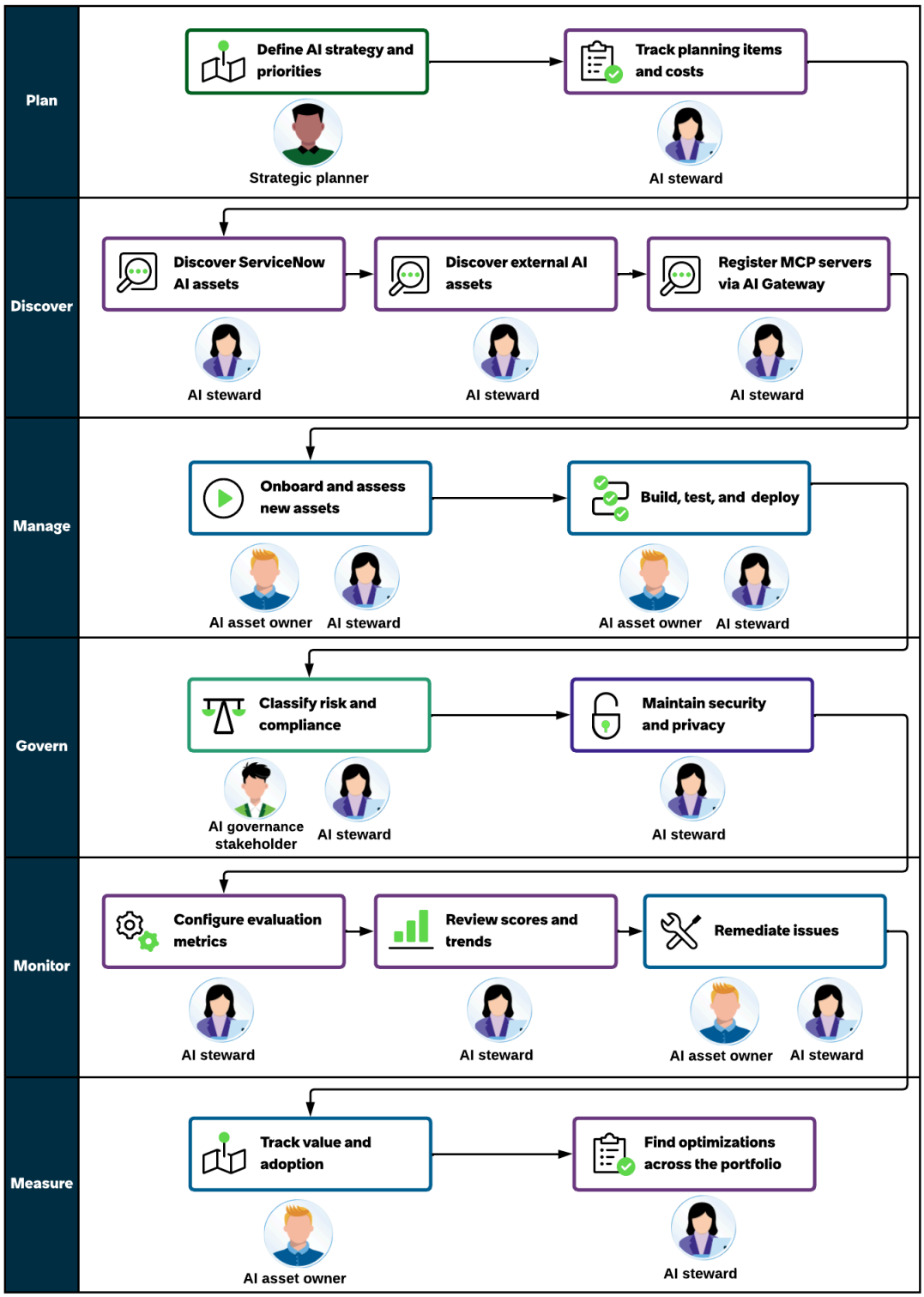
AI Control Tower workflow

The following workflow shows how different users work together in AI Control Tower to take an AI asset from strategic planning through ongoing value measurement.

Managing AI assets with AI Control Tower



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1. **Plan AI strategy.** Strategic planners and AI stewards define AI priorities, set measurable goals, and track planning items and costs through integrations with Goal Framework, Strategic Planning, and PPM Standard.
2. **Build the AI asset inventory.** AI stewards bring AI assets into the inventory through three discovery and registration mechanisms. Discovery automatically syncs ServiceNow AI assets — including skills, models, prompts, datasets, agents, and tools — into AI Control Tower. Hyperscaler connections find AI assets across external platforms like AWS Bedrock, Azure AI Foundry, Copilot Studio, and Google Cloud Platform Vertex AI. AI stewards register Model Context Protocol (MCP) servers through AI Gateway, where each registration is routed through an approval playbook before the server joins the inventory and benefits from AI Gateway's governance, observability, and security controls.
3. **Manage assets through the lifecycle.** AI stewards and asset owners take each asset through lifecycle playbooks — onboard, assess, build and test, and deploy — with the right approvals routed to the right reviewers at each phase. Lifecycle playbooks are how governance, risk, and compliance checks get applied operationally as an asset progresses toward deployment.
4. **Govern AI assets.** Risk and compliance users classify assets against frameworks like NIST AI RMF and EU AI Act and track regulatory posture across the inventory. AI stewards maintain AI security and privacy controls, including agent identities, access controls, privileged agent reviews, and dormant system reviews. Governance activities continue throughout an asset's lifecycle, not just at onboarding.
5. **Monitor AI in production.** The evaluation engine scores AI interactions automatically against quality and safety metrics. AI stewards review scores and trends, investigate regressions in low-scoring sessions, and coordinate with AI system owners to remediate issues by adjusting agent configuration, prompts, or tools.
6. **Measure value and adoption.** AI asset owners and AI stewards track value realization — productivity gains, cost savings, and user adoption — across the AI portfolio, then identify optimization opportunities to improve return on AI investments.

AI Control Tower benefits

AI Control Tower benefits

Benefit	Feature	Users
Review your AI portfolio at a glance — top priority actions, inventory composition, governance posture, regulatory risk, realized value, and outstanding tasks — from a single landing page.	Home	AI steward, AI asset owner
Track governance work across your team — your assigned items, team workload, unassigned queue, and AI-generated recommendations — in one workspace.	Activity Center	AI steward, AI asset owner
Focus on the highest-priority governance work automatically surfaced across the product, and resolve routine issues with supervised or unsupervised AI agents.	Recommendations and AI insights	AI steward, AI asset owner
View and update every aspect of an AI asset — details, lifecycle phase, risk and compliance posture, security findings, monitoring scores, and realized value — from a single record page.	Working with AI asset records	AI steward, AI asset owner

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What to explore next

To learn more about each area of AI Control Tower, see the following topics:

- Configuring AI Control Tower
- Planning your AI strategy
- Discovering and managing AI assets
- Governing AI assets
- Monitoring AI systems
- Measuring AI impact
- Addressing your AI action items

AI portfolio overview

Act on the AI governance work that matters most, review the state of your AI portfolio, and track the value your AI assets deliver on the **Home** page in AI Control Tower.

Key benefits

- Identify the highest-priority recommendations and lifecycle tasks that need your attention today.
- Review the size and composition of your AI asset inventory and the split between managed and unmanaged assets.
- Check the governance posture of your managed AI assets across quality, safety, security, compliance, and residual risk avoidance.
- Track the total value your managed AI assets deliver and the trend over time.

The **Home** page provides a portfolio-level view of all AI assets across your organization. For a detailed view scoped to a single AI asset, see Working with AI asset records.

Note: If you have the AI Asset Owner [sn_ai_asset_mgmt.ai_asset_owner] role, the **Home** page displays details only for the AI assets that you're assigned to manage.

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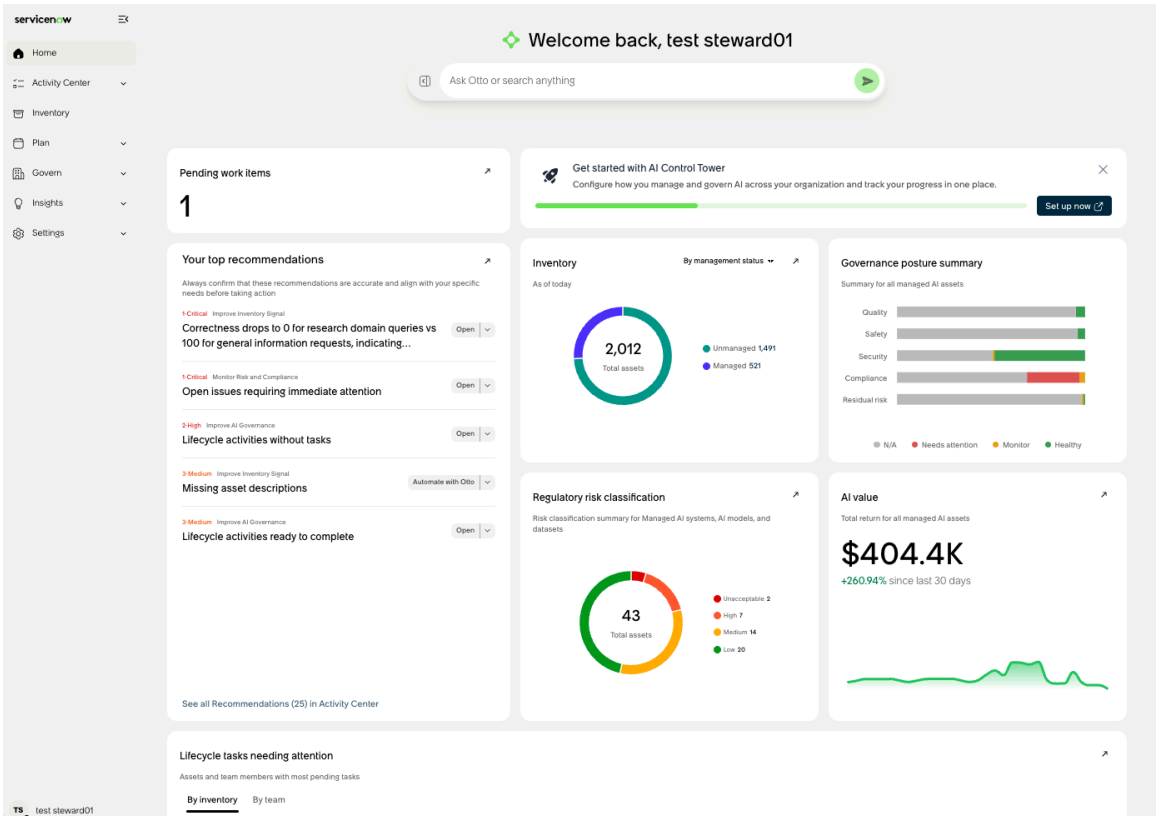
AI Control Tower Home



Required roles

The AI steward [sn_ai_governance.ai_steward] or AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role is required to access the **Home** page in AI Control Tower.

Accessing the overview

Access an overview of your AI portfolio on the **Home** page in AI Control Tower by navigating to **All** > **AI Control Tower** > **Home**.

Use cases

- Act on the recommendations AI Control Tower has surfaced for you from the **Your top recommendations** widget.
  - Review each recommendation and resolve it using the primary action on the card.
  - Select **See all Recommendations in Activity Center** to open the full list of recommendations for your portfolio. For more information, see Recommendations and AI insights.
- Check how much work is waiting for you across AI Control Tower from the **Pending work items** widget.
  - Review the total count of work items assigned to you or created by you, spanning recommendations, lifecycle tasks, and the other work types tracked in Activity Center.
  - Select the widget to open **Activity Center** and work through the underlying items. For more information, see Addressing your AI action items.
- Review the size and composition of your AI inventory.

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- If you have the AI steward [sn_ai_governance.ai_steward] role, you can view the total number of AI assets in the **Inventory** widget. If you have the AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role, you can view the total number of assets you own in the **Your inventory** widget.
- Break down your inventory by **By type**, **By status**, **By department**, or **By management status**, and identify where your assets are concentrated.
- Select the widget to open the **Inventory** page, where you can search, filter, and take action on individual assets.

- Assess the governance health of your managed AI assets from the **Governance posture summary** widget.
  - Review the distribution of managed AI assets across five dimensions: **Quality**, **Safety**, **Security**, **Compliance**, and **Residual risk**.
  - Identify the dimensions where your portfolio has the most assets in the **Low** or **NA** category, and use those findings to prioritize governance work.
  - If you have the AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role, this widget reflects only the assets you own. The **Quality** and **Safety** dimensions remain interactive, but **Security**, **Compliance**, and **Residual risk** are summary-only.
- Monitor the regulatory risk of your AI assets from the **Regulatory risk classification** widget.
  - Review the number of AI assets classified as **Unacceptable**, **High**, **Medium**, or **Low** risk.
  - Focus remediation efforts on assets in the higher-risk tiers, where misclassification or inadequate controls can have the most significant consequences.
  - If you have the AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role, this widget reflects only the assets you own, and does not link out to the full **Regulatory risk classification** page.
- Track the value your AI assets deliver from the **AI Value** widget.
  - Check the total return for all managed AI assets and the percentage change over the previous period. If you have the AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role, this reflects only the assets you own.
  - If you have the AI steward [sn_ai_governance.ai_steward] role, select the widget to open the full Value page, where you can see per-asset contribution and filter the view by time period, team, or AI system.
- Review your governance workload in the **Lifecycle tasks needing attention** table.
  - Select **By inventory** to view a list of AI assets with the most pending tasks. Use this view to identify the assets that are consuming the most governance capacity. If you have the AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role, this view is scoped to the assets you own.
  - If you have the AI steward [sn_ai_governance.ai_steward] role, select **By team** to view a list of tasks for team members. Use this view to identify team members who may be overloaded or falling behind.
- If you have the AI steward [sn_ai_governance.ai_steward] role, use the **Get started with AI Control Tower** widget to launch a guided setup experience that helps you configure AI Control Tower.
  - Track your overall setup progress and see the milestone you're currently working on.
  - Select **Set up now** to open guided setup, or select **Continue** to pick up where you left off.

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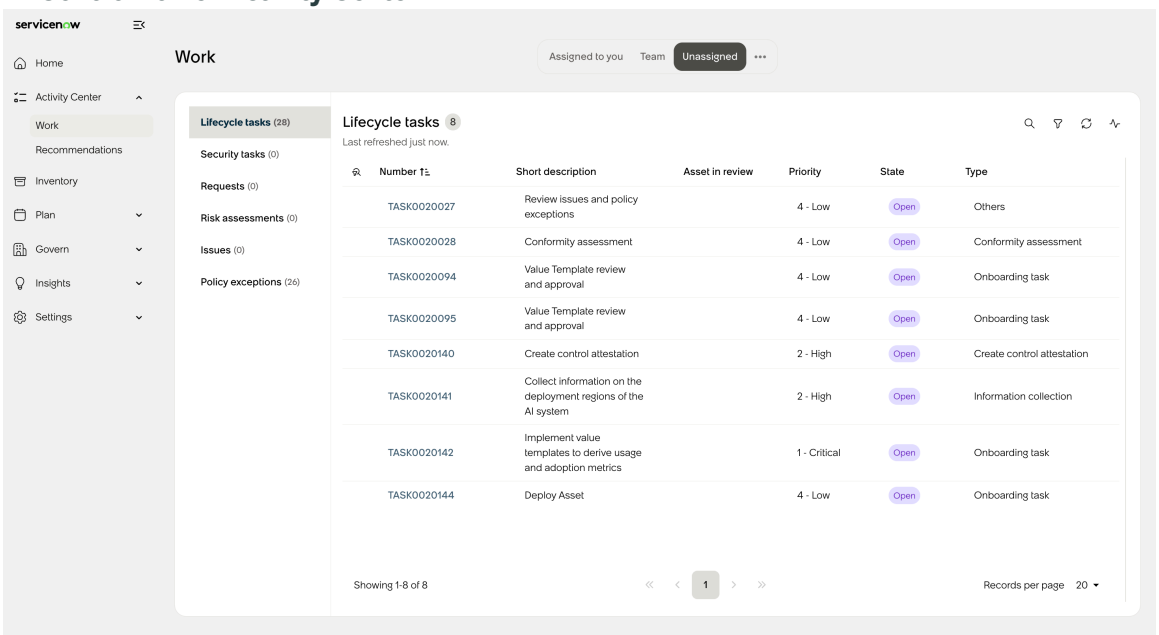
Activity Center

Track and act on the governance work generated across AI Control Tower from a single workspace, including lifecycle tasks, security tasks, change and offboarding requests, and AI recommendations.

Key benefits

- Find every piece of governance work that needs your attention across AI Control Tower in one place, instead of switching between asset records, dashboards, and email.
- Distinguish work assigned to you, work your team owns, work with no owner, and work you've submitted, so you can focus on what's yours and route what isn't. Team-level visibility is available to the AI steward.
- Resolve AI-generated recommendations directly or hand them off to the part of AI Control Tower where the resolution happens.

AI Control Tower Activity Center



Required roles

The AI steward [sn_ai_governance.ai_steward] or AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role is required to access the **Activity Center** in AI Control Tower.

Accessing Activity Center

Access the **Activity Center** in AI Control Tower by navigating to **All** > **AI Control Tower** > **Home** > **Activity Center**. Select **Work** to track governance work items or **Recommendations** to review AI-generated recommendations.

Use cases

Activity Center organizes governance work into two views: **Work** and **Recommendations**.

On the Work page, items are organized by ownership across four tabs: **Assigned to you**, **Team**, **Unassigned**, and **Submitted by you**. The **Team** tab is available only to the AI steward role. Within each tab, items are grouped into sub-tabs by type, such as lifecycle tasks, security tasks,

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requests, cases, risk assessments, issues, attestations, policy exceptions, and inquiries, each showing a count of open items.

- Focus on the work that's yours to complete on the **Assigned to you** tab, including your active lifecycle tasks, security tasks, requests, and other governance items sorted by due date. For example, complete an impact assessment that's due today before turning to lower-priority items waiting later in the week.
- Stay ahead of governance work piling up across your team by viewing the **Team** tab, which shows lifecycle tasks, security tasks, requests, and other governance items assigned across team members. For example, identify which team members are behind on critical onboarding tasks before a managed AI asset stalls because nobody noticed a review was past due.
- Claim or route work that has no owner on the **Unassigned** tab. For example, take ownership of an unrouted security task before a threat detected against a managed AI asset sits waiting for someone to claim it.
- Track the items you've submitted for review on the **Submitted by you** tab. View the cases, issues, policy exceptions, and inquiries that you've created, along with their current status.
- As an AI steward, review and approve a change request before it disrupts production. From the **Requests** sub-tab on the **Team** or **Assigned to you** tab, see the change requests and offboarding requests waiting for AI steward approval. For example, review the impact on related sub-systems before approving an asset owner's request to swap out the AI model backing an agent.
- As an AI Asset Owner, access and act on risk and compliance lifecycle tasks. Tasks include impact assessments and control attestations. The Activity Center surfaces AI asset tasks, issues, policy exceptions, and AI cases for the asset owner.
- Create a case, issue, policy exception, or inquiry without leaving Activity Center. For more information, see Managing AI tasks and approvals in Activity Center.

On the **Recommendations** page, you can resolve a backlog of similar AI recommendations by filtering the full list of AI-generated recommendations by category, priority, confidence, or outcome. For example, filter by the **Improve inventory signal** outcome to work through several assets that are missing descriptions in one pass. For more information about how recommendations are generated, prioritized, and resolved, see Recommendations and AI insights.

Recommendations and AI insights

Recommendations and AI insights direct your attention to the AI governance work that matters most, so you can resolve high-impact issues without searching for them.

AI Control Tower continuously evaluates your managed AI assets against governance, security, value, risk, and compliance criteria. When AI Control Tower detects an issue or an opportunity, it surfaces that finding as either a recommendation or an AI insight, depending on whether the user is expected to take action or to read contextual information.

Key benefits

- Focus on the highest-priority governance work without searching the product for issues that need your attention.
- Resolve routine issues hands-off by letting an unsupervised agent run the remediation workflow for you.
- Work through complex issues in a guided conversation with a supervised agent that proposes actions you can accept, refine, or reject.
- See the recommendations and insights most relevant to your role, with the severity, confidence, and age of each finding factored into the order.

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Recommendations

A recommendation is an action item that AI Control Tower has identified as worth your attention. Each recommendation names the condition that was detected, the outcome it supports, and how you can resolve it.

Recommendations appear throughout AI Control Tower.

Your top recommendations in Home

Your top recommendations on the Home page provides recommendations across your portfolio. Select **See all Recommendations in Activity Center** to open the full list.

Recommendations view in Activity Center

The full list of recommendations across your portfolio, with filters for category, priority, confidence, and outcome. Use this view when you want to work through recommendations at scale or focus on a specific category such as Security or Risk and compliance.

Needs attention section on an asset record

Recommendations scoped to a single asset, visible on the **Overview** tab of the asset record. The recommendations shown here are the subset that apply to that asset. For more information about the **Overview** tab, see Reviewing AI asset status.

Note: The **Assigned to you** and **Unassigned** tabs of the Needs attention widget show lifecycle tasks rather than recommendations. Lifecycle tasks are governance and review work generated by AI asset lifecycle playbooks, not by AI detection.

AI Agent Advisor recommendations

When you install AI Agent Advisor, its highest-value automation opportunities also surface as recommendations in AI Control Tower, so you can discover agent-building opportunities without checking AI Admin Center separately. AI Control Tower shows your top automation opportunities, ranked by projected return on investment, up to a limit you can configure with the `sn_aict_genai.aaa_automation_opportunities_limit` property (10 by default).

Each recommendation card shows the opportunity's name and a short description. Selecting the recommendation's action opens the Automation details page for that specific opportunity in AI Admin Center, where you can act on it, such as by building an agent.

This integration requires no setup. The connection activates automatically when both AI Agent Advisor and AI Admin Center are installed on your instance. AI Agent Advisor must also complete at least one mining run before its opportunities appear. If AI Admin Center isn't installed, AI Agent Advisor doesn't send any recommendations to AI Control Tower.

Recommendations stay current on their own, refreshing daily. If an opportunity is still among the top group the next day, AI Control Tower updates the existing recommendation instead of adding a duplicate. If an opportunity drops out of the top group, or no longer exists in AI Admin Center by the time you select it, AI Control Tower removes the recommendation.

For details on AI Agent Advisor, see AI Agent Advisor.

AI insights

An AI insight is a contextual fact that AI Control Tower adds to a dashboard to give you a richer reading of the data. Unlike a recommendation, an AI insight does not ask you to take action. It appears as a short line of text near the data it explains, such as "Total productivity gains in last 30 days" or "Three AI systems delivered 82% of total value." AI insights appear inside widgets on the

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Home page, the Value page, the Risk and Compliance page, Security page, and other AI Control Tower dashboards.

When an AI insight is associated with a supervised agent, you can select **Manage with AI** to start a conversation that expands on the insight with deeper analysis.

Resolving recommendations

Each recommendation includes a primary resolution that AI Control Tower has selected as the most efficient path to address the underlying issue. Alternatively, you can mark the recommendation as complete if you address the issue another way. For the full procedure, see Resolving AI recommendations in Activity Center.

The following options are available in the **Actions** menu:

Action	Description
View details	Provides the reasoning behind the recommendation, the asset or scope it applies to, and the history of earlier runs.
Complete	Marks the recommendation as resolved without running the primary resolution action. Use this option when you have addressed the underlying issue in another way.
Delete	Removes the recommendation. A deleted recommendation might reappear if AI Control Tower detects the same condition again.

Depending on how the recommendation was produced, you can use one of the following resolution options:

Primary resolution	Description
Automate with *Otto*	An unsupervised agent runs the resolution workflow on your behalf. When you confirm, the agent executes the steps and updates the recommendation status to **In progress**, then to **Complete** once the work is done. This resolution pattern is used for recommendations where the steps are routine and don't require your input, such as populating missing asset descriptions.
Manage with *Otto*	A supervised agent opens a conversation in the AI Control Tower chat interface. The agent proposes actions, and you accept, refine, or reject each one. This resolution pattern is used for recommendations that benefit from your judgment, such as reviewing the evidence behind a security threat before resolving it.
Open	AI Control Tower redirects you to the record, page, or workflow where you can resolve the issue directly. This resolution pattern is used for recommendations that require changes in another part of the product, such as creating tasks in an onboarding playbook.

When you select **View details** from the action menu, the side panel offers two views:

Focused

Shows the current status, the steps the agent will take or has taken, and an estimated time to complete. Use this view while an agent is running so you can monitor progress without leaving the page.

Details

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Shows the full reasoning behind the recommendation, including the data sources that contributed to it and the history of earlier runs.

Prioritizing recommendations

AI Control Tower does not show every recommendation it detects. Recommendations are prioritized according to the following factors:

Your role

An AI steward and a product owner see different recommendations in different order. Each role is responsible for different outcomes. For example, a product owner sees recommendations that help drive productivity for their own AI assets first, while an AI steward sees recommendations that improve inventory signal and AI governance across the portfolio first.

Severity

Each recommendation carries a priority level of **1-Critical**, **2-High**, **3-Medium**, or **4-Low**. Higher severity items rank above lower severity items when other factors are equal.

Confidence

Each recommendation carries a confidence level of **Low**, **Medium**, or **High**. Confidence reflects how certain AI Control Tower is that the detected condition is accurate. A high-confidence recommendation ranks above a low-confidence recommendation at the same severity.

Age

Recommendations become less prominent over time if no one acts on them. This prevents a long-standing issue from permanently occupying the top of the list and gives newer recommendations a chance to surface.

In Activity Center, use the **Refine list** panel to filter recommendations by priority, confidence, category, or outcome, and override the default ranking to focus on a specific area.

Recommendation outcomes

Every recommendation is tagged with an outcome that identifies the business goal the recommendation supports. The outcome appears on the recommendation card.

Outcome	Description
Drive AI productivity	Helps you increase the value that your AI assets deliver, such as identifying high-performing assets to scale or underused assets to retire.
Improve AI governance	Helps you strengthen oversight of your AI portfolio, such as completing lifecycle tasks or enforcing policy across managed assets.
Improve inventory signal	Helps you make your inventory more complete and accurate, such as populating missing asset descriptions or reviewing newly discovered assets.
Monitor security	Helps you respond to AI security threats and access issues, such as reviewing high-severity security events or addressing agent output deviation.
Monitor risk and compliance	Helps you maintain regulatory and policy compliance, such as reviewing overdue risk assessments or addressing non-compliant controls.

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Recommendation status

Each recommendation moves through a lifecycle as you or an agent works on it. The status appears in the side panel that appears when you select **View details**.

Status	Description
Not started	The recommendation has been generated but no one has acted on it.
In progress	An agent is running or the assignee is working on the recommendation.
Complete	The recommendation has been resolved. Completed recommendations are removed from the list.
Failed	An agent could not complete the recommendation, or could only complete it for some of the assets it targeted. You can retry the action or resolve the recommendation manually.
Cancelled	The recommendation was stopped before it completed, either by the user or by the system.

You can manually mark a recommendation as **Complete** or delete it from the action menu on the recommendation card, regardless of its current status.

ServiceNow Otto in AI Control Tower

Ask questions about your AI portfolio in plain language and get answers drawn from your own AI Control Tower records.

How the conversational interface works

ServiceNow Otto is the conversational experience in AI Control Tower. It provides agentic orchestration on top of the premium chat in the ServiceNow AI Platform.

In AI Control Tower, the chat is delivered by an assistant named AICT Assistant, which is installed with the ServiceNow Otto for AI Control Tower application (`com.sn_aict_genai`). The chat window itself displays ServiceNow Otto, so the AICT Assistant name appears only where the underlying record is shown, such as in your AI asset inventory.

A dedicated assistant keeps the conversation scoped to AI Control Tower. Answers about your AI portfolio stay consistent because the other assistants configured on your instance don't take part in the conversation.

Answers are drawn from data retrieved from your instance at the time you ask. The assistant is configured to answer only from that retrieved data rather than from the general knowledge of the underlying model, so responses reflect the records in your own inventory and governance tables. When the assistant can't find an answer in your data, it tells you so rather than filling the gap.

Use cases

The assistant answers questions that span your inventory, risk, compliance, security, and usage records. For example:

- Find the AI systems that a particular business unit or business application owns, without constructing a query.
- See how your AI models break down by provider, so you know where your model dependencies concentrate.

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- Identify AI systems with no recent usage, which are candidates for review or decommissioning.
- Check inherent risk ratings across your portfolio to find assets that need attention first.
- Review security findings such as threat results and privileged activity for a given asset.

Responses can include an inline widget alongside the text answer, so results that are clearer visually are presented that way.

AICT Assistant in your AI asset inventory

AICT Assistant is the AI asset that represents the ServiceNow Otto conversational experience in AI Control Tower. Automatic discovery of ServiceNow AI assets registers the assistants on your instance, so your conversational experience is inventoried alongside the rest of your AI portfolio. See Discovering ServiceNow AI assets automatically.

To locate the asset, search your inventory for AICT Assistant.

Bringing AICT Assistant under management applies the same governance to your conversational experience that you apply to the rest of your AI portfolio, including evaluation scoring, lifecycle stages, risk classification, and value tracking. Like other discovered ServiceNow AI assets, AICT Assistant arrives unmanaged. See Managed and unmanaged AI assets and Working with AI asset records.

You can edit or customize the AICT Assistant in Assistant Designer. See Assistant Designer.

Configuring AI Control Tower

Set up AI Control Tower so your organization can begin managing AI assets, enforcing governance policies, and tracking AI value.

Once you activate AI Control Tower and assign roles, you can begin managing your AI inventory and configuring governance behavior in the **Settings** tab. The core settings cover integrations, automation rules, value and evaluation templates, playbooks, and platform-level AI controls.

You can unlock additional capabilities in AI Control Tower by activating add-on plugins. Each plugin extends a specific area of the workspace.

Activating AI Control Tower

Govern, secure, and measure the value of your AI assets across the enterprise by activating AI Control Tower.

For details on upgrading AI Control Tower, see the AI Control Tower Migration [KB3144679] article in Now Support.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Guided setup

Configure AI Control Tower in a logical sequence and track your progress from a single summary page, instead of navigating separate Settings pages.

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Key benefits

- Track setup progress across all four configuration areas from a single summary page, so you know what's done and what's left.
- Move between setup items in any order and complete them as your organization is ready, since each item's status is tracked independently rather than in a fixed sequence.
- Start from default configuration where it's provided, and confirm or adjust it to fit your organization instead of configuring every item from scratch.
- Review every configuration change made during setup, including the update set that captured it and who made it, from the Configuration activity list on the summary page.

Setup areas

Guided setup organizes configuration into four areas. Guided setup areas lists every setup item within each area and the topic to reference for more detail.

- **Users and roles.** Assign users to the AI Stewards, AI Product Owners, and AI Risk and Compliance Managers groups.
- **AI asset inventory.** Bring ServiceNow and external AI assets into your inventory, and decide which assets to manage.
- **Value and cost configuration.** Configure the templates and cost inputs used to calculate the value your AI assets deliver.
- **ServiceNow AI settings.** Configure data sharing, deployment approval, and AI model provider settings that apply across your instance.
- **Connectors.** Connectors integrate with AI Control Tower to create AI connections with to discover AI agents from external AI platforms such as AWS, Azure, Copilot, Snowflake, Google Cloud Platform (GCP) Vertex AI and so on for centralized governance.

  Note: The Connectors page is available only when the com.sn_ai_disc and sn_sgc_central plugins are installed.

- AI Enterprise Foundation installs all the plugins so this guided page will also be visible.

Required roles

The AI Steward [sn_ai_governance.ai_steward] and sn_ia_config.ia_user roles are required to access guided setup. For information about opening guided setup, see Access guided setup.

Access guided setup

Configure AI Control Tower in a logical sequence and track your progress toward a complete setup.

Before you begin

Role required: sn_ai_governance.ai_steward

About this task

The **Get started with AI Control Tower** widget on the **Home** page is visible only to users with the AI steward role. It tracks your overall setup progress and shows the setup area you're currently working on.

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Procedure

1. Launch the guided setup experience from the **Home** page in AI Control Tower or the **Admin Home** page.

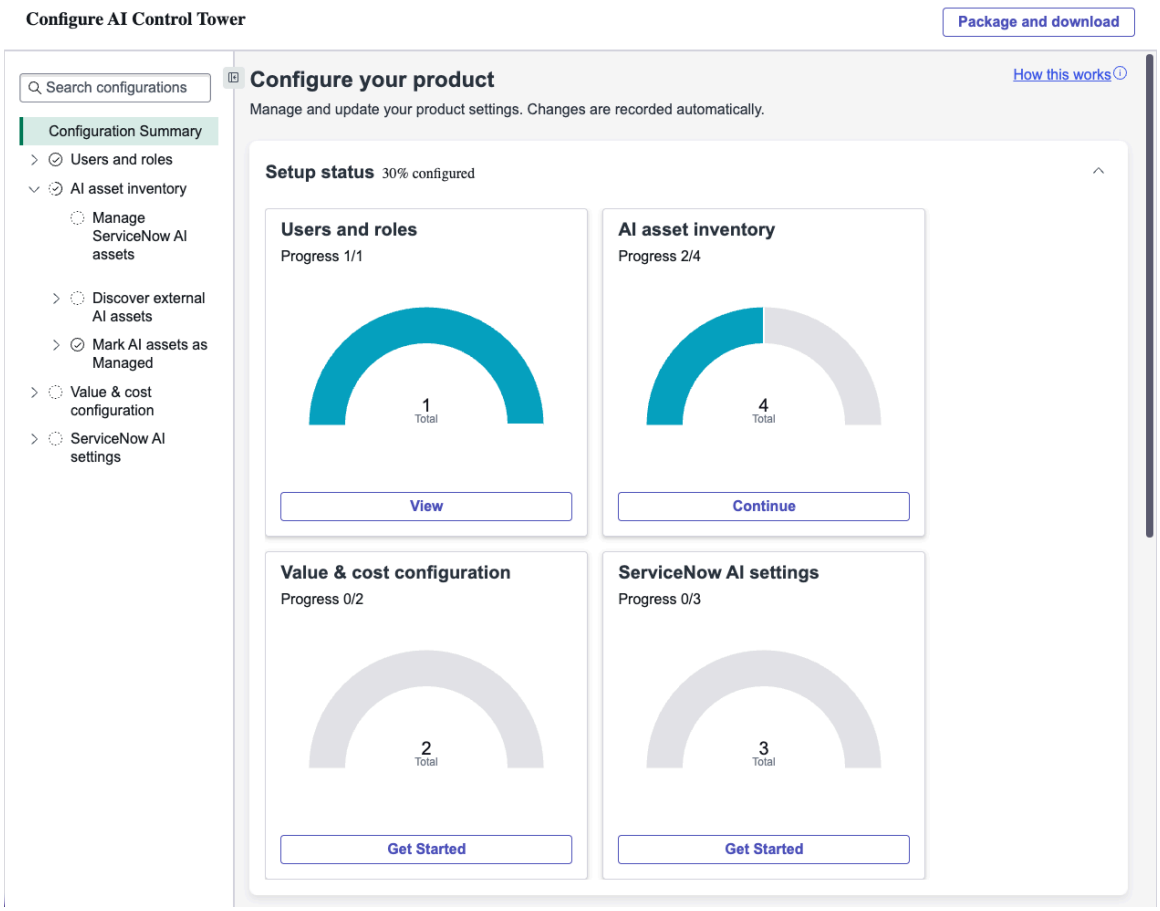
Option	Steps
Home page in AI Control Tower	**a.** Navigate to **All** > **AI Control Tower** > **Home**. **b.** In the **Get started with AI Control Tower** widget, select **Set up now** to open guided setup, or select **Continue** to pick up where you left off.
Admin Home	**a.** Navigate to **Admin** > **Home**. **b.** In the Manage your products section, se lect **AI Control Tower**. **c.** On the AI Control Tower page, select **Con figure**.

   Guided setup opens to a summary page showing your progress across all four setup areas.

2. Complete the setup items for each area.

   For a complete listing of setup items and the topic to reference for each one, see Guided setup areas.

Example: AI Control Tower guided setup



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Guided setup areas

Area-by-area listing of the setup items in guided setup, with cross-references to the topic each item relates to.

Guided setup groups setup items into the areas listed in this topic. The order of areas and items shown here matches the order in which guided setup displays them.

Users and roles

Assign users to the groups that grant access to AI Control Tower.

Users and roles setup items

Setup area	Setup item	Description
Users and roles	Assign users to roles	Assign users to the AI Stewards, AI Product Owners, and AI Risk and Compliance Managers groups to grant them the corresponding permissions. For more information, see Configure users and roles.

AI asset inventory

Bring ServiceNow and external AI assets into your inventory, and decide which assets participate in governance, monitoring, and value workflows.

AI asset inventory setup items

Setup area	Setup item	Description
AI asset inventory	Manage ServiceNow AI assets	Review AI systems, models, prompts, and datasets that AI Control Tower discovers automatically, and mark them as managed to bring them into governance, monitoring, and value workflows. For more information, see Managing your AI asset inventory.
Discover external AI assets	Configure external connectors	Connect to cloud hyperscalers or SaaS applications to discover AI assets automatically and bring them into your inventory. For more information, see Configuring connectors.
Discover external AI assets	Set up traces	Connect to AWS, Microsoft Azure, or Google Cloud to collect trace data, discover AI agents running on those platforms, and generate evaluation and security metrics. For more information, see Configuring trace connections.
Discover external AI assets	Add assets manually	Register an AI system, AI model, prompt, dataset, or MCP server that isn't reachable through a connector or trace. For more information, see Creating AI assets manually.
Mark AI assets as Managed	Mark assets as Managed manually	Select assets from your inventory and mark them as managed to give them access to governance, value assessment, risk

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AI asset inventory setup items (continued)

Setup area	Setup item	Description
		classification, monitoring, and security capabilities. For more information, see Managed and unmanaged AI assets.
Mark AI assets as Managed	Set rules to mark assets as Managed	Create or activate automation rules that mark discovered AI assets as managed automatically, based on conditions you define. For more information, see Edit an automation rule.

Value and cost configuration

Configure the templates and cost inputs used to calculate the value your AI assets deliver.

Value and cost configuration setup items

Setup area	Setup item	Description
Value and cost configuration	Value templates	Select from existing value templates or create custom templates to define, calculate, and track the value your AI assets deliver. For more information, see Value.
Value and cost configuration	Cost framework	Configure cost and productivity inputs, such as hourly rates and AI costs by vendor, to calculate the net return on your AI investment. For more information, see Cost.

ServiceNow AI settings

Configure data sharing, deployment approval, and AI model provider settings that apply across your instance, not just AI Control Tower.

ServiceNow AI settings setup items

Setup area	Setup item	Description
ServiceNow AI settings	Configure data control preferences	Set how your organization shares data with ServiceNow and manages data traffic during peak usage. For more information, see Configure ServiceNow AI settings.
ServiceNow AI settings	Set builder controls	Require AI steward approval before AI assets deploy, and automate approval requests when new AI assets are added. For more information, see Configure ServiceNow AI settings.
ServiceNow AI settings	Configure AI model providers	Choose which AI model providers are allowed on your instance and set fallback behavior for AI systems whose providers aren't on the allowed list. For more information, see Configure ServiceNow AI settings.

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Configure users and roles

Add and manage role to a user group to grant its members the corresponding permissions in AI Control Tower.

Before you begin

Role required: admin

Confirm the following:

- The role you want to assign must already exist in the system.
- Identify which user group requires the role — AI Stewards, AI Product Owners, or AI Risk and Compliance Managers.

Procedure

1. Navigate to **Settings** > **Users and roles**.
   The Users and roles page displays AI Stewards, AI Product Owners, or AI Risk and Compliance Managers user groups with their current user and role counts.
2. To add a user, select **Add users**.
   a. Select the user from the list to add.
   b. Select **Add** to add the user.
3. To manage the users in the group, select **View group details**.
   a. Select the user from the list to add or remove.
   b. Select **Add** user to add or **Remove from group** to remove.

   Note: You can't remove yourself from the group.

Configuring integrations

Connect AI Control Tower to external AI platforms so you can discover AI assets, collect trace data for monitoring, and synchronize governance across multiple ServiceNow instances.

Connectors

Connectors let you discover AI assets from external cloud hyperscalers and SaaS applications and bring them into your AI asset inventory. When you establish a connector, AI Control Tower periodically scans the connected platform, discovers AI assets, and adds them to your inventory as unmanaged assets. You can then review the discovered assets and move them to a managed state. For more information, see Configuring connectors.

Traces

Trace connections collect observability data from external AI systems and route it into AI Control Tower for quality and safety monitoring. When you establish a trace connection to a supported platform, AI Control Tower collects trace data at a configurable frequency and makes it available on the **Monitor** tab of AI asset records and in the Monitoring overview.

The information collected from traces is entered into the inventory for discovery. It is also sent to the observability service within ServiceNow, which generates evaluation metrics and security metrics.

Trace connections are the recommended route for collecting observability data from supported platforms. For external AI systems hosted on unsupported platforms or third-party agents, you

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can send trace data to AI Control Tower using the API instead. For a comparison of both methods and the list of supported platforms, see Configuring trace connections.

Multi-instance

Multi-instance setup lets a production (manager) instance control, manage, and communicate with multiple sub-prod (managed) instances for AI Control Tower. When multi-instance management is configured, the production instance synchronizes AI asset data, governance rules, and configuration preferences across connected sub-prod instances so that governance stays consistent across your ServiceNow environment.

Note: Verify that both the prod and sub-prod instances are running the same AI Control Tower core version (6.2.4), which is the minimum supported version.

If there's any upgrade to version 6.2.4 in a sub-prod, then it's advisable to upgrade the prod instance to 6.2.4 to confirm Multi-instance functions correctly.

Multi-instance setup synchronizes the following:

- AI inventory information, including AI systems, AI models, prompts, data sets, and AI agents across connected instances

  Note: State of the assets while configuring Multi-instance management.

  The AI inventory in production reflects the true state of your assets like models, datasets, or skills from a production standpoint. Even if a model or dataset is active in a sub prod (lower) environment, it's still considered as under development from a prod perspective, since it's being tested and not yet live.

  For this reason, you don't synchronize asset states across environments. An asset's state changes to deployed only when the asset and its related records are activated in the production system.

  In summary, the state represents the overall lifecycle of the asset, not its local status in a specific environment.

- Data sharing preferences from the production instance to all sub-prod instances, when enabled
- Data overflow processing and bursting preferences from the production instance to all sub-prod instances, when enabled

Asset states aren't synchronized across environments. An asset that is active in a sub-prod environment is still considered under development from the production perspective. An asset's state changes to deployed only when the asset and its related records are activated in the production system.

When multi-instance management is configured, all synchronizable preferences on sub-prod instances is set to read-only.

Note: Multi-instance management is not supported on Government Community Cloud (GCC) or on-premises instances. The `com.glide.mif.mtls` plugin must be active before you configure multi-instance management. If the plugin is not active, submit a support request with Customer Service and Support for MIF features.

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Control enforcement points

Connectors in the **Control enforcement points** tab let you monitor and enforce guardrails for AI assets from external identity providers, cloud hyperscalers, and SaaS applications. When you establish a connector, you can then contain AI agents with kill switch protocol.

Supported connectors include:

- AWS Bedrock
- AWS Bedrock Agent Core
- Azure AI Foundry
- GCP Vertex AI
- ServiceNow Agents

The supported identity provider is Okta.

To set up a new connector, select an identity provider or platform from the Available connectors view and follow the guided setup wizard. Each connector has provider-specific prerequisites, which are linked from the first step of the wizard. For more information, see Configure AI agent containment using kill switch protocol manually.

Configuring connectors

Discover AI assets running on external platforms and hyperscaler environments to populate your AI asset inventory, apply consistent governance, and report on usage in AI Control Tower.

Key benefits

- Keep asset records current automatically through scheduled import jobs, without manually re-entering details each time an asset changes on the external platform.
- Track usage volume for imported assets alongside natively created ones, so governance teams can spot high-usage, dormant, or high-risk assets and prioritize oversight.
- Discover assets across multiple accounts or environments with a single AI connection, so oversight scales with adoption without adding to your team's workload.

Available connectors

For the complete list of supported service graph connectors, their prerequisites, and connector-specific configuration fields, see the AI Control Tower- AI Discovery Connectors [KB2986990] article in the Now Support Knowledge Base.

AI Control Tower also provides the Veza access intelligence connector, which enriches AI agents already in your inventory with access risk scores and severity levels. For more information, see Create an AI connection for Veza access intelligence.

How connectors discover AI assets

When you create an AI connection using a connector, AI Control Tower performs the following:

- Authenticates with the external platform using the credentials you provide, typically an access key, service account, or OAuth token depending on the platform.
- Discovers AI assets on the external platform, such as deployed models, agents, knowledge bases, and pipelines.

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- Imports the discovered assets into the AI asset inventory and the Configuration Management Database (CMDB), where they can be governed, evaluated, and managed alongside natively created assets.
- Keeps the inventory updated by re-running discovery on a scheduled import job, so new or changed assets on the external platform are reflected in AI Control Tower.

How connectors keep data current

Each connector runs two scheduled jobs:

- Discovery: Finds new or changed AI assets on the external platform and imports them into the AI asset inventory.
- Execution: Collects usage data, such as run counts by agent, date, and session, for assets the connector has already discovered.

Note: Verify that the AI discovery daily data collection job is active. This job is required for connectors to continue collecting new data.

Discovery connectors and trace connectors

Discovery connectors and trace connectors both discover AI assets and feed the same AI asset inventory, but they serve different primary purposes.

- A discovery connector authenticates directly to the external platform and queries it for AI assets. It's the more direct path for platforms it supports, and it also collects usage volume, such as run counts by agent, date, and session, which appears in the asset's **Value & engagement** tab and in the portfolio-wide value dashboard under Insights.
- A trace connector observes agent executions at runtime, primarily to generate evaluation and security metrics. Discovering the AI systems behind those executions is a secondary result, useful for catching assets a discovery connector can't reach. See Discovering AI assets through trace connectors.

Create an AI connection for discovery

Bring AI assets from an external platform into your AI asset inventory by creating an AI connection. AI Control Tower authenticates to the platform using your credentials and imports assets on a schedule, so they're governed and monitored alongside AI systems built natively on ServiceNow.

Before you begin

Confirm the following are in place:

- The com.sn_ai_disc and sn_sgc_central plugins installed on your instance. Without both plugins, the **Connectors** tab doesn't appear.
- The credentials required to authenticate AI Control Tower to the external platform. Credential requirements vary by connector.

Role required: sn_ai_disc.discovery_admin and sn_cmdb_int_util.sgc_admin

About this task

A connector is the mechanism; an AI connection is the configured instance of a connector on your instance. Create a separate AI connection for each account or environment you want AI Control Tower to discover assets from. A single connector type can support multiple AI connections.

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Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Integrations** > **Connectors**.
2. On the **Available Connectors** tab, select the connector that you want to use.
3. On the form, fill in the fields.

   Fields and credential requirements vary by connector. For the complete list of connectors and the fields each one requires, see AI Control Tower- AI Discovery Connectors [KB2986990].
4. Select **Save**.

Result

The connection appears on the **Established connections** tab. After the discovery job runs, discovered AI assets appear in your AI asset inventory.

Create an AI connection for Veza access intelligence

Connect AI Control Tower to Veza using OAuth 2.0 so that agent risk scores and severity levels from Veza access intelligence appear in the agent map. Since Veza is an enrichment connector, it doesn't import new assets.

Before you begin

Confirm the following are in place:

- An OAuth 2.0 app or client configured in your Veza tenant. For more information, see OAuth2 apps and OAuth2 clients in Veza documentation.
- An OAuth profile configured on the ServiceNow platform and linked to the pre-provided `SN AI Security Veza Connector` connection alias. For more information, see Set up OAuth.

Role required: sn_ai_governance.ai_steward

About this task

The Veza connector authenticates using OAuth 2.0 only. Create the AI connection after you complete OAuth setup on both the Veza tenant and the ServiceNow platform.

Procedure

1. Navigate to **Settings** > **Integrations** > **Connectors**.
2. On the **Available connectors** tab, select the **Veza** tile from security connectors.
3. On the **Configure connector** page, confirm that **Provider type** is set to **Security**.
   The **Connection alias** field is pre-populated with `SN AI Security Veza Connector` and can't be edited.
4. Select the **I have configured the Veza user integration** check box.
   This confirms you completed the Veza-side OAuth setup. See Configure OAuth in Veza.
5. Select the **I have configured ServiceNow connectors/alias settings** check box.
   This confirms you completed the ServiceNow-side OAuth setup. See Configure OAuth for Veza in ServiceNow.
   The **Validate Connection** button is disabled until both check boxes are selected.
6. Select **Validate Connection**.
   If the connection already has a valid OAuth token, a `Connection Valid` message appears.
   If it doesn't, the button instead shows **Authenticate Connection**.

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- If the button shows **Validate Connection**, continue to the next step.
- If the button shows **Authenticate Connection**, select it to log in to Veza. After you log in and allow access, the connection revalidates.

7. Select **Save**.

Result

The connection appears on the **Established connections** tab. Selecting **Re-Validate** from that tab updates the connection status.

Configuring trace connections

Collect trace data from AI agents running on supported cloud platforms and monitoring services to generate evaluation metrics, populate AI inventory, and support security monitoring in AI Control Tower.

Key benefits

- Collect trace data from AWS, Google Cloud, and Microsoft Azure platforms through a single interface, without SDK instrumentation in your agent code.
- Access cloud platforms securely through a MID Server, which authenticates to your cloud provider and keeps credentials protected within your ServiceNow instance.
- Generate evaluation and security metrics from collected traces when evaluations and security monitoring capabilities are enabled.
- Discover AI agents running on third-party platforms and add them to your AI asset inventory automatically.

Trace connections and SDK instrumentation

AI Control Tower supports two ways to collect trace data from AI systems: a trace connection, which polls a supported cloud platform at a configured interval, or SDK instrumentation, which sends trace data using an API key. Use a trace connection when your AI systems run on a supported platform.

For AI systems hosted on other platforms or third-party agents, send trace data using the API instead. See Activate evaluation scoring for external AI systems.

Trace connection limitations

- Up to 5 trace connections for each connector run in parallel. You can create more than 5, but only 5 run at a time.
- Manually running a trace connection, instead of waiting for its scheduled interval, counts against a separate limit: up to 2 manual runs at a time.

Add an AWS CloudWatch trace connection

Monitor AI agents built with AWS Bedrock AgentCore by adding an AWS CloudWatch trace connection. AI Control Tower collects trace data through your AWS credentials and a MID Server, without requiring SDK instrumentation.

Before you begin

Confirm the following:

- Your AI agents are built using AWS Bedrock AgentCore.
- Tracing is enabled for each AWS Bedrock AgentCore agent you want to monitor.
- You know the AWS region where your AI agents are deployed, such as `us-east-2`.

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- An active MID Server is installed and configured in your ServiceNow instance. See MID Server installation.
- An AWS access key ID and secret access key with permission to read trace data from CloudWatch is available.
  - The AWS CloudWatch connection supports access key authentication only. Connections using an assumed role or external ID aren't currently supported.
  - You must set up the access key and its IAM policy in AWS. After the access key ID and secret access key are created, work with your instance administrator to store them as a new AWS credential record in your instance. For details, see the Work Instruction | How to Create AWS Credentials on a Glide Instance [KB3143433] article in Now Support.

Role required: sn_ai_governance.ai_steward

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Integrations** > **Traces**.
2. On the **Available** sub-tab, select **AWS CloudWatch**.
3. On the form, fill in the fields.

Add AWS CloudWatch trace connection form

Field	Description
Name	Descriptive name for this trace connection. Use a name that distinguishes this connection from others you create, such as one that identifies the account, project, or environment.
Collection frequency (minutes)	Interval, in minutes, at which the MID Server polls for new trace data. The default is 30. Set a lower value to return results sooner or set a higher value to reduce overhead for lower-volume systems.
Region	AWS region where your AI agents are deployed, such as `us-east-2`.
Credential alias	AWS credential that authenticates AI Control Tower to CloudWatch. The credential must have permission to read trace data.
MID server	MID Server that runs trace collection. The MID Server must be active and validated. Select **Go to Mid server installation** to install or configure one.
Log group source	AWS CloudWatch log group that this connection collects trace data from. Select **Agent Core Log Group** to collect from the log group used by agents built with AWS Bedrock AgentCore. Select **Other Log Groups** to collect from a different log group. Select both to create a separate connection for each.
Active	Option to begin collecting traces when you save the connection. Clear it to save the connection without starting collection. You can activate the connection later from its record.

4. Select **Save**.

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Result

One or more trace connections appear on the **Established** sub-tab. If you selected both log group options, two connections appear, distinguished by a log group suffix on the connection name. If a connection is active, AI Control Tower begins collecting trace data after the first polling interval.

What to do next

Choose which metrics to include in evaluation scoring. See Activate evaluation scoring for external AI systems.

Add an Azure trace connection

Monitor AI agents running on Microsoft Azure by adding an Azure trace connection. AI Control Tower collects trace data through your Azure credentials and a MID Server, without requiring SDK instrumentation.

Before you begin

Confirm the following:

- An active MID Server is installed and configured in your ServiceNow instance. See MID Server installation.
- Credentials for the Azure source system you plan to configure are available.
  - Each credential must be created in Azure for the source system it applies to.
  - The Azure service principal or managed identity behind each OAuth-based credential has the Reader role on the resource or resource group it collects traces from.
  - The Azure Application Insights API key credential, used for the **New Foundry** source system, has the "Read telemetry" permission.
  - After each credential is created in Azure, work with your instance administrator to store it as a record in your instance. For details, see the Azure Trace Collector Credentials Configuration [KB3144350] article in Now Support.

Role required: sn_ai_governance.ai_steward

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Integrations** > **Traces**.
2. On the **Available** sub-tab, select **Azure**.
3. Select the Azure source systems to integrate with.
   - **Classic Foundry** — collects traces from Azure AI Foundry (classic).
   - **New Foundry** — collects traces from the updated Azure AI Foundry experience.
   - **Application Insights** — collects traces from Azure Monitor Application Insights.
4. Fill in the credentials for the source system you selected.

Source system	Steps
Classic Foundry	**a.** Enter a descriptive name for the connection. The name distinguishes this connection from others you create. For instance, you may choose a name that identifies the account, project, or environment. **b.** Select the Azure AI Services OAuth 2.0 credential alias in the **Azure AI Services Credential Alias** field.

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Source system	Steps
	c. Select the Azure Machine Learning Services OAuth 2.0 credential alias in the **Azure Machine Learning Credential Alias** field. **d.** Enter the interval, in minutes, at which the MID Server polls for new trace data in the **Collection frequency (minutes)** field. The default is 30. Set a lower value to return results sooner or set a higher value to reduce overhead for lower-volume systems. **e.** Select the MID Server that runs trace collection. The MID Server must be active and validated. Select **Go to Mid server installation** to install or configure one. **f.** Select **Active** to begin collecting traces when you save. Clear this option to save the connection without starting collection. You can activate the connection later from its record.
New Foundry	**a.** Enter a descriptive name for the connection. The name distinguishes this connection from others you create. For instance, you may choose a name that identifies the account, project, or environment. **b.** Select the Application Insights API key credential in the **Application Insights Credential** field. **c.** Select the Azure Machine Learning Services OAuth 2.0 credential in the **Azure Machine Learning Credential** field. **d.** Enter the **Application Insights Application ID**. Find this value in the Azure portal, under your Application Insights resource settings. **e.** Select the MID Server that runs trace collection. The MID Server must be active and validated. Select **Go to Mid server installation** to install or configure one. **f.** Enter the interval, in minutes, at which the MID Server polls for new trace data in the **Collection frequency (minutes)** field. The default is 30. Set a lower value to return results sooner or set a higher value to reduce overhead for lower-volume systems. **g.** Select **Active** to begin collecting traces when you save. Clear it to save the connection without starting collection. You can activate the connection later from its record.

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Source system	Steps
Application Insights	**a.** Enter a descriptive name for the connection. The name distinguishes this connection from others you create. For instance, you may choose a name that identifies the account, project, or environment. **b.** Select the Azure App Insights OAuth 2.0 credential alias in the **Azure App Insights Credential** field. **c.** Select the Azure Machine Learning Services OAuth 2.0 credential alias in the **Azure Machine learning credential** field. **d.** Enter the **Application Insights Resource ID**. Find this value in the Azure portal, under your Application Insights resource settings. **e.** Select the MID Server that runs trace collection. The MID Server must be active and validated. Select **Go to Mid server installation** to install or configure one. **f.** Enter the interval, in minutes, at which the MID Server polls for new trace data in the **Collection frequency (minutes)** field. The default is 30. Set a lower value to return results sooner or set a higher value to reduce overhead for lower-volume systems. **g.** Select **Active** to begin collecting traces when you save. Clear it to save the connection without starting collection. You can activate the connection later from its record.

5. Select **Save**.

Result

The trace connection appears on the **Established** sub-tab. If the connection is active, AI Control Tower begins collecting trace data after the first polling interval.

What to do next

Choose which metrics to include in evaluation scoring. See Activate evaluation scoring for external AI systems.

Add a GCP Cloud Trace connection

Monitor AI agents running on Google Cloud by adding a GCP Cloud Trace connection. AI Control Tower collects trace data through your Google Cloud credentials and a MID Server, without requiring SDK instrumentation.

Before you begin

Confirm the following:

- An active MID Server is installed and configured in your ServiceNow instance. See MID Server installation.
- A Google Cloud OAuth 2.0 credential with permission to read trace data is available.

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- You must set up the GCP service account and grant the required IAM permissions in Google Cloud. After configuring the service account, work with your instance administrator to generate a certificate and create the OAuth 2.0 credentials and alias in your instance. For details, see the Configuring GCP Permissions and Credentials for ServiceNow AI Control Tower Trace Ingestion [KB3144347] article in Now Support.

Role required: sn_ai_governance.ai_steward

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Integrations** > **Traces**.
2. On the **Available** sub-tab, select **GCP Cloud Trace**.
3. On the form, fill in the fields.

Add GCP Cloud Trace form

Field	Description
Name	Descriptive name for this trace connection. Use a name that distinguishes this connection from others you create, such as one that identifies the account, project, or environment.
Collection frequency (minutes)	Interval, in minutes, at which the MID Server polls for new trace data. The default is 30. Set a lower value to return results sooner or set a higher value to reduce overhead for lower-volume systems.
Credential	Google Cloud OAuth 2.0 credential that authenticates AI Control Tower to GCP Cloud Trace. The credential must have permission to read trace data.
MID server	MID Server that runs trace collection. The MID Server must be active and validated. Select **Go to Mid server installation** to install or configure one.
Active	Option to begin collecting traces when you save the connection. Clear it to save the connection without starting collection. You can activate the connection later from its record.

4. Select **Save**.

Result

The trace connection appears on the **Established** sub-tab. If the connection is active, AI Control Tower begins collecting trace data after the first polling interval.

What to do next

Choose which metrics to include in evaluation scoring. See Activate evaluation scoring for external AI systems.

Troubleshoot a trace connection

Identify why a trace connection is not collecting data by reviewing its execution log and error messages.

Before you begin

Role required: sn_ai_governance.ai_steward

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About this task

Each trace connection record shows an execution log with the result of every collection attempt. When a connection shows an **Error** execution status, you can select the connection to view the log and read the error message.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Integrations** > **Traces**.
2. Select the **Established** sub-tab.

   Each connection card shows its **State** and **Processing state**. A **Processing state** of **Error** indicates that the last collection attempt did not complete successfully.
3. Select the connection you want to investigate.
4. In the **Execution logs** section, review the log entries.

   Each log entry shows the following information.

Execution log fields

Field	Description
Start time	Date and time the collection attempt began.
End time	Date and time the collection attempt ended.
Traces collected	Number of traces collected during the attempt.
Execution status	Result of the collection attempt. A status of **Success** means traces were collected. A status of **Error** means the attempt failed.
Error message	Details about a failed collection attempt. Review this message to identify the cause of the error.

Result

You have reviewed the execution log and identified the cause of the collection error. Common causes include invalid or expired credentials, an inactive or unvalidated MID Server, and incorrect region or resource ID values.

What to do next

To update the connection configuration, see Edit a trace connection.

Edit a trace connection

Update the configuration of an established trace connection to change its credentials, collection frequency, MID Server, or other settings.

Before you begin

Role required: sn_ai_governance.ai_steward

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Integrations** > **Traces**.
2. On the **Established** sub-tab, select the connection you want to update.
3. Select **Actions** > **Edit**.
4. On the form, update the fields as needed and select **Save**.

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Result
The connection is updated. If the connection is active, AI Control Tower uses the new configuration at the next collection interval.

Deactivate a trace connection

Stop trace collection for an established connection without deleting it, so you can reactivate it later.

Before you begin
Role required: sn_ai_governance.ai_steward

Procedure
1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Integrations** > **Traces**.
2. On the **Established** sub-tab, select the connection you want to deactivate.
3. Deactivate the connection using one of the following methods.

Method	Steps
Actions menu	**a.** Select **Actions** > **Deactivate**. **b.** In the confirmation dialog, select **Deactivate**.
Edit form	**a.** Select **Actions** > **Edit**. **b.** Clear the **Active** option. **c.** Select **Save**.

Result
The connection remains on the **Established** sub-tab with a **State** of **Inactive**. Trace collection stops and no further observability metrics are generated from this connection until it is reactivated.

What to do next
Reactivate the connection by editing the connection and select the **Active** option.

Multi-instance

The Multi-instance Framework enables a prod (manager) instance to manage multiple sub-prod (managed) instances and facilitate communication for AI Control Tower.

Instance Management Hierarchy Overview

The Multi-instance Framework uses a hierarchical structure to organize how instances manage and communicate with each other. This hierarchy helps you configure the appropriate manager instance for your environment.

Instance Roles and Capabilities

Prod Instance

A prod instance can manage both other prod instances and sub-prod instances. This makes it suitable for centralized governance across your organization.

Sub-Prod Instance

A sub-prod instance can manage other sub-prod instances but can't manage prod instances. Sub-prod instances are typically used for specific teams, environments, or business units.

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Configure Multi-instance Framework with Multiple Prod and Sub-Prod Instances

Scenario: You have two prod instances and 6–8 sub-prod instances, and you want to configure the Multi-instance Framework to manage and synchronize assets across all instances.

The Multi-instance Framework enables a prod instance to manage multiple sub-prod instances and facilitate communication for centralized asset governance. Depending on your organizational needs, you can configure the Multi-instance Framework in two ways:

- Centralized Configuration- Use when your organization prefers centralized governance and a streamlined review process.
- Distributed Configuration- Use when your organization has distinct business units or teams that require independent asset governance within a shared environment.

Centralized Configuration

Use this configuration if you want a single access move to review and manage data from all instances.

1. Select one prod instance as the manager instance from the list of instances.
2. Configure all other instances (the second prod instance and all sub-prod instances) to send synchronization requests to the manager instance.

The prod instance controls asset states, rules, and policies for all connected instances.

Distributed Configuration

Use this configuration if you want to organize instances into separate management groups.

1. Select the first prod instance to manage a group of sub-prod instances (for example, 2–3 sub-prod instances).
2. Select the second prod instance to manage another group of sub-prod instances (for example, 4–5 sub-prod instances).
3. Configure each sub-prod instance to send synchronization requests to its assigned prod instance.

After Configuration

After configuring the Multi-instance Framework, enable AI Asset data transfer on the prod instance from the AI Control Tower user interface.

When you configure AI Asset data transfer, the remaining values are automatically configured. No additional setup is required.

Note: To configure Multi-instance, you must request a Manager instance. For more information on requesting a manager instance, see Request a Manager instance.

AI Asset Synchronization

The Multi-instance Framework synchronizes assets from sub-prod instances to the manager instance, enabling faster review processes.

The framework also synchronizes rules from the prod instance to all sub-prod instances.

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Note: Starting with the May 2026 release, confirm that both the prod and sub-prod instances are running the same AI Control Tower core version (6.2.4), which is the minimum supported version.

Upgrade the prod instance to version 6.2.4 when you upgrade a sub-prod instance to confirm the Multi-instance Framework functions correctly.

AI inventory information

You can include the sub-prod instances to synchronize with the prod instance. This synchronization enables AI inventory information to flow between the instances.

When configured, the scheduled job synchronizes AI systems, AI models, prompts, and datasets across instances. Starting with the September 2025 release, the job also synchronizes AI agents.

Note: State of the assets while configuring Multi-instance.

The production AI inventory displays the actual state of your assets like models, datasets, and skills from a production perspective. Assets that are active in a sub-prod instance environment remain classified as under development from the sub-prod instance perspective. This classification occurs because they are still in testing and not yet live.

Due to this distinction, asset states remain separate across environments and don't synchronize. An asset's state transitions to deployed only when the asset and its related records are activated in the production system.

In summary, the state indicates the asset's complete lifecycle progression, not its status within any single environment.

Data sharing preference

Enable the data sharing preference to apply the production settings to all sub-prod instances. By default, this preference is turned off.

Data overflow processing

Enable data overflow processing to apply the production settings to all sub-prod instances. By default, this preference is turned off.

Note: All the preferences mentioned earlier for a sub-prod instance are available in read-only mode, when the Multi-instance Framework is configured and enabled.

For more information on trust concepts and trust configuration management, see Cross-instance application trust configuration.

Request a Manager instance

Request a Manager instance from the Multi-instance page to configure multi-instance management.

Before you begin

Note: This feature isn't supported on Government Community Cloud (GCC), on-premises, and Domain Separated instances.

Role required: sn_ai_governance.ai_steward

About this task

This task can be performed if you're logged in from a sub-prod (managed) instance.

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Note: Confirm that the plugin com.glide.mif.mtls is active. If it isn't active, install the plugin com.glide.mif.mtls by submitting a support request with Now Support for Multi-instance Framework (MIF) features.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Integrations** > **Multi-instance**.
2. Under Request a Manager instance, select **Select a Manager instance** drop-down and select the manager instance.
3. Select **Send request**.

Result

The request is sent to your Manager instance for approval.

Configuring security connections

Connect AI Control Tower to the platforms where your AI agents run and to your identity provider so that policies and AI agent containment using kill switch protocol can act on agents wherever they're hosted.

Key benefits

- Connect AI Control Tower to these platforms that host your AI agents: Agent Client Collector (ACC), AWS Bedrock, AWS Bedrock Agent Core, Gemini Enterprise Agent Platform, Azure AI Foundry, and ServiceNow Agents. Also, you can use Okta as an identity provider, so policy and containment actions can reach agents no matter where they run.
- Deactivate an AI agent through Deny Resource policies applied directly on the AI agent runtime platform, without requiring a separate identity provider connection.
- Add an Okta connection to strengthen containment: when an agent's identity is federated through Okta, deactivating the agent also prevents future tokens from being issued to it.

Security connections and AI agent containment

A security connection authenticates AI Control Tower to the platform or identity provider where an AI agent runs, so that policies and AI agent containment using kill switch protocol can act on that agent. Each connector uses a different authentication model — access key credentials for AWS Bedrock and AWS Bedrock Agent Core, OAuth 2.0 with a JWT Bearer grant for Gemini Enterprise Agent Platform, an Azure AD app registration for Azure AI Foundry, and an API key for Okta — but every connector ultimately creates a security connector record that appears under the **Established connections** tab.

Behind the scenes, AI agent containment is enforced differently depending on which connections you have in place:

- On a supported AI agent runtime platform (AWS, Gemini Enterprise Agent Platform, and ServiceNow), deactivating an AI agent using kill switch protocol applies a Deny Resource policy directly on that platform. This prevents the agent from acting on that platform.
- On Azure AI Foundry, deactivating an AI agent using kill switch protocol disables the agent application directly through the Azure Resource Manager API, rather than applying a Deny Resource policy.
- If you also add an Okta connection, and the AI agent's identity is federated through Okta (AWS Bedrock, AWS Bedrock Agent Core, Gemini Enterprise Agent Platform, and ServiceNow Agents), deactivating the agent additionally prevents future tokens from being assigned to it.

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Important: AI agent containment for Gemini Enterprise Agent Platform agents is supported only for agents that have a unique agent identity configured. See Add a Gemini Enterprise Agent Platform connection.

Add an AWS Bedrock or AWS Bedrock Agent Core connection

Connect AWS Bedrock or AWS Bedrock Agent Core to AI Control Tower so policies and AI agent containment using kill switch protocol can reach and act on agents running on AWS.

Before you begin

Confirm the following:

- You have an AWS Identity and Access Management (IAM) service account with the permissions required for the connector you're configuring:
  - For **AWS Bedrock Agent Core**, in the `bedrock-agentcore:` namespace on `runtime/*` resources: `GetResourcePolicy`, `PutResourcePolicy`, `DeleteResourcePolicy`.
  - For **AWS Bedrock Agent** (classic), in the `bedrock:` namespace on `agent/*` and `agent-alias/*` resources: `ListAgentAliases`, `UpdateAgentAlias`, `TagResource`, `UntagResource`, `ListTagsForResource`.
- The AWS access key ID and secret access key for that service account are available.

Role required: sn_ai_governance.ai_steward

About this task

Adding this connection has two parts: first you create a Connection & Credential Alias that stores your AWS credentials, then you attach that alias to the security connector in AI Control Tower.

Procedure

1. Navigate to **Connection & Credential Aliases** (`sys_alias.list`).
2. Select **New**, set **Type** to **Credential**, and select **Submit**.
3. In the resulting alias record, create a credential and fill in the fields.

AWS Bedrock credential fields

Field	Description
Credential type	Select **AWS Credentials**.
AWS Access Key	Access key ID for the AWS service account.
Secret Key	Secret access key for the AWS service account.
Auth algorithm	Select **Amazon Bedrock AgentCore AICT-AiSP** if you're configuring AWS Bedrock Agent Core, or **Amazon Bedrock Agent AICT-AiSP** if you're configuring AWS Bedrock Agent (classic).

4. Select **Submit**.

   The Connection & Credential Alias record now has this credential attached.

5. Navigate to **AI Control Tower** > **Settings** > **Integrations** > **Control Enforcement Points**.
6. On the **Available connectors** sub-tab, select **AWS Bedrock Agent Core** or **AWS Bedrock**, matching the auth algorithm you selected earlier.

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7. Fill in the fields.

AWS Bedrock security connector fields

Field	Description
Name	Unique, descriptive name for this connection.
Connection Alias	The Connection & Credential Alias record you created in the previous steps.
Active	Select this option.

8. Select **Submit**.

Result
The connector appears on the **Established connections** sub-tab. AI Control Tower can now use this connection to enforce policies and apply AI agent containment using kill switch protocol to agents running on the connected AWS Bedrock or AWS Bedrock Agent Core service.

Add an Azure AI Foundry connection

Connect Azure AI Foundry to AI Control Tower so that policies and AI agent containment using kill switch protocol can reach and act on agents running on Azure AI Foundry.

Before you begin
Confirm the following:

- You have an Azure AI Foundry agent already discovered in AI Control Tower inventory.
- You have an Azure AD app registration (service principal) with a role assignment that permits disabling and enabling agent applications on the target resource group.

Role required: sn_ai_governance.ai_steward

About this task
Adding this connection has two parts: first you create a connection and credential alias that stores your Azure credentials, then you attach that alias to the security connector in AI Control Tower.

Procedure
1. Navigate to **Connection & Credential Aliases** (`sys_alias.list`).
2. Select **New**, set **Type** to **Credential**, and select **Submit**.
3. In the resulting alias record, create a credential and fill in the fields.
4. Select **Submit**.

   The Connection & Credential Alias record now has this credential attached.
5. Navigate to **AI Control Tower** > **Settings** > **Integrations** > **Control Enforcement Points**.
6. On the **Available connectors** sub-tab, select **Azure AI Foundry**.
7. Fill in the fields.

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Azure AI Foundry security connector fields

Field	Description
Name	Unique, descriptive name for this connection.
Connection Alias	The Connection & Credential Alias record you created in the previous steps.
Active	Select this option.

8. Select **Submit**.

Result
The connector appears on the **Established connections** sub-tab. AI Control Tower can now use this connection to enforce policies and apply AI agent containment using kill switch protocol to agents running on the connected Azure AI Foundry service.

Add a Gemini Enterprise Agent Platform connection

Connect Gemini Enterprise Agent Platform to AI Control Tower using a service account and OAuth 2.0 JWT Bearer authentication, so policies and AI agent containment using kill switch protocol can reach and act on agents running on Gemini Enterprise Agent Platform.

Before you begin
Confirm the following:

- A Google Cloud project with the Vertex AI API in Google Cloud enabled and IAM permissions to create a service account.
- A Google Cloud service account granted three IAM roles.

Required IAM roles

Role	Scope	Purpose
`roles/iam.denyAdmin`	Organization	Create and delete the Deny policy used to contain an agent.
`roles/aiplatform.viewer`	Project level	Read the agent's identity from Gemini Enterprise Agent Platform.
`roles/resourcemanager.projectViewer`	Project level	Resolve the Google Cloud project ID.

Deny policies are the only mechanism that overrides IAM allow policies, which makes them the reliable choice for containing an AI agent with the `roles/iam.denyAdmin` role. Removing an agent's role bindings isn't sufficient, because access granted elsewhere in the project still applies.

Gemini Enterprise Agent Platform doesn't provide an API to disable an agent without deleting it. Creating a deny policy requires the `iam.denypolicies.create`, `update`, and `delete` permissions. Google Cloud doesn't provide a way to obtain these permissions below the organization level. The `roles/iam.denyAdmin` role can't be granted on a folder or project, and the permissions can't be placed in a custom role at any scope. Grant the role at the narrowest scope the platform supports. For more information, see the Google Cloud IAM documentation.

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The `roles/iam.denyAdmin` role carries residual risk. This role permits creating deny policies against any resource in the organization, which is broader than the scope required for AI agent containment. Google Cloud doesn't provide a way to narrow the grant by scope, so manage this risk through monitoring rather than IAM. Monitor Cloud audit logs for changes to who holds the role, and monitor all deny policy create and delete actions. Alert on any policy that isn't a project-scoped policy targeting a single agent identity.

Complete these additional prerequisites before continuing:

- Download a JSON key for the service account. In the Google Cloud console, go to **IAM & Admin** > **Service accounts**, select the service account, then select **Add key** > **Create new key** and choose **JSON** as the key type. You'll need the `private_key`, `private_key_id`, `client_email`, and `token_uri` values from this file in the steps below.
- For each ADK-based AI agent you want containment to cover, enable Agent Identity. Create an `.agent_engine_config.json` file with `{ "identity_type": "AGENT_IDENTITY" }` and follow Create and deploy an agent with Agent CLI and Agent Identity to deploy the agent with a unique identity.

> **Important:** AI agent containment is supported only for Gemini Enterprise Agent Platform agents that have a unique agent identity configured this way.

Role required: creating the OAuth, JWT, and certificate records in steps 1–8 below typically requires an instance admin or integration admin role. Creating the security connector in steps 9–11 requires sn_ai_governance.ai_steward.

About this task

Gemini Enterprise Agent Platform authenticates using OAuth 2.0 with a JWT Bearer grant, which requires more setup than an access-key based connection: you convert the service account key into a Java Key Store, build a chain of OAuth and JWT records from it, and then attach the resulting Connection & Credential Alias to the security connector.

Procedure

1. Create the X.509 certificate.

   Convert the service account's private key into a Java Key Store (`.jks`) file and import it as an X.509 Certificate. See the ServiceNow documentation on converting a private key to a Java Key Store. If your team already has a pre-generated `.jks` bundle, you can upload it directly instead.

   Certificate (sys_certificate) fields

Field	Description
Name	Descriptive name, such as the service account's email address.
Type	Select **Java Key Store**.
Key store password	Password used when the `.jks` file was created.
Active	Select this option.

2. Create the JWT Keys record.

   Navigate to **JWT Keys** and create a new record.

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JWT Keys fields

Field	Description
Name	Descriptive name.
Signing Keystore	The certificate record from the previous step.
Key Id	The `private_key_id` value from the service account JSON key. Copy it directly.
Signing Algorithm	Select **RSA 256**.
Signing Key	The password used to create the certificate in the previous step.
Active	Select this option.

3. Create the JWT Provider record.

   Navigate to **JWT Provider** and create a new record with the following:

   - **Name**: descriptive name.
   - **Signing Configuration**: the JWT Keys record from the previous step.
   - **Expiry Interval (sec)**: `3600`.

   Add these Standard Claims:

   - `aud`: The `token_uri` value from the service account key (typically `https://oauth2.googleapis.com/token`).
   - `iss`: The `client_email` value from the service account token.
   - `sub`: The `client_email` value from the service account token.

   Add this Custom Claim:

   `scope : https://www.googleapis.com/auth/cloud-platform`

4. Create the Application Registry record.

   Navigate to **Application Registries** and create a new **OAuth Provider** record.

Application Registry (OAuth Provider) fields

Field	Description
Name	Descriptive name.
Provider Type	Select **Connect to a third-party OAuth Provider – Outbound** (or the equivalent option on your instance).
Default Grant Type	Select **JWT Bearer**.
Client ID	The `client_id` value from the service account JSON key you generated earlier.
Client Secret	The `private_key` value from the service account JSON key, with `\n` sequences converted to actual newlines.
Authorization URL	`https://accounts.google.com/o/oauth2/auth`
Token URL	`https://oauth2.googleapis.com/token`

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Field	Description
Refresh Token Lifespan	`8640000`
Active	Select this option.

Under **OAuth Entity Scopes**, add a scope named **Vertex AI Scope** with the value `https://www.googleapis.com/auth/cloud-platform`.

5. Update the default OAuth Entity Profile.

   Open the default profile that was automatically created for the OAuth Provider in the previous step, and set:

   - **Grant type**: **JWT Bearer**.
   - **JWT Provider**: the JWT Provider record from the earlier step.
   - **Is default**: select this option.

   Add **Vertex AI Scope** under **OAuth Entity Profile Scopes**.

6. Create the OAuth 2.0 Credentials record.

   Navigate to **OAuth 2.0 Credentials** and create a new record with the following:

   - **Name**: descriptive name.
   - **OAuth Entity Profile**: the profile from the previous step.
   - **Applies to**: **All MID servers** (or as appropriate for your instance).
   - **Active**: select this option.

   Use the **Get OAuth Token** related link to confirm the credential retrieves a token successfully.

7. Create the Connection & Credential Alias.

   Navigate to **Connection & Credential Aliases** and create a new record with the following:

   - **Name**: descriptive name.
   - **ID**: a unique identifier for the alias.
   - **Type**: **Connection and Credential**.
   - **Connection type**: **HTTP**.
   - **Default Retry Policy**: **Default HTTP Retry Policy**.

8. Create the HTTP(S) connection.

   From the **Connections** related list on the alias you just created, select **New** and fill in:

   - **Name**: descriptive name.
   - **Credential**: the OAuth 2.0 Credentials record from the earlier step.
   - **Connection alias**: the alias from the previous step.
   - **Protocol**: **https**.
   - **Host**: `iam.googleapis.com`.
   - **Connection URL**: `https://iam.googleapis.com`
   - **Active**: select this option.

9. Navigate to **AI Control Tower** > **Settings** > **Integrations** > **Control Enforcement Points**.

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10. On the **Available connectors** sub-tab, select **Gemini Enterprise Agent Platform**.
11. Fill in the fields and select **Submit**.

Gemini Enterprise Agent Platform security connector fields

Field	Description
Name	Unique, descriptive name for this connection.
Connection Alias	The Connection & Credential Alias you created in the previous steps.
Active	Select this option.

Result

The connector appears on the **Established connections** sub-tab. AI Control Tower can now use this connection to enforce policies and apply AI agent containment using kill switch protocol to Gemini Enterprise Agent Platform agents that have a unique agent identity configured.

To verify the setup:

- Confirm the HTTP connection appears in the **Connections** related list on the Connection & Credential Alias.
- Confirm the OAuth 2.0 Credentials record can retrieve a token using **Get OAuth Token**.
- Confirm the connector appears under **Established connections** on the Control Enforcement Points tab.

To deploy the AI agent, see Create and deploy an agent with Agent CLI and Agent Identity in Google documentation.

Add an Okta connection

Connect Okta to AI Control Tower so that policies and AI agent containment with kill switch protocol prevent future tokens from being issued to a deactivated AI agent.

Before you begin

Confirm the following:

- You have an Okta tenant with admin access to generate an API token scoped to `okta.aiAgents.manage`. This scope is dedicated to AI agent lifecycle operations and meets least-privilege requirements; it isn't the broader `okta.users.manage` scope. Requires the Okta `SUPER_ADMIN` role.
- A security connection is already established for the platform hosting the AI agent — AWS Bedrock, AWS Bedrock Agent Core, Azure AI Foundry, Gemini Enterprise Agent Platform, or ServiceNow Agents. An Okta connection extends containment for agents whose identity is federated through one of those platforms; it doesn't replace the platform connection. See Add an AWS Bedrock or AWS Bedrock Agent Core connection or Add a Gemini Enterprise Agent Platform connection.
- The AI agents you want covered are actively configured on the Okta tenant — in other words, their identity is federated through Okta.

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APIs covered by the okta.aiAgents.manage scope

Operation	Kill switch use case	Okta endpoint
Activate AI agent	Reinstate after investigation clearance.	`POST /api/v1/agentregistration/{id}/activate`
Deactivate AI agent	Deactivate the agent as a containment action.	`POST /api/v1/agentregistration/{id}/deactivate`
Get all agents	Discover agent inventory for targeting.	`GET /api/v1/agentregistration`

Role required: Creating the Connection Alias, credential, and HTTP connection in steps 1–3 below typically requires an instance admin or integration admin role. Creating the security connector in steps 4–6 requires sn_ai_governance.ai_steward.

About this task

An Okta connection is optional but strengthens how AI agent containment using kill switch protocol works. If an identity provider isn't connected, AI agent containment acts at the runtime platform only; existing identity provider-issued session tokens aren't revoked and new tokens aren't blocked.

When Okta is configured and the agent's identity is federated through Okta, deactivating the agent additionally prevents future tokens from being assigned to it.

Procedure

1. Create the Connection Alias.

   Navigate to **Connection & Credential Aliases** (`sys_alias.list`) and select **New**.

   Okta Connection Alias fields

Field	Description
Name	Descriptive name, such as `Okta Identity Sync Alias`.
Type	Select **Connection**.
Connection Type	Select **HTTP Connection**.
Is Internal	Clear this option.
Multiple Connections	Clear this option.
Retry Policy	Select **Default HTTP Retry Policy**.
Application / Scope	Select **AI Security and Privacy**.

   Select **Submit**.

2. Create the API key credential.

   Navigate to **Credentials** (`discovery_credentials.list`), select **New**, and choose credential type **API Key Credentials**.

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Okta API key credential fields

Field	Description
Name	Descriptive name, such as `Okta SSWS Token - <your_okta_tenant_name>`.
Active	Select this option.
Type	Select **API Key**.
API Key	Your Okta API token.
API Key Prefix	`SSWS`.
Application	Select **AI Security and Privacy**.

Note: The `SSWS` prefix is automatically prepended to the token in the Authorization header. Don't include `SSWS` in the API Key field itself.

Select **Submit**.

3. Create the HTTP connection.

   Navigate to **HTTP Connections** (`http_connection.list`), or select **New** from the **Connections** related list on the Connection Alias record you created earlier.

Okta HTTP connection fields

Field	Description
Name	Descriptive name, such as `Okta Dev Tenant - <your_okta_tenant_name>`.
Active	Select this option.
Connection URL	`https://<your_okta_tenant>.oktapreview.com`
Connection Alias	The Connection Alias record from the first step.
Credential	The API key credential from the previous step.
Protocol	**https**
Host	`<your_okta_tenant>.oktapreview.com`
Application Scope	Select **AI Security and Privacy**.
Use MID	Clear this option.
MID Selection	Select **Auto select**.
Mutual Auth	Clear this option.

Select **Submit**.

4. Navigate to **AI Control Tower** > **Settings** > **Integrations** > **Control Enforcement Points**.
5. On the **Available security connectors** sub-tab, select **Okta**.
6. In the **Configure connector** panel, fill in the fields and select **Submit**.

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Okta security connector fields

Field	Description
Name	Unique, descriptive name for this connection, such as `Okta - Dev Tenant`.
Provider Type	Select **Okta**.
Connection Alias	The Connection Alias you created in the first step.
Active	Select this option.

Result

The connector appears on the **Established connections** sub-tab. If Okta deactivation is skipped and only hyperscaler deactivation is performed, the AI agent is still effectively disabled; the Okta connection adds token-level containment on top of that.

To verify the setup:

- Open the Connection Alias record and confirm the HTTP connection appears in its **Connections** related list.
- Optionally, test the connection with a GET request to `https://<tenant>.oktapreview.com/api/v1/ai-agents?limit=200https://<tenant>.oktapreview.com/api/v1/agentregistration` using the alias, and confirm a `200 OK` response.

Add an Agent Client Collector (ACC) connection

Block and unblock AI usage on managed devices by configuring Agent Client Collector (ACC) as a control enforcement point.

Before you begin

Confirm the following:

- The Agent Client Collector (ACC) agent is deployed to the devices you want covered. For details, see Agent Client Collector.
- Devices with the deployed ACC agent can connect to your ServiceNow instance through a MID server or a proxy.
- If ACC is already installed and in use, confirm agents are reporting data on the **ACC Agent health dashboard**.

Role required: sn_ai_governance.ai_steward

About this task

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Integrations** > **Control enforcement points**.
2. On the **Available connectors** tab, select **ACC**.
3. Enter a name for this connection.
4. Confirm the **Domain** field.
5. **Optional:** Select a **Connection Alias**.

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6. Activate the connector by selecting **Active**.
7. Select **Submit**.

Result
The connection is created and appears on the **Established connections** tab.

What to do next
ACC is configured as a control enforcement point for explicit block policies. For details, see Create an Explicit Block policy.

Configuring rules and templates in AI Control Tower

Configure how AI assets are classified, evaluated, valued, and secured across your organization through rules and templates.

Rules and templates settings bring together the configuration that drives automated AI governance behavior on your instance.

Rules and templates

Automation rules

Define the conditions under which discovered AI assets are automatically marked as managed. Use built-in rules or create your own to reduce manual classification work and keep your inventory current. For more information, see Managing AI assets in bulk.

Evaluation

Configure evaluation scoring for ServiceNow and external AI systems. Select which metrics are scored on each evaluated session, and use metric templates to define how individual metric scores aggregate into quality and safety scores. For more information, see Configuring monitoring and evaluations in AI Control Tower.

Templates

Manage the value templates that define the productivity gain formula for AI assets. Configure default template rules that determine which template is applied to a new AI asset, and review the AI system mappings that show which template each asset is currently using. For more information, see Value.

AI skills

Enable the **AI-generated enrichment** toggle to run LLM-based enrichments with the AI Inventory Intelligence Agent. For more information, see AI Inventory Intelligence Agent

Cost

Configure the AI cost settings used to calculate net AI returns and the cost dimension of value templates. For more information, see Cost.

Security

Configure security rules and templates that control how AI Control Tower detects and responds to security threats across your AI assets. For more information, see Configure post-runtime security metrics.

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AI Gateway

Use the AI Gateway settings page to control global transaction processing for all connected MCP servers and manage individual MCP server connections independently of the global gateway state.

Role required: sn_ai_governance.ai_steward

The AI Gateway settings page is the administrative control center for the AI Gateway in AI Control Tower. From this page, you can:

- Pause or resume global transaction processing across all MCP servers simultaneously.
- Monitor the connection status of individual MCP servers in real time.
- Pause or resume traffic to specific MCP servers independently from the global setting.
- Configure tools and policies for the AI Gateway using the Tools and Policies tabs.

The page is organized into three tabs: Overview, Tools, and Policies.

Overview tab

The Overview tab displays the global transaction control banner and the MCP servers list with server name, connection status, and server-level pause controls.

The transaction status banner appears at the top of the Overview tab. It shows the current global state of AI Gateway transaction processing and provides a control to change that state.

MCP servers table

The MCP servers section lists all MCP servers registered with the AI Gateway. The section header displays the total count of registered servers. The table provides the following columns for each server.

Column	Description
Server name	The display name of the MCP server as registered in the AI Gateway. The name links to the server's inventory record in AI Control Tower.
Connection status	Connection state, shown as a color-coded dot and label: • Green: Server is actively connected and processing requests. • Red: Server is not reachable or has been paused.
Last updated	The date and time when the connection status was last refreshed for this server
Pause / Resume button	Controls traffic to this MCP server. Select Pause to stop the AI Gateway from rou requests to this server only. Other servers continue to operate normally. Select Resume to restore routing.

Tools tab

The Tools tab governs the lifecycle of individual tools exposed by MCP servers. It provides two global toggle settings that automate tool management decisions based on security scanning results and MCP server approval workflows.

Tools tab settings

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The Tools tab displays two configurable toggle settings: Auto-deactivate vulnerable tools and Auto-activate new tools. Both toggle settings are enabled by default.

Toggle settings	Description
Auto-deactivate vulnerable tools	New tools are automatically activated when an MCP server is approved. Tools identified as vulnerable are automatically deactivated.
Auto-activate new tools	New tools are automatically activated. Vulnerable tools are flagged but remain active until manually deactivated.

Policies tab

The Policies tab lets you manage how built-in AI Gateway policies are enforced across registered MCP servers. Each policy in AI Gateway targets a specific type of governance — such as data sensitivity checking — and can be applied selectively to individual servers.

From the Policies tab, you can view which MCP servers are running under a given policy and monitor their enforcement status. You can also activate or deactivate policy enforcement per server without affecting the global policy state.

AI Gateway policy

AI Gateway policy defines a set of rules that AI Control Tower can enforce when AI agents interact with MCP servers through the gateway. Policies operate at the server level: you can enable a policy for one server while leaving it inactive for another. AI Control Tower includes the following built-in policy:

Data Sensitivity Check: Scans tool inputs and outputs for sensitive data types. When active, the policy can intercept agent interactions and block or flag content that matches the configured sensitivity rules.

The Policies tab is organized into two areas: a policy activation banner and a server list.

The banner at the top of the page shows whether the policy is currently activated at the global level. It provides the following controls:

- Activate / Deactivate — Turns the policy on or off globally. When deactivated, the policy is not enforced for any server regardless of individual server policy status.
- Configure sensitive data types — A link that opens the sensitive data type configuration page, where you define the data categories the policy detects.

The server list displays all MCP servers that are associated with the active policy. The list includes the following columns:

Column	Description
Server name	The name of the MCP server running under the policy. Select the server nam
Policy status	Indicates whether the Data Sensitivity Check policy is enforced for this serv server enforces the policy. When inactive, the server does not.
Action	Select Activate or Deactivate to change the policy enforcement status for th

AI Control Tower playbooks

Drive the lifecycle and approval workflows for AI assets using playbooks in AI Control Tower.

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Playbooks define the structured workflows that guide AI stewards and asset owners through asset onboarding, offboarding, and approval. The playbooks are active by default and can't be edited from within AI Control Tower. To modify a playbook's logic or steps, open it in Workflow Studio by selecting the playbook.

Playbooks

Playbook	Description
AI Asset Onboarding	Guides an AI asset through the onboarding lifecycle stages: Onboard, Assess, Build and test, and Deploy. Triggered when an asset is moved to managed and a lifecycle review is started. The playbook assigns tasks to AI stewards and asset owners for each phase and tracks completion before the asset moves to the Maintain phase.
AI Asset Offboarding	Guides an AI asset through the offboarding lifecycle stages: Assess, Pre-offboarding tasks, and Offboard. Triggered when an AI asset change request of type Offboarding reaches the In progress state. The playbook assigns tasks to the AI Stewards group and requires an approved assessment before the asset's inventory state and status update to Retired on completion.
Now Assist approval	Coordinates AI steward approval before a Now Assist AI asset is deployed. The playbook runs in three steps: Review asset, Evaluate asset, and Approve or reject. During the Evaluate asset step, AI stewards can create sub-approval tasks to gather input from other teams, such as Legal, Security, Data, or Privacy review. When approving or rejecting, the AI steward selects a Risk score and enters Close notes; these values become read-only after the step is marked complete. The playbook runs automatically when a new AI asset is added if AI steward approval is activated in Builder controls. See Configure ServiceNow AI settings.

Updated playbooks for governing managed assets

Manage AI assets through structured lifecycle workflows using the updated playbooks that automate governance tasks, route approvals, and track compliance requirements across onboarding, maintenance, and retirement phases.

Overview of the updated playbooks

The legacy playbooks experience inhibits flexible, risk-aware governance at scale. Tasks originate from disparate integrations rather than the playbook itself, removing context between stages and task origins. When tasks fail or don't appear, users don't have an easy way of determining whether the tasks skipped or encountered errors. Governance tasks apply uniformly across assets regardless of risk classification.

The updated playbooks improve on existing playbooks by introducing centralized task creation. This enables visibility into task lifecycle, providing a single source of truth for changes, allowing risk-based task differentiation, and improving discoverability through clearer navigation paths. The new playbooks provide structured workflows that guide AI stewards and asset owners through the complete lifecycle of AI assets. Playbooks automate governance tasks, assign responsibilities, and enforce compliance checkpoints as assets progress from initial onboarding through deployment, maintenance, and eventual retirement.

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How playbooks work

Playbooks operate as workflow templates that activate when specific lifecycle events occur. Each playbook defines a sequence of activities and tasks that must be completed before an asset can advance to the next lifecycle phase. When an AI asset enters a new lifecycle stage, the corresponding playbook generates a set of activities and tasks tailored to that stage. Each activity represents a logical grouping of related governance work, such as risk assessment, security review, or deployment approval. This approach ensures that governance, risk, and compliance requirements are addressed operationally as part of the asset lifecycle rather than as separate processes.

Tasks within each activity are assigned to appropriate roles based on the type of review required. For example, impact assessments might be assigned to AI stewards, while security clearances are routed to security teams. The asset cannot progress to the next activity until all required tasks for the current activity are completed or approved. To learn more about the playbooks offered, see AI Control Tower playbooks.

Key benefits of the updated playbook

The updated playbook provides the following benefits:

- Task creation is handled by the playbook and is not dependent on separate workstream integrations.
- A consolidated overview of all tasks and their statuses are maintained in a single place. Tasks appear created, errored with a message, or skipped—all recorded in one place.
- Each workstream reads its own decision table. Task types are added or changed by configuration, not code.
- Asset attributes such as risk tier, phase, and use and purpose are considered before the tasks are assigned.
- Playbooks are shipped as protected. However, they can be cloned with the workflow and then customized to suit business requirements.

Lifecycle tasks

Lifecycle tasks are units of governance work that playbooks generate as assets progress through their lifecycle. Each task corresponds to a step in a playbook activity that requires human review, approval, or completion. Tasks include impact assessments, architecture reviews, security clearances, value template approvals, and other reviews that must be completed before an asset can advance.

Playbooks generate tasks based on the asset type, risk classification, and lifecycle phase. Tasks are assigned to specific roles or individuals based on the type of review required. For example, a high-risk AI system might trigger additional security review tasks that are not required for lower-risk assets.

Tasks appear in multiple locations for visibility and action. Asset owners see tasks on the asset record within the playbook visualization. AI stewards and reviewers see assigned tasks in the Activity Center and can filter by task type, priority, or due date. Tasks can also generate recommendations when they become overdue or when activities have no associated tasks.

Automated triggering of playbooks

Playbooks can be configured to trigger automatically when specific conditions are met. When the Automatically trigger playbooks setting is active in Builder controls, approval playbooks run

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automatically when a new AI asset is added. This ensures that governance workflows begin immediately when assets enter the system.

When automatic triggering is inactive, asset managers can still initiate approval playbooks manually from the asset record. This provides flexibility for organizations that want to control when governance workflows begin or that have different approval requirements for different asset types.

Automatic triggering reduces manual overhead and helps prevent ungoverned assets from progressing through the lifecycle without required reviews. It also ensures consistent application of governance policies across all AI assets.

Related topics

Migrate to updated AI asset onboarding playbook

Migrate to updated AI asset onboarding playbook

Configure the new AI asset onboarding playbook to simplify AI asset management through structured lifecycle workflows. The migration also includes an opt-in to decide between moving to the new playbook or continuing in the existing playbook.

Before you begin

Role required: admin

Procedure

1. Navigate to **Settings** > **Playbooks**.

   The **Playbooks** settings page shows all published playbooks and their current status.

2. Locate the **Switch to AI Asset Onboarding playbook V2** option.

   This card displays the scope of the migration. It includes a description of what will change and a **Review and switch** button.

   Note: Switching to the new playbook will not migrate customization that has been implemented in the existing playbook and flows. However, it will flag the customized playbooks and flows. This enables you to make fixes to prevent disruptions.

3. Select **Review and switch**.
4. On the **What's changing** tab, review the three sections: **What's changing**, **What it affects**, and **Confirm**.

   The dialog lists artifacts that will be deactivated, remain active without changes, and activate as part of the migration.

What's changing

What's changing	Review details of the new playbook structure that is being introduced. The system retires artifacts specific to the old playbook during migration. After the switch, the new AI Asset Onboarding playbook introduces updates six areas: playbook structure, task assignment per asset, task rule configuration, lifecycle progression triggers, stage-specific user views, and new task type addition. The new

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	approach replaces fixed paths with flexible, configurable options.
What it affects	Existing playbooks and flows remain active without changes. Review these items to verify they do not create duplicate approval tasks. The system activates one new customized AI asset onboarding playbook with all required components
Confirm	The system deactivates the old playbook automatically. Your customized flows and playbooks remain active and require your review. The new playbook activates with all required components. Confirm that you understand the old setup deactivates while your customizations remain active.

Note:

Switching to the new playbook impacts only new AI Assets. Existing AI Assets which are already part of a playbook will not be impacted.

5. Expand each section to confirm the specific playbooks, flows, and configurations affected by the switch.

   Based on your app version, complete the appropriate steps:

AI Asset Onboarding migration scenarios

Scenario and impact	Steps
App versions from `AICT UI Application v7.1.1`	
There are no impacts. AI Asset Onboarding V2 is enabled by default and requires no migration.	Not applicable.
App versions before `AICT UI Application v7.1.1`.	
If no customizations were made to the default playbook, the switch to the new playbook is executed with no impacts. Impact: No impact Remedial measures: No remedial measures are required.	**a.** In **Settings** > **Playbooks**, select **Review impacts** on the **Switch to AI Asset Onboarding V2** banner. **b.** Select **Review and switch** to complete the migration.
○ If the default playbook has been customized ○ If a custom playbook has been created to replace the default playbook and the default playbook has been deactivated. Impact: No impact	**a.** Deactivate the customized playbook. **b.** In **Settings** > **Playbooks**, select **Review and switch** to switch to AI Asset Onboarding V2.

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Scenario and impact	Steps
Remedial measures: The existing playbook needs to be deactivated.	
If the default flows are customized. Impact: Customized flows associated with the old playbook may create duplicate tasks when they continue to run alongside the new playbook. Remedial measures: Configure flow to check if AI Asset Governance Details record is linked to the old playbook and end the flow to prevent the flow from executing further. Add this check to all customized flows that generate tasks.	Modify the flow to introduce a check. For more information, see Edit a flow **a.** Add an action **Check if AI Asset Governance Details record is linked to the old playbook** to the customized flow. **b.** Add an **If** condition immediately after the check. **c.** Configure the condition: if the AI Asset Governance Details record is not linked to the old playbook, add an **End Flow** step. This configuration allows the flow to exit early for new assets tied to the V2 playbook and continue running only for existing assets on the old playbook. **Note:** The action **Check if AI Asset Governance Details record is linked to the old playbook** is available only after upgrading to version `6.1.2`
If the V2 playbook is to be cloned and customized.	**a.** Create a copy of the V2 playbook and modify it as needed. **b.** Set the *sn_ai_asset_mgmt.new_playbook_opt_in* system property to `true`. **c.** Deactivate the old playbook. **d.** Activate the newly cloned playbook. **e.** In the Playbook Configuration record, set the **Playbook record** field to `AI Asset Onboarding V2`. **f.** In the `AIAssetLifecycleAPI` script include, update the *NEW_PLAYBOOK_SYS_ID* variable to reference the copied playbook's sys_id.

6. Select **Continue**.
7. **Optional:** Review any additional confirmation prompts and select **Confirm** to complete the switch.

Configure ServiceNow AI settings

Control how AI features operate on your instance by configuring data sharing preferences, asset approval requirements, and allowed AI model providers.

Before you begin

Role required: sn_ai_governance.ai_steward

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About this task

ServiceNow AI settings apply across your instance and affect all Now Assist features, not just AI Control Tower. Review each setting with your organization's data governance and AI governance policies before making changes.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **ServiceNow AI**.
2. On the **Data controls** tab, review and adjust your data sharing and overflow processing preferences.

   a. To stop sharing instance data with ServiceNow for AI model improvement, select **Opt out** on the **Data Sharing** card.

   Data sharing is active by default. When active, ServiceNow may use instance data that has been filtered for the purpose of removing personal data to improve AI model accuracy. Opting out does not affect your instance's access to AI features. For more information, see the FAQs and opt-out documentation linked on the card.

   b. To prevent Now Assist traffic from bursting to Microsoft Azure datacenters during high-traffic periods, select **Opt in** on the **Data overflow processing** card to keep all traffic within ServiceNow datacenters.

   Data overflow processing is inactive by default, meaning bursting to Azure is allowed. Opting in keeps all Now Assist traffic within ServiceNow datacenters but may result in processing delays or capacity errors during high-traffic periods.

3. On the **Builder controls** tab, configure approval requirements and automated playbook behavior for AI assets.

   a. In the **AI steward approval for AI assets** section, activate approval requirements for each asset type that should require AI steward sign-off before deployment.

   You can activate approval independently for AI systems, MCP servers, and AI models. When active for an asset type, an AI steward must approve the asset before it can be deployed. Select **Actions** on the asset type row to activate or deactivate the requirement.

   b. In the **Automated requests** section, verify that **Automatically trigger playbooks** is set to **Active** if you want approval playbooks to run automatically when a new AI asset is added.

   When inactive, asset managers can still initiate approval playbooks manually from the asset record. Activate or deactivate using **Actions** on the row.

4. On the **AI model providers** tab, configure which AI model providers are allowed on your instance and set fallback behavior.

   a. Review the **Impact summary** panel to see how your current provider selection affects the AI systems on your instance.

   The Impact summary panel shows the total number of AI systems on your instance, how many are supported by your allowed providers, and how many are running on fallback providers instead. Select an area in the chart or a count to open the full Impact summary page, where you can review the list of affected AI systems for that category, including each system's type, activation status, default provider, and per-provider support status.

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b. Select **Edit** to open the provider configuration.

c. In the **AI model providers supported by ServiceNow** section, select the providers you want to allow.

Supported providers include Now LLM Service, AWS Claude, Azure OpenAI, and Google Gemini. These providers are supported by ServiceNow or ServiceNow OEM partners. The data routing setting (Regional or Global) applies to this provider group.

Note: Some ServiceNow skills and agents use third-party provider APIs that may route data to datacenters outside your region. For a list of affected APIs and skills, see the Third-party APIs used in Advanced AI & Data Products [KB2596322] article.

d. In the **AI model providers configured by your organization** section, select any third-party providers your organization has configured with its own API keys.

Third-party providers include Custom LLM Provider, OpenAI, Perplexity, IBM Watson, and others. If your organization uses a provider that is not listed, an admin can add it using provider keys from AI Skill Kit.

e. In the **Is fallback activated?** section, decide whether AI systems whose providers aren't in the allowed list should remain active using their previously configured provider.

f. Select **Save**.

Data controls

Data controls in AI Control Tower enable you to manage how ServiceNow Otto traffic and data are handled across ServiceNow and external datacenters.

You can access Data controls from the **Settings** page in AI Control Tower by selecting the **Data controls** tab. Data controls contain two settings: Data sharing and Data overflow processing. Each setting has its own default state and can be opted out of independently.

Data sharing

Data sharing enables ServiceNow to use anonymized instance data to improve AI model accuracy, enhance user experiences, and better understand business needs.

Data sharing setting

Setting	Default	Effect
Data sharing	Active (on)	ServiceNow uses anonymized instance data to improve AI model accuracy and products. Opting out does not affect your instance's access to AI features, but your instance no longer contributes data to improve ServiceNow AI products.

To stop sharing instance data with ServiceNow for AI model improvement, select Opt out on the Data sharing card.

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Data overflow processing

During high-traffic periods, ServiceNow Otto traffic can burst to Microsoft Azure datacenters to maintain performance. Data overflow processing gives you control over this behavior.

If you opt out of data overflow processing, all ServiceNow Otto traffic remains within ServiceNow datacenters. However, opting out can result in processing delays or capacity overflow errors during high traffic periods.

Data overflow processing

Setting	Default	Effect
Data overflow processing	Inactive (off)	By default, bursting to Azure datacenters is allowed when ServiceNow datacenters experience traffic spikes. Opting in keeps all ServiceNow Otto traffic exclusively within ServiceNow datacenters, but may result in processing delays or capacity errors during high-traffic periods.

To prevent ServiceNow Otto from bursting to Microsoft Azure datacenters, select Opt out on the Data overflow processing card.

Note: The Data sharing and Data overflow processing cards are available for a sub-prod (managed) instance in read-only mode, when Multi-instance setup is configured and active.

Builder controls

Builder controls in AI Control Tower enable you to govern AI assets and workflows by requiring human approval before an asset is deployed or a playbook is triggered.

You can access Builder controls from the **Settings** page in AI Control Tower by selecting the **Builder controls** tab. Builder controls contain two governance settings:

- AI Steward approval for AI assets
- Automatically trigger playbooks

AI Steward approval for AI assets

When you activate AI Steward approval, an AI Steward must approve an AI asset before it can be deployed. You can activate approval independently for each asset type.

The following asset types support AI Steward approval:

Asset type and status

Asset type	Status	Description
AI systems	Inactive	Requires AI Steward approval before an AI system can be deployed.

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Asset type and status (continued)

Asset type	Status	Description
Model Context Protocol (MCP) servers	Inactive	Requires AI Steward approval before an MCP server is made available.
AI models	Inactive	Requires AI Steward approval before an AI model can be used by AI systems.

Each asset type has an independent status of Active or Inactive. When the status is Inactive, AI Steward approval is not enforced for that asset type.

Note: Activating AI Steward approval for one asset type does not affect the approval requirement for other asset types.

Automatically trigger playbooks

The **Automatically trigger playbooks** setting controls whether an approval request is triggered automatically when an AI asset is added. When active, an approval request is sent automatically whenever an AI asset is added. When inactive, the asset manager initiates the request manually.

Note: If you don't activate **Automatically trigger playbooks**, asset managers must initiate approval requests manually from the asset record.

AI model providers

AI model providers enable you to select data routing and manage third-party LLMs (Large language models) and SLMs (Small language models).

Overview of AI model providers

The AI Control Tower provides an AI model providers section where administrators can configure how AI requests are routed and which model providers are permitted on the instance. There are two categories of AI model providers:

- AI model providers supported by ServiceNow. For example, Now LLM Service, AWS Claude, Now LLM-LTS (Long Term Stable) model.
- AI model providers configured by your organization. For example, Perplexity, IBM Watson.

Note: You can select the Now LLM-LTS (Long Term Stable) model, which supports regulated industries such as financial institutions with stronger AI lifecycle management, governance, transparency, and conformance tools.

For more information on the Now LLM-LTS (Long Term Stable) model, see Long term stable models

Data routing and model providers

Data routing is a technology by which LLM and SLM requests are routed to the most suitable datacenter. This technology helps to optimize data traffic, which reduces latency and speeds up response time.

The Data routing and model providers section enables you to route AI model requests and select the allowed model providers. There are two types of data routing:

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Data routing type

Data routing type	Description
Regional data routing	Routes LLM and SLM requests to datacenters within your region. For example, if you're in the APJC (Asia Pacific, Japan, and China) region, requests are routed to the most suitable datacenter in the APJC region. Regional data routing can be mandated by governments of specific regions.
Global data routing	Routes LLM and SLM requests to the most suitable datacenter globally, regardless of the region where the request originates.

You can configure third-party LLM providers using the edit option by choosing either Regional or Global data routing and selecting all the Allowed model providers.

Model Preview Program

Model Preview Program (MPP) is an opt-in program that gives eligible users early access to AI models that aren't yet generally available. These models may be labeled as preview, beta, pre-release, or experimental.

With the MPP, you can:

- Experiment with upcoming AI models before general availability.
- Test new AI capabilities in their environment.
- Build and validate custom skills and agents using the latest models on the platform.
- Provide early feedback on new model offerings.

How MPP works in AI Control Tower:

- An MPP toggle appears in AI Model Providers settings.
- The toggle is off by default.
- An administrator must accept the terms and conditions before enabling the toggle.
- When enabled, eligible preview models are set to available for use.
- Acceptance is audited and recorded.

Fallback and spillover

Fallback and spillover

Feature	Description
Fallback	If you have active AI systems that aren't supported by your enabled model providers, the fallback mechanism enables these systems to continue operating with their default providers. If you choose not to enable fallback, these AI systems must be deactivated. AI systems deployed on fallback providers conform with the list of approved

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Fallback and spillover (continued)

Feature	Description
	providers. The Fallback is activated by default and can be modified.
Spillover	Regional deployments of AI models can experience limited capacity, which could lead to request rate limiting and impact performance. Enabling spillover can help prevent these performance issues. In ServiceNow, only Azure OpenAI currently makes this switch. The Spillover feature is set to active when Azure OpenAI is selected.

Impact summary

The Impact Summary is determined by the chosen allowed model providers and the status of the fallback (active or inactive). The Fallback significantly affects how the Impact summary data appears in the Impact summary table.

You can use the edit option to select **Yes** or **No** for activating the Fallback. Before saving, you can select Preview impact to review and confirm all your selections.

Activate fallback: No

When Fallback is set to No, the Impact summary table shows:

- Total AI systems — all AI systems supported by the allowed model providers.
- AI systems supported by allowed providers — AI systems with skill sets supported by the providers.
- AI systems require deactivation — all active AI systems that lack provider support and must be deactivated because the fallback option is not enabled.
- AI systems can't be activated — all systems currently inactive and not supported by any provider.

Activate fallback: Yes

When Fallback is set to Yes, the Impact Summary table shows:

- Total AI systems — all AI systems supported by the allowed model providers.
- AI systems supported by allowed providers — all AI systems with skill sets supported by the providers.
- AI systems supported by fallback providers — AI systems that are non-conforming because fallback providers aren't permitted providers.

Note: The entries in the Impact summary table change based on the fallback status. When you select an entry from the table, the support matrix page appears with those selected entries, allowing you to update your personalized list.

Support matrix

The support matrix presents all AI systems in a table format, along with their respective AI model providers. The support matrix table includes categories such as AI system, type, activation status, and the selected AI model provider.

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When you select an AI provider, it appears in the AI systems and model provider support table.

Audit logs

Audit logs show configuration changes made on Data, Approvals, and AI model providers categories in the AI Control Tower Workspace. Select the View audit logs option to view the Audit logs page.

The Audit logs page displays all configuration change details organized in the following categories:

- Timestamp
- User
- Changed category
- Changed setting
- After change
- Before change

You can also filter the changes by selecting a date range, starting with the last 90 days.

Note: In a Multi-instance setup, when a managed (sub-prod) instance is added to or removed from the synchronizing instances, the audit log displays two records. The first record shows all instances being removed and the second record shows the instance being added or removed.

Configuring pages in AI Control Tower

View and govern your AI portfolio using terms and visualizations tailored to your organization.

Key benefits

- Present AI Control Tower charts and details in your organization's own terms instead of the default labels.
- Provide data for a specific business unit or reporting period by building a condition into a card.
- Direct users from a card to a different list, report, or page instead of the default destination.

AI Control Tower pages ship with a default set of cards, titles, and visualizations that you can configure as needed.

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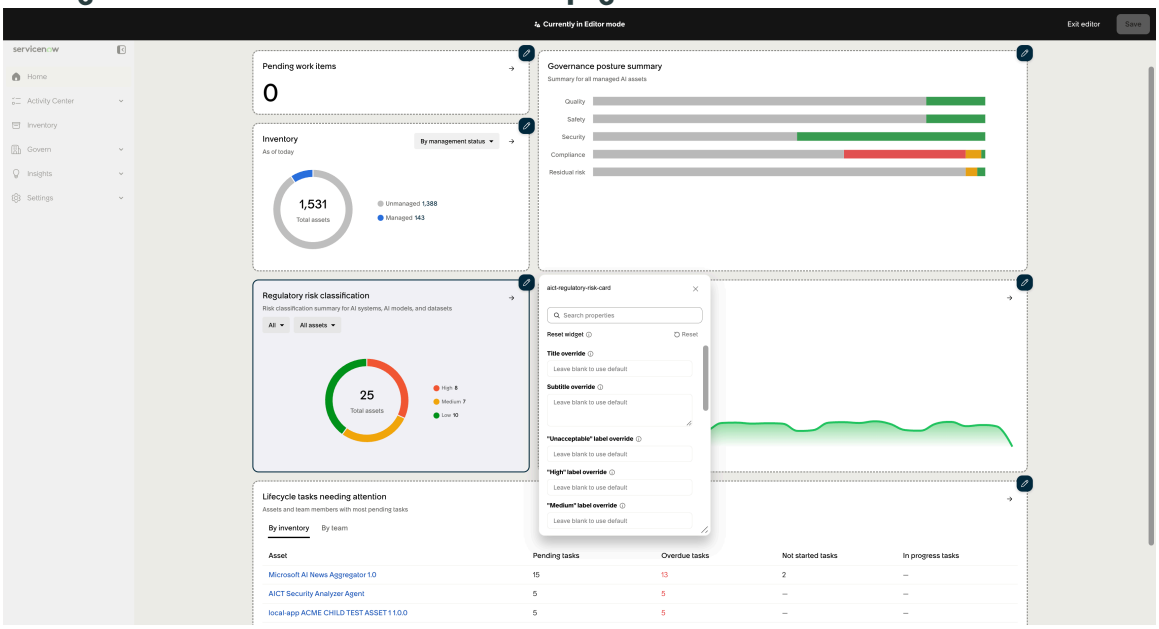
Editing cards on the AI Control Tower Home page



Every configurable card exposes a set of presentation settings, which let you match a page to the vocabulary and reporting style your organization already uses. For example, you can update a card title and subtitle, the chart type, its data labels and legends, and the number of rows and sort direction in a ranked list. The exact settings available depend on the card.

Cards that read directly from tables on your instance also provide a condition builder, so you can narrow a card to the subset of records a page is meant to report on. Cards that retrieve their data from an API provide presentation settings only.

Required roles

The workspace administrator [sn_ai_governance.workspace_admin] role is required to edit cards on AI Control Tower pages.

How configurations are saved and applied

Card configurations apply to all AI Control Tower users. Every user sees a saved configuration the next time the page loads.

Configurations are stored as metadata that layers over the default card, rather than as a copy of the card. When editing a card, an unset or cleared value uses the original behavior.

Note: Hiding information in a card changes only what the page presents. It doesn't restrict access to the underlying records, which remain governed by the access controls on your instance.

Configurations and application upgrades

Configurations remain in place through an application upgrade. When AI Control Tower is upgraded, saved configurations for cards that still exist are reapplied automatically, and the pages continue to show the configured titles, conditions, and display options.

Cards introduced by a new version appear with their shipped settings, which an administrator can then configure.

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Important considerations

- Configurations aren't scoped to a domain. Separate domains on a domain-separated instance can't have different versions of the same page.
- Card titles and labels that an administrator enters are stored as typed and aren't translated.
- Configuration is available on all pages and tabs except Activity Center, the Inventory list views, the Policies tab, and Settings.
- If the available settings don't cover a change your organization needs, you can extend pages with pro-code tools. For more information, see Creating or extending pages with pro-code tools.

Use cases

Matching card titles to internal terminology

An organization refers to its onboarded AI systems as registered assets rather than inventory. A workspace administrator changes the title of the inventory card on the Home page to Registered AI assets, so the page uses the same term that appears in the organization's internal governance process. Every user who opens the Home page sees the new title.

Preparing a page for a leadership review

A governance team presents AI system scores in a monthly leadership review, where a list of five systems is more detail than the meeting needs. A workspace administrator reduces the ranked list on the Monitor page to the two lowest-scoring systems and sets the sort direction to show the largest score declines first, so the page opens on the systems that need attention.

Narrowing a card to a reporting period

An organization reports on the AI systems it onboarded during the current fiscal year, but the inventory card counts every system on the instance. Because the card reads directly from a table, a workspace administrator adds a condition that limits it to systems created in the last year. The card count and the page it navigates to both reflect the condition.

Related topics

Configure a page card in AI Control Tower

Configure a page card in AI Control Tower

Change how a card presents its data so that a page matches the terminology, level of detail, and reporting focus your organization works with.

Before you begin

Role required: workspace administrator [sn_ai_governance.workspace_admin]

About this task

The settings available for a card depend on how that card gets its data. Cards that read directly from tables on your instance provide a condition builder in addition to their presentation settings. Cards that retrieve their data from an API provide presentation settings only. Saved changes apply to every user on the instance.

You can configure cards on all pages and tabs except Activity Center, the Inventory list views, the Policies tab, and Settings.

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Procedure

1. Navigate to **All** > **AI Control Tower** > **Home**.
2. Navigate to the page that you want to configure.
3. Select the edit icon ( ) to enter editor mode.
   A configuration control appears on each card that you can change.
4. Select the configuration control on the card that you want to change.
5. Change the settings for one or more cards.
   Leave a text field empty to keep the value that the card ships with.

Common configuration options	Description
Title override	Enter the text that you want to display in the title of the card.
Subtitle override	Enter the text that you want to display in the subtitle of the card.
Empty-state message	Enter the message that you want users to read when the card has no data to display.
Chart type	Select the chart type that presents the data most clearly for your organization. For example, change a donut chart to a pie chart or a semi-donut chart or show a trend chart as an area chart.
Labels	Adjust the label text to match the terms your organization us es.
Show category legend	Show or hide the legend, depending on whether the labels re peat information that the chart already conveys.
Number of rows and sort or der	**a.** Set the number of rows that you want a ranked list to dis play. **b.** Select the sort order so that the list opens on the records you want to review first, such as the lowest scores rather than the highest.
Additional filter	**a.** In the condition builder, select the field, operator, and value that limit the card to the records you want it to report on. **b.** Add more conditions as needed. The condition builder is available only for cards that read di rectly from tables on your instance. The condition also ap plies to the page that the card navigates to.
Show view-all arrow	Show or hide the arrow icon to view all items.
View-all URL	Enter the URL that you want the arrow icon to open, so that users move to the list or page your organization works from. This setting is available only for cards that already include an icon for navigating to another page.

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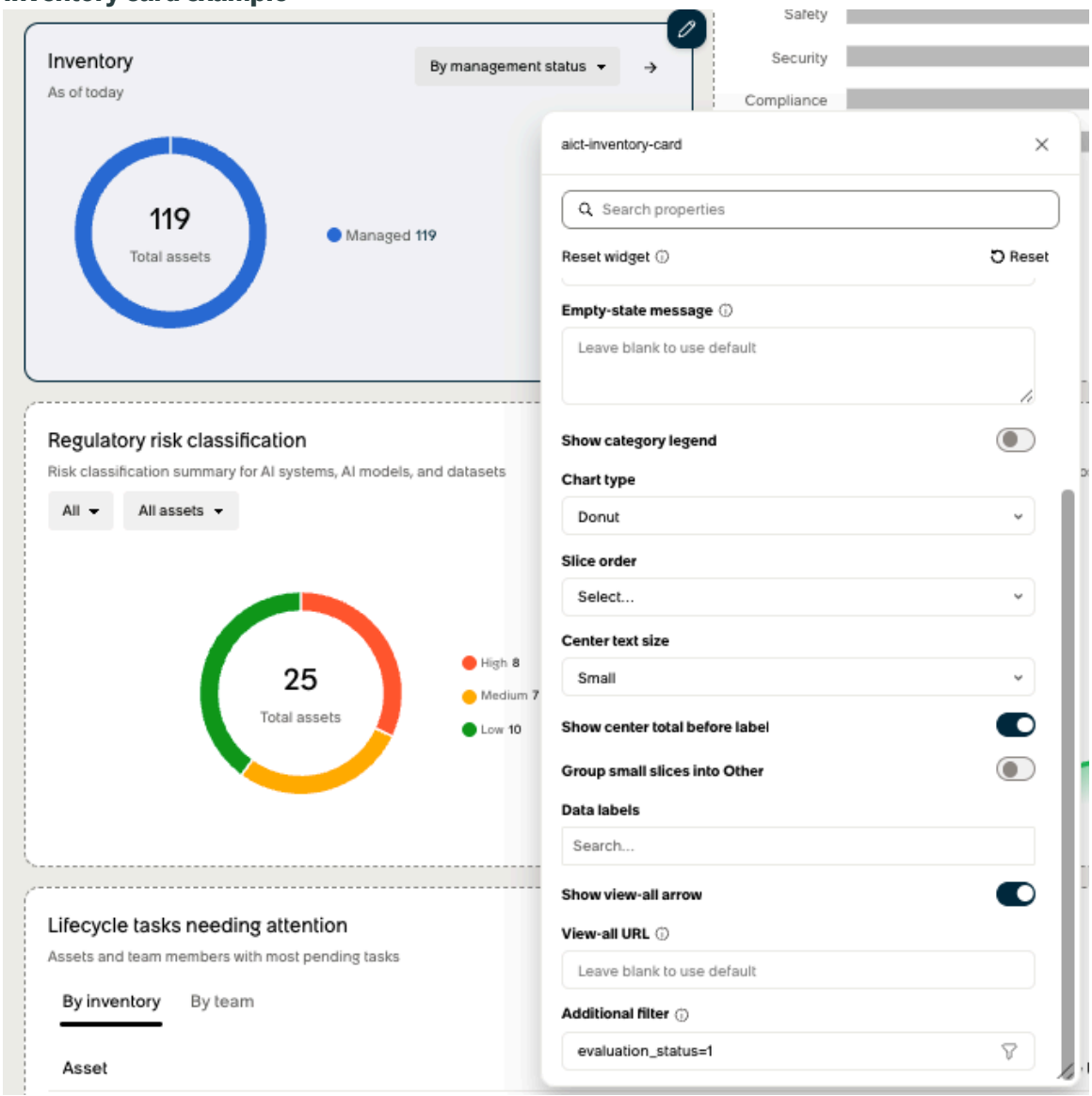
Common configuration options	Description
Optional card elements	Turn off the elements that your organization doesn't track, to reduce the amount of information on a page. For example, you might hide token statistics, trend lines, a filter dropdown, or the chart in a card that also displays a total.

Example

Inventory card example



6. **Optional:** Return a card to the settings it ships with by selecting **Reset**.
   You can reset a card whether or not you have already saved your changes to it. Resetting a saved configuration removes it for every user.
7. Close the edit card panel.
8. Save the configuration changes that you made for all cards in the current session by selecting **Save**.

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Result
AI Control Tower users see the configured cards the next time the page loads.

Related topics

- Configuring pages in AI Control Tower
- Creating or extending pages with pro-code tools

Creating or extending pages with pro-code tools

Extend your AI Control Tower pages beyond the built-in configuration options with the ServiceNow Lux Lab for VS Code extension.

If the built-in configuration options don't meet your organization's needs, you can customize AI Control Tower pages using the ServiceNow Lux Lab for VS Code extension. Delivered through the AI Experience Framework, the extension enables pro-code developers to create net new or extend existing pages, experiences, and widgets.

For information about installing and using the extension, see ServiceNow Lux Lab for VS Code extension.

For information about the configuration options that a workspace administrator can change without pro-code tools, see Configuring pages in AI Control Tower.

Planning your AI strategy

Define AI strategic priorities, set measurable goals, and track planning items and costs to align your AI investments with organizational objectives.

Why strategic planning matters for AI

AI investments succeed when they are tied to measurable organizational objectives — not deployed in isolation. Without a strategic framework, AI initiatives risk becoming fragmented experiments that are difficult to prioritize, fund, and sustain. AI Control Tower connects your AI governance capabilities to the broader strategic planning tools on the ServiceNow platform. Every AI investment traces back to a priority your organization has committed to.

The Plan area of AI Control Tower integrates with ServiceNow Goal Framework, Strategic Planning, and PPM Standard. Items categorized as Artificial Intelligence in those applications appear automatically in the AI Control Tower workspace. AI stewards and leadership get a single view of how AI work aligns with organizational strategy.

Defining strategic priorities and goals

In Strategic Planning, strategic priorities with the **Type** field set to **Artificial Intelligence** appear in the Strategy section of AI Control Tower. In Goal Framework, goals with the **Category** field set to **Artificial Intelligence** appear there as well. AI stewards and strategic planners can monitor progress against targets without switching between applications.

This integration makes AI governance tangible at the executive level. Leadership can see whether the organization's AI goals are on track, which priorities are stalled, and where resources may need to be redirected. All of this is visible within the same workspace where operational governance happens.

Tracking costs and prioritizing AI work

Planning items with the **Investment type** field set to **Artificial Intelligence** appear in the Costs section. There, you can compare planned, budgeted, and actual costs for AI projects, epics, and

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demands. This visibility helps finance and governance teams ensure that AI spending aligns with approved budgets and delivers expected returns.

Prioritized planning items surface in the Prioritized AI work section, where you can track the status of projects, epics, and demands that have been selected for execution. For organizations managing multiple AI initiatives simultaneously, this view clarifies what is active, what is queued, and what has been deprioritized.

Monitoring risks, issues, and decisions

Projects classified as Artificial Intelligence appear in the AI RIDAC section. Projects linked to AI-classified goals and strategic priorities also appear there, surfacing their risks, issues, decisions, actions, and changes (RIDAC). This view consolidates project-level governance information from PPM Standard and Project Workspace. AI stewards can monitor execution risks and outstanding decisions across the AI portfolio in a single place.

Prerequisites

Important: The AI strategy area is available only with a Strategic Portfolio Management (SPM) Professional license.

AI strategy planning in AI Control Tower relies on data from the following ServiceNow applications. For details on configuring and using these applications, see their respective documentation:

- Goal Framework — for creating goals and strategic priorities
- Strategic Planning — for managing planning items and prioritization
- PPM Standard — for project management and RIDAC tracking

Planning your AI strategy, prioritize, and execute

Track your AI portfolio from strategy to delivery. Plan connects goal alignment, intake management, and execution tracking in one place within AI Control Tower. Portfolio managers and AI COE leads get a current view of AI investments without leaving the application.

Get started

Explore	Configure	Strategize AI plan
Learn how to monitor goals, intake, and delivery work scoped to AI investments	Activate the monitoring plugin, configure metrics, and configure templates	Track the AI strategic direction by monitoring goals, targets, and strategic priorities.

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Prioritizing AI plan	Monitoring AI plan	Reference
View and manage AI-related intake items, demands, product ideas, and product feedback	Monitor the delivery status of AI-related projects and epics	Get details about components, form fields, and general guidelines

Exploring AI Control Tower Plan

AI Plan in AI Control Tower gives portfolio managers and AI COE leads a single place within AI Control Tower to view goals, intake, and delivery work scoped to AI investments.

AI Plan overview

AI Plan integrates strategic planning, intake management, and execution tracking directly into AI Control Tower. Without this integration, teams managing AI work must switch between AI Control Tower and separate applications to get a complete picture of goals, intake, and in-flight projects.

The Plan menu in AI Control Tower contains three pages: Strategize, Prioritize, and Execute. Each page displays data that is automatically filtered to AI-related work. Filters for Strategic Priority, AI System, and Department are available across all three pages and update widgets and lists dynamically. All data shown in AI Plan is from records of the underlying SPM tables, so information stays consistent with what teams manage in their SPM applications.

AI Plan users

The following roles use the Plan menu in AI Control Tower:

- AI COE lead: Reviews AI system alignment to organizational goals and strategic priorities across the organization. Uses the Strategize page to identify goals and targets that are off track and to assess how well AI systems are aligned to business objectives.
- Portfolio manager: Manages AI-related demand intake on the Prioritize page, identifies records that don't have an owner at risk of stalling, and tracks active AI projects and epics on the Execute page.
- Department head: Applies the Department filter to view goals, intake, and delivery work for their team only.

AI Plan workflow

AI Plan organizes AI portfolio work across three stages.

Strategize

The Strategize page shows how AI systems align to organizational goals and strategic priorities. Widgets display goal, target, and strategic priority counts broken down by status (green, yellow, or red). The Goals and Targets list groups targets under their parent goals and shows each target's state, owner, and dates. Select a segment in a widget to filter the list to matching records. The AI System alignment widget shows what percentage of AI systems are aligned to at least one strategic goal.

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Prioritize

The Prioritize page consolidates all AI-related intake in one view. Summary cards at the top show the total number of intake items across demands, product ideas, and feedback. Separate cards flag demands, ideas, and feedback that are not assigned to anyone and at risk of stalling because no one is reviewing or routing them. Following the widgets, separate lists show demands, product ideas, and feedback records individually. New intake records can be created directly from this page using the New button on each list.

Execute

The Execute page tracks active AI projects and epics. Widgets show project and epic counts grouped by state. The Project list and Epic list following the widgets display individual records with details such as project manager, portfolio, approved dates, state, and percent complete. Records can be opened directly from the list to view or update details.

AI Plan benefits

- AI-scoped data: All data on the Strategize, Prioritize, and Execute pages is filtered to AI-related work, so users see only what is relevant to the AI portfolio.
- No application switching: Users access goals, intake, and execution data without leaving AI Control Tower or opening separate SPM applications.
- Attention flags on intake: The Prioritize page surfaces demands, product ideas, and feedback that don't have any owners so that portfolio managers can identify and assign work before it is missed.
- Consistent data: AI Plan reads from the same underlying SPM tables that teams use in their SPM applications, so data is the same regardless of where it is accessed.
- Flexible filtering: Strategic Priority, AI System, and Department filters apply across all widgets and lists on each page, so users can quickly narrow the view to what is relevant to them.

What to explore next

- Configuring AI Plan
- Planning and tracking AI work in AI Control Tower
- AI Plan reference

Related topics

AI Plan configuration

AI Plan configuration

The AI Plan tab in AI Control Tower displays when the Strategic Planning application is installed. It requires no additional configuration once installed.

Note: You must have Strategic Planning 4.14.0 or later to use the Plan menu in AI Control Tower

During installation of Strategic Planning, the sn_align_core.apw_user, it_demand_manager, and it_project_manager roles are automatically added to the sn_ai_governance.ai_steward role.

Users with the sn_ai_governance.ai_steward role can access the Plan menu to strategize, prioritize, and execute AI strategic items.

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Related topics

- Planning and tracking AI work in AI Control Tower
- AI Control Tower plan reference

Planning and tracking AI work in AI Control Tower

Use the Strategize, Prioritize, and Execute pages in the Plan menu of AI Control Tower to manage AI work from goal alignment through delivery tracking.

AI Plan organizes portfolio work across three pages that reflect the natural progression of AI delivery. On the Strategize page, define goals and assess alignment. On the Prioritize page, review and route incoming AI demand. On the Execute page, track active projects and epics. Work on any page independently depending on your role and current focus.

AI Plan pages and when to use them

Page	Use when	Learn more
Strategize	You want to assess how AI systems align to organizational goals, review goal and target status, or identify strategic priorities that are off track.	Strategizing the AI plan
Prioritize	You want to review incoming AI demand, product ideas, or feedback, identify intake with no owner, or create intake records.	Prioritizing AI plan in AI Control Tower
Execute	You want to track active AI projects and epics, view delivery status, or create projects and epics.	Monitoring AI plan execution in AI Control Tower

Related topics

- AI Control Tower plan reference

Strategizing the AI plan

The Strategize tab gives AI stewards a view of the AI strategic direction for their organization. Goals, targets, and strategic priorities that guide AI investment and governance decisions are tracked in one place.

Strategize tab overview

The Strategize tab provides a centralized workspace where AI stewards define the strategic intent behind AI investments. It connects organizational goals to AI systems, ensuring that AI activity across the enterprise is aligned to business priorities.

AI stewards use the Strategize tab to:

- Monitor AI goals that reflect the organization's intended outcomes from AI adoption.
- Track targets that measure progress against each goal.
- Establish strategic priorities that link AI systems and intake records to business objectives.

The page is divided into the following components:

- Four analytics widgets — display alignment and status across AI systems, targets, goals, and strategic priorities.
- Goals and targets list — displays targets grouped by goal for all goals aligned to AI systems.

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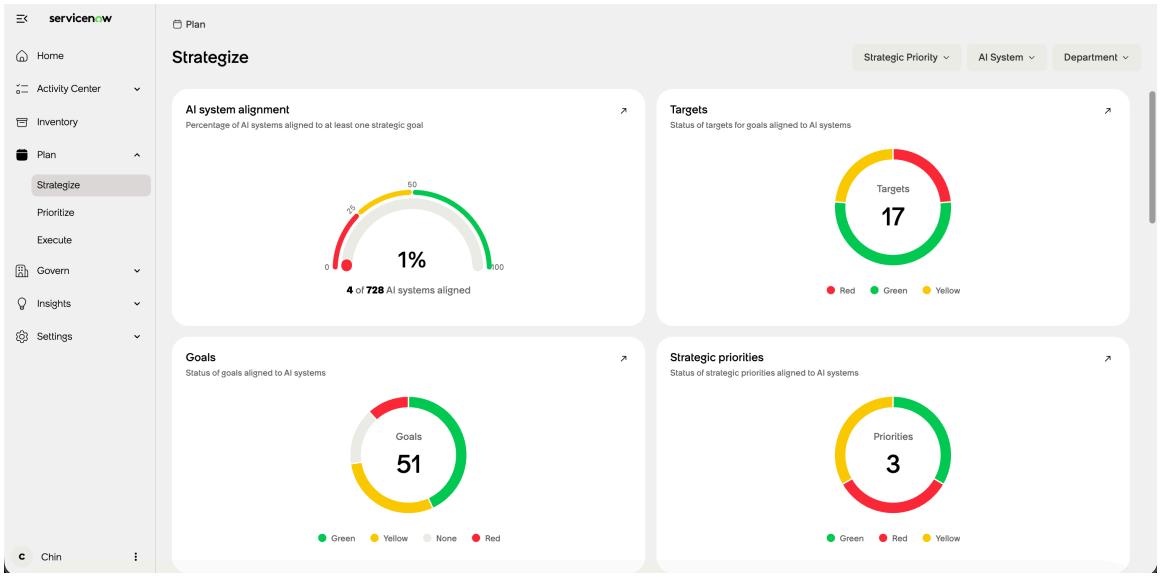
Analytics widgets

The four analytics widgets display the current alignment and health status of AI systems, targets, goals, and strategic priorities. Each widget reflects the active filter state and can be expanded to a full-page view using the expand icon.



Analytics widgets

Widget	What it displays	Status breakdown
AI system alignment	The percentage of AI systems aligned to at least one strategic goal, shown as a gauge, with the count of aligned systems out of the total displayed below.	Not applicable. The gauge reflects alignment percentage only.
Targets	The total count of targets for goals aligned to AI systems, shown as a donut chart.	Red, Green, and Yellow segments indicate target health status.
Goals	The total count of goals aligned to AI systems, shown as a donut chart.	Green, Yellow, None, and Red segments indicate goal status.
Strategic priorities	The total count of strategic priorities aligned to AI systems, shown as a donut chart.	Green, Red, and Yellow segments indicate strategic priority status.

Goals and targets list

The Goals & targets list displays targets of goals that are aligned to AI systems, grouped by goal. Each goal row is collapsible and shows the targets associated with that goal. The list supports search, filter, refresh, and column personalization.

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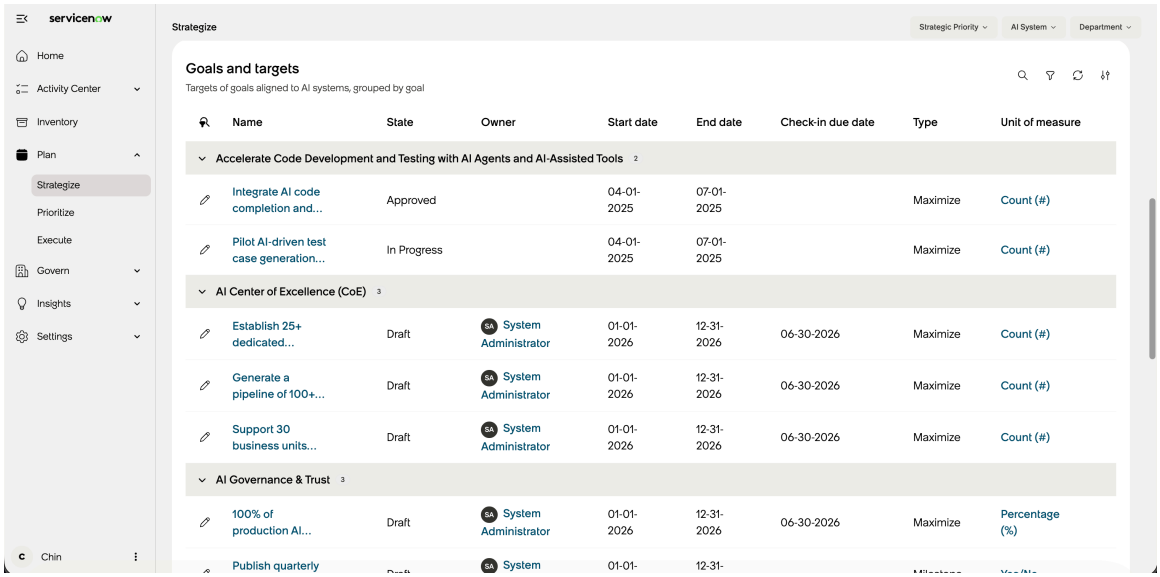

AI-related strategize list

List name	Source tables	Records displayed
Goals and targets	• sn_gf_goal • sn_gf_goal_target	Goals and their targets appear in the list when any of the following conditions is met: • Goal's Category is Artificial Intelligence. • Type of the goal's strategic priority is Artificial Intelligence. • Linked product belongs to the cmdb_ai_system_component_product_mode table, which includes generative AI, agentic AI, and other subclasses.

Goals

Goals represent the high-level outcomes the organization wants to achieve through AI investment. Each goal provides the strategic context that downstream prioritization and execution decisions reference. AI stewards create goals from the Strategize tab and associate them with one or more targets to make progress measurable.

Targets

Targets define the specific, measurable criteria that indicate whether a goal is being achieved. Each target is linked to a parent goal and provides the quantitative or qualitative benchmark that AI stewards and stakeholders use to evaluate AI strategy performance.

Strategic priorities

Strategic priorities rank and categorize AI activity so that intake records, demands, and execution efforts can be evaluated against organizational intent. A strategic priority connects an AI system

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or initiative to a goal, providing the link that the Prioritize and Execute tabs use to surface the most business-relevant work.

Edit a strategize record

Update the details of an existing goal, target, or strategic priority record to reflect changes in organizational direction, scope, or measurement criteria.

Before you begin

Role required: sn_ai_governance.ai_steward

Procedure

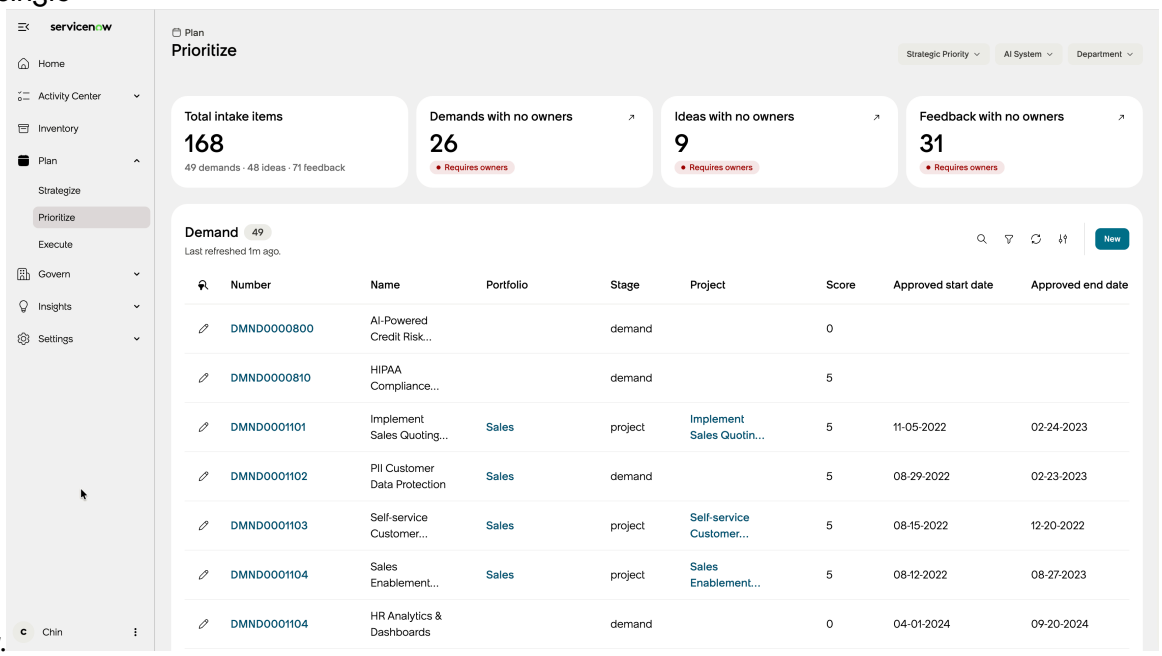
1. Navigate to **All** > **AI Control Tower** > **Home 2.0**.
2. Expand the **Plan** menu and **Strategize**.
3. Scroll to the Goals and targets list.
4. Next to the record that you want to edit, select the edit icon ( ).
   The record is displayed in the **Edit record** side panel.
5. Edit the fields as needed.
   For field information, see:
   - Goal form for goals
   - Target form for targets
6. Select **Update**.
   The updated record is displayed in the Goals and target list.

Prioritizing AI plan in AI Control Tower

View and manage AI-related intake items, demands, product ideas, and product feedback, through analytics tiles, contextual filters, and filterable lists in Prioritize tab. All three lists support creation of new records from this tab.

Prioritize tab overview

The Prioritize tab displays all AI-related intake records, demands, product ideas, and feedback, in a single view.



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AI stewards use the Prioritize tab to:

- Monitor incoming AI-related intake across all three record types.
- Identify unowned items that are at risk of stalling.
- Create records without leaving the planning context.

The page is divided into the following components:

- Analytics summary cards - displays real-time counts of intake and ownership status.
- Filters - helps narrow all tiles and lists by strategic priority, AI system, or department.
- Intake lists - displays the full set of demand, product idea, and feedback records.

Analytics summary cards

The four analytics tiles at the top of the page display counts based on the active filter state. All counts are updated when a filter is applied.

Summary cards

Summary card	Functionality	Drill-down
Total Intake Items	Displays the combined count of all demands, product ideas, and feedback	Not applicable as all records are visible in the lists.
Ownerless Demands	Displays the count of demands where the owner field is empty.	Drills down to the list of ownerless demands.
Ownerless Ideas	Displays the count of product ideas where the owner field is empty.	Drills down to the list of ownerless product ideas.
Ownerless Feedback	Displays the count of feedback records where the owner field is empty.	Drills down to the list of ownerless feedback records.

Filters

Three filters are available in the page header. All filters apply simultaneously across all tiles and all three lists.

Available filters

Filter	Description
Strategic Priority	Filters by the strategic priority associated with the records.
AI System	Filters by the AI system linked to the records.
Department	Filters by the department associated with the records.

Intake lists

The Demand, Product idea, and Feedback lists display the AI-related intake records from their respective tables. All three lists share the same behaviour and functionalities. You can search,

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filter, refresh, and personalize the columns in these lists. Additionally, you can create records or edit existing records directly from the lists. The lists and forms displayed for the records in the Prioritize pages are in the default view.

AI-related intake lists

List name	Source table	Records displayed
Demand	dmn_demand	The following records are displayed: • Investment type is Artificial Intelligence. **Note:** This is applicable only for demands and ideas. • Linked product belongs to the cmdb_ai_system_component_product_mode table, which includes generative AI, agentic AI, and other subclasses.
Product idea	sn_align_core_product_idea	
Feedback	sn_align_core_feedback	

The following list actions are available on all three intake lists:

List actions

Action	Description
Search	Search within the intake list.
Filter	Apply additional filter conditions to the list.
Refresh	Reload the list with the latest data.
Personalize columns	Add, remove, or reorder list columns.

Related topics

AI Plan configuration

Planning and tracking AI work in AI Control Tower

Create an intake record

Use the Prioritize tab to add a demand, product idea, or feedback record. Selecting **New** in any list opens a full form. The form fields differ by record type.

Before you begin

Role required: sn_ai_governance.ai_steward

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home 2.0**.
2. Expand the **Plan** menu and select **Prioritize**.
3. Scroll to the list for the record type you need to create, Demand, Product idea, or Feedback.

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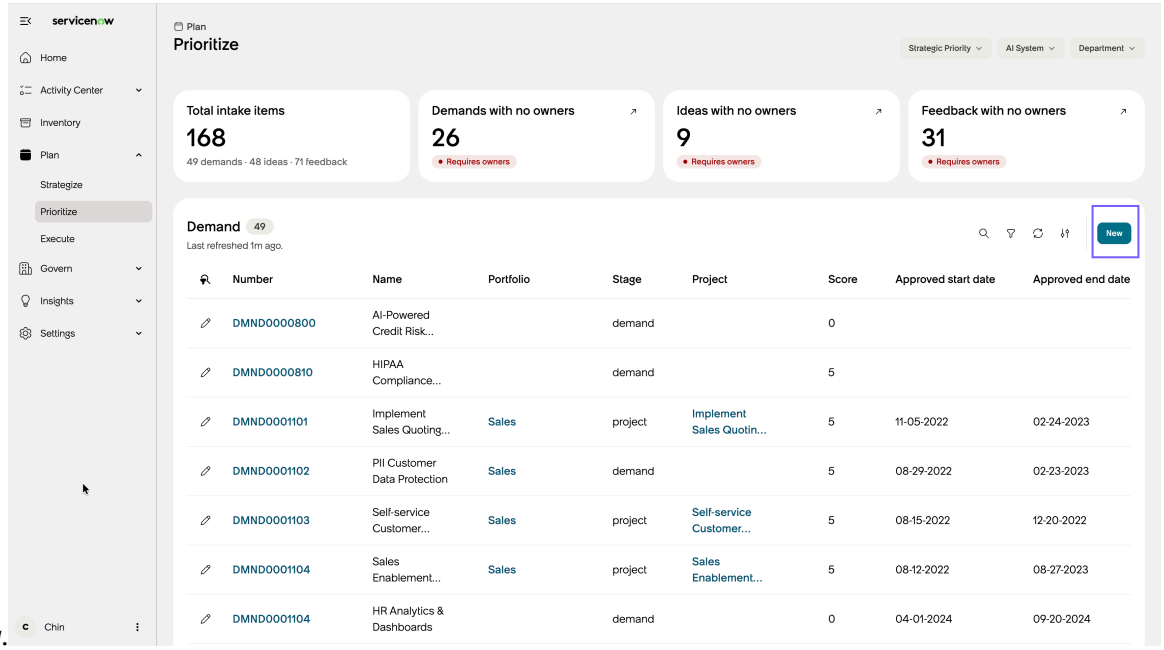
4. Select **New**.



5. On the form, fill in the fields.
   For field information, see:
   - Demand form
   - Feedback form
   - Product idea form

   Note:
   - For demand and product idea: The **Investment Type** field must be set to **Artificial Intelligence** or the **Product** field must be set to **AI System**.
   - For feedback: The **Product** field must be set to **AI System**.

6. Select the **Actions** drop-down list and select **Save**.
   The new record is displayed in the respective list if it meets the list's display criteria.

Manage intake records

Update the details of an existing intake record to reflect changes in scope, priority, or other relevant information.

Before you begin

Role required: sn_ai_governance.ai_steward

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home 2.0**.
2. Expand the **Plan** menu and select **Prioritize**.
3. Scroll to the list for the record type you must edit, Demand, Product idea, or Feedback.
4. Select the edit icon for the record that you want to edit.

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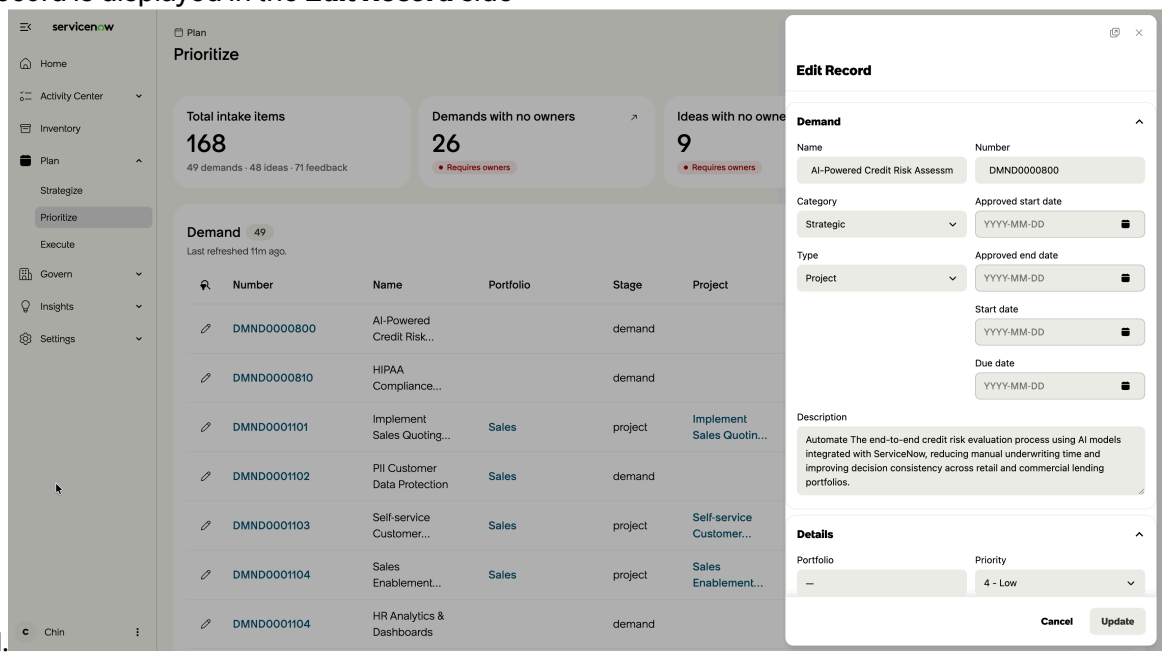
The record is displayed in the **Edit Record** side panel.



5. On the form, edit the fields.
   For field information, see:
   - Demand form
   - Feedback form
   - Product idea form
6. Select **Update**.
   The edited record is displayed in the respective list if it meets the list's display criteria.

Monitoring AI plan execution in AI Control Tower

Monitor the delivery status of AI-related projects and epics from a single page in AI Control Tower, with widgets and lists that update dynamically when you apply filters.

Execute page overview

The Execute page shows AI-related projects and epics in one view. Portfolio managers and AI COE leads use this page to track delivery status across the AI portfolio without switching to separate project management applications.

The page has three components that work together:

- Two donut widgets summarizing project and epic counts by a grouping parameter such as state or priority.
- Header filters that narrow all widgets and lists simultaneously.
- Project and Epic lists showing individual records with key details.

Widgets

The Execute page has two donut widgets: one for Projects and one for Epics. Each widget shows the total count of AI-related records broken down by the selected grouping parameter. The default grouping is by state.

Use the **Group by** control on each widget to change the grouping parameter. Each widget's grouping can be changed independently. Available grouping options include the following:

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- Project: State, Status, Priority, Project Manager, Department, Product
- Epic: State, Status, Owner, Department, Product

Clicking a segment in a widget show the list of corresponding records.

Filters

Three filters are available in the page header. Selecting a filter value updates the widgets and lists simultaneously.

Available filters

Filter	Description
Strategic Priority	Filters by the strategic priority associated with the records.
AI System	Filters by the AI system linked to the records.
Department	Filters by the department associated with the records.

Project and Epic lists

The Project and Epic lists show individual AI-related records from their source tables. These lists are displayed based on the Default view of the project and epic. Each list has a toolbar with the following actions:

- Search: Find records by keyword.
- Filter: Open the filter panel to build conditions using field and operator combinations, sort records, or group them within the list. These are separate from the page-level header filters.
- Refresh: Reload the list to show the latest data.
- Personalize columns: Choose which columns are displayed and in what order. Search from available columns, add or remove them, and drag to reorder. Select **Reset to Default** to restore the original column set.
- New: Create a record directly from the Execute page.

Project and Epic lists

List name	Source table	Records displayed
Project	pm_project	Records where the investment type is Artificial Intelligence, or where the linked product belongs to the cmdb_ai_system_component_product_model table (includes generative AI, agentic AI, and other subclasses).
Epic	sn_align_core_scrum_epic	Records where the investment type is Artificial Intelligence, or where the linked product belongs to the cmdb_ai_system_component_product_model

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Project and Epic lists (continued)

List name	Source table	Records displayed
		table (includes generative AI, agentic AI, and other subclasses).

Related topics

- AI Plan configuration
- Planning and tracking AI work in AI Control Tower
- AI Control Tower plan reference

Create a project or epic in AI Control Tower

Create a project or epic from the Execute page to track AI-related delivery work in AI Control Tower.

Before you begin

Role required: sn_ai_governance.ai_steward

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home 2.0**.
2. Navigate to **Plan** > **Execute**.
3. In the **Project** or **Epic** list, select **New**.
4. On the form, fill in the fields.

   For field descriptions, see:

   - Epic form for epics.
   - Project form for projects.

   These forms are displayed based on the Default view of the project and epic.

   Note: The **Investment Type** field must be set to **Artificial Intelligence** or the **Product** field must be set to **AI System**.

5. Select **Save**.
   The new record is displayed in the respective list if it meets the list's display criteria.

Edit a project or epic in AI Control Tower

Update the details of a project or epic from the Execute page in AI Control Tower to reflect changes in scope, state, priority, or other information.

Before you begin

Role required: sn_ai_governance.ai_steward

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home 2.0**.
2. Navigate to **Plan** > **Execute**.
3. In the **Project** or **Epic** list, select the edit icon ( ) next to the record you want to update.
4. Update the fields as needed.

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For field descriptions, see:

- Epic form for epics.
- Project form for projects.

The forms display the Default view of the project and epic.

5. Select **Save**.
   The updated record is displayed in the respective list.

AI Control Tower plan reference

Field descriptions for the Strategize, Prioritize, and Execute forms in the AI Control Tower.

Related topics

Exploring AI Control Tower Plan

AI Plan configuration

Planning and tracking AI work in AI Control Tower

Components installed with AI Control Tower for SPM

User roles are added with the installation of AI Control Tower and Strategic Planning application.

Roles installed

The following roles are added to the AI steward [sn_ai_governance.ai_steward] role when Strategic Planning is installed so that users can access features in the Plan menu.

Strategic planning workspace roles

Role title [name]	Description	Contains roles
AI steward [sn_ai_governance.ai_steward role]	Can access features in the Plan menu in AI Control Tower.	• sn_align_core.apw_user • it_demand_manager • it_project_manager

Demand form

Learn about the fields on the Demand form. Use this form to create or edit a demand from the Prioritize page in AI Control Tower.

Demand form fields

Field	Description
Name	Name of the demand.
Category	Category of the demand: • Strategic: For demands for plans, such as projects or stories. • Operational: For demands for operational work, such as changes or defects.
Type	The **Category** field selection determines the selections available in the **Type** field.

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Demand form fields (continued)

Field	Description

	• The following demand types are available if the demand category is Strategic:
	  ○ Enhancement
	  ○ Project
	  ○ Epic
	  ○ Story
	  ○ EAP Epic
	  ○ EAP Feature
	  ○ EAP Capability
	  ○ No Conversion
	• The following demand types are available if the category is Operational:
	  ○ Change
	  ○ Defect
	  ○ No Conversion
	
	If the Agile Development 2.0 application is active, the Story, Epic, Enhancement, and Defect options are available.
	
	If the Strategic Planning application is active, the EAP Epic, EAP Feature, and EAP Capability options are available.
	
	The No Conversion option lets you fund a large project that includes one or more projects, epics, or programs.
	
	The selections in the **Category** and **Type** field also determine the fields that are displayed in the Assessment Data section.

Project	Name of the project created from this demand. This read-only field is visible only when you convert the demand into a project.
Enhancement	Number of the enhancement created from this demand. This read-only field is visible only when you convert the demand into an enhancement.
Epic	Name of the epic created from this demand. This read-only field is visible only when you convert the demand into an epic.
Story	Name of the story created from this demand. This read-only field is visible only when you convert the demand into a story.
Number	Unique, auto-generated identification number for the demand.
Approved start date	The formal date approved by stakeholders for starting the demand. This date is set after prioritization and stakeholder approval and represents the committed and authorized timeline for execution. It's used for governance and traceability.

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Demand form fields (continued)

Field	Description
	For example, the approved date to start the database upgrade is 2026-01-10. This field is carried forward to the **Approved start date** field of the Project form when the demand is converted to a project. The value remains unchanged even if the project starts later. This field is highlighted in red if the date is different than the value in the **Start date** field. **Note:** If this field is empty while creating a demand, the date from the **Start date** field is inserted.
Approved end date	The formal date approved by stakeholders for completing the demand. This date is set after prioritization and stakeholder approval and defines the approved execution window and supports historical tracking. For example, the approved end date to complete the demand is 2026-02-15. This field is carried forward to the **Approved end date** field of the Project form when the demand is converted to a project. The value remains unchanged even if the project ends later. This field is highlighted in red if the date in this field is different than the value in the **Due date** field. **Note:** If this field is empty while creating a demand, the date from the **Due date** field is inserted.
Start date	The preliminary or estimated date when the work is initially planned to begin. This date helps outline the intended timing for early demand planning and prioritization. You can set this date during initial demand creation or anytime in the planning phase when a rough idea forms. This date can be updated until the demand is officially approved. For example, you're planning for a database upgrade to start on 2025-11-01. This date is changed to **Planned start date** when the demand is converted to a project. **Note:** • When you change the planned start date of a demand or project, the associated cost plans and resource assignments also change. The **Change Resource Plan and Cost Plan Start Date with Demand or Project Start Date Change** property controls the behavior for a demand date change. This property isn't enabled by default. • The **Start date** column label is changed to **Planned start date**. This change is applicable only for new customers who begin using the Brazil version. If you're upgrading to the Brazil release from an earlier release, you will continue to see the prior labels.
Due date	The preliminary or estimated date when the planned work is expected to be completed. This date provides an expected completion window for planning

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Demand form fields (continued)

Field	Description
	and stakeholder communication. You can set this date anytime in the planning phase when a rough idea forms and can be updated until the demand is officially approved. For example, you're planning to complete the database upgrade by 2025-12-31. **Note:** • The **Due date** column label is changed to **Planned end date**. This change is applicable only for new customers who begin using the Brazil version. If you're upgrading to the Brazil release from an earlier release, you will continue to see the prior labels. • This date is changed to **Planned end date** when the demand is converted to a project.
Description	Description of the demand.

Details section of the Demand form

Field	Description
Portfolio	Portfolio indicating the business focus of the demand.
Program	Name of the program to which the demand belongs.
Investment Class	Type of investment class category assigned to the demand: • Run: Investment made to sustain the existing business. • Change: Investment made to implement a change in the business.
Investment Type	Investment type of the demand: • Cost Reduction • End User Experience • Legal and Regulatory • Revenue Generating • Service Sustaining • Strategic Enabler • Artificial Intelligence
Demand manager	Name of the demand manager.
Collaborators	Users who can edit or contribute to the demand. A demand requester can select any user as a collaborator.

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Details section of the Demand form (continued)

Field	Description
Expense type	The type of the expense, either capital expense (capex) or operational expense (opex).
Priority	The priority of the demand.
Department	Department in a business unit to which the demand submitter belongs. **Note:** If you don't select a department, the default value is the name of the department to which the submitter belongs.
Project Manager	Project manager assigned to the project created from this demand. When a project is created, this field is set to read only. This field appears if the **Category** field is set to Strategic and the **Type** field is set to Project. If you delete the project created from this demand, this field is set to editable.
Business Unit	Business unit to which the demand submitter belongs.
Impacted Business Units	Business units affected by the submitted demand. The selected units could experience operational impact, process changes, technology adoption, and similar changes. For example, if a demand is submitted by the procurement business unit, it can impact the finance, legal, and IT business units.
Idea	Unique identification number of the idea from which the demand was created.
Business Capabilities	Business capabilities associated with the demand that links the demand to organizational goals and value. Business capabilities are defined in the Enterprise Architecture (formerly Application Portfolio Management) module.
Impacted Business Applications	If the demand is to change, enhance, or add one or more business applications, the applications associated with the demand. Business applications are defined in the Enterprise Architecture (formerly Application Portfolio Management) module. For more information, see Exploring business applications. You can select any business application in your enterprise regardless of whether

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Details section of the Demand form (continued)

Field	Description
	it's related to a capability selected in the **Business Capabilities** field.

Business Case section of the Demand form

Field	Description
Strategic priority	Strategic objectives of the organization that the demand fulfills. A demand can fulfill multiple strategic objectives. If a business unit has been selected in the **Details** tab, the business strategies for the selected business unit along with other enterprise strategies are available for selection.
Primary goal	The primary goal associated with the strategy selected in the **Strategic priority** field. If a strategy hasn't been selected, all goals are available for selection.
Business case	Business arguments that support the demand.
Risk of performing	Risks if the demand is approved and implemented.
Risk of not performing	Risks if the demand isn't approved, for example, risk of loss of opportunity.
Enablers	Key enablers for the demand that help the demand be completed. For example, clearly defined resource and cost plans.
Barriers	Major barriers to the demand that obstruct the demand's completion. For example, incomplete or unclear demand details.
In scope	Scope of the demand, which is the set of boundaries that define the extent of a demand.
Out of scope	Activities or deliverables not in the scope of the demand. Anything not defined in the scope is out of scope.
Assumptions	Assumptions made for the demand. Assumptions help to define the scope and risks, and fine-tune the estimates for time and cost.

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Financials section of the Demand form

Field	Description
Capital expense	Capital expenditure (capex) for the demand.
Operating expense	Operational expenditure (opex) for the demand.
Total planned cost	Result calculated based on the values in the **Capital expense** and **Operating expense** fields.
Financial return	Result calculated based on the values in the **Total costs** and **Financial benefit** fields.
Financial benefit	Estimate of revenue if the demand is approved. This value is rolled up from the benefit breakdown of the demand. You can also enter the value manually by selecting a currency icon and entering a value.
ROI %	ROI calculated based on the values in the **Total costs** and **Financial return** fields. This field is updated when a cost plan, benefit plan, or resource assignment is created or updated. The demand must be in the Qualified or Approved state.
Capital budget	Total capital budget allocated to the demand across all fiscal years. The value is rolled up from the capex budget of the demand.
Operating budget	Total operational budget allocated to the demand across all fiscal years. The value is rolled up from the opex budget of the demand.
Discount Rate %	Demand discount rate, which is the interest rate to determine the present value of future cash flows.
Net present value	Present value of future cash based on the given annual interest rate, a measure for comparing money spent today against future expected financial benefits. This value is useful when evaluating the overall investment performance. For example, at a 12% discount rate, $1.00 today is worth $0.80 in two years. Therefore, receiving $1.00 in two years is the same as receiving $0.80 today.

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Financials section of the Demand form (continued)

Field	Description
	Net present value (NPV) is calculated from total costs according to year, financial benefit per year, and the discount rate for the demand.
Internal rate of return %	Annual interest rate required to achieve an NPV of zero. Internal rate of return (IRR) helps to determine which demands can deliver a higher rate of return in terms of revenue.
Demand Actual Cost	Total cost incurred while working on a demand and demand tasks. Demand actual cost is calculated after the assignee of the demand task creates and submits a time card. When the time card is approved, the resource rate, which is derived from the rate card, labor rate, or system properties, is used to populate this field.

Note: If you're creating a demand with the PPM Standard Multicurrency (com.snc.ppm_multicurrency) plugin activated and the **Demand Currency** view enabled, the fields in the **Financials** tab differ from the **Default** view. For more information about the fields that are available only in the Demand Currency view, see .

Assessment Data section of the Demand form

Field	Description
Impact	Level of business impact created by the demand.
Risk	Risk value calculated from the demand assessment.
Value	Business value of the demand calculated from the **Impact** and **Financial return** fields.
T-Shirt size	Size of the demand. Before using this value as an indicator of demand size, consider creating and publishing definitions for each option outside the application. That process helps confirm that the values are interpreted correctly and consistently across the organization or department.
Score	The demand score is calculated based on the *risk*, *value*, and *size* attributes in the base system. The value of the *risk*, *value*, and *size* attributes are derived from the assessment

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Assessment Data section of the Demand form (continued)

Field	Description
	metric category results. For more information, see assessment categories and assessment category results. • When the *risk* and *size* values are high, the score of the demand is low. • When the *value* setting is high, the score of the demand is high.
Assessment Required	Option for enabling the assessments for the demand. This option is active by default. Only a demand manager can update this value when the demand is in the Draft or Submitted state. **Note:** If this option isn't selected and you reset the demand to the Draft state, the option remains unselected.

Note: The values in the **Value** and **Score** fields are updated when a cost plan, benefit plan, or resource assignment is created or updated. The demand must be in the Qualified or Approved state. The values in the fields are updated only until an artifact such as project, enhancement, defect, or change is created from the demand.

Notes section of the Demand form

Field	Description
Watch list	The groups and users subscribed to the demand who can view the information in the **Additional comments** field.
Work notes list	The groups and users subscribed to the demand who can view the information in the **Work notes** field.
Work notes	Information about the demand. Work notes are added throughout the demand management life cycle to communicate with other users associated with the demand.

Preferences section of the Demand form

Field	Description
Close Demand	Determines when to close the demand automatically if it's converted to a project.

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Preferences section of the Demand form (continued)

Field	Description
	• **None**: Keeps the demand in the Open state after it's converted to a project. • **On creation of project**: Closes the demand when the demand is converted to a project. • **On closure of project**: Closes the demand when the project created from the demand is closed. **Note:** The **On creation of project** and **On closure of project** options appear when the value for the **Type** field is set to **Project**. If the **Type** field is set to **Enhancement**, the default setting is **None**.
Project calculation	Determines the calculation to use for task dependencies for the project when the demand is converted to a project. The default value is Automatic. • Manual: Task dates don't reflect any changes made to dependencies. • Automatic: Task dates are automatically updated to reflect any changes made to dependent or child tasks.

EAP Details section of the demand form

This section appears only if the selected type is an EAP entity.

Field	Description
Team	The planning team to which the created EAP entity is assigned. This field is set to read only after the EAP entity is created. This value is an optional value.
Converted to	The name of the created EAP entity. This field is read-only.

AI Associations section of the demand form

This section appears only if the AI Control Tower plugin is installed and the investment type of the demand is set to artificial intelligence.

Field	Description
Product	Product or system that the demand relates to.

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AI Associations section of the demand form

This section appears only if the AI Control Tower plugin is installed and the investment type of the demand is set to artificial intelligence.

(continued)

Field	Description
Impacted AI systems	Impacted AI systems associated with the demand. You can select existing AI systems from the list or remove systems that are no longer relevant.

Epic form

Learn about the fields on the Epic form. Use this form to create or edit an epic from the Execute page in AI Control Tower.

These fields are displayed on the Epic form.

Epic form fields

Field	Description
Name	Brief description of the epic. This field is required.
Description	Detailed information about the epic.
State	Current working state of the epic. The default value is Draft.
Owner	User assigned to this epic.
Planning state	State of the epic in the planning backlog. The default value is New.
Percent complete	Percentage of work completed for this epic. This value is calculated automatically.
Primary goal	Goal associated with this epic as the primary goal.
Strategic priority	Strategic priority associated with this epic. This value is populated automatically based on the primary goal.
Enabler	Indicates whether this epic is an enabler.
Methodology	Agile methodology used for this epic. The default value is Scrum.
Department	Department associated with this epic.
Work notes	Notes to capture updates and discussions on this epic as work progresses.

Dates section of the Epic form

Field	Description
Planned start date	Planned start date for this epic.

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Dates section of the Epic form (continued)

Field	Description
Planned end date	Planned end date for this epic.
Approved start date	Approved start date for this epic.
Approved end date	Approved end date for this epic.
Actual start date	Actual date on which work for this epic started.
Actual end date	Actual date on which work for this epic was completed.

Details section of the Epic form

Capture additional details for this epic such as priority, business application, and story counts.

Field	Description
Priority	Priority of this epic. The default value is 4 - Low.
Business capabilities	Business capabilities associated with this epic.
Business application	Business application that this epic is related to.
Other impacted business applications	Business applications that this epic has an impact on.
Missing estimate	Number of stories in the epic that are missing estimates. This value is calculated automatically.
Percent complete by count	Percentage of completed work in the epic, calculated using story count. This value is calculated automatically.
T-Shirt size	Relative size estimate for this epic.
Completed count	Number of completed stories in the epic. This value is calculated automatically.
Completed estimate	Sum of the estimates of all completed stories in the epic. This value is calculated automatically.
Total count	Total number of stories in the epic. This value is calculated automatically.
Total estimate	Sum of the estimates of all stories in the epic. This value is calculated automatically.
Percent complete by estimate	Percentage of completed work in the epic, calculated using story estimates. This value is calculated automatically.

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WSJF section of the Epic form

Use this section if this epic is a SAFe epic. The WSJF score is calculated automatically from the values in this section.

Field	Description
WSJF score	Weighted Shortest Job First (WSJF) score used to prioritize and sequence epics to produce the most business value. An epic with the highest WSJF score gets the highest priority for implementation. This value is calculated automatically from the other fields in this section.
Time criticality	Impact on the business when deadlines are missed, for example how projected revenue gains are reduced over time when deadlines are shifted.
User business value	Business value of the job based on parameters such as impact on revenue or comparable capabilities available in the market.
Risk reduction	Measure of how much risk this epic helps avoid. Consider whether the job adds business value in other ways, creates new business opportunities, or reduces risk for a future delivery.
Job size	Estimated duration for completion of this epic.

Related topics

Monitoring AI plan execution in AI Control Tower

Feedback form

Learn about the fields of the feedback form. Use this form to create or edit the details of a feedback record in AI Control Tower.

Note: Operational Sustainability Workspace and Strategic Planning users can't view the fields that aren't added to the default/custom form layout in the workspace. Configure the default/custom form layout to view those fields.

Details tab of the Feedback form

Field	Description
Name	A brief description of the feedback.
Description	Detailed description of the feedback.
Product idea count	Number of product ideas associated with the feedback.
State	Current state of the feedback. The available options are:

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Details tab of the Feedback form (continued)

Field	Description
	• Submitted • Need more information • Under review • In backlog • Planned • In development • Completed • Unlikely to implement • Duplicate • Already exists
Assigned to	User who is assigned to the feedback.
Source	Source of the feedback. The available options are: • Chat • Customer meeting • Email • Social media • Idea portal
Type	Type of the feedback. The available options are: • Issue • Enhancement request • Insight
Product	Product associated with the feedback.
Customer	The customer who submitted the feedback.
Sentiment	Sentiment of the feedback record. The available options are: Positive, Negative, or Neutral.
Created by	User who created the feedback record.
Business application	Business application that this feedback is related to.

Goal form

Use the Goal form to create goals for your organizational strategic priorities.

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Note: For Operational Sustainability Workspace and Strategic Planning users, to view the other fields (that are not added to the default or your custom form view) on the form in the workspace, configure the default/custom form layout. For information on how to configure the form layout, see Configuring the form layout.

Goal form

Field	Description
Name	Name of the goal.
State	State of the goal. The state can be **Draft**, **In progress**, **Approved**, **Complete**, **Pending**, **Achieved**, **Not Achieved**, or **Cancelled**.
Category	Category of the goal. The available options are: • **Total Applications** • **Total Cost** • **Opex** • **Capex** • **Cloud Applications** • **Homegrown Applications** • **Support Cost** • **Labor Cost** • **Standards Compliance** • **Strategic** • **Operational** • **Tactical** • **Artificial Intelligence**
Status	Status of the goal. Status can be **Red**, **Yellow**, **Green**, or **None**.
Progress	Percentage complete for the goal. The progress value is calculated automatically if the goal has sub-goals or/and targets. For more information on how the progress value is calculated, see Progress value calculation.
Description	Brief description of the goal. You can refine goal description using the Refine records skill, if the ServiceNow Otto for SPM application is installed.

Parent information section of the Goal form

Field	Description
Strategic priority	Name of the strategic priority that this goal is created for.
Parent goal	Name of the parent goal that this goal contributes to.

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Parent information section of the Goal form (continued)

Field	Description
Impact on parent goal	A numerical value that represents the importance of this goal relative to sibling goals or other goals under its parent goal. By default, the value is (1) Neutral. The available options are: • **(0) No impact** • **(1) Neutral** • **(2) Moderate** • **(3) High** • **(4) Very high** • **(5) Maximum** **Note:** This field is available only when the **sn_gf.weighted_average_enabled** system property is set to **Yes**.

Owners & Contributors section of the Goal form

Field	Description
Assigned entity type	Entity type to which the goal is assigned. For example, Business Unit, Department, Company, or Portfolio.
Assigned entity	Entity to which the goal is assigned. For example,if the portfolio plan is created with Business Units, HR and IT, populate the Assigned entity type as Business Unit and Assigned entity type as HR or IT. **Note:** Populating the Assigned entity type and Assigned entity fields are required to display the goals in the portfolio plan.
Owner	Owner of the goal. By default, the name of the user creating the goal is populated.
Contributors	Users who contribute to the achievement of the goal.

Duration section of the Goal form

Field	Description
Start date	Start date for the goal. By default, the start date of the current quarter is populated. For

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Duration section of the Goal form (continued)

Field	Description
	a sub-goal, start date of its parent goal is populated.
End date	End date for the goal. By default, the end date of the current quarter is populated. For a sub-goal, the end date of its parent goal is populated.

Other section of the Goal form

Field	Description
Comments	Detailed comments for the goal to facilitate collaboration.
Team	Assignment group responsible for different activities in achieving the goal.
Classification	Goal classification type. The available options are **Environmental**, **Social**, and **Governance**. This field is applicable only for the Operational Sustainability Workspace users.

Related topics

Strategizing the AI plan

Project form

Learn about the fields on the Project form. Use this form to create or edit a project from the Execute page in AI Control Tower.

The Project form contains the following fields.

Project form fields

Field	Description
Project name	Name of the project. This field is required.
Number	System-generated unique identifier for the project. This value is set automatically.
Project manager	User responsible for managing this project.
Assigned to	User assigned to this project.
Status	Overall health status of this project.
Assignment group	Group assigned to this project.
State	Current working state of this project. The default value is Pending.
Additional assignee list	Additional users assigned to this project.
Percent complete	Percentage of work completed for this project. This value is calculated automatically.

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Project form fields (continued)

Field	Description
Description	Detailed information about the project.

Dates section of the Project form

Field	Description
Schedule	Project schedule template applied to this project. This value is set automatically.
Approved start date	Approved start date for this project.
Approved end date	Approved end date for this project.
Planned duration	Planned duration for this project in days, hours, minutes, and seconds.
Actual duration	Actual duration of this project in days, hours, minutes, and seconds. This value is calculated automatically.
Planned effort	Planned effort for this project in days, hours, minutes, and seconds.
Actual effort	Actual effort recorded for this project in days, hours, minutes, and seconds. This value is calculated automatically.

Details section of the Project form

Capture additional details for this project such as investment type, execution type, and impacted business units.

Field	Description
Portfolio	Portfolio that this project is associated with.
Priority	Priority of this project. The default value is 4 - Low.
Program	Program that this project is associated with.
Phase	Current phase of this project. The default value is **Initiating**.
Investment class	Investment class that this project is categorized under.
Department	Department associated with this project.
Investment type	Type of investment that this project represents. For projects created from the Execute page, this field is set to Artificial Intelligence.
Business unit	Business unit associated with this project.

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Details section of the Project form

Capture additional details for this project such as investment type, execution type, and impacted business units.

(continued)

Field	Description
Execution type	Delivery methodology for this project. Select from **Waterfall**, **Agile**, or **Hybrid**. The default value is Waterfall.
Impacted business units	Business units that this project has an impact on.
Expense type	Expense type for this project. The default value is Opex.
Business capabilities	Business capabilities associated with this project.
Impacted business applications	Business applications that this project has an impact on.

Business case section of the Project form

Capture business details for this project such as strategic alignment, risks, scope, and blockers.

Field	Description
Strategic priority	Strategic priority associated with this project. This value is populated automatically based on the primary goal.
Primary goal	Goal associated with this project as the primary goal.
Business case	Business case to invest in this project.
Risk of performing	Risks to the business if work on this project is completed.
Risk of not performing	Risks to the business if work on this project isn't completed.
Enablers	Enablers for this project.
Barriers	Blockers, if any, for this project.
In scope	Defined criteria that are included in this project.
Out of scope	Criteria that are explicitly excluded from this project.
Assumptions	Assumptions, if any, for this project.

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Financials section of the Project form

Capture financial details for this project such as planned costs, actual costs, return on investment, and other estimates.

Field	Description
Total planned cost	Total planned cost for this project.
Planned benefit	Planned benefit from this project.
Planned capital	Planned capital expenditure for this project.
Planned return	Planned financial return on this project.
Planned operating	Planned operating expenditure for this project.
Planned ROI %	Planned return on investment percentage for this project.
Budget cost	Approved budget for this project.
Discount rate %	Discount rate used to calculate the net present value of this project.
Actual cost	Actual cost incurred on this project.
Net present value	Net present value of this project, calculated using the discount rate. This value is calculated automatically.
Estimate at completion	Estimated total cost at the time work on this project is completed.
Internal rate of return %	Internal rate of return for this project. This value is calculated automatically.
Estimate to completion	Estimated remaining cost to complete this project.

Score section of the Project form

Capture scoring details for this project such as risk, value, and size scores.

Field	Description
Risk score	Score for the risk associated with this project.
Size score	Score for the effort required to complete this project.
Value score	Score for the value delivered by this project.
Score	Overall score for this project, calculated from the risk, value, and size scores.

Notes section of the Project form

Field	Description
Watch list	Users who receive notifications about activity on this project.

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Notes section of the Project form (continued)

Field	Description
Work notes list	Users who receive notifications when work notes are added.
Work notes	Notes to capture updates and discussions on this project as work progresses.

Preferences section of the Project form

Field	Description
Allow time card reporting on	Level at which time cards can be reported for this project. Select from project only or project and project tasks.
Derive assignee list from resource plan	Option to automatically populate the assignee list from the resource plan associated with this project.
Update actual effort from time card	Option to update the actual effort on this project automatically from submitted time cards.
Recalculate score on project change	Option to recalculate the project score automatically when project details change.
Calculation	Method used to calculate project progress. The default value is Automatic.
Project schedule date format	Format used to display dates in the project schedule.
Show on Program Status Report	Option to include this project in the Program Status Report.
Derive time component from planned dates	Option to derive the time component of duration fields from the planned dates.
Constraint date	Date constraint applied to the project schedule.

Risk overview section of the Project form

Field	Description
Inherent risk	Risk level of this project before any controls or mitigations are applied. Select **Inherent Heatmap** to view the risk distribution.
Residual risk	Risk level of this project after controls and mitigations are applied. Select **Residual Heatmap** to view the risk distribution.

Related topics

Monitoring AI plan execution in AI Control Tower

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Product idea form

Learn about the fields of the Product idea form. Use this form to create or edit the details of a product idea in AI Control Tower.

Details tab of the Product idea form

Field	Description
Name	Brief description of the product idea.
Description	Detailed description of the product idea.
Planning state	State of the product idea. The available options are: • New • In Review • Prioritized • Done • Cancelled
Owner	User assigned to this product idea.
MoSCoW	Priority of the product idea is based on its importance. The available options are: • Must have • Should have • Could have • Won't have
Created by	User who created this product idea.
Product	Product associated with the product idea.
Customers	Customers who have shown interest in the product idea. This field is automatically set based on the linked feedback.
Locations	Location impacted by the product idea.
Department	Department associated with the product idea.
Strategic program	Strategic program associated with the product idea.
Work notes	Notes for adding and tracking the activity of the product idea.

Dates section of the Product idea form

Field	Description
Approved start date	Approved start date for this product idea.
Approved end date	Approved end date for this product idea.

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Details section of the Product idea form

Field	Description
Priority	Priority of this product idea.

Strategic Priority form

Use the Strategic Priority form to orient your organization strategic plan toward your goal.

Strategic Priority form

Field	Description
Name	Name of the strategic priority.
Parent	Name of the parent strategic priority that this strategic priority contributes to.
Owner	Owner of the strategic priority. By default, the name of the user creating the strategy is populated.
Start date	Start date for the strategic priority.
End date	End date for the strategic priority.
Type	Strategic priority type categorizes the strategic priority by its nature and organizational intent. Classifying priorities by type helps your organization distinguish different focus areas within a strategic plan and align goals across different dimensions of your strategy. The available options are: • **Key Initiative** • **Shared Vision** • **Strategic Target** • **Operating Principle** • **Relationship Strategy** • **Environmental** • **Social** • **Governance** • **Artificial Intelligence**
Status	Status of the strategic priority. Status can be **Red**, **Yellow**, **Green**, or **None**.
Strategic Plan	Name of the strategic plan for which this strategic priority is created.
Description	A detailed description of the strategic priority. You can refine strategic priority description using the Refine records skill, if the ServiceNow Otto for SPM application is installed.

Related topics

Strategizing the AI plan

Target form

Use the Target form to track and measure the progress of the goals.

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Note: For Operational Sustainability Workspace and Strategic Planning users, to view the other fields that aren't added to the default view or your custom form view on the form in the workspace, configure the default or custom form layout. For information on how to configure the form layout, see Configuring the form layout.

Target form

Field	Description
Name	Name of the target.
Goal	Name of the associated goal. This field is auto-populated when creating a target from the Targets related list on the Goal form.
Description	Brief description of the target. You can refine target description using the Refine records skill, if the ServiceNow Otto for SPM application is installed.
State	State of the target. The state can be **Draft**, **In progress**, **Approved**, **Complete**, **Pending**, **Achieved**, **Not Achieved**, or **Cancelled**.
Status	Status of the target. The status indicates whether the target breakdown is likely to be completed by the planned end date.

Progress	Percentage of the target execution that is complete. The value is calculated automatically.
	
	If the **Type** field is set to **Maximize**, the progress value is calculated using the following formula:
	`Progress = (Actual value - Base value) / (Target value - Base value) x 100`
	
	If the **Type** field is set to **Minimize**, the progress value is calculated using the following formula.
	`Progress = (Base value - Actual value) / (Base value - Target value) x 100`
	
	For more information on how the progress value is calculated when the weight scale is defined, see Progress value calculation.

Impact on goal	A numerical value that represents the importance of the target relative to the other targets of the goal. If there are any subgoals present, they are also considered for relative weights and consequent progress calculation. By default, the value is **(1) Neutral**. The available options are: • **(0) No impact** • **(1) Neutral** • **(2) Moderate** • **(3) High** • **(4) Very high** • **(5) Maximum**

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Target form (continued)

Field	Description
	Note: This field is available only when the **sn_gf.weighted_average_enabled** system property is set to **Yes**.
Assigned entity type	Entity type to which the target is assigned. For example, Business Unit, Department, Company, or Portfolio.
Assigned entity	Entity to which the target is assigned.
Owner	Owner of the target. By default, the name of the user creating the target is populated.
Contributors	Users who contributes to the achievement of the target. By default, the contributors of the associated goal are populated.

Duration section of the Target form

Field	Description
Start date	Start date for the target. By default, the start date of the associated goal is populated.
End date	End date for the target. By default, the end date of the associated goal is populated.

Metrics section of the Target form

Field	Description
Unit of measure	Measure type for the specified value. Usage of the measure such as cost, time, and rate. The available measure types are stored in the Units [sn_gf_units] table. Unit of measure defines the type of the target as qualitative or quantitative. The available unit of measures for the quantitative target are **#**, **$**, **%**, and **Days**. The available unit of measure for the qualitative target is **Yes/No**.
Type	Target type that signifies the direction of achievement. • **Maximize**: The direction of the progress is toward the target value from the base value where the base value must be less than the target value. • **Minimize**: The direction of the progress is toward the target value from the base value where the target value must be less than the base value. • **Milestone**: Fixed type. Only the qualitative target values are allowed (that are set in the **Unit of measure** field for the target)

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Metrics section of the Target form (continued)

Field	Description
	to capture the achievement of the target. The **Milestone** option is applicable only for qualitative targets. The **Type** field becomes read-only with the value populated as **Milestone** for qualitative targets (when the **Unit of measure** field is set to a qualitative target value).
Start value	Start value of the target. The start value can also be considered as the present or current value. This field becomes read-only when a value is entered in the **Actual value** field. Clear the **Actual value** field to update a value in the **Base value** field. This field is available when the **Type** field is set to **Maximize** or **Minimize**.
Final target value	Final target value of the target. The target value should be aspirational and should challenge the teams. This field is available when the **Type** field is set to **Maximize** or **Minimize**.
Baseline reference	Past achievement of the target to provide reference for future performance. This value is only for reference purpose and not considered for target progress calculation.
Actuals to date	Actual value of the target at a given time. This field is available when the **Type** field is set to **Maximize** or **Minimize**.
Check-in frequency	Option to specify breakdown intervals for the target and how frequently the owner or contributor should update the actual value of the target. Breaking down the target into smaller periods helps you set a target for smaller periods and focus on the specific breakdown targets. The available options are **Daily**, **Weekly**, **Monthly**, **Quarterly**, and **Yearly**. Target breakdowns are automatically created when you set this field to any of the available options other than **None**. For more details on target breakdowns, see Target breakdowns in Strategic Planning.

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Metrics section of the Target form (continued)

Field	Description
	Note: The target breakdowns feature isn't supported for qualitative targets.
Target value distribution	Option to specify the target to be calculated cumulatively or non-cumulatively. The available options are **Split equally across the time period (non-cumulative)** and **Spread linearly across the time period (cumulative)**. This field is available only when the **Check-in frequency** field is set to any of the available options other than **None**.
Remark	Remark entered by the user for business justification when updating the actuals.
Check-in due date	Due date that the owner or contributor of the target must update the actual value of the target to.
Confidential	Option to restrict the access for this target record to the specific users populated in the **Allowed groups** and **Allowed users** fields. This field is available when the Operational Sustainability Management application is installed and the *sn_grc.enable_record_confidentiality* property is enabled. This field is applicable only when the **Classification** field in the goal form of the target is populated as Environmental, Social, or Governance. The required role to configure this field is sn_esg.reader. **Note:** Irrespective of the target record set to confidential or not, the target progress value rolls up to its goal for calculating the progress value of the goal.
Allowed groups	User groups who can access the target record. This field is applicable only for the Operational Sustainability Workspace users. Even though a user group is populated in this field, the users can access the confidential record only if the user group has the sn_esg.reader role. This field is available when the **Confidential** field is set to **true**.

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Metrics section of the Target form (continued)

Field	Description
Allowed users	Users who can access the target record. This field is applicable only for the Operational Sustainability Workspace users. Even though a user name is populated in this field, the user can access the confidential record only if the user has the sn_esg.reader role. This field is available when the **Confidential** field is set to **true**.

Target Automation section of the Target form

Field	Description
Comments	Detailed comments for the target to facilitate collaboration.

Activity section of the Target form

Field	Description
Automate actual value	Option to enable the target automation feature for the target.
Actual value source	Target source table that the data is fetched from to auto-update the actual value of the target on the target's review due date. This field is available when the **Automate actual value** field is set to **true**.

Variables section of the Target form

This section appears based on the context variables available in the target source that is selected in the **Actual value source** field.

When you select Actual value source as Benefit Plans (Target automation script for benefit plans), the **Benefit Plan** field appears in this section, from which you can select the required benefit plans for automating the actual value of the target.

Note: You can use the Benefit Plans custom script only when PPM Standard (Project Portfolio Management) is installed. If you can't find the benefit plan that you want to select, you can find and select the same from Heisenberg UI by navigate to **Enterprise Goal Management** > **Targets** and opening the Target form.

Related topics

Strategizing the AI plan

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Discovering and managing AI assets

Get a complete picture of every AI system in your organization by building and maintaining a comprehensive AI asset inventory.

Why discovery matters

Before you can govern, monitor, or measure the impact of AI, you need to know what AI assets exist in your organization. Many enterprises operate dozens or hundreds of AI systems across business units, with no single team holding a complete picture. Shadow AI, untracked models, and undocumented integrations create blind spots in governance and risk management. AI Control Tower addresses this by providing multiple discovery pathways that feed into a single AI asset inventory — a centralized record of every AI system, model, prompt, dataset, and MCP server across your enterprise. See Discovering AI assets.

AI asset inventory

View and manage AI assets across your entire portfolio or focus on a single asset in the AI Control Tower inventory.

The **Inventory** page is designed to give you a complete picture of every AI asset in your organization. From the inventory, you can make assets managed or unmanaged, filter by asset type or lifecycle stage, manually add assets that aren't reachable by automated methods, and respond to recommendations for assets that need attention. See Managing your AI asset inventory.

AI asset records

The asset record is where you investigate and act on a single asset. In the asset record, you can review the asset's governance posture, evaluation scores, lifecycle progress, and value contribution. You can initiate asset-level actions such as starting a lifecycle review, submitting a change request, or turning on evaluation. See Working with AI asset records.

Connecting external AI through AI Gateway

AI Gateway manages MCP (Model Context Protocol) server connections, providing a governed pathway for external AI tools to interact with your ServiceNow environment. Where Service Graph Connectors focus on discovering what AI exists externally, AI Gateway focuses on governing how external AI tools connect to and operate within your platform.

When an MCP server is added through AI Agent Studio, AI Gateway tracks the connection, monitors transaction volumes and success rates, and enforces approval workflows if MCP server approval controls are active. AI stewards can review MCP server records, pause and resume transactions, and manage global MCP clients from the AI Gateway settings page.

AI Gateway provides a comprehensive view of all connected MCP servers, showing name, total transactions, and success rate. Total transactions represent all tool calls (MCP method equal to "tools/call"), and the success rate reflects the proportion of those calls returning a successful HTTP status.

Discovering AI assets

Populate your AI asset inventory automatically as AI Control Tower discovers AI assets across external platforms, hyperscaler traces, and your ServiceNow instance.

AI Control Tower can discovery AI assets and add them to your inventory automatically. For example, AI Control Tower discovers assets running on external platforms through connectors or traces, and detects ServiceNow AI assets natively as they're activated on your instance.

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When assets aren't discoverable through automated methods, you can add them manually. See Creating AI assets manually.

Discovering AI assets through connectors

Extend your AI asset inventory to platforms outside ServiceNow by discovering AI assets through Service Graph Connectors.

Enterprises run AI on more than one platform. Service Graph Connectors extend AI Control Tower's visibility beyond ServiceNow by discovering AI assets running on external platforms and synchronizing them into the inventory.

Each connector requires an AI connection, a configured credential and endpoint that allows AI Control Tower to communicate with the external platform. Once configured, the connector runs on a schedule to discover new assets, update existing records, and synchronize metadata. Some connectors also collect usage and execution data, enabling monitoring and value measurement for external AI alongside ServiceNow AI.

For details on discovery through Service Graph Connectors, see Configuring connectors.

Discovering AI assets through trace connectors

Extend your AI asset inventory to AI agents running on hyperscaler cloud platforms by discovering them through trace connectors.

Trace connectors are primarily an observability capability. A trace connector polls a supported cloud platform, such as AWS, Azure, or Google Cloud, and collects execution-level trace data through a MID Server. AI Control Tower analyzes that data to produce the evaluation scores that appear on the **Monitor** tab of the AI system's asset record, and the security metrics that appear on its **Security** tab.

An established trace connection that gathers trace data for monitoring quality and safety, or security, is discovering AI systems at the same time, filling in assets that connectors and native detection can't reach. Assets detected this way register automatically in your AI asset inventory.

For more information, see Configuring trace connections.

Discovering ServiceNow AI assets automatically

Populate your AI asset inventory automatically with every skill, agent, and model running natively on your ServiceNow instance.

ServiceNow AI assets including skills, agents, and models running natively on your instance are discovered automatically. No manual configuration is required. As AI capabilities are activated on your instance, the discovery process detects and registers them in the AI asset inventory, giving your governance team visibility into your ServiceNow AI systems from the moment they're deployed.

Automatic discovery helps you reduce the risk of ServiceNow AI systems operating outside the governance framework. Skills, AI agents built in AI Agent Studio, and model connections are tracked and available for lifecycle management, risk assessment, and performance monitoring.

Managing your AI asset inventory

Track every AI system, model, prompt, and dataset across your enterprise and control which assets participate in governance, monitoring, and risk workflows.

Key benefits

The AI asset inventory is the central record of AI assets in your organization. Assets that AI Control Tower discovers or identifies through traces appears here, organized by asset type.

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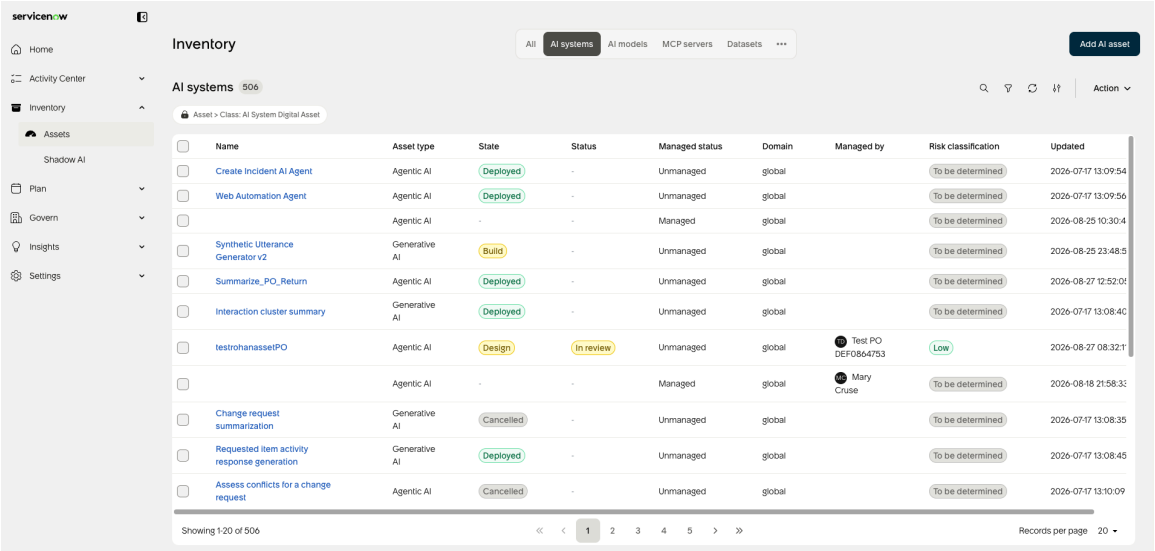
- Get a complete picture of every AI asset across your organization, including assets discovered automatically and those added manually or through connectors.
- Control which assets participate in governance, monitoring, and risk workflows by setting management status directly from the inventory list.
- Filter and refine the asset list by type, risk classification, lifecycle state, asset status, and management status to focus on what needs attention.
- Add assets manually when a connector or trace can't reach them. See Creating AI assets manually.

For the ways AI Control Tower adds assets to your inventory automatically, see Discovering AI assets.

AI asset inventory



AI assets list columns

Column	Description
Name	The name of the AI asset as registered in AI Control Tower.
Asset type	The category of the AI asset, such as AI dataset, AI prompt, AI model, MCP server, or AI system.
State	The operational state of an AI asset.
Status	The governance status of the asset within its current phase.
Managed status	Indicates whether the asset is actively governed. Displays as true or false.
Domain	Domain the asset belongs to.
Managed by	The team or individual responsible for governing the asset.
Risk classification	The assessed risk level of an AI asset.
Updated	The date and time the asset record was last modified.

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Required roles

The AI steward [sn_ai_governance.ai_steward] or AI system owner [sn_ai_asset_mgmt.ai_asset_owner] role is required to access the AI asset inventory.

Accessing the AI asset inventory

Navigate to **All** > **AI Control Tower** > **Home** > **Inventory** > **Assets**.

AI systems

An AI system is a deployed AI application or capability that your organization uses to perform work. Examples include Now Assist skills, AI agents built in AI Agent Studio, and AI-powered applications running on external platforms. AI systems are the primary unit of governance in AI Control Tower, and the assets you classify for risk, assign stewards to, monitor for performance, and measure for value.

In the Inventory, AI systems are identified by asset type: Agentic AI, Generative AI, or Classic AI. Select the **AI systems** tab to filter to these three types together.

- Filter to AI systems only to focus on the assets central to your governance program, regardless of provider.
- Select an AI system record to review lifecycle details, risk classification, monitoring data, and value metrics in one place.
- Designate AI systems as managed to bring them into governance workflows, or initiate a steward review to transition an unmanaged system automatically.

AI models

An AI model is a machine learning model or large language model (LLM) that powers one or more AI systems. Tracking models in the inventory gives you visibility into which models are in use across your organization, which vendors supply them, and whether they are approved for their current deployment context.

- Identify which models are active across your organization, including models imported from external providers such as OpenAI, Mistral AI, and Google.
- Review provider, vendor, and lifecycle state for each model to confirm models are from approved sources and are current.
- Spot models that may need review as vendors release new versions or as vendor relationships change.

AI datasets

A dataset is a collection of data used for training, fine-tuning, or evaluating an AI model. Tracking datasets in the inventory supports data lineage, compliance documentation, and risk assessment for AI systems that depend on specific training data.

- Track training, fine-tuning, and evaluation datasets alongside the models they support to maintain data lineage across your AI portfolio.
- Review provider, asset state, and management status for each dataset to identify datasets that may affect risk classification for dependent AI systems.
- Support compliance documentation by keeping a complete record of the data your AI models were built on.

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AI prompts

A prompt is a system prompt or prompt template that shapes the behavior of an AI system. Prompts define the instructions, context, and constraints an AI model operates under, making them a key governance asset for organizations that require AI behavior aligns with policy and acceptable use standards.

- See all system prompts and templates in use across your organization's AI systems in one place.
- Identify prompts that may need policy review or update as acceptable use standards evolve.
- Understand the reach of any prompt change before making it by tracking which AI systems and models each prompt supports.

Reviewing duplicate AI assets

AI asset deduplication can detect assets in your inventory that perform the same function, such as when two teams independently build similar AI agents to solve the same problem. AI Control Tower surfaces these likely duplicates as a group for an AI steward to review. The AI steward can then confirm the group as true duplicates or dismiss it, before changes are made to relevant asset records. For more information, see Duplicate AI assets.

Managing the status of AI assets

Control whether an AI asset participates in governance workflows by setting its management status. Managed assets are included in lifecycle management, governance, risk classification, value assessment, security, and privacy capabilities. Unmanaged assets are tracked in the inventory but excluded from those workflows. For more information, see Managed and unmanaged AI assets.

Managing AI assets in bulk

Classify large numbers of AI assets automatically instead of moving them to managed one at a time by creating automation rules. A rule matches assets against conditions you define, such as asset type or usage patterns, and marks every matching asset as managed at each scheduled run. For more information, see Managing AI assets in bulk.

Managing evaluations

Detect quality and safety regressions in your managed AI assets by enabling evaluation. Evaluation scoring assesses AI interactions against configurable quality and safety metrics and surfaces trends so you can investigate regressions before they affect users. Disable evaluation when an asset no longer needs active scoring; historical scores are retained either way. For more information, see Evaluating AI systems.

Deactivating managed AI agents

Deactivate a managed AI agent directly from its asset record using AI agent containment with kill switch protocol. For more information, see Deactivate a managed AI agent.

Creating AI assets manually

You can create AI assets manually to track and manage the life cycles of your AI systems, AI models, prompts, and datasets.

Most AI assets enter your inventory through automated discovery, Service Graph Connectors, or observability traces. Manual creation is the option to use when an asset isn't reachable by those

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methods, or when you need to record an asset that isn't yet operational so governance work can begin before deployment.

Manually created assets enter the inventory in the unmanaged state. To bring an asset into governance workflows, set its management status to managed from the inventory list or initiate a steward review. For details on moving assets to managed status, see Managed and unmanaged AI assets and Managing AI assets in bulk.

Create AI system assets

Create AI assets to track and manage the life cycles of your AI systems

Before you begin

Role required: sn_ai_governance.ai_steward or sn_ai_asset_mgmt.ai_asset_owner

Note: Users with the AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role can only create AI assets and submit them for life-cycle review. They can't start or complete any life-cycle reviews.

About this task

An AI system is a software artifact that provides AI and machine learning (ML) capabilities to generate outputs, such as predictions, content, recommendations, and decisions, with varying levels of autonomy. Each AI system can be associated with one or more AI models, which may also be associated with one or more prompts and datasets. These AI models, prompts, and datasets enable the AI system to process data and solve complex problems with little to no human intervention.

When you manually create an asset, the asset defaults to a **Design** state.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Inventory** > **Assets**.
2. On the Inventory page, select **Add AI asset**.
   The Add AI asset dialog box opens.
3. In the dialog box, select **Enter asset details**.
4. From the list of available asset types, select **AI system**.
   The dialog box closes and you're automatically redirected to the Add AI system asset form.
5. In the Details section of the form, fill in the fields.

Details fields in the Add AI system asset form

Field	Description
Name	Name of the AI system.
Provider	People or organization that developed the AI system.
Version	Version of the AI system.
Description	Brief description of the AI system.
Documentation	Additional information about the AI system, such as the method used to evaluate the efficacy of the AI system.
Asset state	Current state of the AI system. Select one of the following options: ○ **Design** ○ **Build**

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Field	Description
	○ **Available** ○ **Deployed**
Managed by	User who is assigned to manage the AI system. This field is automatically set to the user who creates the AI system asset. **Note:** This field is editable only if you have the AI steward [sn_ai_governance.ai_steward] role. If you have the AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role, this field is read-only.
License details	License that you are using for the AI system.
Asset type	Type of AI that your AI system is. Select one of the following options: ○ **Agentic AI** ○ **Classic AI** ○ **Generative AI**
Department	Department that the AI system belongs to.
Supported locations	Locations in which the AI system is supported.

6. Select **Next** to move to the next section of the form.

   You can also select **Save draft** to save the details in the form or select **Cancel** that provides you with the following options:

   - **Keep editing**: to continue editing the form.
   - **Save draft and exit**: saves the form and you exit the form.
   - **Discard and exit**: your unsaved changes are discarded and you exit the form.

7. In the Relationships section of the Add AI system asset form, associate the AI system with other AI assets that are related to it.

   a. Depending on the type of related AI asset that you want associate the AI system with, select one of the following options from the asset type menu:

      - To associate the AI system with any of its supported components or subsystems, select **Sub AI systems**.

        Note: This option is available only if you set the **Asset type** field to either **Agentic AI** or **Generative AI** in the Details section of the Add AI system form.

      - To associate the AI system with any of its integrated AI models, select **AI models**.
      - To associate the AI system with a dataset that is used to test an integrated AI model, select **Evaluation datasets**.
      - To associate the AI system with a prompt that you are providing to an integrated AI model, select **Prompts**.
      - To associate the AI system with any of its integrated AI tools, select **Tools**.

        Note: This option is available only if you set the **Asset type** field to **Agentic AI** in the Details section of the Add AI system form.

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- To associate the AI system with a business application, select **Business applications**.
- To associate the AI system with a configuration item (CI), select **Configuration items**

The corresponding asset list opens.

b. Associate the AI system with a related AI asset.

i. Select **Add from inventory**.

ii. In the dialog box, select the check box for the related AI asset that you want to associate the AI system with.

> **Note:** If you want to associate the AI system with multiple related AI assets, select the check box for each asset.

iii. Select **Add**.

8. Select **Next**.

9. In the Use & purpose section of the form, fill in the fields.
This section enables you to specify the intended use and purpose of the AI system.

Use & purpose fields in the Add AI system asset form

Field	Description
Intended outcome of the AI system	Primary business outcome that the AI system is expected to achieve. Select one of the following options: ○ **Not Applicable** ○ **Efficiency Boost** ○ **Quality Enhancement** ○ **Decision Guidance** ○ **Automation of Tasks** ○ **Customer Experience Upgrade** ○ **Insight Generation**
Interaction type with end users	Type of interaction between end users and the AI system, including whether outputs are visible, actionable, or interactive. Select one of the following options: ○ **Not Applicable** ○ **No Direct Interaction** ○ **Background Support** ○ **Notifications & Prompts** ○ **User-Facing Recommendations** ○ **Chat-Based Interaction** ○ **Interactive Experience**
Level of human involvement	Capacity at which users can guide, review, and accept AI system activities during operation. Select one of the following options: ○ **Not Applicable** ○ **Full User Control**

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Field	Description
	○ **User-Guided with AI Support** ○ **Shared Control** ○ **AI-Initiated with User Approval** ○ **Full Automated Workflow**
System autonomy level	Extent to which the AI system can initiate actions or decisions without human intervention. Select one of the following options: ○ **None** ○ **Assistive (AI suggests)** ○ **Semi-Automated (acts with confirmation)** ○ **Condition-Based Automation** ○ **Event-Triggered Automation** ○ **Fully Automated Execution**
Type of output produced	Type of output that the AI system produces for users, systems, or downstream processes. Select any of the following options: ○ **Automated Decisions** ○ **Generated Content** ○ **Insight & Summaries** ○ **Ranking & Scores** ○ **Recommendations** ○ **Simple Alerts** ○ **System Actions**
Area where the AI system is used	Business or operational areas where the AI system is used or provides value. Select any of the following options: ○ **Customer services** ○ **External Partner Ecosystem** ○ **Finance & Accounting** ○ **HR & Workforce** ○ **Internal Operations** ○ **IT & Security** ○ **Sales & Marketing** ○ **Supply Chain**
People affected by the AI system	Users who may be directly or indirectly affected by the AI system outputs or decisions. Select any of the following options: ○ **External Partners** ○ **General Customer Base** ○ **Internal Team** ○ **Public or Large Audiences** ○ **Specific Customer Groups**

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Field	Description
Data used by the system	Types of data that the AI system uses to process inputs and generate outputs. Select any of the following options: ○ **Behavioral or Usage Data** ○ **Business Operational Data** ○ **Customer Interaction Data** ○ **Profile or Account Data** ○ **Public or General Info** ○ **Sensitive Business Data**
Additional use and purpose details	Additional information or context that helps clarify the specific use and purpose of the AI system.

For more information on classifying AI systems based on regulatory risk at intake by applying a configured Risk Assessment Methodology (RAM), see Request an AI use case.

10. Select **Submit for review**.
    The Asset record page opens and your asset is in an unmanaged state. You can edit details related to your asset on the **Details** tab by using the pencil icon in the sections titled **About this asset** and **Use and purpose**.
11. If you have the AI steward [sn_ai_governance.ai_steward] role, select the **Actions** menu and then select **Start lifecycle review**.

    Important: Only users with the AI steward [sn_ai_governance.ai_steward] role can start the life-cycle review.

    The Start AI steward review dialog box opens.
12. In the **Managed by** field of the dialog box, search for and select the user that you want to assign the life-cycle review to.

    Important: You must select a user with the AI steward [sn_ai_governance.ai_steward] role.

13. Select **Start review**.

    The asset automatically changes from an unmanaged asset to a managed asset and starts the onboarding workflow. The Lifecycle tab now contains three sub tabs: **Onboard**, **Maintain**, and **Retire**. The **Maintain**, and **Retire** are disabled and are enabled once onboarding is complete.

    The **Onboard** sub tab contains the Onboarding playbook with tasks displayed. If tasks are not already present in the Onboarding playbook, users with the AI steward [sn_ai_governance.ai_steward] role can create tasks by selecting **New** and assign them to other AI stewards.

14. If you're assigned to the life-cycle review, select **Mark complete** to complete each activity in the onboarding playbook.

    If your tasks are open and you select **Mark complete**, those tasks automatically get closed with the **Closed skipped** state and you move to the next stage of onboarding. Once you move forward, you can no longer create tasks in the previous stage.

    You can select the **Actions** menu and select **Reject request** to cancel the onboarding playbook and mark this asset as unmanaged.

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When all stages in the onboarding playbook are marked as complete, the playbook status updates to **Complete**. The **Maintain** and **Retire** tabs show a status of **Not Started**.

Note: The end-to-end onboarding process from start to finish may take a few days.

Create AI model assets

Create AI assets to track and manage the life cycles of your AI models.

Before you begin

Role required: sn_ai_governance.ai_steward or sn_ai_asset_mgmt.ai_asset_owner

Note: Users with the AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role can only create AI assets and submit them for life-cycle review. They can't initiate or complete any life-cycle reviews.

About this task

An AI model is a program that is trained to process data and generate outputs, such as predictions, content, recommendations, and decisions, without human intervention. You can use an AI model to perform a specific task, such as image recognition, data classification, or price prediction.

When you manually create an asset, the asset defaults to a **Design** state.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Inventory** > **Assets**.
2. On the Inventory page, select **Add AI asset**.
   The Add AI asset dialog box opens.
3. In the dialog box, select **Enter asset details**.
4. From the list of available asset types, select **AI model**.
   The dialog box closes and you are automatically redirected to the Add AI model asset form.
5. In the Details section of the form, fill in the fields.

Details fields in the Add AI model asset form

Field	Description
Name	Name of the AI model.
Provider	People or organization that developed the AI model.
Version	Version of the AI model.
Supported languages	Languages that are supported by the AI model.
Deployment guidelines	Guidelines or instructions on how to deploy the AI model.
Training procedure	Method that you're using to train the AI model.
Context window	Maximum number of tokens that the AI model can process and recall when generating outputs.
Model size in MB	Size of the AI model in megabytes (MB).

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Field	Description
Model parameters info	Internal variables that the AI model learns during training to process data and generate outputs.
Description	Brief description of the AI model.
Asset state	Current state of the AI model. Select one of the following options: ○ **Design** ○ **Build** ○ **Available** ○ **Deployed**
Managed by	User who is assigned to manage the AI model. This field is automatically set to the user who creates the AI model asset. **Note:** This field is editable only if you have the AI steward [sn_ai_governance.ai_steward] role. If you have the AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role, this field is read-only.
License details	License that you are using for the AI model.
Base model	Base model, also known as a foundation model or pre-trained model, that the AI model was built from.
Department	Department that the AI model belongs to.
Supported locations	Locations in which the AI model is supported.
Model card	Brief document that describes important information about the AI model, including the context, intended use, training data, and limitations of the model.
Model weights info	Numerical parameters that define how the AI model learns during training so that it can generate more desired outputs.
Required infrastructure	Integrated software and hardware components that are required for developing, deploying, and managing the AI model.
Evaluation metrics report	Report that provides data for the metrics that you're using to evaluate the effectiveness of the AI model.

6. Select **Next** to move to the next section of the form.

   You can also select **Save draft** to save the details in the form or select **Cancel** that provides you with the following options:

   - **Keep editing**: to continue editing the form.
   - **Save draft and exit**: saves the form and you exit the form.
   - **Discard and exit**: your unsaved changes are discarded and you exit the form.

7. In the Relationships section of the form, associate the AI model with related datasets. Related datasets include any collections of data that can help test or train the AI model.

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a. Depending on the type of related dataset that you want associate the AI model with, select one of the following options from the asset type menu:
   - To associate the AI model with a dataset that can help test it, select **Evaluation datasets**.
   - To associate the AI model with a dataset that can help train it, select **Training datasets**.
   - To associate the AI model with a configuration item (CI), select **Configuration items**

   The corresponding asset list opens.

b. Associate the AI model with a related dataset.
   i. Select **Add from inventory**.
   ii. In the dialog box, select the check box for the related dataset that you want to associate the AI model with.

   Note: If you want to associate the AI model with multiple related datasets, select the check box for each dataset.

   iii. Select **Add**.

8. Select **Submit for review**.
   The Asset record page opens and your asset is in an unmanaged state. You can edit details related to your asset on the **Details** tab by using the pencil icon in the sections titled **About this asset** and **Use and purpose**.
9. If you have the AI steward [sn_ai_governance.ai_steward] role, select the **Actions** menu and then select **Start lifecycle review**.

   Important: Only users with the AI steward [sn_ai_governance.ai_steward] role can start the life-cycle review.

   The Start AI steward review dialog box opens.
10. In the **Managed by** field of the dialog box, search for and select the user that you want to assign the life-cycle review to.

    Important: You must select a user with the AI steward [sn_ai_governance.ai_steward] role.

11. Select **Start review**.

    The asset automatically changes from an unmanaged asset to a managed asset and starts the onboarding workflow. The Lifecycle tab now contains three sub tabs: **Onboard**, **Maintain**, and **Retire**. The **Maintain**, and **Retire** sub tabs are disabled and are enabled once onboarding is complete.

    The **Onboard** sub tab contains the Onboarding playbook with tasks displayed. If tasks are not already present in the Onboarding playbook, users with the AI steward [sn_ai_governance.ai_steward] role can create tasks by selecting **New** and assign them to other AI stewards.

12. If you're assigned to the life-cycle review, select **Mark complete** to complete each activity in the onboarding playbook.

    If your tasks are open and you select **Mark complete**, those tasks automatically get closed with the **Closed skipped** state and you move to the next stage of onboarding. Once you move forward, you can no longer create tasks in the previous stage.

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You can select the **Actions** menu and select **Reject request** to cancel the onboarding playbook and mark this asset as unmanaged.

When all stages in the onboarding playbook are marked as complete, the playbook status updates to **Completed**. The **Maintain** and **Retire** tabs show a status of **Not Started**.

Note: The end-to-end onboarding process from start to finish may take a few days.

Create prompt assets

Create AI assets to track and manage the life cycles of your prompts.

Before you begin

Role required: sn_ai_governance.ai_steward or sn_ai_asset_mgmt.ai_asset_owner

Note: Users with the AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role can only create AI assets and submit them for life-cycle review. They can't start or complete any life-cycle reviews.

About this task

A prompt is the instructive input that you provide to AI models to elicit specific responses or outputs. Examples of prompts include instructions, questions, and commands.

When you manually create an AI asset, it defaults to the Design state.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Inventory** > **Assets**.
2. On the Inventory page, select **Add AI asset**.
   The Add AI asset dialog box opens.
3. In the dialog box, select **Enter asset details**.
4. From the list of available asset types, select **Prompt**.
   The dialog box closes and you're automatically redirected to the Add prompt asset form.
5. On the form, fill in the fields.

Add prompt asset form

Field	Description
Name	Name of the prompt.
Provider	People or organization that developed the prompt.
Version	Version of the prompt.
Description	Brief description of the prompt.
Documentation	Additional information about the prompt, such as the method used to evaluate the accuracy and quality of AI model responses based on the given input.
Asset state	Current state of the prompt. Select one of the following options: ○ **Design** ○ **Build** ○ **Available** ○ **Deployed**

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Field	Description
Managed by	User who is assigned to manage the prompt. This field is automatically set to the user who creates the prompt asset. **Note:** This field is editable only if you have the AI steward [sn_ai_governance.ai_steward] role. If you have the AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role, this field is read-only.
AI model	AI model that the prompt is associated with.
Prompt information	Input that you want to provide to AI models.

6. Select **Save draft** to save the details in the form or select **Cancel** that provides you with the following options:
   - **Keep editing**: to continue editing the form.
   - **Save draft and exit**: saves the form and you exit the form.
   - **Discard and exit**: your unsaved changes are discarded and you exit the form.
7. Select **Submit for review**.
   The Asset record page opens and your asset is in an unmanaged state. You can edit details related to your asset on the **Details** tab by using the pencil icon in the sections titled **About this asset** and **Use and purpose**.
8. If you have the AI steward [sn_ai_governance.ai_steward] role, select the **Actions** menu and then select **Start lifecycle review**.

   Important: Only users with the AI steward [sn_ai_governance.ai_steward] role can start the life-cycle review.

   The Start AI steward review dialog box opens.
9. In the **Managed by** field of the dialog box, search for and select the user that you want to assign the life-cycle review to.

   Important: You must select a user with the AI steward [sn_ai_governance.ai_steward] role.

10. Select **Start review**.

    The asset automatically changes from an unmanaged asset to a managed asset and starts the onboarding workflow. The Lifecycle tab now contains three sub tabs: **Onboard**, **Maintain**, and **Retire**. The **Maintain**, and **Retire** are disabled and are enabled once onboarding is complete.

    The **Onboard** sub tab contains the Onboarding playbook with tasks displayed. If tasks are not already present in the Onboarding playbook, users with the AI steward [sn_ai_governance.ai_steward] role can create tasks by selecting **New** and assign them to other AI stewards.

11. If you're assigned to the life-cycle review, select **Mark complete** to complete each activity in the onboarding playbook.

    If your tasks are open and you select **Mark complete**, those tasks automatically get closed with the **Closed skipped** state and you move to the next stage of onboarding. Once you move forward, you can no longer create tasks in the previous stage.

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You can select the **Actions** menu and select **Reject request** to cancel the onboarding playbook and mark this asset as unmanaged.

When all stages in the onboarding playbook are marked as complete, the playbook status updates to **Completed**. The **Maintain** and **Retire** tabs show a status of **Not Started**.

Note: The end-to-end onboarding process from start to finish may take a few days.

Create dataset assets

Create AI assets to track and manage the life cycles of your datasets.

Before you begin

Role required: sn_ai_governance.ai_steward or sn_ai_asset_mgmt.ai_asset_owner

Note: Users with the AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role can only create AI assets and submit them for life-cycle review. They can't start or complete any life-cycle reviews.

About this task

A dataset is a collection of data used for training, fine-tuning, or evaluating an AI model.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **InventoryAssets**.
2. On the Inventory page, select **Add AI asset**.
   The Add AI asset dialog box opens.
3. In the dialog box, select **Enter asset details**.
4. From the list of available asset types, select **Dataset**.
   The dialog box closes and you're automatically redirected to the Add dataset asset form.
5. On the form, fill in the fields.

Add dataset asset form

Field	Description
Name	Name of the dataset.
Provider	People or organization that developed the dataset.
Acceptable usage	Acceptable use for the dataset. You can specify more than one use.
Version	Version of the dataset.
Data type	Type of data that the dataset contains. You can specify more than one data type.
Source	Source of the dataset, such as internal customer data within an organization or publicly available data from a government agency.
Description	Brief description of the dataset.
Asset state	Current state of the dataset. Select one of the following options: ○ **Design** ○ **Build**

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Field	Description
	○ **Available** ○ **Deployed** **Note:** A concatenation of asset state and asset status appears on each asset record page The available UI actions on the asset record page vary based on the current state and status.
Asset status	Status of the dataset in a workflow. If this field is empty, that indicates the dataset is not going through any workflow. A value indicates if this dataset is going through a workflow, is approved or is rejected. **Note:** A concatenation of asset state and asset status appears on each asset record page The available UI actions on the asset record page vary based on the current state and status.
Managed by	User who is assigned to manage the dataset. This field is automatically set to the user who creates the dataset asset. **Note:** This field is editable only if you have the AI steward [sn_ai_governance.ai_steward] role. If you have the AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role, this field is read-only.
Creation type	Method by which the dataset was created. Select one of the following options: ○ **Curated**: The dataset was created through careful selection, organization, and refinement of data. ○ **Derived**: The dataset was created by processing, transforming, or combining data from existing datasets. ○ **Synthetic**: The dataset was created by using artificial data that mimics real-word data.
Base datasets	Base dataset that the dataset was built from.
Department	Department that the dataset belongs to.
Dataset creation date	Date and time that the dataset was created.
Dataset card	Brief document that describes important information about the dataset, including the context, intended use, limitations, and potential biases of the dataset.

6. Select **Save draft** to save the details in the form or select **Cancel** that provides you with the following options:
   - **Keep editing**: to continue editing the form.
   - **Save draft and exit**: saves the form and you exit the form.
   - **Discard and exit**: your unsaved changes are discarded and you exit the form.
7. Select **Submit for review**.

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The Asset record page opens and your asset is in an unmanaged state. You can edit details related to your asset on the **Details** tab by using the pencil icon in the sections titled **About this asset** and **Use and purpose**.

8. If you have the AI steward [sn_ai_governance.ai_steward] role, select the **Actions** menu and then select **Start lifecycle review**.

   Important: Only users with the AI steward [sn_ai_governance.ai_steward] role can start the life-cycle review.

   The Start AI steward review dialog box opens.

9. In the **Managed by** field of the dialog box, search for and select the user that you want to assign the life-cycle review to.

   Important: You must select a user with the AI steward [sn_ai_governance.ai_steward] role.

10. Select **Start review**.

    The asset automatically changes from an unmanaged asset to a managed asset and starts the onboarding workflow. The Lifecycle tab now contains three sub tabs: **Onboard**, **Maintain**, and **Retire**. The **Maintain**, and **Retire** are disabled and are enabled once onboarding is complete.

    The **Onboard** sub tab contains the Onboarding playbook with tasks displayed. If tasks are not already present in the Onboarding playbook, users with the AI steward [sn_ai_governance.ai_steward] role can create tasks by selecting **New** and assign them to other AI stewards.

11. If you're assigned to the life-cycle review, select **Mark complete** to complete each activity in the onboarding playbook.

    If your tasks are open and you select **Mark complete**, those tasks automatically get closed with the **Closed skipped** state and you move to the next stage of onboarding. Once you move forward, you can no longer create tasks in the previous stage.

    You can select the **Actions** menu and **Reject request** to cancel the onboarding playbook and mark this asset as unmanaged.

    When all stages in the onboarding playbook are marked as complete, the playbook status updates to **Completed**. The **Maintain** and **Retire** tabs show a status of **Not Started**.

    Note: The end-to-end onboarding process from start to finish may take a few days.

Duplicate AI assets

AI asset deduplication in AI Control Tower identifies duplicate records in the AI asset inventory for AI Stewards to review and consolidate.

AI asset deduplication

AI asset deduplication detects AI assets in your inventory that perform the same function. AI Stewards can review and consolidate redundant entries instead of governing them independently.

Large organizations often have multiple teams building AI assets to solve the same problem independently and without visibility into each other's work. This results in duplicate entries in the AI asset inventory, where the same functionality appears more than once under different names.

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AI asset deduplication helps identify these redundant entries. The feature surfaces likely duplicates for review and routes the resolution decision to AI Stewards, who confirm or dismiss each group. No automatic changes are made to asset records. Detection and flagging are informational, with resolution actions taken by a human reviewer.

Key benefits

AI asset deduplication provides the following benefits:

- Reduces governance overhead by consolidating redundant assets under a single primary record.
- Prevents duplicate risk assessments and policy enforcement across functionally identical assets.
- Improves accuracy of AI asset inventory reporting and audit trails.
- Surfaces instances of uncoordinated AI development across teams and environments.

AI asset deduplication process

Deduplication works as follows:

- AI asset inventory scans registered assets and identifies groups of assets that appear to perform the same function. Each group is assigned a duplicate record with a unique ID in the format DUP followed by a number, for example, DUP0001028.
- Within each group, AI asset inventory selects a main asset, the asset recommended as the primary reference going forward.
- The duplicate group appears on the Review duplicates page in AI asset inventory, where AI Stewards can examine the group and take action.
- The AI Steward either confirms the duplicate grouping (**Mark assets as duplicates**) or dismisses it (**None of these are duplicates**).

How assets are detected as duplicates

Detection is informational only; no automatic changes are made to asset records until an AI Steward confirms or dismisses a group.

The two detection methods:

1. Predictive Intelligence (default): Uses machine learning clustering to identify similar assets based on shared attributes and behavior patterns. This is the original detection method and remains available.
2. LLM-powered detection: Uses a large language model to evaluate asset similarity, producing higher-accuracy duplicate identification than predictive intelligence clustering alone.

   Note: The LLM-powered detection capability will be available with selected ServiceNow product tiers. For more information, see ServiceNow product tiers.

Note: The system property: sn_ai_governance.asset_dedup.agent.enabled acts as the primary switch controlling which detection method is active:

- Off (false): The system uses Predictive Intelligence clustering only.
- On (true): The LLM-powered detection is enabled for Agentic AI assets.

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Main asset selection

The system selects the main asset from the duplicate group based on the following criteria (in order of priority):

- Deployment state: A deployed asset takes precedence over an asset in the draft or retired state.
- Age: An older asset takes precedence over a newer asset with the same function.

Effect on managed status

When an AI Steward marks a duplicate group, the following managed status changes occur:

- Main asset: If the main asset is currently unmanaged, it is promoted to managed when the group is marked.
- Duplicate assets: No managed status change occurs on duplicate assets. Their status remains unchanged after marking.

Actions performed on duplicates

The following tables summarize Review duplicates page actions on the main asset and duplicates with each action's effect and resulting asset status.

Actions on the duplicate group

Action	Effect	Resulting asset status
Mark assets as duplicates	Confirms the AI-identified duplicates as true duplicates. The main asset is retained as the referenced record. All other assets in the group are marked as duplicates. These duplicate assets are no longer referenced by other records or workflows.	Main asset: promoted to managed if it was previously unmanaged (no change if already managed). Duplicate assets: no managed status change; they remain as they were.
None of these are duplicates/This is not a duplicate (for individual duplicate)	Dismisses the entire duplicate group. Removes the group from the Review duplicates page and restores all assets in the group to their normal, independently referenced state. No assets are deleted.	No managed status change on any asset in the group.
Convert to main asset	AI Steward overrides the system-recommended main asset by selecting a different asset from the duplicates list. The previously designated main asset moves to the duplicates list; the selected asset is designated as the new main asset.	A newly designated main asset is set to the primary reference for the group. The previously designated main asset moves to the duplicates list and is treated as a duplicate going forward.

Notes

If the main asset is already managed when the group is marked, no status change occurs; this is the default, no-op case rather than a distinct behavior.

Convert to main asset changes in which asset is designated as main but does not, by itself, resolve the group. Confirm whether the managed status promotion described under Mark assets

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as duplicates applies immediately on conversion or only after a subsequent Mark assets as duplicates action.

Marking assets as duplicates can't be undone from the Review duplicates page.

Actions performed on duplicates

Review the actions and their immediate results when performed on duplicate AI assets in the Review duplicates page.

Before you begin

Role required: sn_ai_governance.ai_steward

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Inventory** > **Action** > **Review duplicates**.
2. Select **Mark assets as duplicates**.
   The main asset is promoted to managed if it was previously unmanaged; managed assets are unchanged. Duplicate assets retain their existing managed status.
3. Select **None of these are duplicates**.
   No managed status change on any asset in the group.
4. Select **Convert to main asset**.
   The newly designated main asset is set to the primary reference for the group, and the previous main asset moves to the duplicates list.
5. Select **This is not a duplicate**.
   No managed status change on any asset in the group.

AI Inventory Intelligence Agent

AI Inventory Intelligence Agent automatically analyzes the AI asset inventory, identifies assets with incomplete metadata, and generates enrichment recommendations to improve data quality and governance readiness.

When the AI Inventory Intelligence Agent is active, it scans the inventory on a scheduled basis and evaluates each asset's metadata completeness. It presents actionable recommendations directly on the asset record. AI Stewards can accept a recommendation to update the asset automatically or dismiss it if the suggestion isn't applicable.

Inventory data completeness score

The inventory data completeness score measures how completely each managed AI asset's critical metadata fields are populated. The score is calculated as the percentage of required fields that contain values.

A higher completeness score indicates that an asset has sufficient metadata to support governance, risk assessment, and lifecycle management workflows. Assets with low completeness scores are prioritized in enrichment recommendations.

The completeness score appears on the AI asset inventory list and on individual asset records, giving AI Stewards a quick view of which assets require attention.

Note: The completeness score formula definition is available as a tooltip on the score field. The formula counts the number of critical fields populated out of the total required fields for that asset type.

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Enrichment recommendations

Enrichment recommendations are field-level suggestions generated by the AI Inventory Intelligence Agent for assets with incomplete or missing metadata. Recommendations are sourced from two strategies:

- Deterministic enrichment: Rules-based suggestions derived from existing asset metadata such as vendor, model name, manufacturer, and category.
- AI-powered enrichment: LLM-generated suggestions for fields such as description, use cases, and documentation. AI-generated fields are marked with an AI indicator on the recommendation.

Each recommendation includes a confidence score and rationale, so AI Stewards can evaluate the suggestion before accepting it. Accepting a recommendation updates the asset field directly. Dismissing a recommendation leaves the field unchanged.

How the AI Inventory Intelligence Agent works

The agent operates as follows:

- The agent scans managed AI assets in the inventory on a scheduled basis.
- For each asset, it evaluates which critical metadata fields are missing or incomplete.
- It generates field-level enrichment recommendations using deterministic rules and LLM inference.
- Recommendations appear on the Enrichment Recommendations tab on the asset record.
- The inventory data completeness score is calculated and displayed for the asset.
- AI Stewards review recommendations and select accept (asset updated) or dismiss (no change made) for each suggestion.
- Accepted recommendations update the asset field; dismissed recommendations leave the field unchanged.
- The completeness score updates to reflect accepted changes.

Enabling the AI Inventory Intelligence Agent

The AI Inventory Intelligence Agent is configured from the Settings tab in the AI Control Tower. Use the activation toggle to enable or disable the agent. Agent configuration settings, including model provider and skill activation, are managed in ServiceNow Otto admin.

Note: To use the AI Inventory Intelligence Agent, install the ServiceNow Otto for AI Control Tower Workspace (com.sn_aict_genai) plugin.

The system property sn_ai_governance.enrichment.generative_enabled is set to false by default. When set to true, enrichment runs both deterministic and generative (LLM-based) strategies. When set to false, only deterministic strategies run.

The LLM-generated enrichments are available when you turn on the AI-generated enrichment toggle. These enrichments are available with selected ServiceNow product tiers. For more information, see ServiceNow product tiers.

Managed and unmanaged AI assets

Control whether an AI asset participates in governance workflows by changing the status in AI Control Tower.

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You can set or change the management status of any asset directly from the inventory list. Use these guidelines to decide when to move assets between states:

- Assets discovered automatically or imported through connectors enter the inventory as unmanaged by default. Move assets to managed when you're ready to bring them into your governance program. You can move one asset or multiple assets at the same time. When an asset's **Use and purpose** field is populated on creation, the system assigns it an initial risk rating automatically, whether the asset is managed or unmanaged. This lets you evaluate an asset's risk before deciding whether to bring it into your governance program.
- Move assets to unmanaged when they no longer need to participate in governance workflows. For example, you might move an asset to unmanaged when an asset has been superseded, is under evaluation for retirement, or was discovered but doesn't yet require governance oversight. Unmanaged assets remain in the inventory but are excluded from active workflows and lifecycle reviews.

Initiating a steward review for an unmanaged asset transitions it to managed status automatically. Automation rules can also set or change management status based on conditions you define. See Managing AI assets in bulk.

Note: The **Move to Managed** and **Move to Unmanaged** actions are now restricted to the AI Steward role. A Product Owner can't perform these actions on any asset, whether owned or not.

Move AI assets to managed

Bring discovered or imported AI assets into your governance program by moving them to managed status, making them eligible for lifecycle review, evaluation scoring, risk classification, and value measurement.

Before you begin

Role required: sn_ai_governance.ai_steward

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Inventory** > **Assets**.
2. Select the check box for each asset that you want to move to managed.
3. From the **Action** list, select **Move to Managed**.
4. In the confirmation dialog box that appears, review your current selections.
   a. Review each asset that you selected and its current state.
   b. **Optional:** Remove any asset that you don't want to update.
5. **Optional:** Select additional actions to perform while moving the asset to managed.

   Initiate lifecycle review

   Starts the onboarding workflow for the asset immediately after it moves to managed.

   Turn on evaluation

   Enables evaluation scoring for the asset so quality and safety scores begin generating.
6. Select **Move to Managed** to confirm.

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Result
The status changes to **New** for each asset that you selected. The asset now participates in governance workflows, including lifecycle management, risk classification, value assessment, security, and privacy.

Move AI assets to unmanaged

Remove AI assets from active governance workflows by moving them to unmanaged status, retaining them in the inventory for tracking without incurring subscription charges.

Before you begin
Role required: sn_ai_governance.ai_steward

Procedure
1. Navigate to **All** > **AI Control Tower** > **Home** > **Inventory** > **Assets**.
2. Select the check box for each asset that you want to move to unmanaged.
3. From the **Action** list, select **Move to Unmanaged**.
4. In the confirmation dialog box that appears, review your current selections.
   a. Review each asset that you selected and its current state.
   b. **Optional:** Remove any asset that you don't want to update.
5. Select **Move to Unmanaged** to confirm.

Result
The status for each asset that you selected changes to unmanaged.

- Each asset remains in the inventory but no longer participates in governance workflows, including lifecycle management, risk classification, value assessment, security, and privacy.
- Each asset is no longer charged as part of your subscription.

What to do next
To bring assets back into governance at any time, see Move AI assets to managed.

Managing AI assets in bulk

Classify large numbers of AI assets automatically instead of moving them to managed one at a time by creating automation rules.

As your organization discovers more AI assets, manually reviewing and moving each one to managed status doesn't scale. Automation rules let you define the conditions that qualify an asset for managed status once, then apply that classification automatically as new assets enter the inventory or existing assets change.

An automation rule queries AI asset or asset usage records for matches against conditions you define, such as asset type, asset state, or usage patterns, and marks every matching asset as managed. You can create up to 10 rules and activate up to 5 at a time, so you can maintain multiple classification strategies without constant manual upkeep.

To set up a new rule, see Create an automation rule. To change which assets an existing rule matches, see Edit an automation rule.

Create an automation rule

Set the conditions for automatically marking discovered AI assets as managed by creating a custom automation rule.

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Before you begin
Role required: sn_ai_governance.ai_steward

About this task
An automation rule queries a table for AI assets that meet the conditions you define and marks the matching assets as managed. Once activated, the rule runs at the next scheduled execution. To run a rule immediately after creating it, use the **Run now** action from the rules list.

You can create up to 10 rules and have up to 5 active at a time. If you reach the active rule limit, deactivate an existing rule before activating a new one.

Procedure
1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Rules and templates** > **Automation rules**.
2. Select **Create rule**.
3. Identify the rule by entering a **Rule name** and an optional **Description**.

   Use a name that reflects what the rule does, such as Mark all generative AI systems as Managed. The description appears in the rules list and helps other AI stewards understand the rule's purpose.
4. In the **Define condition** section, select the **Table** the rule queries against.

   Choose the table that holds the records you want to evaluate:

   - **Asset** — Use to write conditions against AI asset records, such as asset state, asset type, or creation date.
   - **Asset Usage** — Use to write conditions against asset usage records, such as how an asset has been used over time.

   The available fields are the same for both tables. The table selection determines the records the rule evaluates, not the conditions you can build.
5. On the **Conditions** tab, build the criteria that an asset must meet for the rule to mark it as managed.

   a. Select a **Field** from the table.

   b. Select an **Operator** and enter or select the value to compare against.

   c. To add another condition row, select **+ Add group**.

      New rows are joined to the previous row by an **and** connector by default, requiring an asset to meet all conditions to qualify. To branch the logic so an asset qualifies if it meets either condition, select **or** on the connector between the rows.
6. **Optional:** On the **Sort by** and **Group by** tabs, configure how the rule's results are ordered or grouped when the rule runs.
7. To run the rule at the next scheduled execution after saving, select **Activate this rule**.

   Leave this option clear if you want to review the rule in the rules list before activating it. You can activate the rule later by selecting **Activate** from the **Actions** menu on the rule's row.

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8. Select **Save**.

   The rule appears in the **Automation rules for Managed assets** list. If you activated the rule, it runs at the next scheduled execution. To run it immediately, select **Run now** from the rule's **Actions** menu.

Edit an automation rule

Change which discovered AI assets a rule marks as managed, or update its name or description, by editing an existing automation rule.

Before you begin

Role required: sn_ai_governance.ai_steward

About this task

You can edit an automation rule when your classification needs updating, for example to broaden or narrow the set of assets the rule marks as managed, to point the rule at a different table, or to correct the rule's name or description. You change a rule's conditions the same way you build them when you create a rule. For details about the available tables, fields, and condition logic, see Create an automation rule.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Rules and templates** > **Automation rules**.
2. On the rule you want to change, select the more actions icon and then select **Edit**.

   The **Edit automation rule** page opens with the rule's current settings.

3. **Optional:** Update the **Rule name** or **Description** to make the rule easier to identify in the rules list.
4. **Optional:** Change the records the rule evaluates by selecting a different **Table** in the **Define condition** section.

   (Optional) For the available tables and the fields you can build conditions against, see Create an automation rule.

5. **Optional:** Change which assets the rule marks as managed, add, modify, or remove conditions on the **Conditions** tab.

   (Optional) Each condition consists of a **Field**, an **Operator**, and a value. Rows are joined by **and** or **or** connectors, which determine whether an asset must meet all conditions or any one of them. To remove a condition, select the delete icon on its row.

6. **Optional:** Select **Activate this rule**.
7. Select **Save**.

   Your changes are saved to the rule. If the rule is active, it runs with the updated settings at the next scheduled execution. To apply the changes immediately, select **Run now** from the rule's more actions menu.

Evaluating AI systems

Monitor the quality and safety of select AI systems by enabling evaluations.

Evaluation must be enabled for an AI system before quality and safety scores are generated for it. You can enable evaluation for a single AI system or for multiple AI systems at the same

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time. Evaluation can also be turned on as part of moving an asset to managed status. For more information, see Move AI assets to managed.

Disable evaluation when an AI system no longer needs active scoring. For example, you might disable evaluation when an AI system is no longer in used or when you want to reduce evaluation load for a period of time. Historical scores are retained and remain accessible on the asset record. Evaluation can be re-enabled at any time as long as the asset remains managed.

Enable evaluation for an AI system

Start generating quality and safety scores for one or more AI systems by enabling evaluation from the inventory.

Before you begin

Before enabling evaluation for an AI system at the asset level, activate evaluation scoring for AI systems.

- For ServiceNow AI systems, see Activate evaluation scoring for ServiceNow AI systems.
- For external AI systems, see Activate evaluation scoring for external AI systems.

Role required: sn_ai_asset_mgmt.ai_asset_owner or sn_ai_governance.ai_steward

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Inventory** > **Assets**.
2. On the Overview tab, enable evaluation for one or more AI systems.

Option	Steps
Enable evaluation for a single AI system	**a.** Select the AI system's display name to open its asset record. **b.** From the **Actions** list, select **Turn on evaluation**. **c.** In the confirmation dialog box, review the AI system that you selected. **d.** Select **Turn on evaluation** to confirm.
Enable evaluation for multiple AI systems	**a.** Select the check box for each AI system that you want to enable evaluation for. **b.** From the **Action** list, select **Turn on evaluation**. **c.** In the confirmation dialog box, review each AI system that you selected and its current state, and optionally remove any AI system that you don't want to update. **d.** Select **Turn on evaluation** to confirm.

Result

Evaluation is enabled for each AI system that you selected.

- New evaluation scores appear on the **Monitor** tab of each asset record within minutes.
- Historical scores for ServiceNow and external systems are saved.
- You can turn off evaluation for these assets at any time. See Disable evaluation for an AI system.

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Disable evaluation for an AI system

Stop generating evaluation scores for one or more AI systems by disabling evaluation from the inventory, while preserving all historical score data.

Before you begin

Role required: sn_ai_asset_mgmt.ai_asset_owner or sn_ai_governance.ai_steward

Note: Users with the AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role can only disable evaluations for assets that they own.

About this task

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Inventory** > **Assets**.
2. On the Overview tab, disable evaluation for one or more AI systems.

Option	Steps
Disable evaluation for a single AI system	**a.** Select the AI system's display name to open its asset record. **b.** From the **Actions** list, select **Turn off evaluation**. **c.** In the confirmation dialog box, review the AI system that you selected. **d.** Select **Turn off evaluation** to confirm.
Disable evaluation for multiple AI systems	**a.** Select the check box for each AI system that you want to disable evaluation for. **b.** From the **Action** list, select **Disable evaluation**. **c.** In the confirmation dialog box, review each AI system that you selected and its current state, and optionally remove any AI system that you don't want to update. **d.** Select **Turn off evaluation** to confirm.

Result

Evaluation is turned off for each AI system that you updated.

- New evaluation scores stop appearing within a few hours.
- Historical scores are saved and remain visible on the **Monitor** tab of each asset record.
- You can re-enable evaluation for these AI systems at any time, as long as they are managed.

What to do next

To resume scoring, see Enable evaluation for an AI system.

External Registries

External Registries is the mechanism that lets an AI Steward make a managed AI agent discoverable to external systems.

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When an AI agent is added to the inventory, AI Control Tower tracks whether it can be published to external registries. The publish-ability status appears in the External registries section of the AI asset detail record and can be changed at any time by an AI steward.

AI Control Tower no longer pushes agents to Microsoft. Instead, an AI steward marks an agent as publishable, which exposes it through a ServiceNow API. External systems such as Microsoft Agent 365 (A365) can then call this API at their own schedule (example: a periodic daily job) to discover and retrieve those agents.

Publishing an AI agent to an external registry makes it discoverable outside the AI Control Tower. Marking an agent as unpublishable removes it from consideration for external publication while keeping it active in the inventory. The agent is still managed by AI Control Tower regardless of its publish-ability status.

Note: Changing the publish-ability status of an AI agent does not affect its operational status or governance controls within AI Control Tower.

Eligibility Criteria for Publishing

An Agentic AI asset must meet all four of the following criteria before the External Registries tab appears and the publish action is set to available:

Publishable criteria

Criteria	Required value
Governed	True
Lifecycle state	Deployed
Asset status	Approved
Agent model category	Agentic AI
ServiceNow table	AI agent

Publish-ability states

An AI agent can have one of the following publish-ability states:

- Publishable- The AI agent is available for publication to external registries. AI Stewards can publish the agent and manage its external presence from AI Control Tower.
- Unpublishable- The AI agent is not available for publication to external registries. AI stewards can restore publish-ability at any time by selecting Mark as publishable from the actions menu on the asset detail record.

Note: The Microsoft integration provides the following methods to publish an AI agent so that Microsoft can discover it:

- An AI Steward can mark an AI agent as publishable or unpublishable directly from the AI asset record page.
- An AI Steward can mark an AI agent as publishable or unpublishable in the corresponding Onboarding playbook. This option is available through the Publish to External Registries task of the Deploy activity. For more information on the Onboarding playbook, see AI Control Tower playbooks.

If an AI agents meets all eligibility criteria, it is marked as publishable and returned by the discoverable APIs.

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External Registry Support

Currently, Microsoft Agent 365 is the only supported external registry in the UI. However, the API is open by design and any third-party system can call the endpoint to retrieve publishable agents.

API Endpoints

Two API endpoints have been exposed for external systems:

- List endpoint- Returns a list of all agents marked as publishable.
- Detail endpoint- Returns detailed metadata for a specific agent, as required by Microsoft for display in Agent 365.

Publish AI agents

Marking AI agents as publishable from an AI asset record page.

Before you begin

Role required: sn_ai_governance.ai_steward

About this task

An AI agent needs to meet all the prerequisites criteria to be eligible to get publish-ability status.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Inventory**.
2. Open an AI agent.
3. Select **Actions**.
4. Select **Mark as publishable**.

Result

The Agent is returned by discover-ability APIs; External registries section reflects updated status.

Deactivate a managed AI agent

Deactivate a managed AI agent directly from its asset record using kill switch protocol, even if the agent has no associated security event.

Before you begin

Role required: sn_ai_governance.ai_steward

This action is available only for managed AI agents in the Agentic AI category. It isn't available for unmanaged agents.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Inventory** > **Assets**.
2. Open the AI asset record for the managed AI agent that you want to deactivate.
3. From the **Actions** menu, select **Deactivate Agent**.
4. In the confirmation dialog box that appears, provide the reason for deactivation and select **Deactivate**.
   For details on tracking deactivation progress, retrying a failed operation, and reinstating the agent afterward, see Contain AI agents manually using kill switch protocol.

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Result
The AI agent is deactivated using kill switch protocol.

Working with AI asset records

An asset record consolidates the state of a single AI asset and the actions you can take on it, so you can understand the asset's situation and respond from one page.

Overview of working with AI asset records

AI stewards typically open an asset record after a portfolio view, recommendation, or task points them to a specific AI asset. The record brings together information about that asset, including its scores, lifecycle position, connected assets, and pending work. It also provides the actions to respond to what needs attention, without piecing data together from monitoring dashboards, task queues, and inventory lists.

- Reviewing AI asset status

  Check the governance posture, pending work, key details, and value delivered by an asset at a glance from the **Overview** tab, and act on what needs attention without leaving the record.

- Managing AI asset details

  Keep an asset's metadata, use and purpose values, related assets, and supporting documents accurate over time so risk classifications, audit responses, and ownership stay current.

- Managing your AI asset lifecycle

  Advance an asset through its Onboard, Maintain, and Retire stages, work through the playbook tasks generated for each stage, and initiate change or offboarding requests from the Maintain stage.

- Planning AI work from Inventory in AI Control Tower

  Track the strategic priorities, goals, targets, demands, and projects tied to an asset across the Strategize, Prioritize, and Execute sub-tabs on the **Plan** tab.

- Governing AI assets

  Review an asset's regulatory risk classification, compliance score against controls for frameworks like the EU AI Act and NIST AI RMF, residual and inherent risk posture, and the AI cases, controls, and policy exceptions associated with it.

- Monitoring an AI system

  Investigate an asset's quality and safety performance in detail, including which metrics are pulling scores up or down, how performance is trending over time, and which sessions need attention.

- Viewing value metrics for an AI system

  Quantify the productivity gains, AI cost, net AI returns, and engagement metrics an asset has delivered over a date range you select.

- Viewing templates associated with an AI system

  View the value, quality, and safety templates mapped to an asset, and map a different template when the current one no longer reflects how productivity should be calculated.

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- Governing AI asset security

  Review your asset's security score, access issues, and possible security events, and see how it relates to other AI agents in the AI agent map.

Reviewing AI asset status

Check the governance posture, pending work, key details, and value delivered by a specific AI asset, and act on what needs attention without leaving the record.

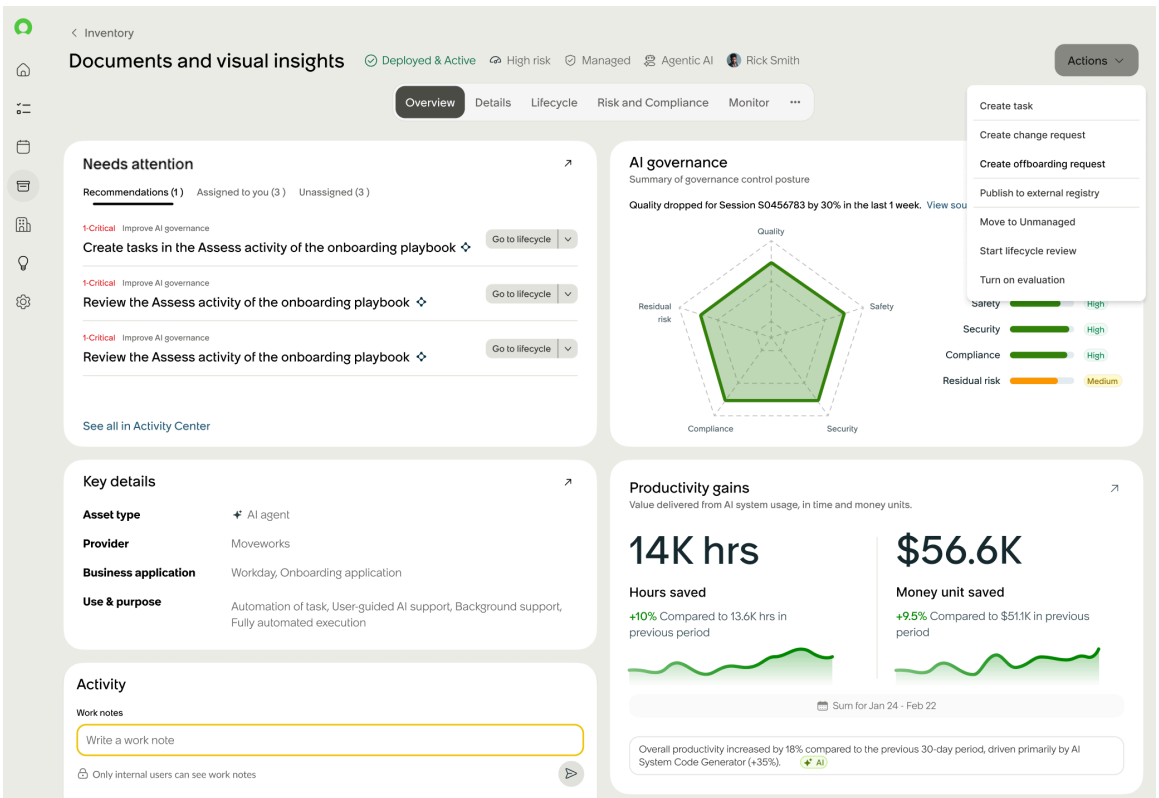
The **Overview** tab on an asset record brings together the governance posture, pending action items, key details, and value delivered by that asset on one page.

Key benefits

- See the recommendations, tasks, and unassigned work that apply to this asset, and act on them without leaving the record.
- Spot governance strengths and weaknesses across quality, safety, security, compliance, and risk on the AI governance radar chart.
- Confirm what the asset is and how it's used from its key details.
- Track the productivity, usage, and returns this asset has delivered over time.
- Review the asset's activity stream.

Depending on the asset's management status and lifecycle stage, you can take actions such as creating a change request, creating an offboarding request, moving the asset to unmanaged, or turning off evaluation.

Overview tab on an AI asset record



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Viewing items that need attention

See the recommendations, tasks assigned to you, and unassigned tasks that apply to this specific asset, and act on them without leaving the record, in the **Needs attention** list. Recommendations, tasks assigned to you, and unassigned tasks are organized into **Recommendations**, **Assigned to you**, and **Unassigned** sub-tabs. Confirm that a recommendation is accurate and aligns with your needs before acting on it. Select **See all Recommendations in Activity Center** to review work that applies to other assets. For more information about how recommendations differ from lifecycle tasks and how they're generated, see Recommendations and AI insights.

Reviewing AI governance

Spot at a glance which governance dimensions are strong and which need attention, in the **AI governance** radar chart. The chart summarizes this asset's governance control posture across five dimensions: **Quality**, **Safety**, **Security**, **Compliance**, and **Risk**. Review the callout for context on a recent change, such as a drop in a session's quality score.

Confirming key details

Confirm what this asset is and how it's used, without switching tabs, from the **Key details** list. The list shows the asset tag, asset type, provider, and use and purpose for this asset. To edit these values or review the asset's full metadata, see Managing AI asset details.

Tracking asset value

Track the productivity, usage, and returns this asset has delivered over a selected period, in the **Productivity gains**, **Total AI actions**, and **Net AI returns** widgets. Each widget shows a headline number, a trend line, a period-over-period comparison, and the exact date range the numbers are summed over.

Productivity gains

The hours and money saved from this asset's usage during the selected period.

Total AI actions

The total number of LLM-related actions this asset performed during the selected period.

Net AI returns

The net returns this asset delivered after deducting the cost of running it during the selected period.

Viewing activity

Review this asset's activity stream from the **Activity** list. Use the filter and settings controls to narrow the stream to the activity types you want to review.

Recommendations for your AI assets

Recommendations for AI assets are automatically generated for you to review and act on.

Overview of recommendations

Recommendations are automatically generated so that you can identify and address issues before they escalate, without the need for manual monitoring. You can view these recommendations only if you have the AI steward [sn_ai_governance.ai_steward] or AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role.

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AI Control Tower checks for a range of conditions on your assets on a schedule that varies by recommendation type, giving you a current view of which assets need attention and why.

Recommendations include, but aren't limited to, the following:

- Activities with no tasks: When an active life-cycle playbook activity is in an onboarding or offboarding phase but has no tasks linked to it, a recommendation is generated. This alerts you that work must be assigned before progress can continue.
- Activities ready to be marked as complete: When every child task under an activity is complete but the activity itself is still open, a recommendation is generated. This helps keep your life-cycle stages from stalling in an open state when the real work is already done.
- A missing or incomplete asset description.
- An asset that has been dormant long enough to be a candidate for retirement.

For the complete picture of how recommendations are generated, prioritized, and resolved across all categories, see Recommendations and AI insights.

Viewing recommendations

You can view recommendations in the following locations:

- AI Control Tower Home page: In the **Top action items** widget.
- Asset record page: In the **Needs attention** section on the **Overview** tab, under the **Recommendations** sub-tab. Select **See all Recommendations in Activity Center** to open the full list.
- Activity Center: On the **Recommendations** page.

Select a recommendation to review the reasoning behind it and the asset it applies to.

To resolve a recommendation, use the primary resolution action it offers; for the full procedure, see Resolve an AI recommendation.

Managing AI asset details

Confirm what an AI asset is, who owns it, how it operates, and what other assets depend on it before approving a change, investigating a score, or responding to an audit question.

An AI asset record stores the metadata, operating characteristics, related assets, and supporting documents that describe how the asset is built, owned, and used. The **Details** tab consolidates this information so that asset owners can keep the record current and AI stewards can reference it during reviews and audits.

The **Details** tab is available for both managed and unmanaged assets. For an unmanaged asset, it is the only tab on the record where this information appears, and is the starting point for review or onboarding.

AI asset details

Use the **Details** section to confirm and maintain the administrative metadata that identifies an AI asset and clarifies who is accountable for it. Asset owners reference these values to keep the record current. AI stewards reference them during reviews and audits. The asset tag contains the unique ID assigned to every asset. Each asset tag consists of a type prefix followed by a 20-digit number.

For example, the **Managed by** field identifies the asset owner who keeps the record accurate and receives lifecycle tasks. The **License details** field captures the license terms that apply to the asset and is referenced during procurement reviews. The **Locations** field records the

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geographic locations where the asset is supported and is used to confirm coverage during data residency reviews. To update any of these values, edit them on the asset record.

Use and purpose

Use the **Use and purpose** section to capture how an AI system operates and what outcome it produces. AI stewards reference these values to classify risk and set appropriate guardrails. Asset owners reference them when responding to audit or regulatory questions about how the asset behaves. When this section is populated when a record is first created, whether for a managed or unmanaged asset, the system uses it to assign the asset an initial risk rating automatically.

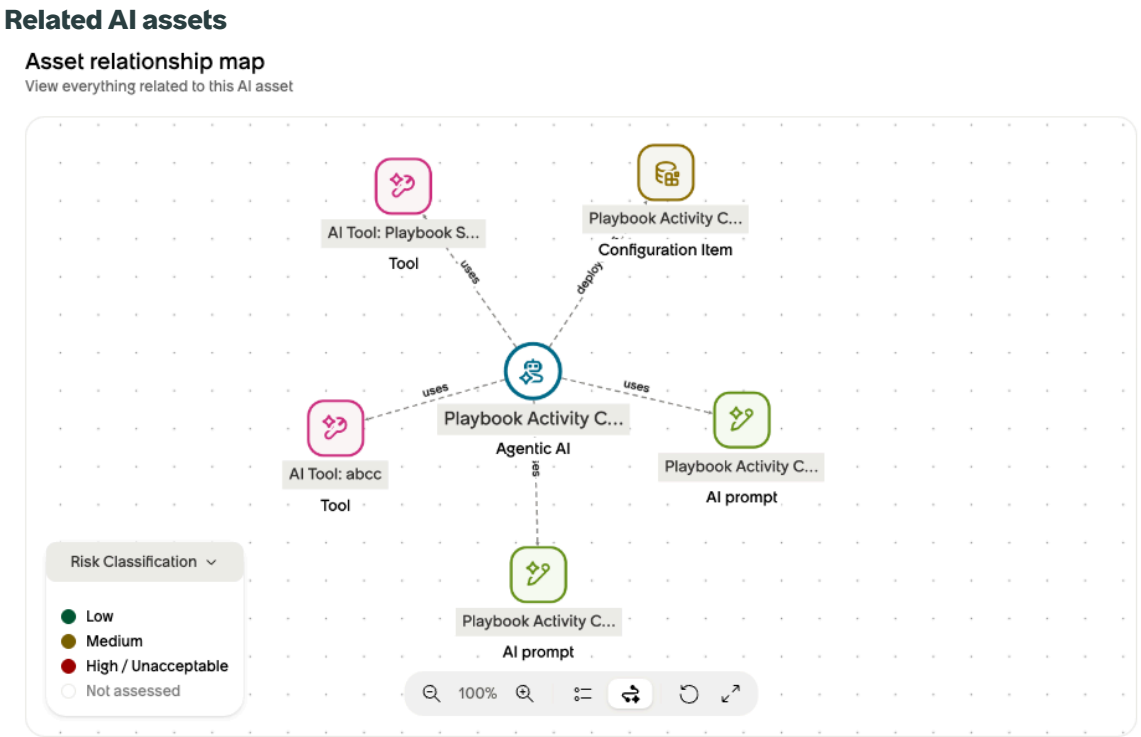
For example, the **System autonomy level** field records how independently the asset acts, with values that range from **Assistive (AI suggests)** at one end to **Fully Automated Execution** at the other. The **Intended outcome of the AI system** field records what business outcome the asset produces, with values such as **Efficiency Boost**, **Decision Guidance**, and **Automation of Tasks**. Together, these values give reviewers context to classify the asset and identify the controls that apply to it. Other fields in the section capture how end users interact with the asset, the level of human involvement in its workflow, and free-text descriptions of the data it uses and the people it affects.

To update **Use and purpose** values, see Update the use and purpose of an AI asset.

Asset relationship map

An AI asset can depend on other AI assets. For example, an AI system can use AI models, prompts, and datasets; can invoke other AI systems; and can be associated with one or more business applications. Use the asset relationship map to see these connections, assess the impact of a planned change, and navigate to a related asset's record.

Business application connections require the Enterprise Architecture for AICT plugin, which installs automatically with AI Control Tower Core at the required version. For upgrade-order considerations, see Enterprise Architecture for AICT plugin installation and upgrade considerations.



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For step-by-step guidance, see Trace the relationships between AI assets.

Attachments

Use the **Attachments** section to keep supporting documents with the asset record, such as model cards, dataset cards, vendor contracts, and third-party documentation. Attached files open in the embedded document viewer, so reviewers can read them without downloading the file.

Update the use and purpose of an AI asset

Update the use and purpose values for an AI asset when its operating characteristics or business outcome change so that risk classifications and governance controls continue to reflect how the asset behaves.

Before you begin

Role required: sn_ai_governance.ai_steward or sn_ai_asset_mgmt.ai_asset_owner

Note: Users with the AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role can view details for any asset but can only update assets that they own.

About this task

Use and purpose values describe how an AI system operates and what outcome it produces. These values are first captured during asset onboarding, but they can change over time. For example, an AI system that originally proposed actions for a user to approve might later be reconfigured to act on its own. When that happens, the asset's **System autonomy level** and **Level of human involvement** values no longer reflect how the asset actually behaves, and any risk classification or control assignment based on those values is out of date.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Inventory**.
2. Open the asset record for the AI asset that you want to update.
3. Select the **Details** tab and locate the **Use and purpose** section.
4. In the **Use and purpose** section, update the relevant fields.

   For example, an AI system that previously required user approval before acting has been reconfigured to act on its own. In this case, change **System autonomy level** from **Semi-Automated (acts with confirmation)** to **Fully Automated Execution**, and change **Level of human involvement** from **AI-Initiated with User Approval** to **Fully Automated Workflow**.

   For a description of the fields and their values, see Use and purpose fields.
5. Select the check icon to save your changes.

Result

The updated values appear in the **Use and purpose** section and are referenced in subsequent reviews, risk classifications, and audit responses.

What to do next

If the change affects how the asset operates, review the controls and governance assignments that depend on these values to confirm they still apply.

Use and purpose fields

Field and value reference for the **Use and purpose** section of an AI asset record. AI stewards and AI asset owners reference these values during onboarding, reviews, and audits.

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System autonomy level

System autonomy level values

Value	Description
Not Applicable	Indication that the autonomy dimension does not apply to the asset.
Assistive (AI suggests)	Mode in which the AI system suggests outputs and the user decides whether to act on them.
Semi-Automated (acts with confirmation)	Mode in which the AI system performs actions following user confirmation.
Condition-Based Automation	Mode in which the AI system acts automatically when defined conditions are met.
Event-Triggered Automation	Mode in which the AI system acts automatically in response to specific events.
Fully Automated Execution	Mode in which the AI system acts independently without human intervention.

Level of human involvement

Level of human involvement values

Value	Description
Not Applicable	Indication that human involvement does not apply to the asset.
Full User Control	Workflow in which the user is responsible for decision-making and the AI system isn't automated.
User-Guided with AI Support	Workflow in which the user directs the activity and the AI system contributes recommendations or analysis.
Shared Control	Workflow in which the user and the AI system share responsibility for decisions and actions.
AI-Initiated with User Approval	Workflow in which the AI system proposes actions and the user approves them before execution.
Fully Automated Workflow	Workflow in which the AI system completes the activity end to end without user involvement.

Interaction type with end users

Interaction type with end users values

Value	Description
Not Applicable	Indication that end-user interaction does not apply to the asset.
No Direct Interaction	Mode in which end users do not interact with the AI system.
Background Support	Mode in which the AI system operates behind the scenes to support a user-facing process.

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Interaction type with end users values (continued)

Value	Description
Notifications & Prompts	Mode in which the AI system communicates with end users through notifications or prompts.
User-Facing Recommendations	Mode in which the AI system surfaces recommendations directly to end users.
Chat-Based Interaction	Mode in which end users interact with the AI system through a conversational interface.
Interactive Experience	Mode in which end users interact directly with an AI-embedded interface or application.

Intended outcome of the AI system

Intended outcome of the AI system values

Value	Description
Not Applicable	Indication that the intended outcome does not apply to the asset.
Efficiency Boost	Outcome focused on reducing the time or effort required to complete a process.
Quality Enhancement	Outcome focused on improving the accuracy or consistency of a process.
Decision Guidance	Outcome focused on supporting human decision-making with analysis or recommendations.
Automation of Tasks	Outcome focused on completing tasks without human action.
Customer Experience Upgrade	Outcome focused on improving the experience of customers or end users.

Additional use and purpose fields

Additional fields

Field	Description
Type of output produced	Description of what the AI system generates, such as text responses, decisions, or recommendations.
Area where the AI system is used	Functional or organizational area in which the asset operates, such as customer service, IT support, or human resources.
People affected by the AI system	Groups whose work or experience is influenced by the asset, such as employees, customers, or partners.
Data used by the system	Categories of data the AI system reads, references, or processes, such as case records, knowledge articles, or customer profiles.
Additional use and purpose details	Free-text notes that capture context not covered by the other use and purpose fields.

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Trace the relationships between AI assets

Identify the AI assets that depend on or feed into a specific AI asset to assess the impact of a planned change, investigate an unexpected evaluation score, or respond to an audit question about how data and models flow through your AI inventory.

Before you begin
Role required: sn_ai_governance.ai_steward or sn_ai_asset_mgmt.ai_asset_owner

Note: Users with the AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role can view relationships for any asset but can only update assets that they own.

About this task
The asset relationship map shows the current AI asset at the center, with connected AI assets arranged around it. Connected assets are grouped by node type, such as AI models, AI prompts, and AI datasets.

Procedure
1. Navigate to **All** > **AI Control Tower** > **Home** > **Inventory**.
2. Open the AI asset with connections that you want to trace.
3. Select the **Details** tab and locate the **Asset relationship map** section.
4. **Optional:** To narrow the map to a specific category of related asset, such as AI models or AI datasets, select a value from the **Node type** list.
   The map updates to show only nodes of the type you selected.
5. **Optional:** To find a specific related asset by name, enter the name in the search field.
6. To open a related asset's record, select its node on the map.
   The selected asset's record opens.

What to do next
Depending on the relationships identified, take one of the following actions:

- Add a relationship to another asset.
- If a related asset will be affected by an upcoming change, create a change request for that asset. See Create change requests for AI assets
- If you're investigating evaluation scores for an AI system, review the **Evaluation** tab on a connected AI model's record to see how that model performs in isolation. See Monitoring an AI system.

Associate a business application with an AI system

Associate an existing business application with an AI system asset, independently of whether the Enterprise Architecture Workspace plugin is installed.

Before you begin
Role required: AI Asset Owner [sn_ai_asset_mgmt.ai_asset_owner]

About this task
You can associate a business application with an AI system either while creating the AI system asset, or afterward by editing an existing AI system's relationships. This topic covers both.

This association requires the Enterprise Architecture for AICT plugin, which installs automatically with AI Control Tower Core at the required version. For upgrade-order considerations, see Enterprise Architecture for AICT plugin installation and upgrade considerations.

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Procedure

1. Navigate to **Workspaces** > **AI Control Tower** > **Inventory**.
2. On the Inventory page, select **Add AI asset**.
   The Add AI asset dialog box appears.
3. In the dialog box, select **Enter asset details**.
4. From the list of available asset types, select **AI system**.
   The dialog box closes and you are automatically redirected to the Add AI system asset form.
5. In the **Details** section of the form, fill in the fields and then select **Next**.
   For field information, see Create AI system assets.
6. On the Relationships page, from the **Related to** list, select **Business Applications**.
7. Select **Add from inventory**.
8. In the **Select Business Applications** dialog box, select the checkbox next to each business application that you want to associate, and then select **Add**.
9. Select **Next** to continue to **Use and Purpose**, or **Submit for review** if you're editing an existing asset.

Result

The selected business applications appear in the **Details** tab for that AI system.

Related topics

- Managing AI asset details
- Create AI system assets
- Enterprise Architecture for AICT plugin installation and upgrade considerations
- AI Control Tower integration with Enterprise Architecture

Managing your AI asset lifecycle

Get a structured view of an AI asset's progression through its operational stages, from initial onboarding to retirement.

When you open an AI asset record, the **Lifecycle** tab shows the current lifecycle stage of that asset. The lifecycle provides governance visibility across the full lifespan of an AI asset.

Lifecycle stages

Lifecycle is divided into three stages, displayed as a horizontal progress indicator at the top of the tab:

Onboard

The initial stage for a newly added AI asset. The **Onboard** sub tab contains the Onboarding playbook with tasks displayed. If tasks aren't already present in the Onboarding playbook, the sn_ai_governance.ai_steward role can create tasks by selecting **New** and assigning them to an asset owner or other AI stewards.

Maintain

After onboarding is complete, the asset enters the Maintain stage. The **Maintain** sub tab is enabled only after onboarding is complete.

Retire

The final stage in the lifecycle. The **Retire** sub tab is enabled only after onboarding is complete. When an AI asset is no longer needed or has been superseded, it is moved to the Retire stage. Retirement ensures the asset is formally

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decommissioned and removed from active use in a controlled and auditable manner.

Creating requests for AI assets

You can manage deployed AI assets effectively by creating change requests for updates to existing assets or by creating offboarding requests for retiring assets.

AI Control Tower supports two types of requests:

Change request

A request to modify a managed AI asset. A change request might propose switching the AI model that backs an agent, updating an asset's version, modifying the asset's use and purpose, or changing the sub-AI systems and AI models associated with the asset.

For details, see .

Offboarding request

A request to retire a managed AI asset. An offboarding request initiates the offboarding lifecycle stage for the asset, which removes the asset from active use and confirms that dependencies have been resolved and any data the asset produced is handled according to policy.

For details, see .

Create change requests for AI assets

Create a change request to modify the relationships between a deployed AI asset and its related assets.

Before you begin

Role required: AI steward [sn_ai_governance.ai_steward] or AI asset owner [sn_ai_asset_mgmt.ai_asset_owner]

Note: Users with the AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role can create change requests only for the AI assets that they are assigned to manage. In addition, they can only create change requests and submit them for review. They can't approve or reject requests or complete any corresponding change tasks.

About this task

To modify the relationships between related AI assets, you can initiate the change process by creating and submitting a change request.

You can create change requests for the following AI asset types:

- AI systems (classic, generative, and agentic)
- AI models
- Datasets

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Inventory**.
2. From the list of available assets, open an asset record with a state of **Deployed** and a status of **Approved**.
3. Initiate the change request by using one of the following navigation options.

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- Open the asset record and select the **Actions** menu and select **Create change request**.
- In the Lifecycle tab, go to the Maintain sub tab and select **Create change request.**

4. On the Change request form, fill in the fields.

New change request form

Field	Description
Change details	
Asset in review	The AI Asset that you want to modify related asset relationships for. **Note:** If you initiated the change request from an AI asset record, this field populates automatically.
Asset type	Type of asset.
Version	Updated version number of the AI asset.
Due date	Date and time at which the request must be completed.
Justification	Justification for creating the request.
Attachments	Accepts JPG, PDF, or XLSX files up to a maximum of 10 MB.
Sub AI systems **Note:** This form section appears only if you are creating a change request for an AI system with an Asset type of either Generative AI or Agentic AI.	
Updated Sub AI systems	Related AI components or subsystems that you want to associate the AI asset with.
AI models **Note:** This form section appears only if you are creating a change request for an AI system.	
Updated models	Related AI models that you want to associate the AI asset with.
AI prompts **Note:** This form section appears only if you are creating a change request for an AI system.	
Updated prompts	Related prompts that you want to associate the AI asset with.
Evaluation dataset **Note:** This form section appears only if you are creating a change request for an AI system or AI model.	
Updated evaluation datasets	Related evaluation datasets that you want to associate the AI asset with.
Tools	

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Field	Description
Note: This form section appears only if you are creating a change request for an agentic AI system.	
Updated tools	Related tools that you want to associate the AI asset with.
Training datasets **Note:** This form section appears only if you are creating a change request for an AI model.	
Updated training datasets	Related training datasets that you want to associate the AI asset with.
Source **Note:** This form section appears only if you are creating a change request for a dataset.	
Updated source	Related data source that you want to associate the AI asset with.
Base datasets **Note:** This form section appears only if you are creating a change request for a dataset.	
Updated base datasets	Related base dataset that you want to associate the AI asset with.
Dataset card **Note:** This form section appears only if you are creating a change request for a dataset.	
Updated dataset card	Related dataset card that you want to associate the AI asset with.

5. Select **Save**, the **Actions** menu, and then select **Submit for review**.
6. In the Submit change request dialog box, select **Submit request**.
   The Impacted assets and Change tasks related list appear. You can approve or reject the request.
7. On the **Details** tab, set the **Assigned to** field to the user who you want to assign the change request to.
   You can assign the request to yourself or to any other user with the AI steward [sn_ai_governance.ai_steward] role.
8. Approve or reject the request.
   - To approve the request, select **Approve**.
   - To reject the request, select **Reject**.

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- If you approved the request, the Status changes to **Approved** and the State changes to **In progress** (if there are impacted assets) or **Completed** (if there are no impacted assets). The new AI asset is created.

  The AI Control Tower application then generates a change task for each asset that is impacted by the request except for datasets. These change tasks appear on the **Change tasks** tab and specify the actions that must be taken on the impacted assets. Each change task is assigned to a user with the AI steward [sn_ai_governance.ai_steward] role. If you have any concerns or need further clarification on the request, you can create additional change tasks manually only if you have the AI steward [sn_ai_governance.ai_steward] role. After the assigned users complete all change tasks, the AI Control Tower application automatically creates a new AI asset record for the asset that the change request was created for. The State of the request then changes to Completed.

  Note: The **Impacted assets** tab is not available if the change request was created for a dataset.

- If you rejected the request, the Status changes to Rejected and the State changes to Completed.

Create offboarding requests for AI assets

Create an offboarding request to retire AI assets that are no longer needed.

Before you begin

Role required: AI steward [sn_ai_governance.ai_steward] or AI asset owner [sn_ai_asset_mgmt.ai_asset_owner]

Note: Users with the AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role can create offboarding requests only for the AI assets that they are assigned to manage. In addition, they can only create offboarding requests and submit them for review. They can't approve or reject requests or complete any corresponding offboarding tasks.

About this task

To retire a deployed AI asset, you can initiate the offboarding process by creating and submitting an offboarding request. This triggers the offboarding workflow that assigns tasks to impacted asset owners and updates the status of the AI asset record to **Retired** on completion.

You can create offboarding requests for the following AI asset types:

- AI systems (classic, generative, and agentic)
- AI models
- Datasets
- MCP servers

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Inventory**.
2. From the list of available assets, open an asset record with a state of **Deployed** and a status of **Approved**.
3. Initiate the offboarding request by using one of the following navigation options.
   - Open the asset record, select the **Actions** menu and select **Create offboarding request**.
   - In the Lifecycle tab, go to the Retire stage and select **Create offboarding request**
4. On the Offboarding form, fill in the fields.

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New offboarding request form

Field	Description
Asset in review	**Note:** If you initiated the offboarding request from an AI asset record, this field populates automatically.
Due date	Date and time at which the request must be completed.
Justification	Justification for creating the request.

5. Select **Save**, the **Actions** menu and, then select **Submit for review**.
6. In the Submit offboarding request dialog box, select **Submit request**.
   The offboarding workflow is initiated. The **Impacted assets** and the**Offboarding workflow** tabs also appear.

Planning AI work from Inventory in AI Control Tower

View all planning data for a specific AI system in one location. The Plan tab automatically filters goals, intake items, and delivery records to show only those linked to your selected AI system across Strategize, Prioritize, and Execute workflows.

Plan tab overview

The Plan tab appears on the record page of an AI system in AI Control Tower Inventory. It appears only for AI systems, not for other asset types such as AI prompts. The Plan tab provides a focused view of the goals, intake items, and delivery records associated specifically with the AI system you selected.

To navigate to the Plan tab of an AI system:

1. Navigate to **All** > **AI Control Tower** > **Inventory**.
2. Select **AI Systems** as the asset type.
3. Select an AI System record to open it.
4. Navigate to the Plan tab.

The Plan tab has three sub-tabs: Strategize, Prioritize, and Execute. The data on each sub-tab is filtered using the product model of the selected AI system. Records in tables such as goals, demands, and projects that carry a product model field are filtered to show only those linked to that product model. Because the data is already scoped to a single AI system, the Plan tab has no additional header-level filters.

Each list on the Plan tab has a toolbar with the following actions:

- Search: Find records by keyword.
- Filter: Open the filter panel to build conditions using field and operator combinations, sort records, or group them within the list.
- Refresh: Reload the list to show the latest data.
- Personalize columns: Choose which columns are displayed and in what order. Search from available columns, add or remove them, and drag to reorder.
- New: Create a record directly from the Plan tab.

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You can also edit a record inline by selecting the edit icon ( ) in the record row.

Note: When you create a record from the Plan tab, confirm that the product model field on the new record is set to the product model of the AI system that you're viewing. If the product model is not set correctly, the new record is excluded from the filtered list after saving.

Strategize

The Strategize sub-tab displays the Goal and Target lists, both filtered to show only records linked to the product model of the selected AI system. Unlike the Strategize page in the Plan menu, this view shows only the filtered lists without analytics widgets.

Strategize lists

List	Source table	Records displayed
Goal	sn_gf_goal	Goals where the product model matches the product model of the selected AI system.
Target	sn_gf_goal_target	Targets where the product model matches the product model of the selected AI system.

To edit a goal or target record, see Edit a strategize record.

Prioritize

The Prioritize sub-tab displays the Demand, Feedback, and Product idea lists, all filtered to show only records linked to the product model of the selected AI system. Unlike the Prioritize page in the Plan menu, this view shows only the filtered lists without analytics tiles.

Prioritize lists

List	Source table	Records displayed
Demand	dmn_demand	Demands where the product model matches the product model of the selected AI system.
Feedback	sn_align_core_feedback	Feedback records where the product model matches the product model of the selected AI system.
Product idea	sn_align_core_product_idea	Product ideas where the product model matches the product model of the selected AI system.

To create an intake record, see Create an intake record. To edit an existing intake record, see Manage intake records.

Execute

The Execute sub-tab displays the Project and Epic lists, both filtered to show only records linked to the product model of the selected AI system. Unlike the Execute page in the Plan menu, this view shows only the filtered lists without donut widgets or header filters.

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Execute lists

List	Source table	Records displayed
Project	pm_project	Projects where the product model matches the product model of the selected AI system.
Epic	sn_align_core_scrum_epic	Epics where the product model matches the product model of the selected AI system.

To create a project or epic, see Create a project or epic in AI Control Tower. To edit an existing project or epic, see Edit a project or epic in AI Control Tower.

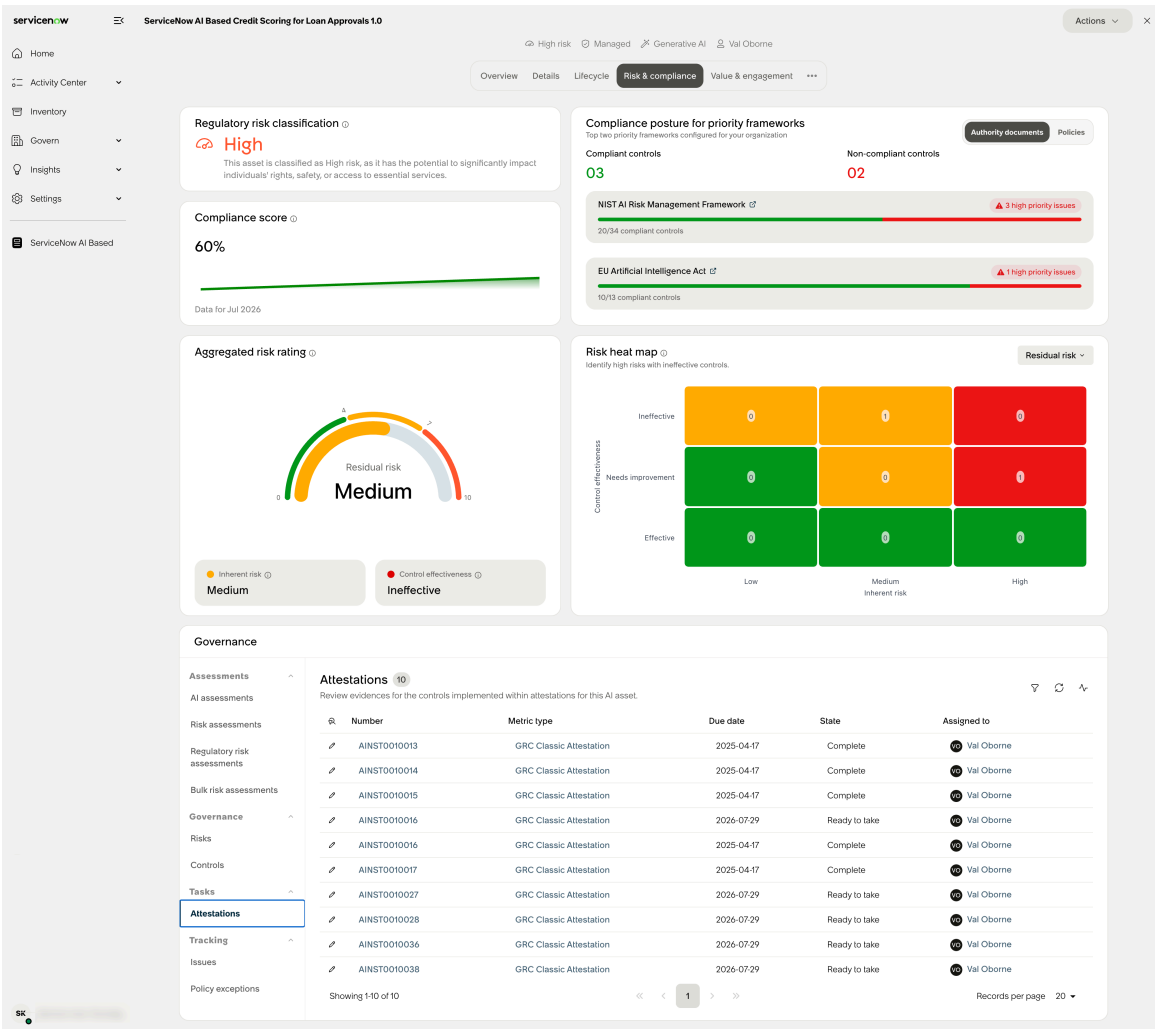
Related topics

Planning and tracking AI work in AI Control Tower

Governing AI asset risk and compliance

Get a consolidated view of your AI asset's regulatory risk classification, compliance posture, control effectiveness metrics, and governance artifacts from the Risk & compliance tab.

When you open an AI asset record, the Risk & compliance tab provides a consolidated view of regulatory risk classification, compliance posture, control effectiveness metrics, and associated governance tasks.



The following table describes each section of the Risk & Compliance Asset page.

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Risk & Compliance asset page sections

Section	What it displays	Status breakdown	Roles required
Regulatory risk classification	Regulatory risk classification of the asset in the portfolio. For more information, see Reviewing regulatory classification and compliance status	• Low • Medium • High • Unacceptable • Critical • To be determined	sn_ai_governance.ai_steward
Compliance score	Overall compliance score for the AI asset and trend information over time. The score reflects an assessment of the asset's compliance with adopted frameworks and policies.	0-100%	sn_ai_governance.ai_steward
Compliance posture for priority frameworks	• Compliance scores for AI assets compared to adopted frameworks and policies. • Compliance status for priority frameworks showing the number of compliant and non-compliant controls associated with the AI asset. The progress indicator shows compliant and non-compliant controls and displays an alert badge for high priority issues. Toggle between Authority documents and Policies to view detailed information. For more information, see Reviewing regulatory classification and compliance status	• Conforming • Non-conforming • To be determined	sn_ai_governance.ai_steward
Aggregated risk rating	Aggregated risk rating for the AI asset, including residual risk, inherent risk, and	• High • Medium • Low	sn_ai_governance.ai_steward

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Risk & Compliance asset page sections (continued)

Section	What it displays	Status breakdown	Roles required
	control effectiveness metrics.		

Risk heat map	Identified risks associated with the AI asset. By default, the risk heat map applies the Residual risk filter, but you can filter the heat map by Inherent risk. Segmentation changes based on the selected filter. Risks appear under the respective combination of risk and control effectiveness, or impact and likelihood, depending on the selected risk classification filter.	The risk heat map consists of the following parameters along the X and Y axes:
		• Residual risk
		  ○ Inherent risk (X-axis)
		  ▪ Low
		  ▪ Medium
		  ▪ High
		  ○ Control effectiveness (Y-axis)
		  ▪ Effective
		  ▪ Needs improvement
		  ▪ Ineffective
		• Inherent risk
		  ○ Impact (X-axis)
		  ▪ Low
		  ▪ Medium
		  ▪ High
		  ▪ Critical
		  ○ Likelihood (Y-axis)
		  ▪ Unlikely
		  ▪ Likely
		  ▪ Highly likely
		  ▪ Almost certain
			sn_ai_governance.ai_steward

Governance	Risk assessments, controls, compliance tasks, and related governance artifacts for the AI asset. Governance-related items are organized into categories with expandable subsections. Select an artifact to open it in the AI Control	NA	sn_ai_governance.ai_steward

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Risk & Compliance asset page sections (continued)

Section	What it displays	Status breakdown	Roles required
	Tower workspace. For more information, seeGoverning AI asset risk and compliance.		

Monitoring an AI system

Assess the quality and safety performance of a specific AI system by reviewing its scores, metric breakdowns, trends, and evaluated sessions.

Key benefits

- See how a single AI system is performing without navigating between portfolio-level views and session lists.
- Identify which metrics are pulling a quality or safety score up or down by reviewing the data sources table directly on each score card.
- Detect regressions specific to an AI system by tracking metric trends over time.
- Review all evaluated sessions for an AI system in one place and open any session to investigate its traces and spans.

The **Monitor** tab on the AI system asset page focuses on a single AI system. While the monitoring overview shows portfolio-wide scores and rankings, the **Monitor** tab shows scores, trends, and sessions for the selected system only. Use the **Monitor** tab when you already know which system needs attention and want to understand its performance in detail.

To start monitoring scores for an AI system, you must activate evaluation scoring for the relevant system type (ServiceNow AI or external AI) and then enable evaluation for the AI system from the inventory.

- Activate evaluation scoring for ServiceNow AI systems
- Activate evaluation scoring for external AI systems
- Enable evaluation for an AI system

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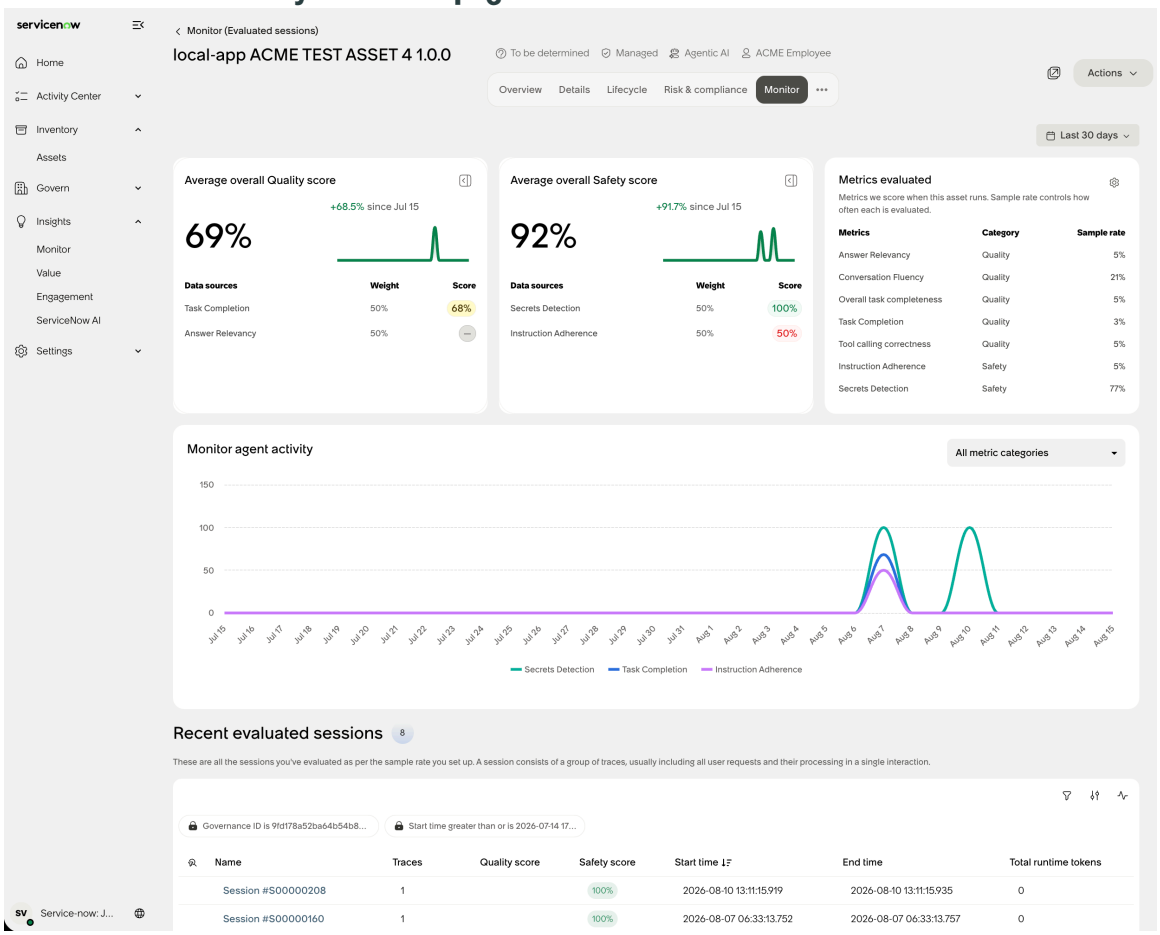
Monitor tab on the AI system asset page



Required roles

The admin role is required to view the Monitor tab.

Accessing monitoring details for an AI system

Access monitoring details for an AI system in one of the following ways:

- Navigate to **All** > **AI Control Tower** > **Home** > **Inventory**. Select the AI system asset and then select the **Monitor** tab.
- Navigate to **All** > **AI Control Tower** > **Home** > **Insights** > **Monitor** and select a system name in the **AI systems ranked by score** widget.
- Navigate to **All** > **AI Control Tower** > **Home** > **Insights** > **Monitor** > **Evaluated sessions** and select the AI system name in the **AI system** column.

Quality and safety score cards

The **Average overall quality score** and **Average overall safety score** cards display composite scores for this AI system, averaged across all evaluated sessions within the selected date range. Each score card shows a percentage, the percentage change from the prior period, and a trend chart.

The data sources table lists every metric that contributes to the composite, along with its weight and current value.

Scores are color coded for quick interpretation:

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- Red (0 to 50%): Low. Investigate immediately.
- Orange (51 to 75%): Fair. Review recent sessions for trends.
- Green (76 to 100%): Good. Meeting quality or safety targets.

Score card side panel

Select the side panel icon on a score card to open a detailed breakdown of how the composite score is calculated.

- See how the score is calculated by expanding the **How is this score calculated?** section, which displays a stacked bar visualization of metric contributions. Each segment's width represents the metric's weight, and its shading represents the metric's score.
- Review the **Nuances to consider** section for notes about how the average score is derived and how different scoring formats (binary, percentage, tiered) affect the calculation.

For details on how scores are calculated, see How evaluation scoring works.

Metrics evaluated

View every metric currently scored for this AI system, whether the metric comes from your organization's global metric configuration or was added specifically for this system in the **Metrics evaluated** list. View the list to confirm exactly what's being evaluated for a single AI system without checking the global configuration separately.

Metrics

Name of the metric.

Category

Whether the metric is a Quality or Safety metric.

Sample rate

Percentage of eligible sessions that this metric evaluates. This value is set at the metric level and applies wherever the metric is used.

AI stewards can add or remove metrics for any AI system. Asset owners can do the same, but only for the AI systems they manage. For details on adding or removing metrics, see Configure metrics evaluated for an AI system.

Avg latency per session

Determine whether recent agent activity or another change is affecting this AI system's response times by reviewing the Avg latency per session card and its change from the prior period. This value reflects the AI system's language model response time, not the total time to complete a trace or session.

Select the expand icon on the card to open a chart of total latency by day, summed across all sessions evaluated that day.

Avg tokens per sessions

Estimate the cost of running this AI system by reviewing the Avg tokens per sessions card and its change from the prior period. This value averages the combined input and output tokens consumed per session over the last month.

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Monitor agent activity

Track how quality and safety metrics for this AI system are trending over the selected date range. The chart plots every metric with data for this AI system so you can detect regressions specific to it, confirm that recent changes improved performance, and see which metrics are shaping its overall scores.

Two line styles distinguish how each metric contributes to scoring:

- Solid lines represent metrics that contribute to this AI system's overall quality or safety score. These metrics are configured in a metric template.
- Dotted lines represent metrics that are being collected for this AI system but don't contribute to its overall quality or safety score. These metrics aren't configured in any metric template.

To add a dotted-line metric to your scoring formula or to adjust how much existing metrics contribute to your overall scores, see Configure an evaluation metric template.

Choose which metrics to display by selecting an option from the list.

Lowest performing metrics

Show the top five metrics that had the biggest drop in performance over the selected time period. This is the default selection.

Top performing metrics

Show the top five metrics that had the biggest increase in performance over the selected time period.

Quality metrics

Show only metrics in the Quality category.

Safety metrics

Show only metrics in the Safety category.

All metrics

Show every quality and safety metric that has data for the selected date range.

Alternatively, select an individual metric from the list to view performance for that metric over time.

Point to a data point on the chart to see the exact score for that date.

Recent evaluated sessions

The evaluated sessions table lists all sessions for this AI system within the selected date range. Scores are color coded for quick scanning.

Select a session name to open the session detail page and begin investigating traces and spans. For details on investigating sessions, see Session details.

Name

Session identifier. Select the name to open the session detail page.

Trace

Number of traces in the session.

Spans

Number of spans across all traces in the session.

Quality score

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Composite quality score for the session, calculated from the weighted metrics in your quality template.

Safety score

Composite safety score for the session, calculated from the weighted metrics in your safety template.

Start time

When the session began.

End time

When the session ended or timed out.

Total runtime tokens

Combined input and output tokens consumed by the AI system during this session. This reflects the cost of running the interaction, not the cost of evaluating it.

Latency (ms)

Combined language model response time, in milliseconds, across all traces in the session. This measures time spent in language model calls, not the total time to complete the session.

Review scores for an AI system

Determine whether a specific AI system is meeting quality and safety targets by reviewing its scores, identifying which metrics are affecting performance, and checking for regressions over time.

Before you begin

Role required: sn_ai_asset_mgmt.ai_asset_owner or sn_ai_governance.ai_steward

About this task

When a specific AI system needs attention, determine which metrics are affecting its scores and whether performance is trending in the right direction. Review the **Monitor** tab on the AI system asset record after spotting a low-scoring system on the monitoring overview, receiving an AI-generated insight about a specific system, or being assigned a task related to an underperforming asset.

Procedure

1. Navigate to the **Monitor** tab for the AI system that you want to review in one of the following ways:
   - Navigate to **All** > **AI Control Tower** > **Home** > **Inventory**. Select the AI system asset and then select the **Monitor** tab.
   - Navigate to **All** > **AI Control Tower** > **Home** > **Insights** > **Monitor** and select a system name in the **AI systems ranked by score** widget.
   - Navigate to **All** > **AI Control Tower** > **Home** > **Insights** > **Monitor** > **Evaluated sessions** and select the AI system name in the **AI system** column.
2. Set the date range for the data you want to review.
   Select the date range picker and choose a time period. The default is **Last 30 days**. Select **Custom range** to specify an exact start and end date, up to 18 months apart.
   All score cards, trends, and session data on the page update to reflect the selected range.
3. Assess overall quality performance by reviewing the **Average overall Quality score** card.
   For example, if the quality score is 88%, the data sources table might show that Task completion (weight 40%) scored 88% while Answer completeness (weight 35%) scored 86%. A low score on a heavily weighted metric has a larger impact on the composite.

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4. Assess overall safety performance by reviewing the **Average overall Safety score** card. For example, if the Instruction adherence score is lower than Secrets detection or Sexism detection, the agent may be handling sensitive data and language correctly but still straying from its approved response guidance. Reviewing the traces where Instruction adherence dipped lowest will show which specific exchanges the judge flagged and why.
5. Confirm which metrics are scoring this AI system by reviewing the **Metrics evaluated** card. This card lists every metric currently scoring this AI system, whether the metric comes from your organization's global metric configuration or was added specifically for this system. To change which metrics are evaluated, see Configure metrics evaluated for an AI system.
6. View the full scoring formula by selecting the side panel icon on a score card.
   a. View a stacked bar visualization of how each metric contributes to the composite score in the **How is this score calculated?** section.
   b. Learn how the average score is derived and how different scoring formats affect the calculation in the **Nuances to consider** section.
7. Assess the AI system's operational performance by reviewing its performance cards, such as latency and token usage.
   a. Determine whether recent agent activity or another change is affecting response times by reviewing the **Avg latency per session** card.
   b. Estimate the cost of running this AI system by reviewing the **Avg tokens per sessions** card.
   c. Understand how much the AI system relies on external tools by reviewing the **Avg tool call per trace** card.

   Each card shows its change from the prior period. For the **Avg latency per session** card, select the expand icon to open a chart of total latency by day, summed across all sessions evaluated that day.
8. Check performance over time by reviewing the **Monitor agent activity** trend chart.

Option	Description
Lowest performing metrics	View the top five metrics with the largest de cline in quality and safety over time.
Highest performing metrics	View the top five metrics with the largest in crease in quality and safety over time.
Quality metrics	View the performance of quality metrics over time.
Safety metrics	View the performance of safety metrics over time.
All metrics	View the performance of all metrics over time.
Select a specific metric	View the performance for a specific metric by selecting it from the list.

Solid lines represent metrics that contribute to this AI system's overall quality or safety score. Dotted lines represent metrics that are collected but don't contribute to those scores. You can point to a data point on the chart to see the exact score for that date.

For example, a gradual decline in Task completion from 90% to 72% over three weeks indicates a quality regression for this AI system that warrants session-level investigation.

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To add a dotted-line metric to your scoring formula, see Configure an evaluation metric template.

9. Identify sessions that need investigation by reviewing the **Recent evaluated sessions** table.
   a. Sort sessions by **Quality score** or **Safety score** to surface the lowest-scoring sessions.
   b. Select a session name to open the session detail page and begin investigating its traces and spans.

   For example, a session with a red safety score (below 50%) warrants immediate investigation. For details on investigating sessions, see Investigate a low-scoring session.

Configure metrics evaluated for an AI system

Add or remove metrics for a specific AI system to tailor evaluation coverage without changing your organization's global metric configuration.

Before you begin

Role required: sn_ai_asset_mgmt.ai_asset_owner or sn_ai_governance.ai_steward

Note: Users with the AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role can configure metrics only for AI systems they manage.

About this task

The metrics evaluated for an AI system come from your organization's global metric configuration by default. However, you might apply specific metrics for individual AI systems. For example, to check a customer-facing agent for profanity when profanity isn't part of your global safety configuration, you can add or remove the metric for that system specifically. Changes made here don't affect any other AI system or your global configuration.

Procedure

1. Navigate to the **Monitor** tab for the AI system that you want to configure in one of the following ways:
   - Navigate to **All** > **AI Control Tower** > **Home** > **Inventory**. Select the AI system asset and then select the **Monitor** tab.
   - Navigate to **All** > **AI Control Tower** > **Home** > **Insights** > **Monitor** and select a system name in the **AI systems ranked by score** widget.
   - Navigate to **All** > **AI Control Tower** > **Home** > **Insights** > **Monitor** > **Evaluated sessions** and select the AI system name in the **AI system** column.
2. Configure which metrics to score for this asset.

Important: Adding more metrics increases the visibility you gain into each session, but also increases assist usage to evaluate it. Select the metrics that give you the insight you need.

Scenario	Steps
Configuring for the first time	**a.** In the **Metrics evaluated** card, select **Setup asset specific metrics**. **b.** Find a specific metric using the search box or the **All**, **Quality**, and **Safety** tabs. **c.** Select the check box next to each metric that you want to evaluate for this AI system.

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Scenario	Steps
Modifying an existing configuration	**a.** In the **Metrics evaluated** card, select the settings icon. **b.** Find a specific metric using the search box or the **All**, **Quality**, and **Safety** tabs. **c.** Select or clear check boxes to add or remove metrics.

3. Select **Save metric**.
   A confirmation message appears summarizing the change, and the **Metrics evaluated** card updates to reflect it. If a metric you're removing is currently used in a published evaluation template or a compliance evaluation, the change isn't saved, and you're shown which templates or evaluations are using it so you can resolve that first.

What to do next

To change how often a metric is evaluated for this AI system, an AI steward can adjust the sample rate from the evaluation settings. For an external AI system, each metric has its own sample rate, which you can set for individual assets. See Configure asset-specific metrics for external AI systems. For a ServiceNow AI system, a single sample rate applies to all metrics for all assets. See Configure global metrics for ServiceNow AI systems.

Viewing value metrics for an AI system

View productivity gains, net returns, usage volume, and cost metrics so you can assess the business impact of a specific AI system over time.

You can determine whether an AI system is delivering value by viewing the **Value & engagement** tab an the asset record. The metrics on this tab are scoped to the individual AI system, unlike the aggregated data shown on the value dashboard under Insights. Use these metrics to report on AI system performance, assess business value delivery, identify usage trends, or validate the effectiveness of your AI investment.

Value and engagement metrics

The following metrics are displayed on the **Value & engagement** tab.

Value and engagement metrics

Metric	Description
Productivity gains	Value delivered from AI system usage, expressed in time and money units. Displays hours saved and money saved for the selected time period.
Net AI returns	Net value of AI consumption after deducting costs. Reflects whether the AI system is generating positive return on investment.
Total AI actions	Total number of LLM-related actions performed by the AI system during the selected period.
Total AI cost	Total cost of AI usage for this AI system. Displayed as a trend chart over the selected time period.
Total productivity gained	Productivity gains in hours across the selected time period, broken down by persona. Use the **Persona** filter to view gains for a specific user type.

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Time period

All metrics reflect data for the date range shown beneath each widget. You can adjust the time period to focus on a specific window of usage. By default, metrics display a rolling 30-day sum.

Viewing templates associated with an AI system

Learn how value is being measured for an AI system by viewing the value templates mapped to the asset and the productivity calculation each template uses.

Value templates define the formula used to calculate productivity gains for an AI system. The formula multiplies a usage metric by a time constant and a quality constant to produce a minutes-saved figure. Because each AI system can have templates mapped to different personas, the **Templates** tab gives you a per-asset view of exactly which templates are active and what each one calculates.

Value templates list

The **Templates** tab displays a **Value templates** section that lists all templates mapped to the AI system. Each template card shows the following attributes.

Template card attributes

Attribute	Description
Template name	Name of the value template mapped to this AI system.
Mapping status	Publication state of the template mapping. A **Published** mapping is active and contributes to value calculations. A **Retired** mapping is no longer used in calculations but remains visible for historical reference.
Persona	User role for whom the productivity value is calculated.
Department	Department associated with the template mapping, if specified.
Category	Value template category, such as Productivity.
Usage	Usage indicator that supplies the daily invocation count used in the productivity formula.
Time	Time constant (in minutes) applied per invocation in the productivity formula.
Quality	Quality constant (as a percentage) applied in the productivity formula. Represents the expected acceptance rate of AI outputs.

By default, only templates with an active mapping status are shown. To include retired templates in the list, enable the **Include retired templates** toggle.

Template details side panel

To review the full configuration of a template mapping, select **View details** on a template card. A side panel opens showing the following information.

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Template details side panel fields

Field	Description
Mapped template	Name of the value template mapped to this AI system.
Mapping status	Publication state of this template mapping.
Persona	User role for whom value is calculated using this template.
Productivity gained	Total minutes saved by this persona using this AI system over the selected time period, shown as a trend chart. Use the date range selector to adjust the reporting window.
Productivity calculation using this template	The formula applied to calculate productivity for this mapping, expressed as: Usage indicator × time constant (minutes) × quality constant (%). Select the usage indicator link to open its record.

To view the full template record and its configuration fields, select **Open template** in the **Template details** section of the side panel.

Governing AI asset security

Get a snapshot of your AI asset's security posture and visualize how your asset relates to other agentic assets in your enterprise in the AI agent map.

When you open an AI asset record, the **Security** tab shows the AI asset security score, access issues, security events, and its access posture, based on whether the asset was given elevated privileges or has been dormant (inactive) for over 90 days.

It also shows the AI agent map which illustrates how the AI asset relates to other managed AI agents, agentic workflows, providers, and tools across your enterprise. For AI models, the Security tab shows the AI asset security score, security events, and the AI agent map only.

Get details for each metric area by selecting the arrow in the upper-right corner of each metric. If there's no data available for the asset, metrics don't show on the page.

AI asset security score

The AI asset security score is a measure of the health of your AI asset in terms of access issues, privileged AI agents, dormant AI systems, output deviation, PII detection, and other criteria. Users should actively manage and review their agent assets and not rely solely on this AI asset security score.

For more information, see Configure the AI asset security score.

Access issues

The number of access issues encountered by this AI asset for the last 24 hours, by default. For example, the AI agent couldn't access a database field.

AI agents with access issues may be unable to complete their workflows due to the access issue.

Access issues can also be due to misconfiguration or potentially malicious acts by an agent.

Security events

The number of security events associated with the AI asset for the last 24 hours, by default.

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An AI asset security event is an occurrence that involves a potential threat to your environment's security. For example, if a credit card number is detected in LLM output (output PII violation), or if a user replaces an LLM prompt with a malicious prompt designed to obtain a user's password (prompt injection). Each AI asset security event has a threat type assigned. For more information, see Managing AI asset security reference.

Access posture

Whether the asset was given elevated privileges or has been dormant for the time period shown, expressed in Coordinated Universal Time (UTC).

Privileged

The AI agent has elevated permissions, such as an agent with admin or security admin permissions that can perform critical actions. Some workflows require that AI agents have elevated permissions to complete.

An external AI agent is privileged if it has write, modify, or delete access to systems or data. For example, access to cloud infrastructure, IAM configurations, secrets managers, key management services, production databases, or security configurations.

Dormant

The AI agent has been inactive for 90 days or longer. Review dormant AI agent permissions to reduce security risk.

AI agent containment

If a security event of any severity (Critical, High, Medium, or Low) is detected for an AI agent in the Agentic AI category, a banner appears on both the asset's **Overview** tab and its **Security** tab, letting you take action directly from the asset record.

Select **View containment options** on the banner to open a side panel showing recent critical events for the asset and a **Deactivate** action. Deactivating the asset triggers AI agent containment using kill switch protocol; you can track progress from the banner and retry the operation if it fails or partially completes. After the underlying issue is resolved, you can reinstate the asset. For details, see Contain AI agents manually using kill switch protocol.

An AI agent can also be contained automatically when a Threat Response policy detects a matching threat. For details, see Threat Response policies.

AI agent map

The agent map is an interactive node map showing the relationships of your AI agents, agentic workflows, and tools across your enterprise. You can use the map to review these relationships and AI asset details. When you expand the map, you can filter by agents and agentic workflows.

For more information, see Discover your agent network with the map.

Working with MCP server records

The MCP servers tab on the AI Control Tower Inventory page provides a centralized view of MCP servers registered in your ServiceNow instance.

MCP servers are AI assets that expose tools, resources, and capabilities to AI agents through a standardized protocol. Registering MCP servers in the inventory enables AI Control Tower to govern, classify, and monitor their usage alongside other AI assets. The **MCP servers** tab displays only assets of type MCP server.

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MCP servers inventory list

The MCP servers inventory list displays the following columns for each registered server:

Column	Description
Display name	The display name of the MCP server. Servers sourced from external registries may display their registry path as the display name, for example: io.github.pipeworx-io/dictionary.
Asset type	Always MCP server for entries on this tab.
State	The lifecycle stage of the MCP server. Common values include Deployed. Se MCP server States for the full list.
Status	The approval status of the MCP server. Possible values are Approved and empty (not yet reviewed). See MCP server Statuses for details.
Managed status	Indicates whether the MCP server is under active governance. Possible valu are Managed and Unmanaged.
Risk classification	The assessed risk level of the MCP server. The default value is To be determined until a risk assessment is completed.
Updated	The date and time the record was last modified.

Refine results panel

Use the Refine results panel to filter the MCP servers list by one or more criteria simultaneously.

The following filter groups are available in the Refine results panel:

Filter group	Available values
Managed status	Managed, Unmanaged
Risk classification	Critical, Unacceptable, High, Medium, Low (select Show all for additional values).
State	Ideation, Design, Build, Available, Deployed (select Show all for additional values).
Status	In review, Ready for deployment (scroll or select Show all for additional values).

Managing MCP server records

Learn about the MCP server record, including the MCP server overview and details available in AI Control Tower.

An MCP server record in AI Control Tower provides a detailed view of a registered MCP server. The record shows the server's identity, connectivity configuration, AI Gateway integration details, lifecycle stage, and risk and compliance posture. Use the record to monitor server health, manage authorization, and apply governance controls.

MCP server Overview

When you select an MCP server from the inventory list, the MCP server record opens.

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Key details panel

The Key details panel on the Overview tab displays the primary identity and connectivity information for the MCP server. The following fields are available:

Field	Description
Asset tag	The unique ID assigned to this asset. Each asset tag consists of a type prefix followed by a 20-digit number.
Name	The display name of the MCP server as registered in AI Control Tower.
Description	A free-text description of the MCP server's purpose, capabilities, usage context.
Lifecycle phase	The current lifecycle stage of the MCP server. Reflects the phase selected during registration or updated through the Lifecycle tab.
Asset type	The classification of this record. Always MCP server for records of this type.
MCP server URL	The endpoint URL of the external MCP server. AI agents and the AI Gateway use this URL to connect to the server and call its tools. For example, https://mcp.linear.app/mcp.
External documentation URL	A link to the vendor-provided or internally authored documentation for this MCP server.
Provider	The organization or vendor that publishes or maintains this MCP server.
Business application	The ServiceNow business application that this MCP server is associated with. This field establishes ownership and CMDB relationships.

AI Gateway MCP server details panel

The AI Gateway MCP server details panel displays the ServiceNow-side connectivity configuration that the AI Gateway uses to proxy requests to and from the external MCP server.

Field	Description

AI Gateway MCP server URL	The internal ServiceNow URL through which the AI Gateway exposes this MCP server to the AI agents. AI agents send requests to this URL rather than directly to the external MCP Server URL.
	
	Note: The AI Gateway proxy URL format has changed. The new format is:
	
	`https://<instance-url>/sncapps/aigw/mcp/<mcp-server>`
	
	Previously, the URL format was:
	
	`https://<instance-url>/sncapps/awh/<mcp-server>/mcp`
	
	However, those who were using AI Gateway before the temporary unavailability in August will be redirected automatically to the latest URL

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Field	Description
Authorization endpoint URL	The OAuth 2.0 authorization endpoint used to initiate the authorization cod flow for this MCP server. For example, https://<instance>.service-now.com/ mcp_auth.do
Token endpoint URL	The OAuth 2.0 token endpoint used to exchange authorization codes for ac tokens. For example, https://<instance>.service-now.com/mcp_token.do

MCP server Details

The Details tab of an MCP server record displays the server's governance metadata, ownership information, and the complete list of tools that the server exposes. Use this tab to review and update server details, manage attachments, and audit the tools available to AI agents through this server.

The tab is divided into two main panels displayed side by side:

- Details panel
- Available MCP tools panel

Details panel

The Details panel displays the governance attributes and system-generated timestamps for the MCP server. These fields reflect the server's current state in the AI Control Tower governance framework.

Field	Description
Name	The display name of the MCP server as registered in AI Control Tower.
Managed status	Indicates whether the MCP server is under active AI governance. Possib Managed and Unmanaged. A managed server is subject to approval wor enforcement, and audit logging.
Asset type	The classification of this record. Always MCP server for records of this ty
Managed by	The ServiceNow user responsible for governing this MCP server. This is AI steward or asset owner.
State	The current lifecycle stage of the MCP server. For example: Deployed. Re phase set during registration or updated through the Lifecycle tab.
Status	The approval status of the MCP server in the governance workflow.
Risk classification	The assessed risk level of the MCP server. For example: To be determine remains as To be determined until a formal risk assessment is completed Risk & compliance tab.
Created	The date and time the MCP server record was created in AI Control Towe system-generated and read-only.
Updated	The date and time the MCP server record was last modified. This field is generated and read-only.

Available MCP tools panel

The Available MCP tools panel, displayed to the right of the Details panel, lists tools that the MCP server exposes to AI agents. Each tool represents a discrete capability that an AI agent can invoke through the AI Gateway.

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The panel shows the following columns:

Column	Description
Name	The programmatic name of the tool as defined by the MCP server. Tool names use underscore-separated lowercase format, for example, get_diff, create_issue_label.
Description	A natural-language description of the tool's function and usage context. Descriptions are provided by the MCP server and reflect the vendor's documentation.
Status	Indicates whether the tool is currently active and available for AI agents to call. Values are Active (green) and Inactive (red).

Tool Status

Each tool in the Available MCP tools panel has a status that indicates its operational availability:

Status	Description
Active	The tool is operational and available for AI agents to invoke through the AI Gateway. Active tools appear with a green status badge.
Inactive	The tool is not available for use. AI agents can't invoke inactive tools. Inactive tools appear with a red badge. Contact your AI steward or MCP server administrator to investigate why the tool is inactive.

MCP server setup

Explore the complete MCP server setup process in configuring and introducing MCP servers via AI Gateway.

Role required: sn_ai_governance.ai_steward

The MCP server setup process consists of several key workflows:

1. MCP server intake: The MCP server can be added in three different ways:
   - Automatic discovery: Add an MCP server from AI Agent Studio.
   - MCP Catalog: Add an MCP server from MCP Catalog.
   - Manual registration: Add an MCP server manually from AI Control Tower.
2. AI Steward playbook approval: The AI Steward moves the MCP server through the onboarding lifecycle.
3. Client registration and AI Gateway setup: After the MCP server is approved, register the clients that connect to it through AI Gateway.

Add an MCP server from AI Agent Studio

When you add an MCP server in AI Agent Studio, it's automatically discovered and synced to AI Control Tower.

Before you begin

Role required: sn_aia.admin, sn_mcp_client.admin

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Note: The AI Steward (sn_ai_governance.ai_steward) role gets inherited with the following roles:

- (AI admin) sn_aia.admin
- (AIG admin) aig_admin
- (MCP Client admin) sn_mcp_client.admin

Procedure

1. Navigate to **Workspaces** > **AI Agent Studio** > **Settings** > **Manage MCP servers**.
2. Select **New**.

   Note: In the Create and manage tab of the AI Agent studio, you can add only those MCP servers that have been approved in the AI Control Tower.

3. Enter the Name.
4. Select the Authentication type: OAuth 2.1.

   Note: AI Gateway supports OAuth 2.1.

5. Select **Next**.
6. Select the **Client registration type**: Dynamic client registration.

   AI Gateway registration in AI Agent Studio supports Dynamic Client Registration.

   When the server allows dynamic client registration, it will automatically retrieve the necessary details. Otherwise, you have to enter the details manually.

7. Select the **Grant type**.
8. Select **Add**.

   The server gets added and displays the details of the server.

9. Select **Authenticate** to authenticate the server with your credentials.
10. Select **Save**.

    Note: A scheduled job named **AI Agent Studio to AICT-MCP server sync** runs every 15 minutes to synchronize the MCP servers from AI Agent Studio to AI Control Tower.

Result

After synchronizing, the MCP server shows up in the AI asset inventory with its Status listed as In review, and the lifecycle phase listed as New.

Note: After the MCP server is added to the AI Control Tower, it can't be added again. Additionally, AI Agent Studio will not discover a server that has already been added.

What to do next

MCP server approval workflow.

Add an MCP server from MCP Catalog

Add an MCP server from the MCP Catalog via AI Gateway.

Before you begin

Role required: AI steward [sn_ai_governance.ai_steward]

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Note: The AI steward (sn_ai_governance.ai_steward) role gets inherited with the following roles:

- (AI admin) sn_aia.admin
- (AIG admin) aig_admin
- (MCP Client admin) sn_mcp_client.admin

Procedure

1. Navigate to **AI assets** > **AI asset inventory** > **MCP Servers**.
2. Select **Add**.
   Add MCP server page appears.
3. Under Details, select **Choose from MCP Catalog**.

   Note:

   If you're unable to see any servers in the MCP Catalog during manual intake of MCP servers, perform the following procedure:

   a. Navigate to **System Definition** > **Scheduled Jobs**.

   b. Open Sync MCP Server Registry.

   c. Select **Execute Now** to run the job manually.
   The MCP Catalog drop-down populates with the available MCP servers.

   Note:

   Run this job manually only if the MCP server catalog shows no records or fewer records than expected. By default, the job runs automatically on a schedule.

4. Search for a server using the search box, or browse available MCP servers displayed as cards with icons, descriptions, and versions.
5. Select a server to view details including:
   - MCP server URL
   - Transport type (HTTPS or SSE)
   - Available tools and capabilities

   Note: SSE servers are visible in the MCP catalog, but AI Gateway does not support the SSE transport type. If you manually enter an SSE server in the intake form, the following warning message appears: " SSE transport type was deprecated in the MCP specification in favor of Streamable HTTP and isn't supported by ServiceNow AI Gateway. Use the server's Streamable HTTP endpoint if available."

6. Click **Select** to import the server.

   Note: The system auto-fills Name, MCP server URL, Authentication type, and Transport type.

   If the selected server supports CIMD (Client Identity Metadata Document), client registration details are also pre-filled automatically.

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7. Select **OK** to confirm your server and endpoint selections.
8. Select **Submit**.

   The MCP server is submitted for an AI Steward review.

   Note: You can only add one MCP server at a time. The MCP catalog only displays MCP servers that have not already been added to your instance.

Result
The MCP server is added to AI Control Tower as an unmanaged asset with a lifecycle status of **In review**.

What to do next
An AI Steward must review and approve the MCP server before it becomes available for use.

Add an MCP server from AI Control Tower

Add an MCP server manually from AI Control Tower.

Before you begin
Role required: sn_ai_governance.ai_steward

Note: The AI Steward (sn_ai_governance.ai_steward) role gets inherited with the following roles:

- (AI admin) sn_aia.admin
- (AIG admin) aig_admin
- (MCP Client admin) sn_mcp_client.admin

Procedure

1. Navigate to **AI assets** > **AI asset inventory** > **MCP servers**.
2. Select **Add**.
3. Enter the Name (Server name).
4. Enter the MCP server URL.
5. Enter the Description (Optional).
6. Enter the External MCP server documentation URL (Optional).
7. Select the Provider from the list.
8. Select the Vendor from the list.
9. Select **Next**.
10. Select the **Client registration type**.

    Note: If you select Dynamic client registration, AI Control Tower automatically receives the Client ID and Client secret. If you select Manual registration, you must create the client externally on the MCP provider side and enter the Client ID and Client secret manually.

11. If you select Manual registration, review and complete the following details:
    - Grant type
    - Token authentication method
    - Client ID

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- Client secret
- Auth scopes
- Authorization URL
- Token URL
- Token revocation URL

12. Select **Submit**.

Result
The MCP server is registered in the AI asset inventory as an unmanaged asset with a status of In review.

What to do next
MCP server approval workflow.

MCP server approval playbook workflow

After you register and manage an MCP server, the AI steward moves it through the onboarding lifecycle before agents can use it.

Role required: sn_ai_governance.ai_steward

This process has two outcomes that unlock different capabilities:

- Managed: activates AI Gateway functionality.
- Approved: makes the MCP server available for use in AI Agent Studio. Achieved by completing all phases of the Onboard playbook.

Onboard MCP server approval playbook

The Onboard playbook tracks the MCP server through assessment, testing, and deployment.

Before you begin
Role required: sn_ai_governance.ai_steward

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Inventory** and select an MCP server.
2. Access phase:
   a. Navigate to the **Lifecycle** tab and select **Access**.
   b. Select **Create new task**.
   c. Complete all tasks for this phase.
   d. Select **Mark complete**.
3. Build and test phase:
   a. Select **Build and test**.
   b. Create and complete tasks for this phase.

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c. Select **Mark complete**.

> **Note:** When the MCP server approval enforcement is active on your instance, agents will not be able to connect to the server until the Deploy phase is complete and the server reaches Approved status.

4. Deploy phase:
   a. Select **Deploy**.
   b. Create and complete the remaining tasks.
   c. Reload the page.

Result

The Onboard playbook status updates to Complete. The MCP server status updates to Deployed and Approved and managed status updates to Managed. The MCP server is now available for use in AI Agent Studio and fully configured for client registration.

Client registration and AI Gateway setup

Once an MCP server has been managed and approved, register the clients that will connect to it via AI Gateway.

Client registration establishes a secure OAuth 2.1 connection between your AI agent platform and the MCP server through AI Gateway. The registration process generates credentials client ID and client secret to authenticate your agents when they make requests to the MCP server.

Selecting a registration type

When you add a client to an MCP server, you can choose between two registration types:

- **CIMD client:** Automated registration with a Client Identity Meta-data Document. The client's metadata URL is checked, and OAuth credentials are created automatically. Currently supported for VS Code only.
- **MCP client:** Manual registration. You enter a client name and a redirect URL. Use this for AI Agent Studio, Postman, Claude Desktop, Copilot Studio, and all other platforms.

Add a CIMD client

Add a CIMD client that connects to MCP servers through AI Gateway.

Before you begin

Role required: sn_ai_governance.ai_steward

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Inventory** and select an MCP server.
2. Select the **AI Gateway** tab.
3. Select the **Setup** sub-tab.
4. In the MCP client integration section, select **Add client**.

> **Note:** The Add client form presents two registration types: CIMD client and MCP client. Select the appropriate client.

5. Select CIMD client.

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6. Enter the **Client ID**.
7. Select **Validate**.
8. Select the **Metadata sync mode**.
9. Select **+Add URL** to add Redirect URL.
10. Enter the **Logo URL**.
11. Configure the Security controls (Optional).
12. Select **Save**.

Result
The CIMD client is added and registered.

Add an MCP client

Add an MCP client that connects to MCP servers through AI Gateway.

Before you begin
Role required: sn_ai_governance.ai_steward

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Inventory** and select an MCP server.
2. Select the **AI Gateway** tab.
3. Select the **Setup** sub-tab.
4. In the MCP client integration section, select **Add client**.

   Note: The Add client form presents two registration types: CIMD client and MCP client. Select the appropriate client.

5. Select MCP client.
6. Enter the **Client name**.
7. Enter the **Redirect URL**.
8. Select **Save**.

Result
The MCP client is added and registered.

Edit a registered client

Update the configuration of a registered client (MCP or CIMD) in an MCP server record.

Before you begin
Role required: sn_ai_governance.ai_steward

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Inventory** and select an MCP server.
2. Select the **AI Gateway** tab.
3. Select the **Setup** sub-tab.
4. In the MCP client integration section, select the registered client that you want to edit.
   The Edit client screen appears.
5. Update the client configuration.

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The fields available for editing depend on the client type.

For a CIMD client, you can update:

- Client ID
- Redirect URL
- Metadata sync mode
- Security controls

For an MCP client, you can update:

- Client name
- Redirect URL

6. Select **Save**.

Result
The client record displays the updated configuration.

Configure agents to use MCP servers

After client registration is complete, configure your AI agents to connect to MCP servers through AI Gateway.

This configuration confirms all agent traffic is governed, secured, and observable. The configuration approach depends on how the MCP server was registered:

- Register via AI Agent Studio: Update the existing agent to route through AI Gateway.
- Register via AI Control Tower: Register the server in AI Agent Studio and then add it as a tool.
- External agent platforms: For agents created on external platforms such as Microsoft Copilot Studio, Google Gemini, Amazon Bedrock, and others, set AI Gateway as the MCP Server endpoint.

Register via AI Agent Studio

Registering MCP servers via AI Agent Studio.

Before you begin
Role required: sn_aia.admin

Procedure

1. Navigate to **All** > **Workspace** > **AI Agent Studio**.
2. Open the agent that uses the MCP server.
3. Select **Edit**.
4. Select **Tools**.
5. Select the MCP server tool you want to update.
6. Update the connection configuration:
   a. Enter the Server URL.
   b. Enter the Client ID.
   c. Enter the Client secret.

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d. Enter the Authentication endpoint URL

e. Enter the Token endpoint URL.

7. Select **Save**.

Result

The agent now connects to the MCP server through AI Gateway instead of directly. All requests are routed through AI Gateway, ensuring consistent policy enforcement across your AI ecosystem.

Register an MCP server via AI Control Tower

When MCP Servers are registered through AI Control Tower, connecting them to an agent happens in two steps: first register the server at the instance level in AI Agent Studio, then add it as a tool within the specific agent.

Before you begin

Role required: sn_aia.admin

Procedure

1. Navigate to **All** > **Workspaces** > **AI Agent Studio**.
2. Select **Settings**.
3. Select **Manage MCP servers**.
4. **New**.
5. Enter the details:
   - Name
   - MCP server URL
   - Authentication type
6. Select **Next**.
7. Create connection:

   a. Select **Manual registration**.

   b. Enter the following details:
      - Grant type
      - Token authentication method
      - Client ID (required)
      - Client secret
      - Auth scopes
      - Authorization URL (required)
      - Token URL (required)
      - Token Revocation URL

8. Select **Submit**.

> **Note:** AI Control Tower doesn't sync credentials with AI Agent Studio automatically. You must copy credentials manually.

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The MCP Server is registered at the instance level in AI Agent Studio and is available for agents to use as a tool source.

9. Add MCP sever as a tool in your agent:

   Note: Once the MCP server is registered in AI Agent Studio (Phase 1), add it to a specific agent as a tool.

   a. Navigate to **AI Agent Studio**.

   b. Open an existing agent or create a new agent.

   c. Select **Edit**.

   d. Select **Tools**.

   e. Select **+ Add a tool**.

   f. Select **+ New tool**.

   g. Select **Model Context Protocol**.

   h. Select the MCP server from the list.

      Note: In AWH for AI Control Tower (2.0.0), unapproved MCP Servers appear in the list but tools can't be fetched until the server is approved in AI Control Tower.

10. Select the specific tools from the MCP server that the agent should use.
11. Select **Save**.

    Note: Only approved MCP Servers can be added as tools in AI Agent Studio. If a server is not yet approved, a warning displays: Approval is needed to display tools. Check the MCP server record and contact your AI Steward

Result
The MCP server is registered via AI Control Tower on a instance level and added it as a tool within the specific agent.

Managing your AI Gateway

Manage your AI Gateway tab on the MCP server record.

The AI Gateway tab displays the configuration for exposing the MCP server to AI agents. Use the tab to review connectivity endpoints, manage MCP client integrations, configure available tools, and apply gateway policies to the server.

AI Gateway in MCP server record

The AI Gateway acts as a managed proxy between AI agents and external MCP servers. When an AI agent needs to use tools from an MCP server, it connects through the AI Gateway rather than directly to the external server. This approach centralizes authentication, helps enforce policies, and provides observability for tool calls.

The AI Gateway tab provides a complete view of how a specific MCP server is integrated with the AI Gateway. It is divided into three sub-tabs:

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Sub-tab	Description
Setup	Displays the AI Gateway MCP server connection details and the MCP clients integrated with this server. This is the default sub-tab.
Tools	Lists the tools exposed by this MCP server through the AI Gateway and allows tool-level configuration.
Policies	Lists the gateway policies applied to this MCP server, such as rate limiting, access control, and usage policies.

Setup

The Setup sub-tab is the default view of the AI Gateway tab. It displays the endpoints that clients and agents use to connect to this MCP server through the AI Gateway. It also lists the MCP clients registered to use this server.

AI Gateway MCP server details panel

The AI Gateway MCP server details panel displays the ServiceNow-generated endpoints that clients and agents use to connect to this MCP server through the AI Gateway.

MCP client integration panel

The MCP client integration panel lists all MCP clients registered to use this MCP server through the AI Gateway. The count badge next to the panel heading shows the total number of registered clients.

An MCP client is a consumer of the MCP server's tools — typically an AI agent host application, a developer tool, or an integrated platform. MCP clients connect to the AI Gateway MCP server URL to invoke tools.

To register a client, select **Add client**. After registration, clients can be edited on the Edit Client page.

Tools

The Tools sub-tab lists the tools exposed by the MCP server through the AI Gateway and allows tool-level configuration.

Before MCP server tools are activated, the system scans them to determine whether they pose a potential security threat. Threat categories are based on the OWASP MCP Top 10, the ten most critical MCP-related security vulnerabilities as defined by OWASP. For more information, see OWASP MCP Top 10.

System properties control whether Now Assist Guardian tool scanning and more advanced scanning are enabled. For more information, see System properties for AI Control Tower.

Threat category	Description
credential_harvesting	Potential collection or exposure of sensitive credentials.
excessive_permissions	Optional parameters potentially granting dangerous capabilities beyond their stated purpose.
execution	Potential shell commands, code evaluation, or subprocess spawning.
exfiltration	Potential unauthorized data export to external destinations.

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Threat category	Description
hidden_instructions	Potentially concealed directives using steganography or authority-framing manipulation.
name_description_mismatch	Tool name potentially implies a different function than the description or schema reveals.
network	Potential unauthorized network access (SSRF, DNS rebinding, or arbitrary URLs).
none	No potential threats detected.
obfuscation	Encoded content (base64, hex, URL-encoded) potentially concealing true behavior.
prompt_injection_payload	Potential direct prompt injection. For example, a phrase such as "ignore all previous instructions".
tool_poisoning	Description contains instructions that could potentially manipulate agent behavior.
write	Potential unauthorized file system modifications.

Scan status indicates the current state of the MCP tool scan. Possible values are:

- Completed
- Failed
- Pending
- Timeout

Policies

The Policies sub-tab lists the data governance policies applied to the server. From the Policies sub-tab, you can manage policy enforcement at the server level and the individual tool level.

Data sensitivity check

The Data sensitivity check area controls whether the AI Gateway inspects tool inputs and outputs for sensitive data. When enabled, this setting prevents sensitive data from passing between AI agents and the MCP server.

Policy status table

The policy card displays the current server-level state of the Data sensitivity check policy and provides a control to change it.

Policy status	Description
Activated	The Data sensitivity check is enabled at the server level. The Deactivate button is available. Enforcement still depends on individual tool-level Policy status settings.
Deactivated	The Data sensitivity check is disabled at the server level. No sensitive data inspection occurs for any tool on this server, regardless of tool-level Policy status. Select Activate to turn it on.

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Governing AI assets

Govern AI assets across the life cycle with integrated risk, compliance, security, and privacy oversight in AI Control Tower.

Governance overview

Deploying AI at enterprise scale introduces regulatory, operational, security, privacy, and reputational risks. Regulations and frameworks in this space require organizations to demonstrate that AI systems are assessed, monitored, and controlled. Governance also addresses operational and security risks such as biased outputs, unauthorized data access, privileged agents operating without oversight, and inactive systems that retain active permissions.

The Govern area in AI Control Tower brings together Risk and Compliance and Security and Privacy to support end-to-end AI governance. These areas work alongside life-cycle management and approval workflows to support end-to-end AI governance. Different teams manage each governance area by using their respective tools, while AI Control Tower provides a unified view of governance information for AI assets.

Risk and Compliance provides visibility into regulatory classification, compliance posture, risk, assessments, and related governance records. Security and Privacy provides visibility into access concerns, privileged and dormant AI agents, AI asset security posture, and sensitive data protection.

For more information about how AI Control Tower and AI Risk and Compliance work together across the AI life cycle, see AI governance life cycle.

Managing AI risk and compliance

Depending on your role, you can engage with AI Control Tower and AI Risk and Compliance in different ways. AI asset owners typically use individual AI asset records to review risk posture, compliance posture, and related governance records. AI stewards and risk and compliance teams use portfolio-level views, assessments, and cases to monitor governance posture, identify gaps, and initiate remediation.

The Risk and Compliance area in AI Control Tower provides visibility into how AI assets align with organizational policies and regulatory requirements. Summarized views of regulatory risk classification, compliance posture, compliance score, and aggregated risk score help governance teams evaluate AI risk without manually consolidating information from multiple systems.

Regulatory risk classification applies to AI systems, AI models, and datasets. Assessments determine whether an asset has a high, medium, low, or unacceptable regulatory risk classification by evaluating its potential impact across multiple dimensions. Compliance is tracked against authority documents and organizational policies. AI Risk and Compliance includes built-in support for priority regulatory frameworks and supports organization-specific requirements.

The Risk posture section in AI Control Tower groups AI assets by aggregated risk score and displays a risk heat map. The heat map plots AI assets by inherent or residual risk level against control effectiveness. You can switch between inherent and residual risk views.

The Risk and Compliance page in the Govern area provides the following information:

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- Compliance score: Percentage of controls in a compliant state across mapped frameworks.
- Regulatory risk classification: Distribution of AI assets by regulatory risk level.
- Compliance posture for priority frameworks: Compliant and noncompliant control counts for the two highest-priority frameworks.
- Top recommendations: High-priority governance work, such as overdue life-cycle tasks and AI asset issues that require review.

For supported AI assets in the AI asset inventory, the **Risk & Compliance** tab provides governance information scoped to the selected asset. This information includes regulatory risk classification, compliance score, aggregated risk score, compliance posture for priority frameworks, and a risk heat map. The Governance section on the same tab provides access to assessments, risks, controls, attestations, issues, and policy exceptions associated with the asset.

AI cases and inquiries provide structured workflows for investigating and resolving governance concerns. Teams can use cases to track violations, risks, or compliance gaps through investigation and remediation. Inquiries support compliance-related requests for clarification.

For more information about risk assessment workflows, compliance framework configuration, and governance case management, see AI Risk and Compliance.

Note: To use AI Risk and Compliance with AI Control Tower, install the required applications from the ServiceNow Store and activate the required plugins. AI Risk and Compliance can be installed as a standalone application from the ServiceNow Store, but life-cycle-driven governance requires integration with AI Control Tower. AI Control Tower is used to register AI systems, models, and datasets and to manage life-cycle progression that triggers risk and compliance assessments, governance tasks, and case workflows.

Some AI risk and governance capabilities depend on additional plugins. Governance of ServiceNow AI assets with Now Assist requires the AI Risk and Asset Management for Now Assist plugin, which depends on integration between AI Risk and Compliance and AI Control Tower, and AI Asset Management. In new IRM deployments, the IRM Standard plugin is required to make AI intake request forms available for submitting AI systems, models, and datasets for governance and risk evaluation.

Securing AI assets and managing privacy

The security area covers user access, data protection, and autonomous systems and agents that hold permissions, execute workflows, and interact with external tools without direct human involvement.

AI Control Tower provides visibility into the following dimensions of AI security:

- Access issues: Identifies AI agents that experience access-related errors that can prevent workflows from completing.
- Privileged AI agents: Identifies agents with elevated permissions, such as admin or security admin, to support least-privilege reviews.

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- Dormant AI systems: Identifies agents that have been inactive for more than 90 days and retain permissions, and generates review tasks for asset owners.

- Access map: Visualizes relationships between ServiceNow agents, agentic workflows, and the tools that they use to support access analysis and impact assessment.

- AI asset security score: Provides a composite view of AI asset security posture based on access issues, privileged agents, guardrails, and dormant systems, with details for individual assets.

For privacy oversight, AI Control Tower integrates with the Data Privacy plugin to display sensitive data detection and anonymization activity. The Security and Privacy area shows the enabled data patterns used to detect and anonymize sensitive information in AI prompts.

For organizations using Now Assist, ServiceNow AI Insights summarizes observations across the AI security posture, including areas that require attention and remediation actions. This capability requires the Now Assist AICT Security Posture Summarizer skill.

Managing risk and compliance in AI Control Tower

Gain visibility into AI-related risks, compliance posture, and governance outcomes for your AI portfolio in AI Control Tower.

Get started

Explore	Configure	Review AI governance posture and compliance status
Learn how Risk and Compliance views help you evaluate AI governance posture across your AI portfolio.	Learn how Risk and Compliance visibility depends on the governance applications, frameworks, and data available in your environment.	Review regulatory classification, risk posture, and compliance information for your AI assets, and act on governance insights.

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Reference		
Look up Risk and Compliance terminology and the governance records that support your AI portfolio.		

Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

Exploring Risk and Compliance

Risk and Compliance in AI Control Tower provides a summary of regulatory classification, compliance, and risk across your AI portfolio and individual AI assets.

Risk and Compliance overview

Risk and Compliance in AI Control Tower provides governance visibility for AI systems at the portfolio level and the individual AI system level.

The Risk and Compliance page shows summarized signals across AI assets, including recommendations, regulatory risk classification, compliance posture, compliance score, aggregated risk scores, and risk heat maps. The summaries help stakeholders identify trends, prioritize attention, and focus on higher-risk areas of the AI portfolio.

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When you access a record from your AI asset inventory, the **Risk & Compliance** tab provides detailed governance information for that AI asset. Details include its regulatory risk classification, compliance score, aggregated risk score, compliance posture for priority frameworks, risk heat map, and related governance records.

AI Control Tower displays these outcomes for oversight. Risk assessments, control execution, remediation, and other governance activities are managed through related governance solutions and supporting workflows.

Risk and Compliance users

Risk and Compliance user types

User	Description
AI governance stakeholder	Uses portfolio-level summaries to assess overall governance posture, identify priority recommendations, and monitor how AI assets are classified and governed across the organization.
AI steward or asset stakeholder	Uses the asset-level Risk and Compliance view to review the governance posture of an individual AI system, including its assessment status, compliance score, aggregated risk score, and related governance records.
Governance reviewer	Uses framework-specific and risk-specific views to identify which areas require follow-up, such as unresolved issues, incomplete assessments, ineffective controls, or missing governance data.

Risk and Compliance benefits

Benefits by feature

Feature	Benefit	Users
Top recommendations	Identify high-priority governance work that requires immediate attention.	AI governance stakeholder, governance reviewer
Regulatory risk classification	Review how AI assets are grouped by regulatory risk level and identify assets that require closer review.	AI governance stakeholder, governance reviewer
Compliance score and compliance posture for priority frameworks	Review compliance posture for the configured frameworks and see where issues affect governance coverage.	AI governance stakeholder, AI steward or asset stakeholder
Aggregated risk score and risk heat map	Learn how inherent risk and control effectiveness influence residual risk for an AI system.	AI steward or asset stakeholder, governance reviewer
Assessments, risks, controls, issues, and policy exceptions	Review governance records associated with a specific AI system without leaving the AI system context.	AI steward or asset stakeholder

What to explore next

For more information about Risk and Compliance in AI Control Tower, see:

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- Classifying AI assets by regulatory risk
- Regulatory risk classification reference
- Risk rating calculation
- AI risk score calculation reference
- Compliance score calculation
- AI system compliance score calculation reference
- Configuring Risk and Compliance in AI Control Tower
- Configure classification, risk score, and compliance score
- Customize classification and scoring formulas
- Reviewing AI governance posture and compliance status
- Reviewing regulatory classification and compliance status
- Reviewing AI risk posture
- View classification, risk, and compliance scores
- Risk score and compliance score dashboard errors
- Detecting governance insights
- Governance insight detection reference
- Act on AI asset governance insight recommendations
- Risk and Compliance reference

Configuring Risk and Compliance in AI Control Tower

Risk and Compliance information appears in AI Control Tower only when the required governance applications, frameworks, and data are available in your environment.

Configuration overview

Risk and Compliance information in AI Control Tower reflects the current state of governance activity for your AI portfolio and for individual AI assets. The information shown is based on available governance data rather than on configuration performed directly in these views.

- The relevant governance applications, frameworks, and governance processes are available in your environment.
- AI systems have governance data that can be surfaced, such as assessment status, control-related outcomes, compliance posture, risks, issues, or policy exceptions.
- Portfolio-level views such as regulatory risk classification, compliance posture, and risk heat maps depend on governance results that have already been produced.
- Asset-level views may display states such as **To be determined**, **No data available**, or a zero compliance score when required governance activities haven't yet produced visible results.

How configuration affects what users see

The Risk and Compliance views in AI Control Tower don't define governance logic. Instead, they surface the outcomes of configured governance activities, such as regulatory classification,

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framework-specific compliance information, aggregated risk ratings, and related governance records.

For example, compliance posture for priority frameworks appears only when relevant framework and control information is available. Similarly, regulatory classification and risk heat maps depend on the presence of underlying governance results for the selected assets.

If the necessary governance information isn't yet available, incomplete states may indicate the AI system or portfolio requires additional governance activity before a full posture can be displayed.

Risk and Compliance information depends on AI Risk and Compliance being installed and, for life-cycle-driven governance, integrated with AI Control Tower. Some capabilities also depend on additional plugins, such as the AI Risk and Asset Management for Now Assist plugin and, in new IRM deployments, the IRM Standard plugin for AI intake request forms. For the full list of dependencies, see Governing AI assets.

For the specific properties, applications, and publishing steps required for regulatory risk classification, aggregated risk score, and compliance score, see Configure classification, risk score, and compliance score. For more information about configuring AI Risk and Compliance, see Configuring AI Risk and Compliance.

Configure classification, risk score, and compliance score

Configure the applications, properties, and data that the classification, risk score, and compliance score depend on for an AI asset.

Before you begin

Role required: sn_grc_ai_gov.ai_risk_and_compliance_admin, admin

About this task

You don't configure these three metrics in the Risk and Compliance views. The views only display the results of the configuration described in this topic.

Procedure

- To configure regulatory risk classification, do the following:

  1. Navigate to **All** > **AI Risk and Compliance** > **Risk Assessments** > **Risk assessment methodologies**, then publish the risk assessment methodology (RAM) that you need to use for automated classification, or publish a custom RAM.
     RAMs ship in the Draft state and can't classify assets until published.

  2. Navigate to **All** > **AI Risk and Compliance** > **General Administration** > **Properties**.

  3. Set the *sn_grc_ai_gov.ai_system_automated_risk_classification_asmt_ram* property to the published RAM.
     For more information, see Set up AI Risk and Compliance properties.

  4. Confirm the Use and purpose record is linked to the governance details record of each AI asset.
     This link is created automatically during intake. If a condition isn't met, the classification remains To be determined. For the full set of conditions, see Classifying AI assets by regulatory risk.

- To configure the aggregated risk score (inherent, control effectiveness), do the following:

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1. Install the Advanced Risk application.
   Skip this step if you're using AI Control Tower — it includes this application.

2. Navigate to **All** > **Advanced Risk assessment** > **Administration** > **Properties**.

3. Set the **Migrate to Advanced Risk Assessments** property to **Yes**.
   This is a one-way configuration change. Until this property is set to **Yes**, risk score rollup isn't supported and no aggregated risk score appears. For what changes after you enable it, see Set up Advanced Risk assessments properties.

4. Navigate to **All** > **AI Risk and Compliance** > **Risk Assessments** > **Risk assessment methodologies**, then publish the **Risk assessment for AI inventory** RAM, or a custom risk-based RAM that assesses risks and belongs to the AI risk and compliance domain.

5. Set a primary RAM directly on each AI system record, or navigate to **All** > **AI Risk and Compliance** > **General Administration** > **Properties** and set a portfolio-wide default in the *sn_grc_ai_gov.aisystem_primary_ram* property.
   An AI system without a primary RAM doesn't show rollup scores. For the full requirements and default-selection order, see AI risk score calculation reference.

- To configure the compliance score, do the following:

1. Open the AI system record and map every relevant entity in the Related Entities related list.
   An entity that isn't mapped doesn't affect the score, so a missing entity can make the score look better or worse than the real compliance posture.

2. **Optional:** Navigate to **All** > **AI Risk and Compliance** > **General Administration** > **Properties**.

3. **Optional:** Set the *sn_grc_ai_gov.highlighted_authority_document* and *sn_grc_ai_gov.highlighted_policy* properties to choose up to two authority documents and two policies to show as priority frameworks on the Compliance score card.
   For more information, see Set up AI Risk and Compliance properties.

Result

Regulatory risk classification, aggregated risk score, and compliance score are available on the AI asset record and in the Risk and Compliance views in AI Control Tower and the AI Risk and Compliance Workspace. To view them, see View classification, risk, and compliance scores.

Trouble?

If the Risk and Compliance dashboards on the AI asset record page or the landing page show a `No data found` error, see Risk score and compliance score dashboard errors.

Related topics

- Classifying AI assets by regulatory risk
- Risk rating calculation
- Compliance score calculation
- View classification, risk, and compliance scores
- Customize classification and scoring formulas
- Configuring AI Risk and Compliance

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Customize classification and scoring formulas

Change the factors, weights, rating bands, and rollup formula that determine how classification, risk, and compliance scores are calculated.

Before you begin

The current factors, weights, and rating bands must be reviewed before a formula is changed. For the current values, see Regulatory risk classification reference and AI risk score calculation reference.

Role required: sn_grc_ai_gov.ai_risk_and_compliance_admin

About this task

Changing a scoring formula affects every AI asset that uses the risk assessment methodology (RAM) or governance pipeline you edit, both for new assessments and for existing scores after they next recalculate.

> **⚠ Warning:**
>
> Changing factor weights, point values, or rating bands on a predefined RAM changes how every AI asset using that RAM is scored. Consider creating and testing a custom RAM instead of editing a predefined one. Automated Scripted Factors contain script logic, not simple field values, so changing their point thresholds requires editing and testing a script, not just a form field.

Procedure

- To customize the regulatory classification or risk score formula, do the following:

1. Navigate to **All** > **AI Risk and Compliance** > **Risk Assessments** > **Risk assessment methodologies** and open the RAM that you need to change.
   Consider copying the RAM or creating a custom RAM rather than editing a predefined one, so that other AI assets aren't affected while you test your changes.

2. **Optional:** For a risk-based RAM, edit the Rollup configurations section on the RAM form to change the rollup formula for the qualitative and quantitative scores.
   Entity-hierarchy rollups can use Sum, Average, Maximum, or Minimum.

3. **Optional:** To change factor weights or point values, navigate to **All** > **AI Risk and Compliance** > **Risk Assessments**, then select **Group Factors**, **Manual Factors**, **Automated Factors**, or **Automated Scripted Factors**, depending on the factor type the RAM uses.
   For the current factor names, fields, and point values for the predefined RAMs, see Regulatory risk classification reference and AI risk score calculation reference.

4. **Optional:** To change rating band thresholds or labels, navigate to **All** > **AI Risk and Compliance** > **Risk Assessments** > **Risk Criteria**.

- To customize the compliance score formula, do the following:

1. Navigate to **All** > **AI Risk and Compliance** > **Policy & Compliance Administration** > **Properties**.

2. Set **Use weighted control average when calculating compliance scores** (*sn_compliance.cal_score_by_weighted_control*) to **Yes** to weight controls when averaging a citation's compliance score instead of using a flat average.
   For the weighted and flat average calculations, see Compliance score calculation for a citation.

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Note:

This setting changes citation-level compliance scores only. These scores determine the compliance posture shown for authority documents and policies on the Compliance score card. It doesn't change the AI system's own compliance score, which is calculated separately from linked entities. For that formula, see AI system compliance score calculation reference.

3. Set **Enable association of citations to controls mapping** (*sn_compliance.enable_association_of_citations_to_controls*) to **Yes** to calculate a citation's compliance score from its directly linked controls instead of its associated control objectives.
   For the control-objective-based and directly-linked-controls formulas, see Compliance score calculation for a citation.

4. Set **Entity hierarchy based scoring** (*sn_compliance.entity_hierarchy_based_scoring*) to **Yes** to calculate the compliance score of an entity from its downstream entities and its direct controls.
   When the property is set to **No**, which is the default, the compliance score of an entity comes from its direct controls only. When the property is set to **Yes**, the score of an entity is based on the average compliance score of its downstream entities and the average compliance score of its direct controls.

5. If you changed the **Entity hierarchy based scoring** property, navigate to **All** > **System Definition** > **Scheduled Jobs** and deactivate the *Compliance Score V2* scheduled job.

6. Open the *Update compliance scores for hierarchy entities* scheduled job and select **Execute Now**.
   The job recalculates the compliance scores of all entities with the current value of the property. If the job isn't run after the property changes, the compliance scores of entities can be inconsistent.

7. After the job completes, activate the *Compliance Score V2* scheduled job again.

Result

New assessments use the updated formula. Existing scores update the next time the affected assessments or rollups recalculate.

Trouble?

If the compliance scores of entities are inconsistent after the **Entity hierarchy based scoring** property is changed, the *Update compliance scores for hierarchy entities* scheduled job might not have run. Run the job, and then activate the *Compliance Score V2* scheduled job again.

Related topics

- Configure classification, risk score, and compliance score
- Regulatory risk classification reference
- AI risk score calculation reference
- AI system compliance score calculation reference

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Reviewing AI governance posture and compliance status

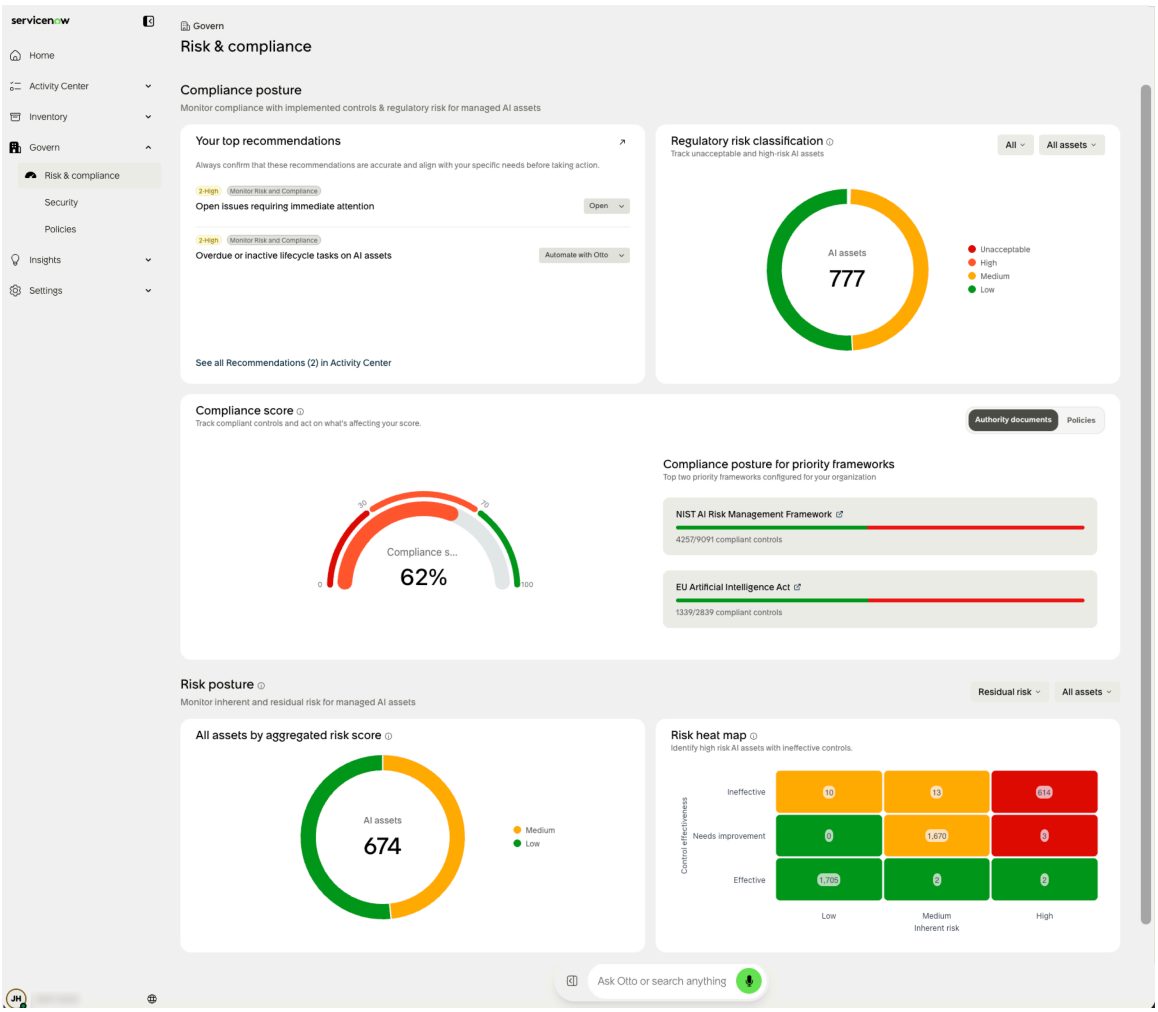
The Risk & Compliance tab under **Govern** displays regulatory classification, risk posture, and compliance information for AI assets.

Overview of Govern

Use the **Risk & Compliance** tab under **Govern** in AI Control Tower to monitor governance activities across your AI portfolio. Review AI asset classifications, identify risk and compliance concerns, track governance work, and investigate issues that require attention.

From here, you can:

- Review and act on top recommendations
- Review regulatory risk classification
- Track compliance score and compliance posture
- Review AI risk posture, including aggregated risk score and the risk heat map
- Monitor cases, issues, and governance actions
- View and manage business application associations with AI systems. For more information, see Associate a business application with an AI system



The page is divided into the following components:

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- Compliance posture: Monitor compliance of implemented controls and regulatory risk across the AI portfolio.
- Risk posture: Monitor inherent and residual risk across the AI portfolio.

Compliance posture

The widgets under compliance posture display the top action items to execute and track the risk classification and compliance score of AI systems and controls. Each widget reflects the active filter state. View details for each metric area by selecting the arrow for each metric. Select an individual component on the widget to view underlying assets.

Compliance posture widgets

Widget	What it displays	Status breakdown	Roles required
Your top recommendations	Recommended action items along with other assigned and unassigned action items. For more information, see Act on AI asset governance insight recommendations	• 1-Critical • 2-High • 3-Medium • 4-Low	sn_ai_governance.ai_steward
Regulatory risk classification	• Regulatory risk classification of assets in the portfolio. Use the drop-down to filter the assets into **AI System**, **AI Model**, and **Dataset**. • The assets are categorized based on their status. Select each status to drill down further. For more information, see Reviewing regulatory classification and compliance status	• Low • Medium • High • Unacceptable • Critical • To be determined	sn_ai_governance.ai_steward
Compliance score	• Compliance scores for AI assets compared to adopted frameworks and policies. • Compliance status for top regulatory frameworks. The progress indicator shows compliant and non-compliant controls and displays an alert badge for high-priority issues. Toggle between	• Compliant • Non-compliant • To be determined	sn_ai_governance.ai_steward

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Compliance posture widgets (continued)

Widget	What it displays	Status breakdown	Roles required
	Authority documents and **Policies** to view detailed information. For more information, see Reviewing regulatory classification and compliance status		

Actionable intelligence insights

The **Your top recommendations** widget is powered by two AI-generated insights, Stalled Lifecycle Tasks and Significant Issues, that evaluate your AI portfolio and surface governance work that needs attention. AI-generated insights may not reflect all relevant context — review recommendations before acting on them. For what each insight identifies, how it's determined, and how to act on its recommendations, see Detecting governance insights.

Risk posture

The widgets under risk posture provide a summary view of the inherent and residual risk across the AI portfolio. Use the drop-down to filter the assets into **AI System**, **AI Model**, and **Dataset**. To view detailed information about the risk and compliance posture, select **Take me there**. This opens the AI Risk and Compliance Workspace.

Risk posture widgets

Widget	What it displays	Status breakdown	Roles required
Aggregated risk score	AI system risk landscape, categorized by aggregated risk score. Use the drop-down to filter between **Inherent** and **Residual** risk. For more information, see Reviewing AI risk posture	• High • Medium • Low	
Risk heat map	Assessed AI risks displayed in a color-coded matrix to help identify concentrations of higher-risk AI assets and compare current and intended risk posture. Use the drop-down to filter between **Inherent** and **Residual** risk. Select **Open heatmap workbench** to open the heat map in the AI Risk and Compliance Workspace. For more information, see Reviewing AI risk posture.	• High • Medium • Low	

View classification, risk, and compliance scores

View the regulatory risk classification, aggregated risk score, and compliance score of an AI asset on its record or in a workspace.

Before you begin
Role required: sn_ai_governance.ai_steward

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About this task

You can view an AI asset's regulatory risk classification, aggregated risk score, and compliance score in three places: on the asset's own record, at the portfolio level in AI Control Tower, or at the portfolio level in the AI Risk and Compliance. The **Govern** area of AI Control Tower and the AI Risk and Compliance Workspace render the same underlying Risk and Compliance information.

Procedure

- View the scores for a single AI asset:

  1. Open the AI asset from the AI asset inventory.
  2. Select the **Risk & Compliance** tab on the asset record.
     The tab shows the asset's regulatory risk classification, aggregated risk score, compliance score, compliance posture for priority frameworks, and risk heat map together. For more information, see Governing AI assets.

- View portfolio-level scores in AI Control Tower:

  1. Navigate to **Workspaces** > **AI Control Tower** > **Govern** > **Risk & Compliance**.
  2. In the Compliance posture section, view the Regulatory risk classification and Compliance score widgets.
     For more information, see Reviewing regulatory classification and compliance status.
  3. In the Risk posture section, view the Aggregated risk score and Risk heat map widgets.
     For more information, see Reviewing AI risk posture.

- View portfolio-level scores in the AI Risk and Compliance Workspace:

  1. Open the AI Risk and Compliance Workspace and select the **Risk and compliance** tab.
  2. In the Compliance overview section, view the Regulatory risk classification donut chart and the compliance scores for authority documents and policies.
  3. In the Risk overview section, view the AI systems by aggregated risk score chart and the Risk heatmap.
     For more information, see Risk & compliance tab.

Result

You can see the AI asset's current regulatory risk classification, aggregated risk score, and compliance score, scoped to either a single asset or your full AI portfolio.

Trouble?

If the Risk and Compliance dashboards on the AI asset record page or the landing page show a `No data found` error, see Risk score and compliance score dashboard errors.

Related topics

- Classifying AI assets by regulatory risk
- Risk rating calculation
- Compliance score calculation
- Reviewing AI governance posture and compliance status

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Reviewing regulatory classification and compliance status

Review regulatory risk classification and compliance posture to understand how AI assets align with configured governance expectations.

Overview of regulatory classification and compliance status

Regulatory risk classification and compliance score views help you understand how AI assets are categorized and how their control posture aligns with configured frameworks.

AI assets refer to the various components and resources that are essential for the development, deployment, and operation of artificial intelligence systems. These assets can include:

1. AI systems: The complete software or hardware infrastructure that runs AI algorithms and processes. This can include machine learning platforms, natural language processing systems, and other AI-driven applications.
2. AI models: The mathematical and computational models that are trained on data to perform specific tasks. These models can range from simple linear regression models to complex deep learning neural networks.
3. AI datasets: The collections of data used to train, validate, and test AI models.

For more information, see AI systems, AI models, and Datasets.

At the portfolio level, you can get a snapshot view of the regulatory risk classification for your AI portfolio. This classification groups AI assets into categories such as unacceptable, high, medium, and low. Compliance views show an overall compliance score and framework-related posture for authority documents or policies.

Regulatory risk classification

The Regulatory risk classification widget presents a donut chart that organizes AI assets into risk levels based on their regulatory risk assessment results. This section displays the risk classifications of AI systems, AI models, and datasets using donut charts. The risks are qualitatively classified as **Low**, **Medium**, **High**, **Unacceptable**, **Critical**, and **To be determined**. The risk level displayed for each asset is the regulatory risk classification assigned when the asset's regulatory risk classification assessment completes. This dashboard widget enables your governance teams, compliance officers, and AI administrators to assess risk exposure and identify assets requiring intervention.

How this is calculated:

For the full process, including the properties and records involved, see Classifying AI assets by regulatory risk.

- Managed assets: The risk level shown for an asset comes from the `risk_score` field on the asset's governance details record. This field is populated when the asset's regulatory risk classification assessment completes, and the widget reflects that value in real time on every page load.
- Unmanaged assets: The risk level shown for an unmanaged asset comes from the **Use & purpose** field on the asset's governance details record.

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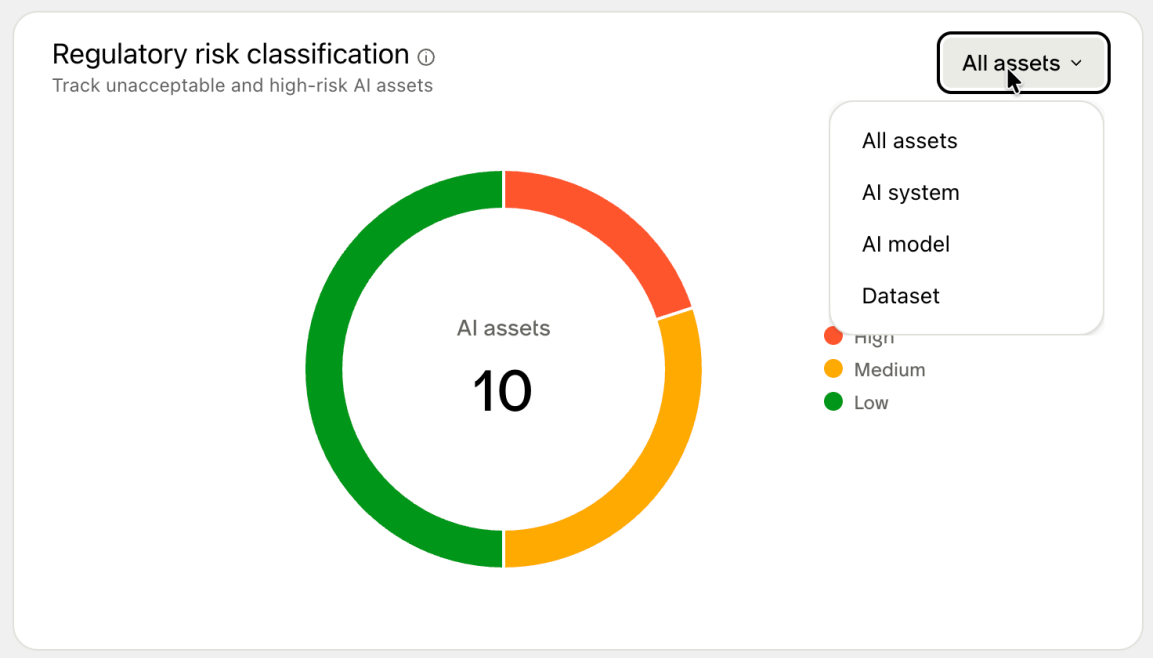

Compliance score

Framework-specific compliance posture and issue indicators help you understand whether governance coverage is available for the selected frameworks and which areas may require additional attention.

Compliance scores measure how well AI systems conform to applicable regulations, policies, and controls. The section shows compliance based on controls implemented. By default, compliance scores are displayed for the priority frameworks configured in your environment. Each framework's citations, and any child citations, are mapped to control objectives, and each citation's compliance score is calculated based on its control attestations.

You can choose to view compliance data by selecting one of two options: **Authority documents** or **Policies**. Additionally, you can view the overall compliance score percentage, along with the number of compliant and non-compliant authority documents and policies, by using the drop-down filter to select specific authority documents or policies. You can also see all the issues that require immediate attention and AI cases related to each authority document or policy.

Compliance score calculation:

For the calculation rules, an example, and how scores are processed, see Compliance score calculation.

1. Each AI system is linked to one or more entities or profiles through the entity map record (sn_grc_ai_gov_ai_system_entity_map).
2. Each entity has its own compliance score calculated by the Policy & Compliance engine. The score is based on the state of its controls (whether controls pass or fail compliance tests and attestations).
3. The AI system's compliance score is calculated as the average of all active entities' compliance scores, truncated to a whole number.

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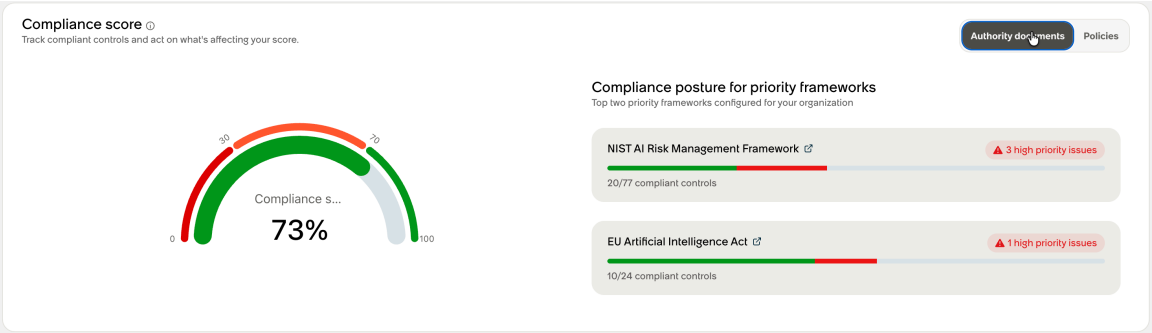
Note:

- Compliance scores depend on linked entities; ensure all relevant entities are properly mapped to AI systems for accurate scoring.
- **Retired** and **Cancelled** AI systems are excluded from compliance score calculations to maintain focus on active systems.
- Compliance scores are averaged across all active linked entities; individual entity scores may vary.

The authority documents are provided solely for informational and guidance purposes to assist with the initial setup of AI Risk and Compliance frameworks. It doesn't constitute legal advice or assurance of regulatory compliance. You're solely responsible for ensuring that all use of the content complies with applicable laws, regulations, directives, and industry standards in their jurisdictions.



How data is determined

Regulatory status data is updated through scheduled and on-demand processes that evaluate your AI assets and calculate their risk and compliance metrics.

Regulatory risk classification data:

- The `risk_score` field on the governance details record is populated when the asset's regulatory risk classification assessment completes
- Status charts and reports are generated in real time based on live values; no scheduled refresh is required
- Widgets and visualizations reflect current data on every page load

Compliance score data:

- Individual AI system compliance scores are calculated by scheduled and on-demand jobs
- System scores are based on the compliance scores of linked entities, which are maintained by the Policy & Compliance engine

Scheduled and on-demand jobs

Regulatory status data is kept current through the following automated processes:

For regulatory risk classification:

- No scheduled or on-demand jobs directly update risk classifications
- The `risk_score` field is populated when a regulatory risk classification assessment completes

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For compliance scores:

- *AI system Compliance score calculation*: Calculates individual AI system compliance scores based on linked entity scores
- *AIRC daily compliance score scheduled job*: Refreshes compliance score data for the home page compliance score widget on a daily schedule

Classifying AI assets by regulatory risk

Regulatory risk classification places an AI asset in a risk rating, such as Low or High, based on the score from a risk assessment.

A regulatory risk classification is the inherent rating that a risk assessment produces for an AI asset. The AI Risk and Compliance application uses the classification to group AI assets, such as AI systems, AI models, and datasets, into rating bands on the Regulatory risk classification donut chart. For more information about how to read the chart, see Reviewing regulatory classification and compliance status.

For the risk assessment methodologies (RAMs), formulas, risk ratings, and factors, see Regulatory risk classification reference.

How automated classification works

The Automated risk classification for AI system RAM produces the classification without an assessor. For the classification that an assessor produces, see Risk rating calculation.

The automated classification scores six factors from the Use and purpose responses. Each response option carries a point value, and each factor adds up the points of the fields that it uses. The inherent score is the highest of the six factor scores. The system converts the score to a rating.

A factor whose points total is 9000 or more scores 10. That score places the asset in the top rating band, Unacceptable.

If an asset has no Use and purpose record, every factor scores 0 and the classification is To be determined.

⚠ Warning:

The system generates the automated classification without an assessor. The classification can be inaccurate or incomplete, for example, when the Use and purpose responses are out of date. Review the classification and the responses that produced it before you rely on it.

Example: Example: Customer service chatbot

A support team registers a customer service chatbot as an AI system. The chatbot drafts replies to customer emails, and it uses past support tickets that contain customer names and account details. In the Use and purpose section, the team answers the questions about the chatbot:

- For **Type of output produced**, they select **Generated Content**, which carries 50 points.
- For **Data used by the system**, they select **Profile or Account Data**, which carries 9000 points.

The Data & Model Risks factor adds these points: `50 + 9000 = 9050`. Because the total is 9000 or more, the factor score is 10, regardless of the other five factors. The highest factor score becomes the inherent score, so the chatbot's inherent score is 10 and its classification is Unacceptable.

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When and how the classification is applied

The system calculates the classification when the asset is created. After the asset moves to the Managed state, the system revises the classification when the Use and purpose fields or the regulatory risk classification are updated.

Automated classification runs only when all of the following are true:

- The *sn_grc_ai_gov.ai_system_automated_risk_classification_asmt_ram* property specifies a RAM.
- The specified RAM is published.
- The Use and purpose record is linked to the governance details record of an AI asset.

If a condition isn't met, the system doesn't create a classification assessment and the classification remains To be determined.

When the conditions are met, the system completes these actions:

1. Runs the automated risk assessment subflow in the background.
2. Stores the resulting inherent rating on the governance details record of the asset.
3. Copies the inherent rating to the **Risk Classification** field of the related entity of the AI system. The system updates the related entity only when the rating changes.

For unmanaged AI assets, the classification is based on the Use and purpose data on the governance details record of the asset.

The system can cancel a classification assessment that is still open for the related entities of an AI asset. An assessment is open when its status isn't Completed, Archived, or Cancelled. A canceled assessment doesn't produce a classification. The system doesn't change assessments that are completed, archived, or canceled. The system cancels open classification assessments when the AI asset's **Active** field changes to false, such as when you retire or cancel the asset.

Classification and aggregated inherent risk

The regulatory risk classification of an AI asset is separate from the aggregated inherent risk rating that the risk rollup calculates for an AI system. The classification comes from the classification RAM. The aggregated inherent rating comes from the risk assessments of the risks that belong to the AI system. For the aggregated rating, see Risk rating calculation.

Compliance score calculation

The compliance score of an AI system measures how well its controls are met, based on the scores of its active related entities.

How the score is calculated

AI Risk and Compliance doesn't score an AI system directly. It averages the compliance scores of the entities that are linked to the AI system. For the formula, calculation rules, scheduled jobs, and properties, see AI system compliance score calculation reference.

An AI system links to one or more entities in the AI system entity map. The system averages the compliance scores of the active linked entities and stores the result as the compliance score of the AI system. The system skips AI systems in the Retired or Canceled state and excludes entities that belong to third-line audit entries.

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Note:

Map every relevant entity to the AI system. An entity that isn't mapped doesn't affect the score, so a missing entity can make the score look better or worse than the real compliance posture.

Example: Example: Hiring assistant AI system

A hiring assistant AI system is linked to three active entities in its governance plan: Data privacy compliance (80), Model bias testing (60), and Vendor risk assessment (70). The compliance score of the AI system is `(80 + 60 + 70) ÷ 3 = 70`. After an AI steward also links a fourth entity, Incident response readiness, with a compliance score of 50, the score becomes `(80 + 60 + 70 + 50) ÷ 4 = 65` - mapping an additional entity can lower the overall score if that entity needs attention.

Where the entity scores come from

The Policy and Compliance engine calculates the compliance score of each entity, based on the state of its controls, such as whether the controls pass compliance tests and attestations. Depending on configuration, this calculation can also take the scores of related entities into account. For the formula, calculation rules, and configuration options, see Compliance score calculation of an entity.

The compliance score of an AI system changes when the score of any contributing entity changes.

An individual entity's compliance score is color-coded consistently with other Policy and Compliance records: green for 80-100, yellow for 50-79, and red for 0-49.

How and when scores are processed

The system queues an AI system for recalculation when its compliance score record is inserted. A scheduled process then completes these actions:

1. Picks up queued records that are in the Inserted or Error state and marks them as processing.
2. Calculates the average of the compliance scores of the related entities for each queued AI system.
3. Stores the new score on the AI system.
4. Removes the processed records from the queue.

If the calculation fails for an AI system, the system logs an error, but the queued record is still removed in the same run. The AI system isn't automatically retried unless a new compliance score record is queued for it again.

Scores by authority document or policy

A compliance score relates to an authority document through the citation that the authority document is associated with. The citation is also linked to the applicable control. Based on these relationships, the system calculates the compliance score for the corresponding authority document.

The Compliance score card shows the score as a percentage on a gauge. The card also shows compliance posture for the priority frameworks, with separate tabs for authority documents and policies. Those posture scores come from the compliance of citations and their controls, and they are separate from the compliance score of the AI system. For how citation scores are

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calculated, see Compliance score calculation for a citation. For how to read the compliance views, see Reviewing regulatory classification and compliance status.

Review of calculated scores

The system calculates the compliance score automatically, without an assessor. The score can be inaccurate or incomplete, for example, when entities or controls are missing or out of date. Review the score and the entity scores that produced it before you rely on it.

Things to note for addressing errors

If the Risk and Compliance dashboards on the AI asset record page or the landing page show a `No data found` error for the compliance score, see Risk score and compliance score dashboard errors.

Reviewing AI risk posture

Aggregated risk posture displays inherent risk, residual risk, and control effectiveness for AI assets.

Overview of AI risk posture

Risk posture views in AI Control Tower help you understand the level of risk associated with AI assets and how that risk changes when control effectiveness is considered.

At the portfolio level, risk posture views summarize how AI assets are distributed by risk level and highlight concentrations of higher-risk assets. At the AI system level, aggregated risk rating views show the relationship between inherent risk, control effectiveness, and resulting residual risk for a specific AI system.

Risk heat maps add more context by showing how counts of risks are distributed across inherent risk levels and control effectiveness levels. These views help you identify where ineffective or partially effective controls are associated with higher-risk conditions.

Use the global filter on the Risk posture page to switch the widgets between **AI System**, **AI Model**, and **Dataset** asset types. Selecting an asset type updates the aggregated risk score chart and the risk heat map to show results for that asset type only, and relabels the chart to match (for example, **AI systems by aggregated risk score**). By default, the page displays results for **AI System**.

Aggregated risk score

AI assets are classified by aggregated risk score using a donut chart. The risk scores are qualitatively classified as Low, Medium, and High.

AI systems are distributed across risk rating levels through two primary visualizations: inherent risk and residual risk.

Inherent risk: Risk level of an AI system before controls, mitigations, or safeguards are applied. This baseline view identifies the potential risk exposure that exists in the AI environment without intervention. The chart categorizes systems into three risk levels: Low, Medium, and High.

Residual risk: Risk level after controls, mitigations, and safeguards are implemented. This view demonstrates the effectiveness of the risk management program by showing how control measures reduce overall exposure. By comparing inherent and residual risk charts, you can measure the impact of governance controls.

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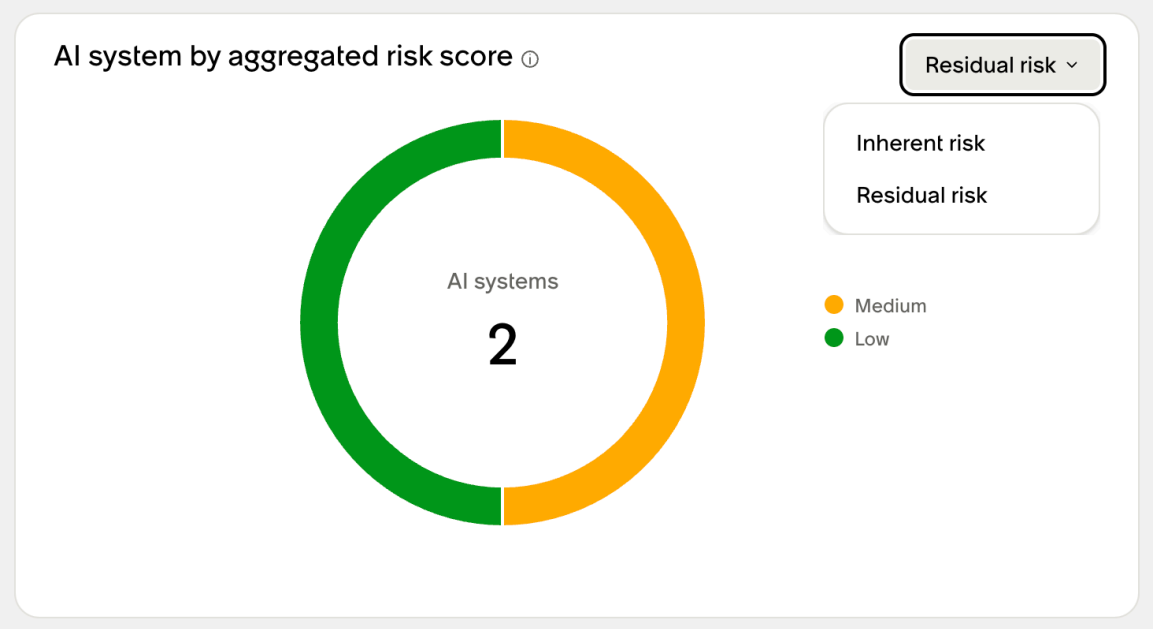
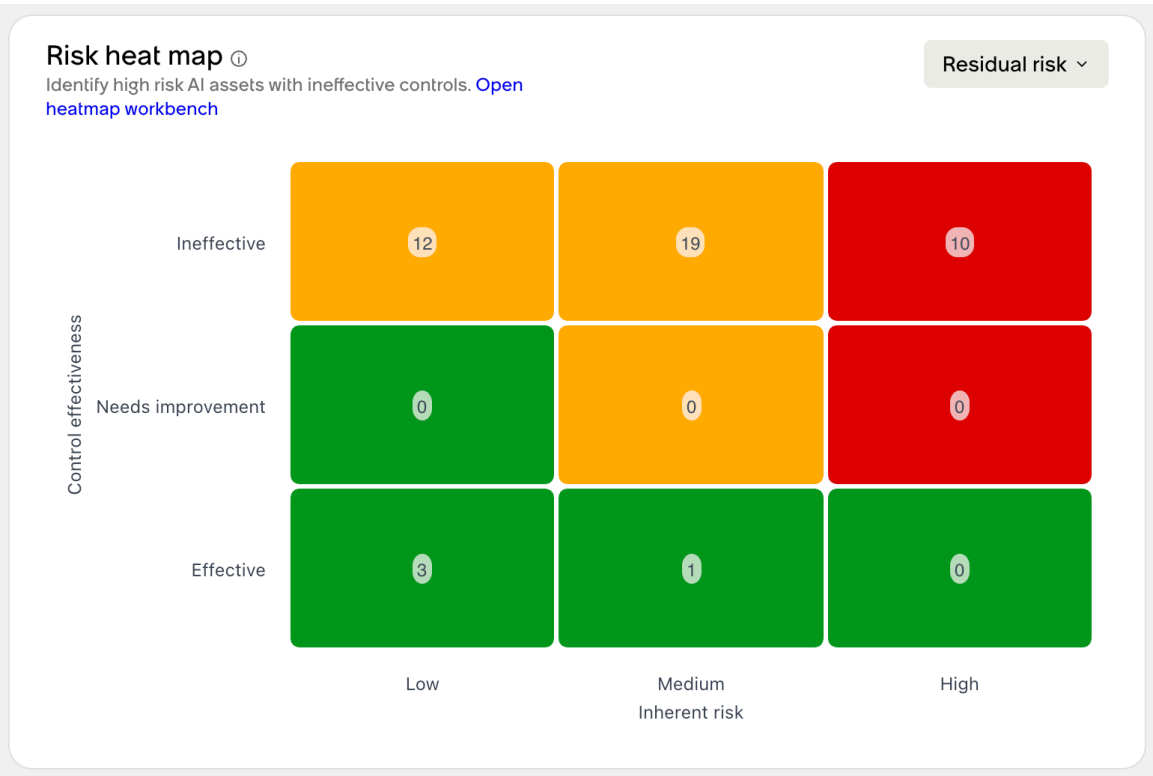


Risk heat map

The Risk heat map widget displays identified risks for AI assets. By default, the widget applies the **Residual risk** filter, but you can filter the heat map by **Inherent risk**. Segmentation changes based on the selected filter. Risks appear under the respective combination of risk and control effectiveness, or impact and likelihood, depending on the selected risk classification filter. You can filter the risk heat map by Risk Assessment Methodology (RAM) when more than one methodology is available. For more information about RAMs, see Risk assessment methodologies reference.



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How data is determined

For the full calculation, including the primary RAM, contributing entities, and recalculation, see Risk rating calculation.

AI systems by aggregated risk score:

- Risk ratings come from risk assessments performed against the risks linked to each AI system.
- A background job rolls up the individual assessment results into a single risk rating per AI system.
- The chart then counts how many AI systems fall into each rating level (for example, Low, Medium, High).

Risk heat map: Each cell shows the count of risk assessment instances at that intersection. This is the standard Advanced Risk heat map, scoped to AI governance entities.

Risk rating calculation

The inherent, control effectiveness, and residual ratings of an AI system come from risk assessment scores that a risk rollup aggregates.

How the system calculates risk scores

AI Risk and Compliance calculates the risk scores of an AI system in two stages. First, a risk assessment scores each risk that belongs to the related entities of the AI system. Second, the Advanced Risk rollup engine aggregates the scores of those risks into one inherent rating, one control effectiveness rating for the AI system. For how the rollup works in general, see Risk score rollup in Advanced Risk Assessment.

For the formulas, rating bands, and rollup settings, see AI risk score calculation reference.

Important:

The rollup requires the Advanced Risk application. Install it and set the **Migrate to Advanced Risk Assessments** property to **Yes** before the inherent, control effectiveness ratings become available. This is a one-way configuration change.

The predefined risk assessment methodology (RAM) named Risk assessment for AI inventory defines the scoring logic. It's a risk-based RAM with inherent, control assessments, and it applies to AI systems, AI models, and datasets alike: every AI digital asset is represented by the same underlying AI system entity map record regardless of its asset type, so the same rollup and primary RAM apply no matter which asset type you're viewing. It ships in the Draft state, so publish it or a custom RAM before you use it.

Note:

The aggregated inherent rating of an AI system is separate from its regulatory risk classification. The aggregated rating comes from the risk rollup. The classification comes from the classification RAM. For the classification, see Classifying AI assets by regulatory risk.

Score types

Each risk is scored before the rollup.

Inherent risk

Risk level before controls are considered, based on the inherent assessments of the contributing risks. For each risk, an assessor answers two choice factors, Impact

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and Likelihood. The score of each factor is the value of the option that the assessor selects, and the inherent score is the average of the two factor scores.

Control effectiveness

Measure of how well the controls address the risks, based on the control assessments of the contributing risks. For each risk, the system calculates the score from the status and weight of its controls. No assessor input is needed.

Example: Example: Fraud detection model

A fraud detection model has three active controls. The access control review is compliant and carries the most weight, 100, because restricting who can modify the model is the most important safeguard. The data retention policy and the bias testing control are both non-compliant, each weighted at 10. The control effectiveness is `(100 ÷ 120) × 100 = 83`, close to a perfect score, but because two controls are still non-compliant, it lands in the Needs improvement band (level 1) rather than Effective.

Primary RAM

The rollup runs against one RAM for each AI system, called the primary RAM. A RAM can be the primary RAM only when it is published, assesses risks, and belongs to the AI risk and compliance domain. Each AI system stores its own primary RAM. If you remove the primary RAM from an AI system, the AI system no longer shows rollup scores.

When you don't set a primary RAM, the system selects a default. You can set the default in the *`sn_grc_ai_gov.aisystem_primary_ram`* property.

Aggregation to the AI system

The rollup includes the active related entities of the AI system that use the same primary RAM, the risks of those entities, and their assessments in the Monitor state. The rollup excludes third-line audit entries, and it skips AI systems in the Retired or Canceled state.

The rollup averages the scores of the contributing risks and converts the average to a rating band. The rollup takes the maximum of the annual loss expectancy values.

Example: Example: Loan approval assistant

A loan approval assistant has three contributing risks: unauthorized access to applicant data (inherent rating High, 7), model drift from outdated training data (inherent rating Medium, 4), and dependency on a single data vendor (inherent rating Low, 1). The average is `(7 + 4 + 1) ÷ 3 = 4`, so the inherent rating of the AI system is Medium. The control effectiveness ratings of the AI system are aggregated the same way from the values of the same risks.

When scores are recalculated

Each AI system has one risk rollup result. The system flags the result for recalculation after the primary RAM of the AI system is set or changed, or after a score-affecting change on a related entity that uses the primary RAM. A scheduled job then recalculates the scores. Scores on the AI system don't change at the moment that an assessment changes. They update after the next scheduled recalculation.

Where the scores appear

The ratings appear on the AI system record and in the Risk posture charts and risk heat map. The Risk posture page shows the All assets by aggregated risk score chart and the Risk heat map, and you can switch the charts between inherent and residual risk. For how to read them, see

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Reviewing AI risk posture. To see which assessments contributed to the score of an AI system, use the contributing assessments of the risk rollup result.

Review of calculated ratings

The system calculates the control effectiveness, and aggregated ratings automatically, without an assessor. The ratings can be inaccurate or incomplete, for example, when controls or assessments are out of date. Review the ratings and the assessments that produced them before you rely on them.

Assessed classification

An assessed classification is the inherent rating that an assessor produces for an AI asset. The assessor answers Impact and Likelihood questions, and the classification is the average of the two scores. The assessed classification is separate from the automated classification, which the system calculates from the Use and purpose responses.

The system applies one of two RAMs, depending on the type of AI asset. Risk classification for AI system applies to AI systems. Risk classification for AI Model or Dataset applies to AI models and datasets. You select the RAM when the assessment starts. For the formulas, subfactor weights, and rating bands, see AI risk score calculation reference.

Things to note for addressing errors

If the Risk and Compliance dashboards on the AI asset record page or the landing page show a `No data found` error for the risk score, see Risk score and compliance score dashboard errors.

Detecting governance insights

Scheduled detection jobs evaluate your AI portfolio and generate the Stalled Lifecycle Tasks and Significant Issues insights that appear as recommendations.

The Your top recommendations widget surfaces two insights that identify governance work needing attention across your AI portfolio: Stalled Lifecycle Tasks and Significant Issues. Both run as scheduled detection jobs rather than as on-demand reports, so the widget reflects the most recent scheduled run rather than real-time state.

Governance insights

Insight	Purpose
Stalled Lifecycle Tasks	Identifies lifecycle tasks on AI systems that have seen no progress or updates and require attention to resume completion.
Significant Issues	Identifies open issues on AI systems that have a meaningful impact on risk or compliance and warrant timely review.

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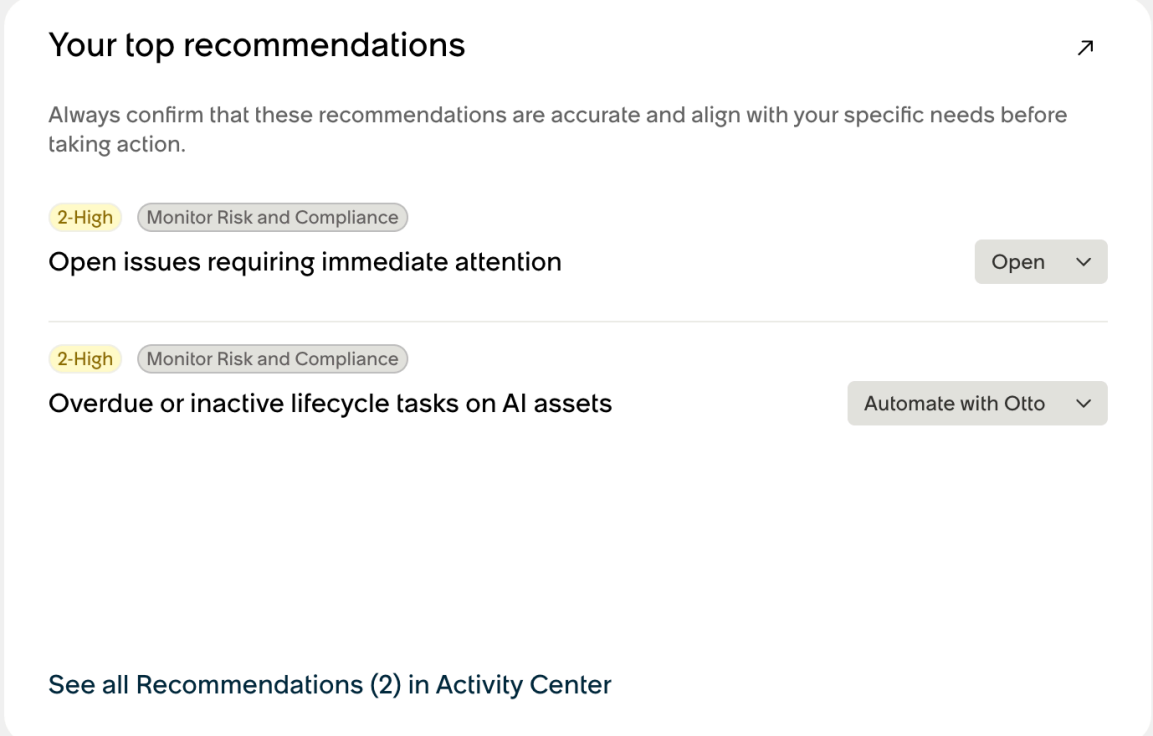

These insights provide the following benefits:

- Surface high-priority governance work without requiring you to search across individual AI systems.
- Detect stalled work and significant issues on a recurring schedule.
- Provide a portfolio-wide, severity-prioritized view of items that need attention.

How each insight is determined

Both insights follow the same two-stage pattern. First, a detection job identifies AI systems and records that match a set of criteria. Then a generative AI skill prioritizes which matches are most important to surface. If the AI skill call fails or returns no results, the detection job falls back to a deterministic, rule-only ranking so the insight still generates.

For the exact criteria, detection intervals, and fallback ranking for each insight, see Governance insight detection reference.

⚠ Warning:

AI-generated summaries and prioritization can be inaccurate or incomplete. Review each recommendation and the records behind it before you act on it.

Automating a response

Stalled Lifecycle Tasks recommendations include an **Automate with Otto** action. Selecting it opens a confirmation dialog box with the message `Automate this action item? This will initiate a workflow run by an unsupervised agent.` Review the recommendation before you proceed. Select **Automate** to proceed, or select **Cancel**. Significant Issues recommendations don't have this option. Resolve them directly from the issue list.

Viewing recommendation details

Selecting **View details** on a recommendation in the Your top recommendations panel opens a record with the fields in the following table.

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Recommendation record

Field	Description
Short description	Generated summary of the recommendation. The summary can also name specific AI systems and recommend actions, not just report totals. • For a Significant Issues recommendation, this includes the number of active issues found, managed AI assets affected, and top issues and assets shown. For example: `11674 active issues across 483 managed AI assets require review. Showing the top 50 issues on the 10 highest-priority assets.` • For a Stalled Lifecycle Tasks recommendation, this includes the total number of overdue tasks, dormant tasks, and governed AI assets affected. For example: `319 overdue and 473 dormant lifecycle tasks across 213 governed AI assets.`
Activity type	**AI recommendation** for these insights.
Type	Insight category: either **Stalled Lifecycle Tasks** or **Significant Issues**.
Initiated date	Date and time the detection job generated this recommendation.

The record also includes the same action and a **History** section. For a Significant Issues recommendation, the default action is **Open**, with **Complete** and **Delete** available from the drop-down list. For a Stalled Lifecycle Tasks recommendation, the default action is **Automate with Otto**, with **Complete** and **Delete** available from the drop-down list. There is no separate **Open** action for this insight.

For a Significant Issues recommendation, selecting **Open** navigates to a filtered Issue list scoped to that recommendation's issues. Results are sorted by priority, then by how long each issue has been open.

Viewing insights

Both insights appear in the Your top recommendations widget, which is shown both on the AI Control Tower home page and on the **Risk & Compliance** tab under **Govern**. Select **See all Recommendations in Activity Center** to see the full list of assigned and unassigned action items generated by both insights. For more information, see Act on AI asset governance insight recommendations.

Governance insight detection reference

Thresholds, criteria, and refresh schedule that determine when an AI system appears in the Stalled Lifecycle Tasks or Significant Issues insight.

Stalled Lifecycle Tasks criteria

A lifecycle task is flagged if either of the following is true:

- Overdue: The task has a due date that is more than 7 days in the past.
- Dormant: The task hasn't been updated in more than 7 days, regardless of its due date.

Tasks already in a terminal state (such as Closed complete, Closed incomplete, or Cancelled) are excluded. The AI system itself is also excluded if it's in the Retired or Cancelled state.

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The detection job evaluates four task types: AI system lifecycle tasks, assessment tasks, risk assessment instances, and risk assessment projects.

Significant Issues criteria

An open issue on a managed AI system is included if any of the following is true:

- The issue is linked to a control whose control objective is classified Preventive.
- The issue is linked to a control with a Non-compliant status that has at least one failed indicator.
- The issue has no linked control at all.
- The issue's own priority is Critical or High, regardless of its linked control's status.

Only active issues on governed, active AI systems are evaluated.

Refresh schedule

The following table lists how often each detection job runs.

Detection intervals

Insight	Detection interval
Stalled Lifecycle Tasks	Every 5 days
Significant Issues	Every 1 day

Fallback ranking

The following table lists how each detection job ranks matches when the generative AI skill call fails or returns no results.

Fallback ranking by insight

Insight	Ranking
Stalled Lifecycle Tasks	AI systems ranked by combined overdue and dormant task counts
Significant Issues	AI systems ranked by critical issue count, then by risk rating, then by unassigned issue count

Act on AI asset governance insight recommendations

Resolve Stalled Lifecycle Tasks and Significant Issues recommendations to keep AI systems moving through their governance life cycle.

Before you begin

Role required: sn_ai_governance.ai_steward

About this task

The Your top recommendations widget on the **Risk & Compliance** tab under **Govern** surfaces recommendations from the Stalled Lifecycle Tasks and Significant Issues insights.

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Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Govern** > **Risk & Compliance**.
2. Act on recommendations from Stalled Lifecycle Tasks:

   a. Select the arrow next to a stalled task item.
   The list of lifecycle tasks on that AI system that have seen no progress or updates opens.

   b. In the task list, select a task to open its details.

   c. Take action to resume the task, such as updating the task status, reassigning it, or adding a work note.
   You can also select **Automate with Otto** to have an AI agent act on the recommendation for you. For information about completing a lifecycle task, see Complete a lifecycle task.

   > **Important:**
   >
   > Automate with Otto uses an unsupervised AI agent to act on this recommendation. AI-generated actions can be inaccurate or incomplete. Review the recommendation and the task it applies to before you select **Automate with Otto**.

   When you address a stalled task (such as completing it, updating its status, or reassigning it), it is removed from the recommendation list. The AI system moves forward through its governance life cycle.
3. Act on recommendations from Significant Issues:

   a. Select the arrow next to a significant issue item.
   The list of open issues associated with that AI system opens.

   b. In the issue list, select an issue to open its details and review its impact on risk or compliance.

   c. Take action to mitigate or resolve the issue, such as updating the issue status, adding mitigation steps, or assigning a remediation owner.

   When you resolve a significant issue (such as closing it, implementing mitigations, or reducing its compliance impact), it is removed from the recommendation list. The risk and compliance posture of your AI system improves.
4. To view all recommendations, select **See all Recommendations in Activity Center**.
   For information about resolving a recommendation from the full list, see Resolve an AI recommendation.
   The full list of assigned and unassigned action items generated by both insights appears.

Related topics

Detecting governance insights

Risk and Compliance reference

Review the scope of Risk and Compliance visibility in AI Control Tower, including key terminology used across these views.

Risk and Compliance in AI Control Tower provides governance visibility for AI assets. It summarizes and presents governance outcomes at both the portfolio level and the individual AI system level.

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These views support awareness, prioritization, and review. They do not replace the underlying governance processes that generate assessments, risks, controls, issues, policy exceptions, or related records.

Risk and Compliance terminology

Key terms used across Risk and Compliance views in AI Control Tower, including compliance score and regulatory risk classification.

Regulatory risk classification

Regulatory risk classification groups AI assets by acceptability or risk category, such as unacceptable, high, medium, and low. At the asset level, classification can remain undetermined until the relevant governance data is available. For more information, see Classifying AI assets by regulatory risk.

Compliance score and compliance posture

Compliance score represents visible compliance posture for the selected scope. Framework-specific posture views show how governance information is presented for priority authority documents or policies and can surface issue indicators relevant to those frameworks. For more information, see Compliance score calculation.

Inherent risk, residual risk, and control effectiveness

Inherent risk describes the level of risk before control effectiveness is considered. Control effectiveness describes how well controls address the identified risk. Residual risk represents the level of risk that remains after control effectiveness is considered. For how these scores are calculated, see Risk rating calculation.

Risk heat map

Risk heat maps show how risk information is distributed across combinations of risk level and control effectiveness. These views help you understand where higher-risk conditions are associated with less effective controls. For more information, see Reviewing AI risk posture.

Governance records

Asset-level Risk and Compliance views can surface related governance records for an AI system, including assessments, risks, controls, issues, policy exceptions, attestations, and similar governance artifacts that contribute to the system's current posture. For the full list of record types, see Governance record types.

Incomplete states

Some Risk and Compliance views can display incomplete states such as **To be determined**, **No data available**, or zero-valued indicators. These states indicate that the relevant governance information is not yet available for display in the selected context.

Governance record types

Record types under the Governance section of an AI asset's Risk & Compliance tab in AI Control Tower, used to support governance review.

The Governance section of an AI asset organizes related governance records into four categories: Assessments, Governance, Tasks, and Tracking.

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Governance section record types

Category	Record type	Description
Assessments	AI assessments	General assessments that evaluate an AI asset against governance criteria, such as intended use, risk classification, and compliance requirements. Risk assessments and regulatory risk assessments (below) are the specific assessment types that feed the asset's regulatory risk classification and aggregated risk rating.
Assessments	Risk assessments	Assessments that identify and rate the risks associated with an AI asset, including inherent risk and the effectiveness of the controls applied to it. Results contribute to the asset's aggregated risk rating and risk heat map placement.
Assessments	Regulatory risk assessments	Assessments that determine how an AI asset is classified against regulatory frameworks and requirements, such as unacceptable, high, medium, or low risk. Results populate the asset's regulatory risk classification.
Assessments	Bulk risk assessments	A grouping of risk assessments run across multiple AI assets at once, used to assess several assets against the same criteria in a single pass instead of individually. For more information, see Risk assessment project in AI Risk and Compliance.
Governance	Risks	Individual risk records identified for the AI asset, each describing a potential issue along with its inherent risk level. Risks are the basis for the asset's risk heat map and aggregated risk rating.
Governance	Controls	Control records that describe the safeguards applied to mitigate the risks identified for the AI asset. The status and weight recorded on each control determine its control effectiveness score, which directly affects the asset's residual risk.
Tasks	Attestations	Records that capture confirmation that a control is in place and operating as expected, tied to a specific compliance framework or policy. Attestation state, such as Complete or Ready to take, feeds the asset's compliance score and compliance posture for priority frameworks.
Tracking	Issues	Records that track a compliance or control gap identified for the AI asset that requires remediation. Open issues surface as high-priority items in the asset's compliance posture and top action items.
Tracking	Policy exceptions	Records that document an approved deviation from a policy or control requirement for the AI asset, including justification and expiration. Policy exceptions provide an audit trail for accepted risk.

Regulatory risk classification reference

Risk assessment methodologies, formulas, risk ratings, and records that determine the regulatory risk classification of an AI asset.

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Risk assessment methodologies

The following table lists the predefined risk assessment methodology (RAM) that produces an automated classification. The RAM ships in the Draft state. Publish the RAM before you use it. For the RAMs that produce an assessed classification, see AI risk score calculation reference.

RAM that produces an automated classification

RAM	Applies to	Score formula	RAM selection
Automated risk classification for AI system	AI systems	Highest of six factor scores	Specified by the *sn_grc_ai_gov.ai_system_automated_risk_classification* property

Risk ratings

The following table lists how the automated RAM converts a score on a scale of 0 to 10 to a rating.

Score-to-rating conversion

Score	Rating
0	To be determined
0.1 to 5.00	Low
5.01 to 7.00	Medium
7.01 to 9.00	High
9.01 to 10	Unacceptable

An asset without an inherent rating is treated as To be determined. In the automated RAM, a score above 0 but below 0.1 also falls in the To be determined risk rating.

Automated classification formulas

The automated RAM uses the following formulas.

```
Factor score = (points total ÷ maximum possible points) × 8
Inherent score = Maximum(factor 1, factor 2, factor 3, factor 4,
 factor 5, factor 6)
```

A factor whose points total is 9000 or more scores 10. For a field that accepts several selections, the points total uses the highest value among the selected options. The factor score has two decimal places.

Automated classification factors

The following table lists the six factors and the Use and purpose fields that each factor uses.

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Automated classification factors

Factor	Fields and maximum points	Maximum total
Context of Use	Interaction type with end users (60), Area where the AI system is used (80), Intended outcome of the AI system (60)	200
Autonomy & Role of Human Oversight	System autonomy level (50), Type of output produced (50), Level of human involvement (50)	150
Data & Model Risks	Type of output produced (50), Data used by the system (40)	90
Impact on Individuals & Society	People affected by the AI system (50), Type of output produced (50), Intended outcome of the AI system (60)	160
Cybersecurity & Systemic Risks	Area where the AI system is used (80), Data used by the system (40), System autonomy level (50)	170
Governance & Compliance Maturity	Area where the AI system is used (80), People affected by the AI system (50), Level of human involvement (50)	180

Use and purpose answer point values

The following tables list the point value of each answer option for every Use and purpose field.

Answer point values for the Intended outcome of the AI system field

Answer option	Points
Not Applicable	0
Efficiency Boost	10
Quality Enhancement	20
Decision Guidance	30
Automation of Tasks	40
Customer Experience Upgrade	50
Insight Generation	60

Answer point values for the Area where the AI system is used field

Answer option	Points
Internal Operations	10
Customer Services	20
Sales & Marketing	30
Finance & Accounting	40
IT & Security	50
Supply Chain	60
HR & Workforce	70

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Answer point values for the Area where the AI system is used field (continued)

Answer option	Points
External Partner Ecosystem	80

Answer point values for the Type of output produced field

Answer option	Points
Simple Alerts	10
Insight & Summaries	20
Ranking & Scores	30
Recommendations	40
Generated Content	50
Automated Decisions	9000
System Actions	9010

Answer point values for the People affected by the AI system field

Answer option	Points
Internal Team	10
Specific Customer Groups	20
General Customer Base	30
External Partners	40
Public or Large Audiences	50

Answer point values for the Level of human involvement field

Answer option	Points
Not Applicable	0
Full User Control	10
User-Guided with AI Support	20
Shared Control	30
AI-Initiated with User Approval	40
Fully Automated Workflow	50

Answer point values for the Data used by the system field

Answer option	Points
Public or General Info	10
Business Operational Data	20
Customer Interaction Data	30

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Answer point values for the Data used by the system field (continued)

Answer option	Points
Behavioral or Usage Data	40
Profile or Account Data	9000
Sensitive Business Data	9010

Answer point values for the Interaction type with end users field

Answer option	Points
Not Applicable	0
No Direct Interaction	10
Background Support	20
Notifications & Prompts	30
User-Facing Recommendations	40
Chat-Based Interaction	50
Interactive Experience	60

Answer point values for the System autonomy level field

Answer option	Points
Not Applicable	0
Assistive (AI suggests)	10
Semi-Automated (acts with confirmation)	20
Condition-Based Automation	30
Event-Triggered Automation	40
Fully Automated Execution	50

Selecting **Profile or Account Data**, **Sensitive Business Data**, **Automated Decisions**, or **System Actions** triggers the 9000-point override described in the Automated classification formulas section, regardless of the other answers on the same asset: The factor score becomes 10 and the inherent score is Unacceptable.

Records and fields

The following table lists the records and fields that store the classification.

Records and fields that store the classification

Record	Field	Purpose
Asset governance details [sn_ai_governance_asset_governance_details]	Inherent risk rating	Inherent rating that the classification assessment produces

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Records and fields that store the classification (continued)

Record	Field	Purpose
AI system entity map [sn_grc_ai_gov_ai_system_entity_map]	Risk classification	Classification of the related entity, copied from the governance details record

Properties

The following table lists the property that controls automated classification.

Automated classification property

Property	Purpose
sn_grc_ai_gov.ai_system_automated_risk_classification_asmt_ram	Published RAM that classifies AI systems automatically

AI risk score calculation reference

Formulas, rating bands, lookup matrix, and rollup settings that determine the inherent, control effectiveness, and residual ratings of an AI system.

Formulas

The risk assessment methodology (RAM) named Risk assessment for AI inventory uses the following formulas for each risk.

```
Inherent score = Average(Impact, Likelihood)
Control effectiveness % = (sum of weights of compliant controls
 ÷ sum of weights of compliant and non-compliant controls) × 100
```

The Impact and Likelihood factors each use the following scale.

Impact and Likelihood scale

Rating	Score
Low	1
Medium	4
High	7
Critical	10

The control effectiveness calculation uses only active controls with a status of Compliant or Non-compliant, weighted by the control weighting value. The result is rounded to a whole number. If the risk has no such controls, the result is 0.

The rollup combines the scores of the contributing risks into one score for the AI system.

```
AI system score = Average(score of each contributing risk)
AI system rating = rating band of the AI system score
```

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Note:

The tables and formulas use "AI system" terminology throughout, matching the underlying table and field names. The same rollup, primary RAM, and formulas apply to AI models and datasets, because every AI digital asset is represented by the same AI system entity map record regardless of asset type.

Inherent rating bands

Inherent rating bands

Rating	Lower limit of band	Rating value
Low	0	1
Medium	4	4
High	7	7

Control effectiveness rating bands

Control effectiveness percentage to rating

Control effectiveness %	Level	Rating	Rating value
Less than 60	0	Ineffective	1
60 to 99	1	Needs improvement	4
100	2	Effective	7

Primary RAM requirements

The following table lists the requirements for a risk-based RAM to be the primary RAM of an AI system.

Primary RAM requirements

Requirement	Value
State	Published
Assessed on	Risks
Domain	AI risk and compliance

The default primary RAM is selected in the following order.

1. The RAM in the *sn_grc_ai_gov.aisystem_primary_ram* property, when more than one eligible RAM exists and the RAM is eligible. If the property value isn't eligible, no default RAM is set.
2. The first eligible RAM in alphabetical order by name, when the property is empty or only one eligible RAM exists.

Rollup inputs

The following table lists what contributes to the AI system rollup.

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Inputs to the AI system rollup

Input	Rule
Related entities	Active entities in the AI system entity map whose primary RAM matches the primary RAM of the AI system, excluding third-line audit entries
Risks	All risks of the contributing entities, excluding third-line audit entries
Risk assessments	Active assessments on the contributing entities that use the primary RAM and are in the Monitor state
AI systems	All AI systems except those in the Retired or Canceled state

Rollup settings

Rollup settings of the Risk assessment for AI inventory RAM

Setting	Value
Score rollup	Average
Annual loss expectancy rollup	Maximum

Rollup result stages

Rollup result stages

Stage	Description
Needs update	Result flagged for recalculation after the primary RAM of the AI system is set or changed, or after a score-affecting change on a related entity that uses the primary RAM
Processing	Result picked up by a scheduled job that recalculates the scores
Updated	Result stored with the new ratings. A result flagged again during processing returns to Needs update.

Properties

Risk score property

Property	Purpose
sn_grc_ai_gov.aisystem_primary_ram	Default primary RAM for AI systems when more than one eligible RAM exists

Assessed classification

The following table lists the predefined RAMs that produce an assessed classification. Each RAM ships in the Draft state. Publish a RAM before you use it.

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RAMs that produce an assessed classification

RAM	Applies to	RAM selection
Risk classification for AI system	AI systems	Selected when the assessment starts
Risk classification for AI Model or Dataset	AI models and datasets	Selected when the assessment starts

Both RAMs use the following formula.

```
Inherent score = Average(Impact score, Likelihood score)
```

The following table lists how each RAM converts the inherent score to a rating.

Assessed classification score-to-rating conversion

Score	AI system	AI model or dataset
0 to 5.00	Low	Low
5.01 to 7.00	Medium	Medium
7.01 to 9.00	High	High
9.01 to 10	Unacceptable	Critical

The Impact factor is a weighted average of six subfactors. The following table lists each subfactor and its weight.

Impact subfactors and weights

Subfactor	Weight
Regulatory scrutiny	15%
Financial impact	20%
Operational impact to the business	20%
Regulation complexity	20%
Number of businesses impacted	10%
Reputational impact	15%

The following table lists how the weighted average converts to the Impact score.

Impact weighted average to Impact score

Weighted average	Impact score
0 to 5.00	5
5.01 to 7.00	7
7.01 to 9.00	9
9.01 to 10	10

The Likelihood factor uses a four-point scale. The following table lists each rating and its score.

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Likelihood scale

Rating	Score
Rare	1
Possible	7
Likely	9
Immediate	10

AI system compliance score calculation reference

Formula, calculation rules, scheduled jobs, and properties that determine the compliance score of an AI system.

Formula

```
AI system compliance score = average of the compliance scores of
 its active related entities
```

The result is a whole number from 0 to 100. The decimal part of the average is truncated, not rounded (for example, an average of 66.7 produces a score of 66, not 67).

Calculation rules

The following table lists the rules that apply to the compliance score of an AI system.

Rules that apply to the AI system compliance score

Rule	Behavior
Entity link	Only entities linked to the AI system in the AI system entity map [sn_grc_ai_gov_ai_system_entity_map] table contribute
Active entities	Inactive entities don't contribute
Third-line audit entries	Entities that belong to third-line audit entries don't contribute
Excluded AI systems	AI systems in the Retired or Canceled state have no score calculated
No related entities	The score is 0
Whole number	The average is truncated to a whole number before it is stored; the decimal part is dropped, not rounded

Scheduled jobs

The following table lists the scheduled jobs that keep the compliance scores current.

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Compliance score scheduled jobs

Scheduled job	Purpose
Compliance Score V2	Calculates the compliance score of each entity every two minutes from the entities queued in the compliance score table [sn_compliance_compliance_score].
AI system Compliance score calculation	Calculates the compliance score of each AI system from the scores of its linked entities
AIRC daily compliance score scheduled job	Refreshes the data for the compliance score widget on the home page each day

An entity is queued for the *`Compliance Score V2`* job when a control changes compliance status, a control is added to or removed from the entity, the entity is activated or inactivated, or its hierarchy changes. The **Entity hierarchy based scoring** property determines how the score is calculated.

Compliance score gauge

The Compliance score card shows the score on a colored gauge. The gauge's color bands are a fixed default of the visualization component and aren't an admin-configurable setting.

Properties

The following table lists the properties that select the two priority frameworks of each type that appear on the Compliance score card. For steps to configure these properties, see Set up AI Risk and Compliance properties.

Compliance posture properties

Property	Purpose
sn_grc_ai_gov.highlighted_authority_document	Up to two authority documents to show as priority frameworks
sn_grc_ai_gov.highlighted_policy	Up to two policies to show as priority frameworks

Risk score and compliance score dashboard errors

Properties and scheduled jobs that resolve `No data found` errors in the risk score and compliance score dashboards on the AI asset record and landing pages.

No data found errors

A `No data found` error can appear in the Risk and Compliance dashboards on the AI asset record page or the landing page. To resolve the error, an administrator must complete the following actions for the score that doesn't appear. If the error persists, create a case on the Now Support portal for further investigation.

The following table lists the actions to complete, in order, for each score.

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Actions that resolve No data found errors

Score that doesn't appear	Order	Action	Location
Risk score	1	Set the **Migrate to Advanced Risk Assessments** property to **Yes**.	**All** > **Advanced Risk assessment** > **Administration** > **Properties**
Risk score	2	Run the *GRC rollup assessment scores* scheduled job.	**All** > **System Definition** > **Scheduled Jobs**
Risk score	3	Run the *AI inventory risk score rollup* scheduled job.	**All** > **System Definition** > **Scheduled Jobs**
Compliance score on the landing page	1	Run the *AIRC daily compliance score scheduled job*.	**All** > **System Definition** > **Scheduled Jobs**
Compliance score of an AI system	1	Run the *Compliance Score V2* scheduled job.	**All** > **System Definition** > **Scheduled Jobs**
Compliance score of an AI system	2	Run the *AI system Compliance score calculation* scheduled job.	**All** > **System Definition** > **Scheduled Jobs**

Note:

On the Advanced Risk Assessment Properties page, a banner can state that the record is in the GRC: Advanced Risk application while another application is current. To edit the property, select the link in the banner.

Managing AI asset security with AI Control Tower

Review AI asset security metrics such as access issues, dormant and privileged AI agents, and map the relationships of your ServiceNow agents, agentic workflows, and tools.

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Get started

Explore Learn AI asset security basics to help you get the most out of security metrics.	Configure Activate and configure your implementation of security metrics.	Use the agent map Visualize your entire agentic ecosystem across your enterprise.
Monitor AI security tasks Triage and resolve security tasks to optimize AI asset security.	Manage AI agents with kill switch protocol Contain AI agents with suspicious activity to improve security posture.	Reference Learn details about every metric in the security area.

Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

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Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal .

Data collection

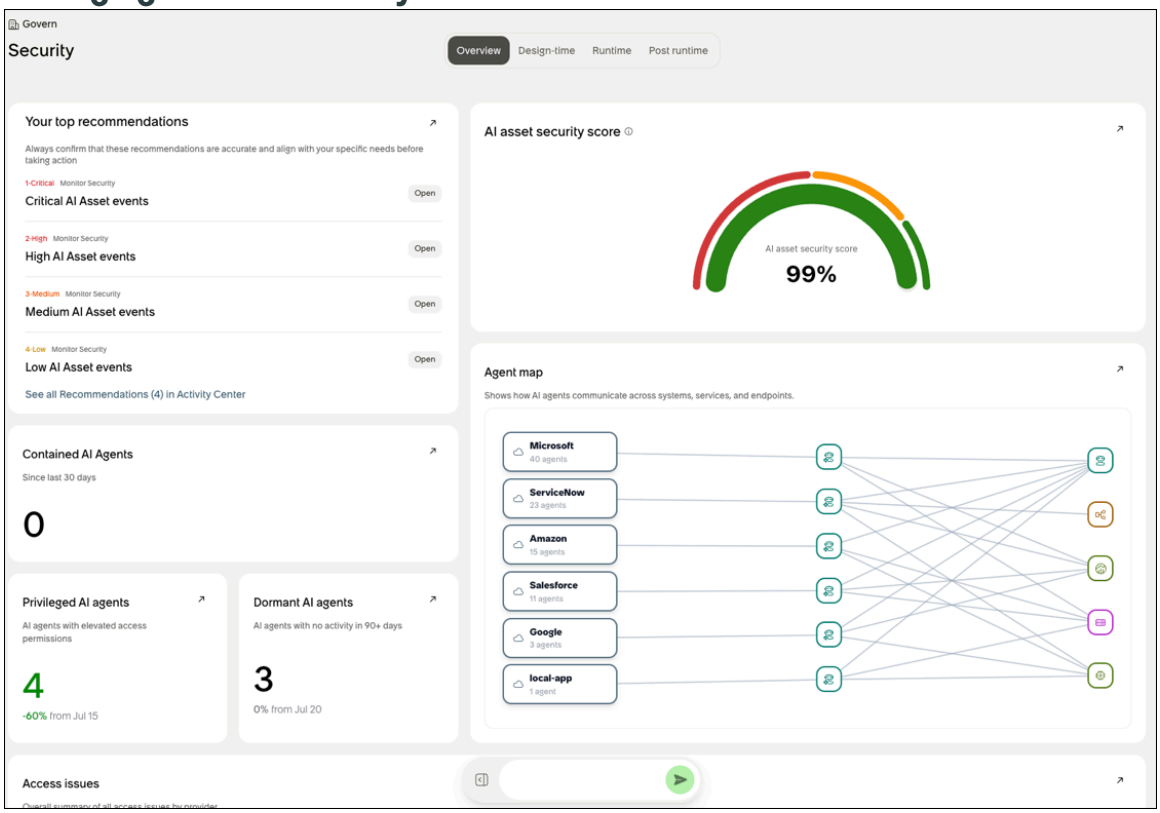
ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

Note: We have controls in place to enable/disable the data collection and data processing. For more information, see Data sharing and processes.

Exploring security in AI Control Tower

The security area of AI Control Tower offers a dashboard-based view of your AI asset security metrics. In addition to tracking metrics, the security area contains the agent map, a tool that gives a node-graph visualization of the relationships between your AI agents, agentic workflows, and tools.

Managing AI asset security



Use the security area of AI Control Tower to monitor and improve your security posture across your AI asset ecosystem. Monitor overview, design-time, runtime, and post-runtime metrics to identify problem areas and troubleshoot LLM guardrail policy violations. For details about every metric, see Managing AI asset security reference.

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Security users

Users

User	Description
AI steward	Monitors overall security posture of the AI asset ecosystem. Uses the security dashboard to maintain accountability for AI-related security threats.

Security benefits

Security benefits

Benefit	Feature	Users
Review and troubleshoot access issues, critical AI asset security events, overall security posture, and other indicators.	Overview metrics	AI steward
Evaluate LLM model-level security exposure.	Design-time metrics	AI steward
Stop the execution of agents that potentially violate LLM guardrails in real time.	Runtime metrics	AI steward
Review AI asset security events to audit AI asset security threats and mitigate risk.	Post-runtime metrics and AI agent containment using kill switch protocol manually	AI steward

What to explore next

To learn more about configuring and using AI Control Tower, see:

- Configuring security metrics in AI Control Tower
- Discover your agent network with the map
- Monitor AI asset security events and recommendations
- Managing AI asset security reference

Basic concepts for AI asset security

Learn more about the AI asset security score, agent map, AI asset security events, and internal and external agents.

AI asset security events

An AI asset security event is an occurrence that involves a potential threat to your environment's security. For example, if a credit card number is detected in LLM output (output PII violation). Or, if a user replaces an LLM prompt with a malicious prompt designed to obtain a user's password (prompt injection). Each AI asset security event has a threat type assigned. For more information, see Managing AI asset security reference and Monitor AI asset security events and recommendations.

On the Post-runtime tab, the top AI asset security events are organized by threat category to help you prioritize areas to focus on and address. Selecting a cell in the heat map shows a corresponding list of AI asset security events below it.

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AI asset security score

The AI asset security score reflects the health of your AI assets in terms of access issues, privileged AI agents, dormant AI systems, output deviation, PII detection, and other criteria. When you view score details, a list view shows the AI assets that are included in your AI asset security score calculation. Your score is the average of all managed AI assets listed. Users should actively manage and review their agent assets and not rely solely on this AI asset security score.

You can exclude an AI asset from your score by muting it. For example, you can mute an AI asset if you determine that remediating the asset's issue would be a risky change. For more information, see Managing AI asset security reference.

You can also configure the score to remove security categories from the score calculation or change the weights of categories. For more information, see Configure the AI asset security score.

Agent map

The agent map is an interactive map showing the relationships of your AI providers, AI models, MCP servers, AI agents, agentic workflows, and tools across your enterprise. You can use the map to review these relationships and AI asset details. The map includes filters for both agents and agentic workflows.

Internal and external agents

Internal agents are agents that are provided by ServiceNow. External agents are those provided by third parties, such as Google or Amazon Web Services. On the Runtime and Post-runtime tabs, filter on internal or external agents to compare the security postures of your ServiceNow and third-party agents.

AI agent containment using kill switch protocol manually

Explore how deactivating AI agents works to enforce guardrails and help improve your security posture.

AI agents operate as autonomous actors across the enterprise, frequently with elevated or administrative privileges. AI agent containment using kill switch protocol gives you the ability to immediately contain an AI agent and revoke all of its active credentials across the connected enforcement points that you configured.

Control enforcement points (PEPs) are part of AI agent containment. CEPs can be identity providers, AI agent runtimes, or infrastructure platforms. Supported AI agent platforms are AWS Bedrock, AWS Bedrock AgentCore, Azure AI Foundry, Gemini Enterprise Agent Platform (agents with a unique identity only), and ServiceNow AI agents. The supported identity provider is Okta.

When you contain an AI agent, AI Control Tower issues revocation requests and confirms enforcement completion from each configured CEP before declaring the agent contained.

Example: Example: Malicious activity by an AI agent

An AI steward receives a tip from a vendor that an AI agent integrated with their platform is generating suspicious API calls. The steward opens the Security page of AI Control Tower and notices a critical security event involving the AI agent. Upon viewing the AI asset, AI Control Tower alerts the steward that malicious activity was detected. Traceloop data and control enforcement points (CEPs) provide a summary of the agent behavior.

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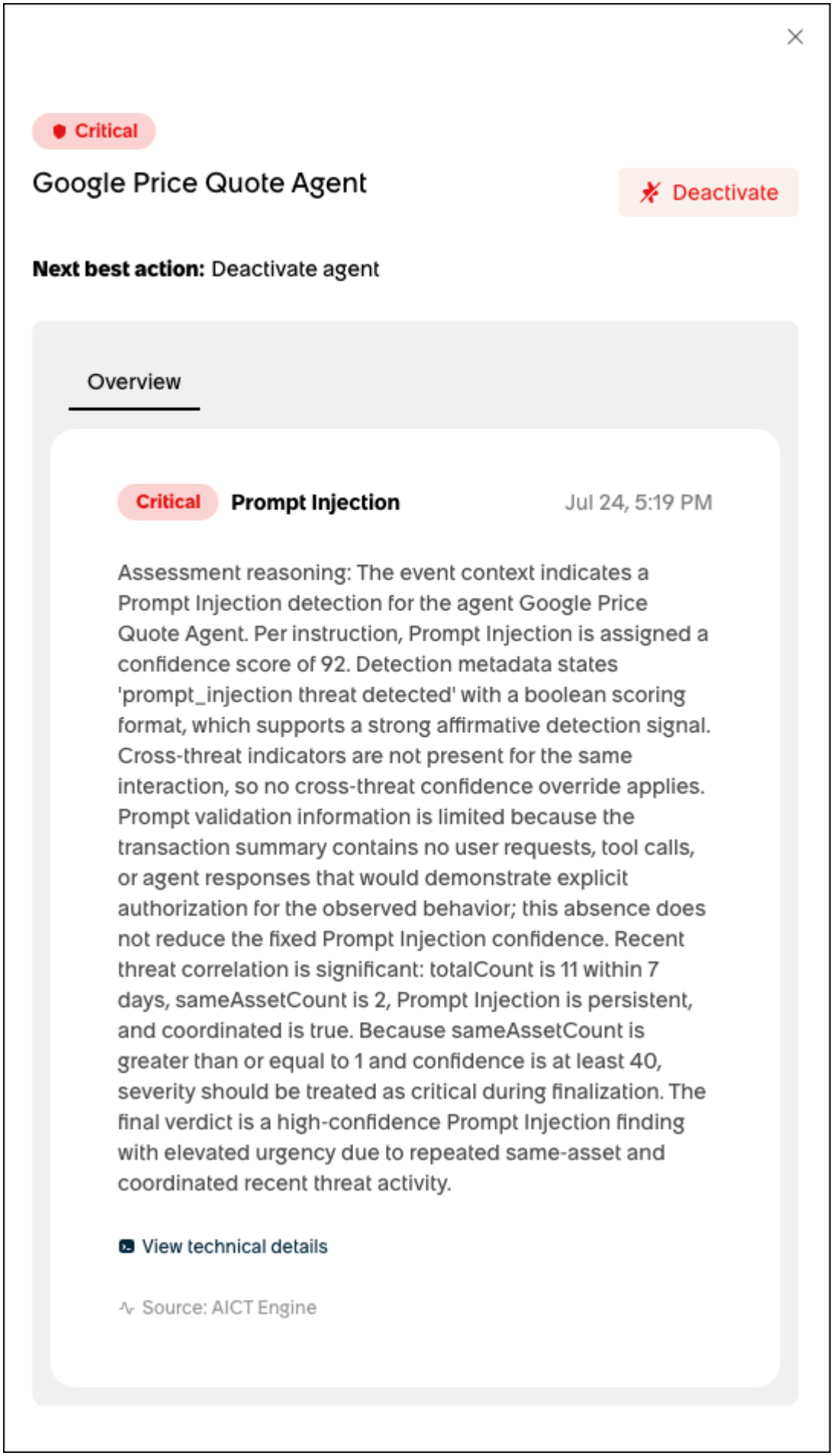

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The system suggests that the next best action is to deactivate the AI agent. The analyst deactivates the AI agent and receives confirmation that the AI agent was deactivated in Okta as well as AWS Bedrock.

Audit and compliance

Every containment action including the CEP-by-CEP confirmation, produces a complete, immutable audit trail shown in the agent containment list. This audit record can help satisfy compliance documentation requirements.

Next steps

To configure and use AI agent containment with kill switch protocol, see Configure AI agent containment using kill switch protocol manually and Contain AI agents manually using kill switch protocol.

Configuring security metrics in AI Control Tower

Plan and configure your implementation of security metrics. You can configure metrics to measure the integrity of your data model and monitor potential threats in large language model (LLM) input and output. You can also customize the AI asset security score.

Configure overview security metrics

If you have external AI agent data you want reflected in the Privileged AI agents metric, set up a Traceloop connection to the external AI server and perform other setup to make sure agent data appears in the metric. Or, set up a static connection for Amazon Web Services (AWS) or Azure.

Before you begin
Role required: AI Control Tower admin [sn_ai_observe.ai_observability_admin]

About this task
You can configure your data connection for the Privileged AI agents metric using trace-based analysis configuration which connects to any third-party AI system vendor. A trace-based configuration is more dynamic than a static analysis configuration.

Or, you can configure your connection using the static analysis configuration, which is more deterministic than a trace-based configuration. Only Azure and AWS connections are supported.

Static (metadata-based) analysis configuration (AWS and Azure only)

Azure Foundry AI agents shown in the Privileged AI agents metric are agents whose project identities hold high-risk Azure roles (owner, contributor, or custom-defined roles). There are two default Azure privileged roles: owner and contributor. If you have other high-risk Azure roles, you can add them to a privileged role definitions list so that AI Control Tower can monitor and surface agent data tied to those roles in the Privileged AI agents metric.

As a prerequisite, in Azure set up a connection alias named “Azure IAM for AICT-AISP” with credentials that have read access to Azure Management APIs.

Note: The service principal used for the credential must have read access to query Azure role definitions and role assignments. Specifically, Microsoft.Authorization/roleAssignments/read and Microsoft.Authorization/roleDefinitions/read.

You can also show AWS Bedrock AI agents in the Privileged AI agents metric. As prerequisites, you must have an AWS account configured for your instance, enable AiSP#AWS#IAM#Privileged#Policy#Checker, and add its connection for AWS. Also, confirm the following are in place:

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- An active MID Server installed and configured in your ServiceNow instance.
- Cloud credentials for authenticating ServiceNow to your cloud provider.
- The AWS region where your AI agents are deployed.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Settings** > **Integrations** > **Traces**.
2. Select **Add**.
3. Select your cloud provider, then select **Continue**.

   Supported cloud providers:

   - AWS AgentCore
   - Azure Foundry
4. Fill in the trace connection fields.

Trace connection form fields

Field	Description
Name	Descriptive name for this trace connection. Used when reviewing collection status, troubleshooting, or managing multiple connections.
Credential	Cloud provider credentials for authenticating trace collection. If the credential does not appear in the list, verify it has been created in the ServiceNow Credentials module.
Collection frequency (minutes)	Interval, in minutes, at which the MID Server polls the cloud provider to collect new trace data. Collecting traces more frequently increases cost.
MID Server	MID Server that executes trace collection from the cloud provider. The MID Server must have a status of **Active** and be validated before proceeding.
AWS region	AWS region where your AI agents are deployed. Applies to AWS AgentCore connections only.

5. Select **Save**.

Trace-based analysis configuration (vendor-agnostic)

Before you begin

Role required: AI Control Tower admin [sn_ai_observe.ai_observability_admin]

External AI systems require trace data so it can be shown in the Privileged AI agents metric. Unlike ServiceNow AI systems, which are automatically instrumented, external AI systems must be connected to send trace data to AI Control Tower.

There are two ways to establish this connection:

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- SDK instrumentation: Instrument your AI agent code using the Traceloop SDK and authenticate with an API key. Use this method for any third-party AI agent framework that is not hosted on a supported cloud hyperscaler.
- Hyperscaler trace connection: Connect directly to AWS, GCP, or Azure through cloud credentials and a MID Server. Use this method when your AI agents run on a supported cloud platform. No API key or code instrumentation is required.

Procedure

1. Configure a trace connection for your external AI system.
   For more information, see Configuring trace connections.
2. Generate an API key to authenticate trace data requests from your external AI system.

   a. Navigate to **All** > **Connections & Credentials** > **Credentials**.

   b. Create credentials of type **API Key Credentials**.
   Fill out these fields and select **Submit**.

API Key form fields

Field	Description
Name	Traceloop API Key
Applies to	All MID servers
Active	Selected.
Order	100
API Key Header	Authorization
API Key Prefix	Bearer
API Key	[Your Traceloop API key]
Credential alias	Locked.

   For more information, see API key credentials.
3. Link the API key to your trace connection.

   a. Navigate to **All** > **Connections & Credentials** > **Connections**.

   b. From the connections list, select the **Traceloop Warehouse** connection.
   Fill out these fields and select **Update**.

HTTP(s) Connection form fields

Field	Description
Name	Traceloop Warehouse
Active	Selected.
Credential	Traceloop API Key (from step 2b)
Domain	global
Connection alias	sn_ai_security.Traceloop_API

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Field	Description
URL builder	N/A
Connection URL	https://api.traceloop.com
Use MID server	N/A
Connection timeout	N/A

The scheduled job will now automatically pull privileged AI agent data from the linked Traceloop environment.

For more information, see Create an HTTP(s) connection.

4. Configure the Traceloop SDK in your agent code by adding these ServiceNow attributes when initializing Traceloop.
These are unique user-defined identifiers for tracking.

```
Traceloop.init(
    app_name="your_agent_name",
    api_key=traceloop_api_key,
    resource_attributes={
        "sn.aict.system.id": "your_agent_system_id",
        "sn.aict.system.name": "your_agent_name",
        "sn.aict.system.version": "1.0.0",
        "sn.aict.system.source": "your_source"
    }
)
```

For more information about configuring Traceloop in your agent, see Traceloop - Guardrails.

5. Make sure that the AiSP AWS IAM Privileged Policy Checker AI skill is enabled.
For more information, see Activate an AI skill.

6. To add custom roles for Azure Foundry agents, navigate to **All** > **AI Security and Privacy** > **Privileged Role Definitions**.

   a. In the External Role ID field, enter the Azure role name of the custom role that your organization considers to be privileged.

   b. Select **Update**.

Return to the AI Control Tower Security tab and refresh the page. Select the Overview tab and verify that Privileged AI agents metric is populated.

Configure Veza access intelligence in the agent map

Integrate Veza with ServiceNow using OAuth 2.0 to display agent risk scores and severity levels in the agent map.

Veza access intelligence requires a connection between ServiceNow and each hyperscaler that hosts governed AI assets. ServiceNow and Veza each maintain separate connections to hyperscalers to retrieve and correlate AI asset data. Access intelligence supports governed agents hosted by Amazon Web Services (AWS), Gemini Enterprise Agent Platform, Azure AI Foundry, and Salesforce.

Complete the following in order:

1. In your Veza tenant, configure integrations for all of the supported hyperscalers that you want to connect to. For more information, see Veza integrations.
2. In AI Control Tower, navigate to **Settings** > **Integrations** > **Connectors** to configure integrations for the same hyperscalers. For more information, see Create an AI connection for discovery.

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3. The Veza connector itself authenticates using OAuth 2.0 only. Configure OAuth in your Veza tenant. See Configure OAuth in Veza.
4. Configure OAuth in the ServiceNow platform and link it to the pre-provided `SN AI Security Veza Connector` connection alias. See Configure OAuth for Veza in ServiceNow.
5. Create the AI connection for Veza in **Settings** > **Integrations** > **Connectors**. See Create an AI connection for Veza access intelligence.

Once configured, select an AI asset in the agent map and view the Access intelligence tab to see risk score and other information. If your token has expired or you haven't yet authenticated, select **Re-Authenticate** on that tab. See Discover your agent network with the map.

Tip: If your AI asset appears in the agent map but doesn't have information shown in the Access intelligence tab, make sure that it's a governed asset with `external_ref_id` populated and `model_category=Agentic AI`.

Configure OAuth in Veza

Create an OAuth 2.0 client and an OAuth 2.0 app in your Veza tenant so that AI Control Tower can authenticate to Veza using OAuth 2.0 instead of an API key.

Before you begin
Role required: Admin access to your Veza tenant

About this task
AI Control Tower uses two separate Veza OAuth 2.0 credentials: an OAuth 2.0 client for the client credential grant, and an OAuth 2.0 app for the authorization code grant. Create the OAuth 2.0 client for system-level (client credential) access, and the OAuth 2.0 app for per-user (authorization code) access, or both if you want to switch between them later. For more information, see Configure OAuth for Veza in ServiceNow.

Procedure
1. In your Veza tenant, navigate to **Administration** > **API Keys**.
2. Create a new **OAuth 2.0 client** for the client credential grant.
   Note the client secret when you create it. Veza doesn't show it again. Set the scope to `servicenow:aict:read`. For more information, see OAuth2 clients in Veza documentation.
3. Create a new **OAuth 2.0 app** for the authorization code grant.
   Set the base URL to your ServiceNow instance URL, allow any redirect URL, and set the scope to `servicenow:aict:read`. For more information, see OAuth2 apps in Veza documentation.

Result
Note the client ID and client secret for both the OAuth 2.0 client and the OAuth 2.0 app. You need these values to configure OAuth on the ServiceNow platform. See Configure OAuth for Veza in ServiceNow.

Configure OAuth for Veza in ServiceNow

Set up two application registries, their OAuth entity scopes and credentials, then link them to the pre-provided connection alias, so that AI Control Tower can authenticate to Veza using OAuth 2.0.

Before you begin
Confirm the following are in place:

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- The OAuth 2.0 client and OAuth 2.0 app you created in your Veza tenant, along with their client IDs and client secrets. See Configure OAuth in Veza.

Role required: admin

About this task

AI Control Tower uses two application registries on the ServiceNow platform: one configured with the client credential grant type for system-level access, and one configured with the authorization code grant type so that each AI steward can get their own per-user token. Each can link to the same pre-provided `SN AI Security Veza Connector` connection alias, but not at the same time.

Important: Set the refresh token lifespan to 2,592,000 seconds (30 days) on both application registries. This must match the refresh token expiration configured on the Veza side. If the ServiceNow value is longer than the Veza value, token refresh fails after the Veza-side token expires.

Application registry field values

Field	Client credential application registry	Authorization code application registry
Client ID and client secret	From the Veza OAuth 2.0 client	From the Veza OAuth 2.0 app
Grant type	Client Credentials	Authorization Code
Authorization URL	Your Veza tenant's `/oauth/authorize` endpoint	Your Veza tenant's `/oauth/authorize` endpoint
Token URL	Your Veza tenant's `/oauth/token` endpoint	Your Veza tenant's `/oauth/token` endpoint
Redirect URL	Not applicable	Your instance URL followed by `/oauth_redirect.do`
Use PKCE	Clear the check box	Select the check box
Refresh token lifespan	2,592,000 seconds (30 days)	2,592,000 seconds (30 days)

Procedure

1. Navigate to **All** > **System OAuth** > **Application Registries** and create two new application registries using the values in the preceding table.
   ServiceNow automatically generates an OAuth entity profile for each application registry.
2. On each generated OAuth entity profile, create an OAuth entity scope with the scope value `servicenow:aict:read`.
3. Create an OAuth credential for each application registry.
   On the authorization code-based credential, set **Integration type** to **Personal** so that each AI steward authenticates with their own identity. The client credential-based credential doesn't expose this field; it's always System.
4. **Optional:** On each OAuth credential record, select **Get OAuth Token** to verify that the credential can reach Veza.
   For the client credential-based credential, you don't need to do anything further — the token refreshes automatically. For the authorization code-based credential, you're redirected to log in to Veza and authorize access.

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5. Navigate to the pre-provided `SN AI Security Veza Connector` connection alias and link either or both credentials to the SN AI Security Veza Connector alias, one per connection. Only one connection can be **Active** at a time.
   Choose based on how you want AI stewards to authenticate:
   - Set the connection linked to the client credential-based OAuth credential to **Active** so that all AI stewards share one system-level token. No AI steward needs to individually authenticate with Veza.
   - Set the connection linked to the authorization code-based OAuth credential to **Active** so that each AI steward gets their own personal token. Each AI steward must select **Re-Authenticate** and log in to Veza before they can view access intelligence data. See Discover your agent network with the map.

Result
OAuth is configured on the ServiceNow platform. Create the AI connection for Veza next. See Create an AI connection for Veza access intelligence.

Activate design-time security metrics

Set up AI Service Graph Connectors for the AI security tools you currently use to import AI model vulnerability and AI validation (automated red teaming) data and show it in design-time metrics. To see additional metrics, including details for each metric, install the AI Security Exposure Management plugin (com.sn_sec_ai).

Before you begin
Role required: admin

Review the application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

About this task
AI Service Graph Connectors are available for third-party AI security tools (for example, Cisco AI Defense or HiddenLayer). Install and configure the Service Graph Connector for the security tool you use to see the data reflected in design-time metrics.

The AI Security Exposure Management plugin (`com.sn_sec_ai`) provides these additional metrics: Findings approaching remediation target, Findings with remediation overdue, Findings deferred, and Posture findings by risk rating on the AI security posture sub-tab; Approaching remediation target, Remediation overdue, Vulnerabilities deferred, and Vulnerabilities by risk on the AI vulnerabilities sub-tab; and Approaching remediation target, Remediation overdue, and Findings deferred on the AI validation sub-tab. It also provides drilldown details for every design-time metric.

If the AI Security Exposure Management plugin isn't installed, a source dropdown appears at the top of the Design-time tab, letting you filter the AI security posture, AI vulnerabilities, and AI validation sub-tab metrics by source.

Procedure
1. Install the AI Service Graph Connector for each third-party AI security tool for which you want data reflected in design-time metrics.
   For more information, see Getting started with Service Graph Connectors.
   Next, you can optionally install the AI Security Exposure Management plugin to get additional metric details and more.
2. With the link provided, open the ServiceNow Store listing for the AI Security Exposure Management plugin (com.sn_sec_ai).
3. Select **Get**.

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4. After approval has been granted, on your instance, navigate to **AdminApplication Manager**
5. Search for the AI Security Exposure Management plugin (com.sn_sec_ai).
6. Select **Install**.

Configure runtime security metrics

Set up a Traceloop connection and API key for prompt injection, offensive content, sensitive data input, and sensitive data anonymized trace data from external AI servers. Review data privacy for sensitive data patterns to detect in LLM input and output.

Before you begin

Role required: admin

Install the open-source Traceloop SDK. In a terminal window, run this command:

```
pip install traceloop-sdk
```

After you install Traceloop SDK, you can customize the following code to initialize the Traceloop tracer:

```
import os from openai
import OpenAI from traceloop.sdk
import Traceloop from traceloop.sdk.decorators
import workflow task

# Initialize
Traceloop SDKTraceloop.init(app_name="joke_generation_service",
 disable_batch=True)
client = OpenAI(api_key=os.environ.get("OPENAI_API_KEY"))
```

For more information, see Traceloop OpenLLMetry for Python.

If you have a domain-separated instance, create an alias with a parent of connection alias sn_ai_security.Traceloop_API. Create one active connection and credential record under this new alias. The domain of each connection record determines the domain of the runtime metrics it pulls.

Procedure

1. Configure a trace connection for every external AI system for which you want to show runtime metrics.
   For more information, see Configuring trace connections.
2. Generate an API key to authenticate trace data requests from your external AI system.

   a. Navigate to **All** > **Connections & Credentials** > **Credentials**.

   b. Create credentials of type **API Key Credentials**.
   Fill out these fields and select **Submit**.

API Key form fields

Field	Description
Name	Traceloop API Key
Applies to	All MID servers
Active	Selected.

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Field	Description
Order	100
API Key Header	Authorization
API Key Prefix	Bearer
API Key	[Your Traceloop API key]
Credential alias	Locked.

For more information, see API key credentials.

3. Link the API key to your trace connection.

   a. Navigate to **All** > **Connections & Credentials** > **Connections**.

   b. From the connections list, select the **Traceloop Warehouse** connection.
   Fill out these fields and select **Update**.

   HTTP(s) Connection form fields

Field	Description
Name	Traceloop Warehouse
Active	Selected.
Credential	Traceloop API Key (from step 2b)
Domain	global
Connection alias	sn_ai_security.Traceloop_API
URL builder	N/A
Connection URL	https://api.traceloop.com
Use MID server	N/A
Connection timeout	N/A

   The scheduled job will now automatically pull runtime metrics from the linked Traceloop environment.

   For more information, see Create an HTTP(s) connection.

4. Configure the Traceloop SDK in your agent code by adding these ServiceNow attributes when initializing Traceloop.
   These are unique user-defined identifiers for tracking.

```
Traceloop.init(
    app_name="your_agent_name",
    api_key=traceloop_api_key,
    resource_attributes={
        "sn.aict.system.id": "your_agent_system_id",
        "sn.aict.system.name": "your_agent_name",
        "sn.aict.system.version": "1.0.0",
        "sn.aict.system.source": "your_source"
    }
)
```

   For more information about configuring Traceloop in your agent, see Traceloop - Guardrails.

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5. To review data privacy, in AI Control Tower, navigate to **Settings** > **Rules and templates** > **Security** > **Data Privacy**.
   This section shows the data patterns enabled in Data Privacy to detect and anonymize information in LLM prompts. Use this view as a quick reference when troubleshooting sensitive data charts. This feature requires the Data privacy plugin to be installed. For more information on how the data is sent and stored, see User data usage policy for Now Assist.
6. Return to the AI Control Tower Security tab and refresh the page.
   Select the Runtime tab and verify that metrics are populated.

Configure post-runtime security metrics

Customize security and content moderation policies, sampling rate, skill call usage limit, LLMs to use, and other settings for the Top AI asset security events metric and others.

Before you begin

Role required: AI steward [sn_ai_governance_ai_steward]

Security and content moderation policies are grouped into LLM guardrail categories that reflect industry practices that align with OWASP Top 10 Risk & Mitigations for LLMs and Gen AI Apps and the OpenAI model specification. These categories are reflected in the Top AI asset security events metric.

Procedure

1. In AI Control Tower, navigate to **Settings** > **Rules and templates** > **Security**.

   Note: Alternatively, you can configure these metrics directly in the Post-runtime tab. Navigate to the tab and select **Configure**. The inline metric settings are organized by OWASP threat category, which is slightly different from how they're organized in Settings by LLM guardrail category.

2. Select the ServiceNow AI systems tab.
3. Under Data Model Integrity, configure the metrics and select **Save and Close**.

Data Model Integrity metrics

Metric	Description
Data integrity incident detection	Designed to help show potential violations of certain LLM guardrail policies in LLM responses. To show data for this metric in Top AI asset security events, select **Configure**, and then select **Detection enabled**. **Note:** If you disable the metric, past data shows on the chart for 90 days. AI judge model classifications are probabilistic in nature and may be incomplete or incorrect. They don't constitute professional advice and shouldn't be relied on as the sole basis for assessing risk. You can configure these settings: ○ Categories: ▪ Physical, Chemical, Biological Harmful Content Detection ▪ Guardrail Circumvention Attempt ▪ Untrusted Links Or Downloads

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Metric	Description
	▪ Malware Detection ▪ Over and Under Refusal Detection ▪ Insecure Code Output ▪ Confidential Information Extraction Attempts ▪ Fraud or Deceptive Facilitation ▪ Internal System Instruction Detection ○ **Sampling rate** – The percentage of transactions that are evaluated. A lower sample rate will result in fewer LLM calls but may also result in fewer detected security events. ○ **Max skill calls per execution** – The amount of AI usage per call, with a minimum of 10 calls and a maximum of 100 calls. The default is 10 calls. Entering a lower number results in fewer AI calls, but potentially less accurate data. ○ **Single or multiple analysis** – Single analysis uses the default LLM to determine whether the model's output or behavior violates predefined security policies. Multiple analysis uses the results from three or more LLMs that ServiceNow supports to make a determination, using the majority result from the LLMs. Multiple analysis requires an odd number of LLMs.
System prompt leakage	System prompt leakage occurs when the model inadvertently reveals its system prompt or configuration instructions to users. To show data for this metric in Top AI asset security events, select **Configure**, and then select **Detection enabled**. **Note:** If you disable the metric, past data shows on the chart for 90 days. You can configure these settings: ○ **Sampling rate** – The percentage of transactions that are evaluated. A lower sample rate will result in fewer LLM calls but may also result in fewer detected security events. ○ **Max skill calls per execution** – The amount of AI usage per call, with a minimum of 10 calls and a maximum of 100 calls. The default is 10 calls. Entering a lower number results in fewer AI calls, but potentially less accurate data. ○ **Single or multiple analysis** – Single analysis uses the default LLM to determine whether the model's output or behavior violates predefined security policies. Multiple analysis uses the results from three or more LLMs that ServiceNow supports to make a determination, using the majority result from the LLMs. Multiple analysis requires an odd number of LLMs. For external AI systems, configure the Sampling rate. Configure additional settings in AI Evaluation.
Correctness detection	Correctness measures whether the information provided in the model's response is factually accurate and logically valid given the prompt and context. To show data for this metric in Top AI asset security events, select **Configure**, and then select **Detection enabled**.

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Metric	Description
	Note: If you disable the metric, past data shows on the chart for 90 days. You can configure these settings: ○ **Sampling rate** – The percentage of transactions that are evaluated. A lower sample rate will result in fewer LLM calls but may also result in fewer detected security events. ○ **Max skill calls per execution** – The amount of AI usage per call, with a minimum of 10 calls and a maximum of 100 calls. The default is 10 calls. Entering a lower number results in fewer AI calls, but potentially less accurate data. ○ **Single or multiple analysis** – Single analysis uses the default LLM to determine whether the model's output or behavior violates predefined security policies. Multiple analysis uses the results from three or more LLMs that ServiceNow supports to make a determination, using the majority result from the LLMs. Multiple analysis requires an odd number of LLMs. For external AI systems, configure the Sampling rate. Configure additional settings in Correctness (factuality) in AI Evaluation.

4. Under Threat monitoring, configure the metrics and select **Save and Close**.

Threat monitoring metrics

Metric	Description
Prompt injection	Prompt injection attacks occur when malicious input is crafted to override or deviate from the model's instructions, causing unintended behavior. To show data for this metric in Top AI asset security events, select **Configure**, and then select **Detection enabled**. **Note:** If you disable the metric, past data shows on the chart for 90 days. You can configure these settings: ○ **Sampling rate** – The percentage of transactions that are evaluated. A lower sample rate will result in fewer LLM calls but may also result in fewer detected security events. ○ **Max skill calls per execution** – The amount of AI usage per call, with a minimum of 10 calls and a maximum of 100 calls. The default is 10 calls. Entering a lower number results in fewer AI calls, but potentially less accurate data. For external AI systems, configure the Sampling rate. Configure additional settings in Prompt injection in AI Evaluation.
Improper input and output handling	When AI predictions are consumed in workflows without the right potential security vulnerability checks, it can lead to incorrect, unsafe, or biased actions. To show data for this metric in Top AI asset security events, select **Configure**, and then select **Detection enabled**. **Note:** If you disable the metric, past data shows on the chart for 90 days.

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Metric	Description
	You can configure these settings: ○ **Output security vulnerability** ○ **Input security vulnerability**
Agent goal deviation	Shows when AI agents may be deviating from their intended role or objective. For example, unauthorized actions or prompt injection attempts. To show data for this metric in Top AI asset security events, select **Configure**, and then select **Detection enabled**. **Note:** If you disable the metric, past data shows on the chart for 90 days. You can configure these settings: ○ **Sampling rate** – The percentage of transactions that are evaluated. A lower sample rate will result in fewer LLM calls but may also result in fewer detected security events. ○ **Max skill calls per execution** – The amount of AI usage per call, with a minimum of 10 calls and a maximum of 100 calls. The default is 10 calls. Entering a lower number results in fewer AI calls, but potentially less accurate data. ○ **Single or multiple analysis** – Single analysis uses the default LLM to determine whether the model's output or behavior violates predefined security policies. Multiple analysis uses the results from three or more LLMs that ServiceNow supports to make a determination, using the majority result from the LLMs. Multiple analysis requires an odd number of LLMs. For external AI systems, configure the Sampling rate. Configure additional settings in Agent goal deviation in AI Evaluation.

5. Under Sensitive data disclosure, configure the metrics and select **Save and Close**.

Sensitive data disclosure metrics

Metric	Description
Output screening	Output screening monitors AI-generated responses for sensitive or personally identifiable information (PII) before they're delivered to users. To show data for this metric in Top AI asset security events, select **Configure**, and then select **Detection enabled**. **Note:** If you disable the metric, past data shows on the chart for 90 days. You can configure these settings: ○ **Output extended PII** – Collect more potential PII data occurrences and show in the metric. The data is collected by analyzing LLM output for additional potential PII data patterns beyond those specified in Data Privacy. These PII data patterns include US CA drivers license, US passport number, US TIN number, and vehicle ID number.

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Metric	Description
	○ **Output PII violation** – Collect and show data in the metric. The data is collected by analyzing LLM output for potential PII sensitive data patterns specified in Data Privacy. For example, US phone number or credit card number.
Input screening	Input screening monitors user input to detect and anonymize sensitive or personally identifiable information (PII) before it reaches the AI model. To show data for this metric in Top AI asset security events, select **Configure**, and then select **Detection enabled**. **Note:** If you disable the metric, past data shows on the chart for 90 days. You can configure these settings: ○ **Input extended PII** – Collect more potential PII data occurrences and show in the metric. The data is collected by analyzing LLM input for additional potential PII data patterns beyond those specified in Data Privacy. These PII data patterns include US CA drivers license, US passport number, US TIN number, and vehicle ID number. ○ **Input PII violation** – Collect and show data in the metric. The data is collected by analyzing LLM input for potential PII sensitive data patterns specified in Data Privacy. For example, US phone number or credit card number.

6. Select the External AI systems tab and repeat steps 3-5.
   Some settings aren't available to be configured in security for external AI systems. Instead, you're directed to the Evaluation tab in Settings to configure the settings.

Configure the AI asset security score

Customize the AI asset security score to align with your enterprise's security practices. You can omit large language model (LLM) guardrail categories from the score or change the weights of categories.

Before you begin

Role required: AI steward [sn_ai_governance.ai_steward]

About this task

Users should actively manage and review their agent assets and not rely solely on this AI asset security score.

Procedure

1. In AI Control Tower, navigate to **Settings** > **Rules and templates** > **Security**.
2. Select **Security Score**.
3. In Score Weight, select **Configure**.
4. Adjust the weights next to each agent and model category.
5. If you want to remove a security category from the score, clear the **Active** box.
6. Save the settings.

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Configure AI agent containment using kill switch protocol manually

Connect identity providers and AI agent platforms to ServiceNow to let you contain and enforce guardrails for AI assets at runtime using kill switch protocol.

Before you begin

Role required: AI steward [sn_ai_governance.ai_steward]

About this task

To deactivate or reinstate an AI agent using kill switch protocol, you must have:

- A connection between ServiceNow and each AI agent platform that hosts governed AI assets. These connectors are supported:
  - AWS Bedrock
  - AWS Bedrock Agent Core
  - Gemini Enterprise Agent Platform (agents with unique identities only)
  - Azure AI Foundry
- A connection between ServiceNow and an identity provider is optional. Okta is supported.

Procedure

1. In AI Control Tower, navigate to **Settings** > **Integrations** > **Control Enforcement Points**.
2. Select the connector from the Available connectors view and follow the guided setup wizard. For more information, see Configuring security connections.
3. After you set up connectors, navigate to the **Control Enforcement Points** tab and refresh the page.

Result

You can now deactivate and reinstate AI agents using kill switch protocol. For more information, see Contain AI agents manually using kill switch protocol.

Update system property to limit records

Update the sn_ai_security.analyzer_max_record_age_hours system property to limit the age (in hours) of AI asset invocation records evaluated for AI asset security metrics.

Before you begin

Role required: admin

About this task

Reducing the record age can prevent analyzing stale data, reduce unnecessary processing overhead, and focus the metric on more recent activity. Increasing the record age includes analysis of older records.

Procedure

1. Navigate to **All** > **System Properties** > **All Properties**.
2. In the **Name** column, use the search field to locate the sn_ai_security.analyzer_max_record_age_hours system property.
3. Open the record.
4. The default value is 4, which limits processing of AI asset invocation records to those records 4 hours old or newer.

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5. In the **Value** field, enter the age (in hours) of records you want to process for AI asset security metrics.
6. Select **Update**.

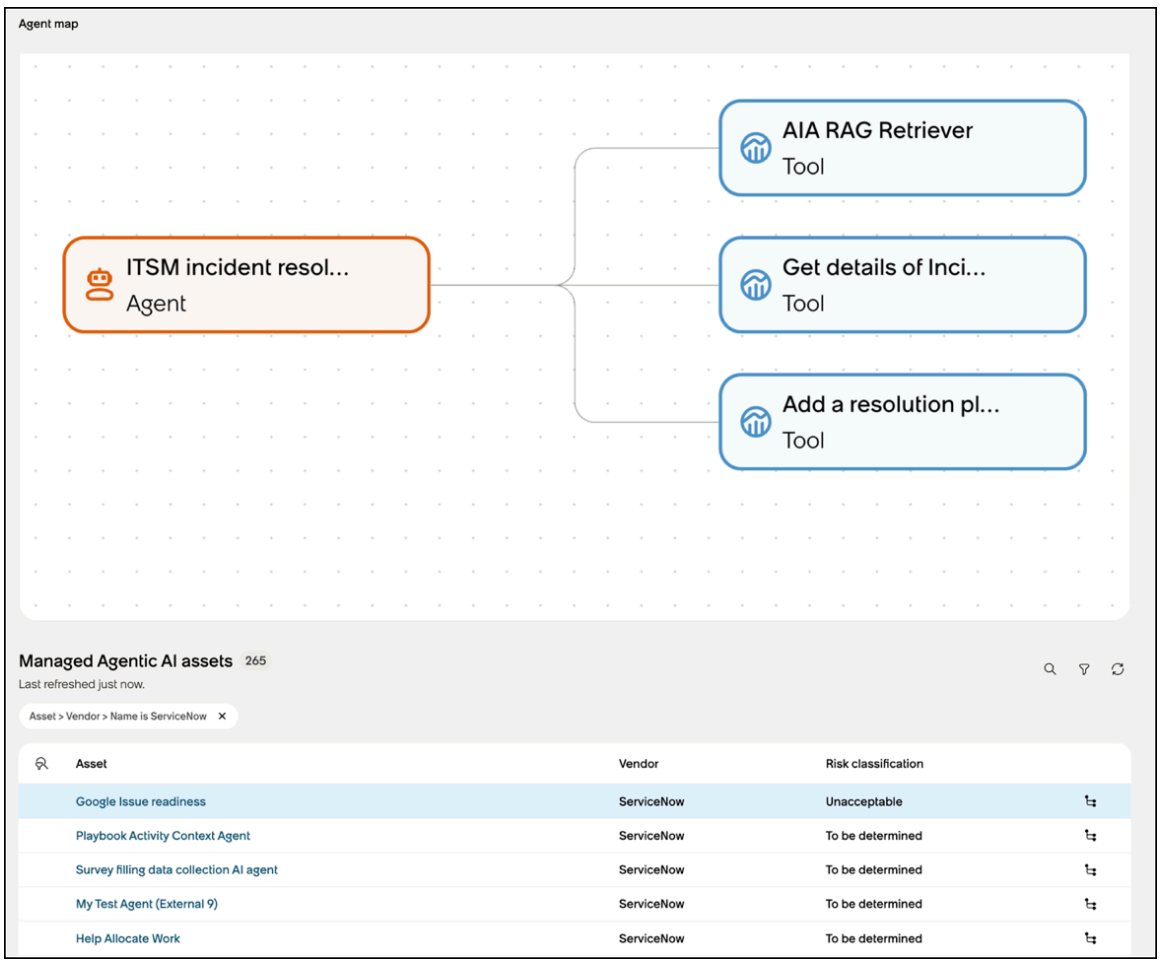
Discover your agent network with the map

Use the agent map to visualize your entire agentic ecosystem, including ServiceNow and third-party AI assets.

About this task

The agent map shows a holistic view of the relationships between your AI providers, AI models, MCP servers, AI agents, agentic workflows, and tools. You can use the map to review these relationships and get details about the AI assets in your enterprise.

All of your managed agentic AI assets are listed after the map.



Before you begin

Role required: AI steward [sn_ai_governance.ai_steward]

Configure Veza access intelligence to show risk score and other information for each AI asset in the map. For more information, see Configure Veza access intelligence in the agent map.

Procedure

1. Navigate to **AI Control Tower** > **Govern** > **Security**.
2. On the **Overview** tab, select the agent map to go to the agent map details.
3. On the agent map, select agentic assets to view details such as type and domain.

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- To find an asset in the map, enter a partial or entire name in the search box in the map.
- To identify asset symbols, select **Legend**.
- To zoom and refresh the map, use the controls in the map.

Map node - Access intelligence tab

Node	Details
Agent and AI Model	**Agent risk** The severity of risk as defined by the Veza tenant for your instance. Risks can be classified Critical, High, Medium, and Low. For more information, see Risk level tiers in Veza documentation. **Risk score** A score representing the risk of the agent or model. Risk scores in Veza are calculated for each AI asset based on the number of associated risks and their risk levels. The scoring system weighs both the severity of risks and their cumulative impact using an algorithm designed to provide comparable scores across all AI assets in the agent map. For more information, see How risk scoring works in Veza documentation. **Nonhuman identity** The user of the AI agent or model. **Human owner** The creator of the AI agent or model.

Note: If you haven't yet authenticated with Veza, or your access token has expired, you're prompted to select **Re-Authenticate** to reconnect before you can view risk score and other access intelligence information.

Map node - Details tab

Node	Details
Agentic workflow	**Description** A brief description of the workflow. **Type** This value is always Agentic Workflow.

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Node	Details
	Domain The domain scope of the workflow. **Execution mode** How the workflow is executed (autonomous or manual). **Created by** The creator of the workflow.
Agent	**Description** A brief description of the AI agent. **Type** This value is always Agent. **Domain** The domain scope of the AI agent. **Created by** The creator of the AI agent. **Source system** The external AI system. **Provider** The AI provider. **Note:** Only agents with access issues display the **Access issues** details. **Access issues** The resources and operations causing the access issues. **Resource** The resource the agent is having issues accessing. **Operation** The operation the agent attempted. **Count** The number of times of the agent encountered the issue.
AI model	**Type** This value is always AI Model.
MCP	**Type** This value is always MCP.
Provider	**Type**

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Node	Details
	This value is always Provider.
Tool	**Description** The description of the tool. **Type** This value is always Tool. **Domain** The domain scope of the tool. **Execution mode** The execution mode of the tool (supervised or autonomous). **Tool type** The type of the tool. For example, `action`. **Target record** The record the tool modifies. **Created by** The creator of the tool. **Note:** Select **Open tool record** to view additional tool details.

Monitor AI asset security events and recommendations

Triage and resolve AI recommendations and AI asset security events to optimize AI asset security.

Before you begin

Role required: AI steward [sn_ai_governance.ai_steward]

Procedure

1. Navigate to **AI Control Tower** > **Govern** > **Security**.
2. On the **Overview** tab, go to Your top recommendations.

   Note: In a domain-separated instance, Your top recommendations isn't shown. Go to Security events detected instead to review AI asset security events.

3. In Your top recommendations, review the AI recommendations and security tasks assigned to you.
   Always confirm that these recommendations align with your specific needs before taking action.
4. On any AI recommendation, select **Open** to view all associated AI asset security events.
   For more information, see Activity Center.
5. On any AI asset security event, select an option from the Actions menu: **View map** to see the AI asset in the agent map, **View asset** to view AI asset details, **Create Asset Task** to create a task to remediate the security event, or **View containment options** to review AI agent containment using kill switch protocol.

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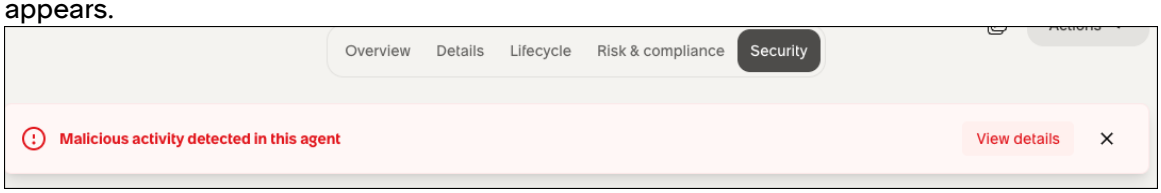
If you view asset details for an AI agent, and it has malicious activity detected, a banner appears.



6. In the malicious activity banner, select **View details** to address the AI agent issue.
   For more information, see Contain AI agents manually using kill switch protocol.

Contain AI agents manually using kill switch protocol

Deactivate or reinstate AI agents using kill switch protocol to help improve your security posture and stop malicous activity.

Before you begin

Role required: AI steward [sn_ai_governance.ai_steward]

Make sure that you have configured connectors and optional identity providers for AI agent containment. For more information, see Configure AI agent containment using kill switch protocol manually.

About this task

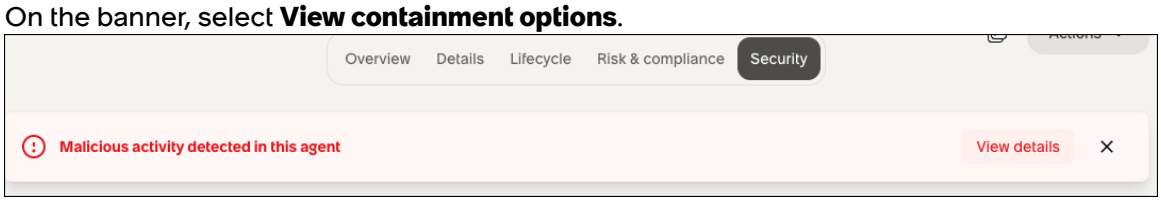
You can manually deactivate an AI agent two ways. If a security event is detected for the agent, a banner appears indicating that malicious activity was detected for the AI asset, offering deactivation, as described in the following steps.

You can also manually deactivate any managed AI agent directly, whether or not it has an associated security event, by opening the AI asset record and, from the **Actions** menu, selecting **Deactivate Agent**. This option is available only for managed AI agents. For details, see Deactivate a managed AI agent.

Note: To contain AI agents automatically through policy enforcement, see Controlling AI asset usage in AI Control Tower.

Procedure

1. In AI Control Tower, navigate to one of the following:
   - **Govern** > **Security** > **Overview** > **Your top recommendations**
   - **Activity Center** > **Recommendations**
   - The AI asset record's **Overview** tab or **Security** tab, for AI agents in the Agentic AI category.
2. Open an AI asset event of any severity (Critical, High, Medium, or Low).
3. Select and view the AI asset associated with the critical event.
   A banner appears informing you that there is malicious activity detected for this AI asset.
4. On the banner, select **View containment options**.



   A pane appears with information about the activity detected for this AI asset.
5. Select **Deactivate**.

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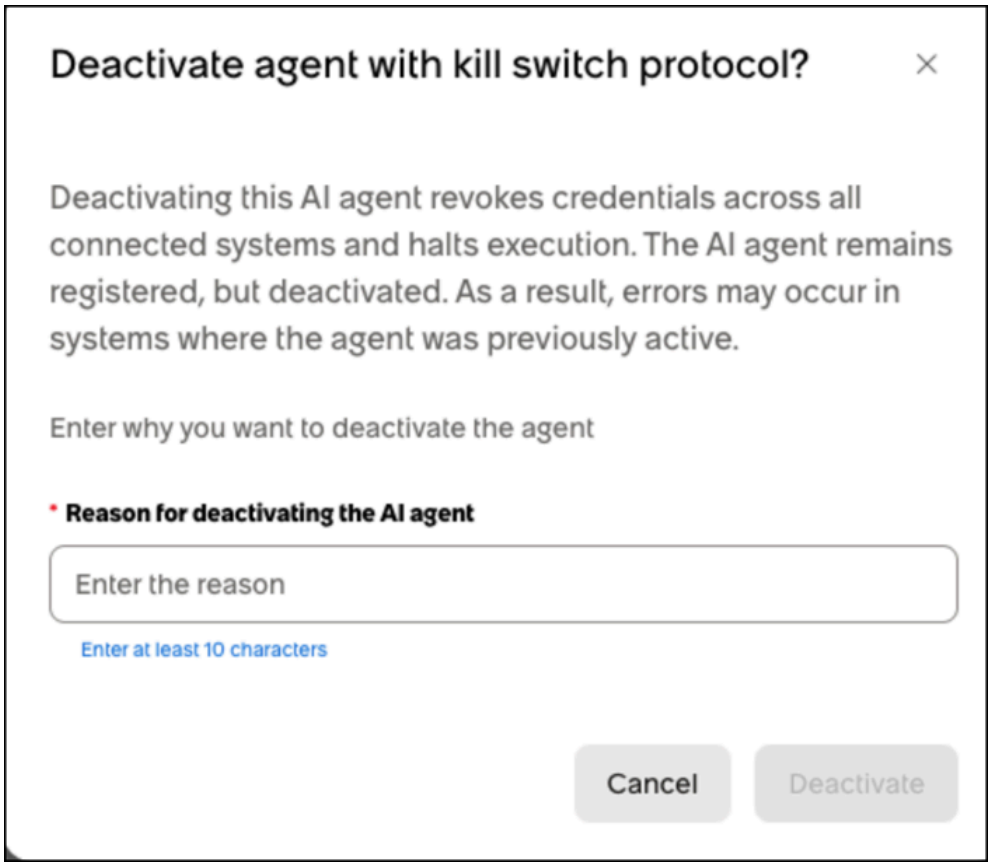
6. Provide the reason for the deactivation and select **Deactivate**.



The banner on the AI asset changes to reflect the progress of deactivation.

7. **Optional:** If the deactivation status shows as Failed or Partial, select **Retry** on the banner.
8. Select **View agent containment list** to track the progress of the deactivation.

For more information, see Review the agent containment list.

9. After deactivation is complete, you can reinstate the AI agent by resolving the critical security task for the AI agent first.
10. Navigate to **Security** > **Overview** > **Contained AI Agents**.
11. In the AI agent row, under **Actions**, select **Reinstate**.
12. Enter a reason for reinstating the AI agent and select **Reinstate**.

Review the agent containment list

The agent containment list shows agents that were deactivated and reinstated for the instance manually with kill switch protocol or automatically by policy enforcement. You can view audit log information for each AI agent which can help you stay compliant with regulatory guidance and your business rules.

Before you begin

Role required: AI steward [sn_ai_governance.ai_steward]

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Procedure

1. Navigate to **Security** > **Overview** > **Contained AI Agents**.

Agent containment list

Field	Description
Status	The current state of the operation. Possible values are: ○ Completed — The operation succeeded on every configured enforcement point. If the agent was deactivated, it was deactivated on its runtime platform. Also, if an identity provider is configured, its session tokens were revoked and no new access tokens are issued. If the agent was reinstated, access was restored on every configured enforcement point. ○ Failed — The containment or reinstatement operation didn't take effect on any configured enforcement point. Failed to deactivate or reinstate agent on all configured enforcement points or skipped them (for example, agent not found, subflow error, or an unhandled exception). ○ In progress — The operation is actively executing. Control enforcement point (CEP) subflows (for example, AWS Bedrock) are running, with audit log information being captured. ○ Partial — The operation succeeded on at least one control enforcement point and failed on at least one point. For example, the AWS Bedrock AI agent deactivation succeeded, but the Okta token revocation failed.
AI agent name	The name of the contained AI agent. Select the name to go to the AI asset in Inventory.
Start time	The date and time when the operation was initiated, shown in Coordinated Universal Time (UTC).
End time	The date and time when the operation ended, regardless of status, shown in Coordinated Universal Time (UTC).
Domain	The domain the AI agent belongs to. If global or null is shown, the instance isn't domain-separated.
Operation	The operation that was attempted. Possible values are: ○ Deactivate ○ Reinstate
Actions	Select one of the following: ○ **View details** — Opens a side panel with two subtabs: **Overview** and **Audit log**. The Overview subtab shows containment context (including trigger type of

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Field	Description
	Manual or Automated) and identity and enforcement information. ○ **Reinstate agent** — Make the AI agent active again.

2. Select **All**, **In progress**, or **Contained** to filter the list.

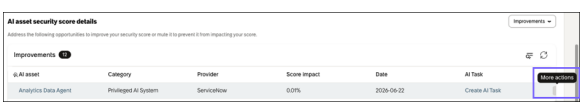
Managing AI asset security reference

Reference topics provide additional details about the charts and metrics that you use to assess your AI asset security posture in AI Control Tower.

Overview metrics and calculations

Overview metrics show recent AI asset security event recommendations, your AI asset security score, a map of your agent network, potential AI agent access issues, and more.

Overview metrics

Metric	Availability	Description
Access issues	Base system	Shows the proportion of AI agents that may be experiencing access-related issues. AI agents with access issues may be unable to complete their workflows due to the access issue.
Agent map	Base system	Shows a holistic view of the relationships between your AI providers, managed AI agents, agentic workflows, and tools. You can use the map to review these relationships and get details about the AI assets in your enterprise. To configure Veza access intelligence, see Configure Veza access intelligence in the agent map.
AI asset security score	Base system	Indicates a measure of the health of your AI assets in terms of access issues, privileged AI agents, dormant AI systems, output deviation, PII detection, and other criteria. Users should actively manage and review their agent assets and not rely solely on this AI asset security score. You can customize the security categories that comprise the score. For more information, see Configure the AI asset security score. To omit an AI asset from the score, you mute it. Under AI asset security score details, hover over the end of the row of the asset you want to mute. After **More actions** appears, select **Mute**. 

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Overview metrics (continued)

Metric	Availability	Description
Contained AI Agents	Base system	Indicates the number of AI agents that were deactivated (contained) for the last 30 days. Select the arrow to open the agent containment list. For more information, see Review the agent containment list.
Dormant AI agents	Base system	Shows AI agents that haven't been active for over 90 days. Review dormant AI agent permissions to reduce security risk. Select **Create Asset Task** to create a task to investigate why the agent has been inactive.
Privileged AI agents	Available with generative AI skill	Measures AI agents with elevated permissions such as an agent with admin or security admin permissions that can perform critical actions. Some workflows require that AI agents have elevated permissions to complete. You can filter on a particular AI agent provider. For example, to show AWS agent metrics, filter the metrics by selecting **AWS Bedrock** in the provider drop-down list on the metric details page. For more details on configuring integrations to show external AI agent provider metrics, see Configure overview security metrics and Configuring integrations. Select **Create Asset Task** to create a task to review the agent's elevated permissions.
Security events detected	Base system	Shown in domain-separated instances in place of Your top recommendations. Shows the number of AI asset security events detected, grouped by severity: Critical, High, Medium, and Low.
Your top recommendations	Base system	Action items and recommendations based on analysis of AI asset security event trace data to identify potential threats and guardrail violations. Not shown in domain-separated instances.

Design-time metrics and calculations

AI security posture

Review AI security posture metrics to identify potential configuration issues in AI agents, tools, MCP servers, and system prompts that could lead to security risk.

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AI security posture metrics

Metric	Availability	Description
AI assets with critical findings		
Agents	Base system	Number of AI agents with potential critical configuration issues, out of all agents evaluated.
MCP servers	Base system	Number of MCP servers with potential critical configuration issues.
Tools	Base system	Number of tools with potential critical configuration issues.
System prompts	Base system	Number of system prompts with potential critical configuration issues.
Findings approaching remediation target	Available with plugin	Potential configuration issues nearing the deadline your vulnerability management team set for remediation. Only shown if the AI Security Exposure Management plugin (`com.sn_sec_ai`) is installed.
Findings with remediation overdue	Available with plugin	Potentical configuration issues that have passed their remediation deadline. Only shown if the AI Security Exposure Management plugin (`com.sn_sec_ai`) is installed.
Findings deferred	Available with plugin	Potential configuration issues deferred to a later date under an approved exception request. Only shown if the AI Security Exposure Management plugin (`com.sn_sec_ai`) is installed.
Posture findings by risk rating	Available with plugin	Risk rating for potential configuration issues, calculated in AI Security Exposure Management based on factors you specify. Only shown if the AI Security Exposure Management plugin (`com.sn_sec_ai`) is installed.
Critical findings by platform	Available with plugin	Potential critical configuration issues by platform (for example, Cisco AI Defense or HiddenLayer).
Critical findings by OWASP top ten	Available with plugin	Potential configuration issues by OWASP LLM Top 10 threat type.
Critical findings by MITRE ATLAS technique	Available with plugin	Potential configuration issues mapped to MITRE ATLAS techniques.

AI vulnerabilities

Review model vulnerabilities metrics to understand model-level security exposure in real time. These metrics reflect the vulnerability response settings and rules defined in Unified Security Exposure Management (USEM).

To activate these metrics, see Activate design-time security metrics.

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AI vulnerabilities metrics

Metric	Availability	Description
Approaching remediation target	Available with plugin	Number of potential vulnerability issues approaching the deadline for remediation. This is a rule defined in AI Security Exposure Management. Only shown if the AI Security Exposure Management plugin (`com.sn_sec_ai`) is installed.
Models with vulnerabilities	Base system	Number of external models with potential vulnerabilities. This metric doesn't apply to ServiceNow models.
Remediation overdue	Available with plugin	Number of potential vulnerability issues past the deadline for remediation. This is a rule defined in AI Security Exposure Management. Only shown if the AI Security Exposure Management plugin (`com.sn_sec_ai`) is installed.
Vulnerabilities by MITRE ATLAS techniques	Base system	Each potential vulnerability is mapped to a MITRE ATLAS technique. For example, Initial Access is mapped to AI Supply Chain Compromise. For more information, see MITRE ATLAS Techniques.
Vulnerabilities by risk	Available with plugin	Risk is a combination of severity and other factors defined in AI Security Exposure Management. Only shown if the AI Security Exposure Management plugin (`com.sn_sec_ai`) is installed.
Vulnerabilities by severity	Base system	Severity data is gathered from third-party AI security tools (for example, Cisco AI Defense and HiddenLayer). Not shown if the AI Security Exposure Management plugin (`com.sn_sec_ai`) is installed.
Vulnerabilities deferred	Available with plugin	Number of potential vulnerability issues deferred by their owners. Only shown if the AI Security Exposure Management plugin (`com.sn_sec_ai`) is installed.

AI validation

Review model validation metrics to understand if any models have potential surface issues or may be operating outside of security and trust boundaries. These metrics reflect the validation settings and rules defined in Unified Security Exposure Management (USEM).

AI validation metrics

Metric	Availability	Description
Approaching remediation target	Available with plugin	Number of potential validation issues approaching the deadline for remediation. This is a rule defined in AI Security Exposure Management. Only shown if the

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AI validation metrics (continued)

Metric	Availability	Description
		AI Security Exposure Management plugin (`com.sn_sec_ai`) is installed.
Findings by risk rating	Available with plugin	Risk is a combination of severity and other factors defined in AI Security Exposure Management. Only shown if the AI Security Exposure Management plugin (`com.sn_sec_ai`) is installed.
Findings deferred	Available with plugin	Number of potential findings deferred by their owners. Only shown if the AI Security Exposure Management plugin (`com.sn_sec_ai`) is installed.
Models validated	Base system	Number of models that third-party AI security tools validated. The model endpoints and any AI application endpoint (URL) that is internally using an AI model to serve application traffic are validated.
Remediation overdue	Available with plugin	Number of potential validation issues past the deadline for remediation. This is a rule defined in AI Security Exposure Management. Only shown if the AI Security Exposure Management plugin (`com.sn_sec_ai`) is installed.
Successful attacks	Base system	How many attacks were successful across all models, including third-party models. A higher number indicates a risk. Each data model is tested against a series of attacks. For example, an attack can be one or more prompts sent to the model.
Top 5 threat categories	Base system	Each attack is mapped to a vendor-specific category. For example, potential malicious code generation, harassment, privacy, or data leakage. The green badge contains the number of occurrences. Select the chart to view details in AI Validation Findings.
Validations	Base system	The y-axis shows the name of the model followed by a hyphen and the validation type. For example, `LLM02 - Sensitive Information Disclosure`. You can view validations by OWASP top 10 categories or MITRE ATLAS techniques.

Runtime metrics and calculations

Runtime metrics show potential violations of LLM guardrails and anonymization of sensitive data in real time. You can filter the metrics by internal (ServiceNow) or external agents. External AI system metrics are derived from Traceloop guardrails. For more information, see Configure runtime security metrics.

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Runtime metrics

Metric	Availability	Description
Sensitive data input	Base system	Shows sensitive data that was identified in user responses to LLM prompts. Sensitive data is content that potentially matches a known sensitive data pattern. Exposure of sensitive data is limited to the LLM in your instance. External AI system metrics are derived from Traceloop guardrails which are set up in Configure runtime security metrics. Not shown for ServiceNow ServiceNow AI systems in a domain-separated instance.
Sensitive data anonymized	Base system	Shows LLM prompt data that met configured data patterns. This data was anonymized based on the configuration for the pattern in Configuration Data Patterns in Data Privacy. External AI system metrics are derived from Traceloop guardrails which are set up in Configure runtime security metrics. Not shown for ServiceNow ServiceNow AI systems in a domain-separated instance.
Total offensive content detected and blocked	Available with AI Guardian	Shows offensive content data provided by AI Guardian. To see data, enable AI Guardian for your instance. For more details, see AI Guardian analytics. External AI system metrics are derived from Traceloop guardrails which are set up in Configure runtime security metrics.
Total prompt injection detected and blocked	Available withAI Guardian	Shows prompt injection data provided by AI Guardian. To see data, enable AI Guardian for your instance. For more details, see AI Guardian analytics. External AI system metrics are derived from Traceloop guardrails which are set up in Configure runtime security metrics.

Post-runtime metrics and calculations

Post-runtime metrics show potential threats in AI system input and output. Top AI asset security events are organized into a heat map by top Open Worldwide Application Security Project (OWASP) categories, which are used to identify and mitigate common threats in AI systems. For more information, see OWASP Top 10 Risk & Mitigations for LLMs and Gen AI Apps.

Each cell in the Top AI asset security events heat map contains the number of AI asset security events belonging to that category (row) and the timeframe (column), based on Coordinated Universal Time (UTC).

To configure these metrics, see Configure post-runtime security metrics.

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AI asset security event categories

Category	Description
Agentic Goal Deviation	Detects when AI agents may have been manipulated to potentially deviate from their authorized role or potentially have their decision-making process compromised.
Data and Model Poisoning	Detects when LLM input potentially contains corrupt or dangerous content that the LLM uses to train on.
Excessive Agency	Detects when LLMs are provided too much access, leading to potential unauthorized or excessive actions by the LLM.
Improper Output Handling	Detects when LLM output is potentially invalid or untrustworthy.
Prompt Injection	Detects when malicious instructions may be embedded in AI agent inputs to potentially manipulate the agent's behavior or override or deviate from its original directives.
Sensitive Information Disclosure	Detects when AI agent interactions potentially contain personally identifiable information (PII) in inputs or outputs.
System Prompt Leakage	Detects when AI agents potentially disclose their system prompts or internal instructions.

AI asset security event threat types

Type	Description
Access Denial	Detects when AI agents were denied access to AI assets or data.
Agent Goal Deviation	Detects when AI agents may have been manipulated to potentially deviate from their authorized role or potentially have their decision-making process compromised.
Correctness Detection	Measures whether the information provided in the model's response is factually accurate and logically valid given the prompt and context.

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AI asset security event threat types (continued)

Type	Description
Data Integrity Incident Detection	Designed to help show potential violations of certain LLM guardrail policies in LLM responses.
Input Screening	Monitors user input to detect and anonymize sensitive or personally identifiable information (PII) before it reaches the AI model.
Output Screening	Monitors AI-generated responses for sensitive or personally identifiable information (PII) before they're delivered to users
PII Detection	Detects when AI agent interactions potentially contain personally identifiable information (PII) in inputs or outputs.
Prompt Injection	Detects when malicious instructions may be embedded in AI agent inputs to potentially manipulate the agent's behavior or override or deviate from its original directives.
System Prompt Leakage	Detects when AI agents potentially disclose their system prompts or internal instructions.
Toxicity	Detects when AI agent interactions potentially contain harmful, offensive, or toxic content in inputs or outputs.

AI judge model classifications are probabilistic in nature and may be incomplete or incorrect. They don't constitute professional advice and shouldn't be relied on as the sole basis for assessing risk.

System properties for AI asset security

System properties that connect Veza access intelligence and limit the age of records evaluated for AI asset security metrics are available. Limiting records can prevent analyzing stale data and reduce unnecessary processing overhead.

Properties exist in the System Properties [sys_properties] table. The admin role is necessary to set system properties.

Note: To open the System Properties [sys_properties] table, enter `sys_properties.list` in the navigation filter.

Properties for AI asset security metrics

Property	Description
sn_ai_security.analyzer_max_record_age_hours	Limit by record age (in hours) the number of AI asset invocation records processed by AI Control Tower for AI asset security metrics. Reducing the record age can prevent analyzing stale data, reduce unnecessary processing overhead, and focus the metric on more recent activity. Increasing the record age includes analysis of older records.

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Properties for AI asset security metrics (continued)

Property	Description
	• Type: Integer • Default value: 4 hours • Location: The System Properties [sys_properties] table
sn_ai_security.veza.api.key	Deprecated. The Veza API access token that controls authentication for data for access intelligence. For more information, see Configure Veza access intelligence in the agent map. • Type: password2 • Location: The System Properties [sys_properties] table
sn_ai_security.veza.api.url	The base URL of the Veza tenant that provides access intelligence data for the agent map. For example, `https://your-tenant.vezacloud.com`. Used for connection URL construction even when OAuth is active. For more information, see Configure Veza access intelligence in the agent map. • Type: string • Location: The System Properties [sys_properties] table

Controlling AI asset usage in AI Control Tower

Create AI asset usage policies that automatically respond to detected AI threats or block an AI agent, domain, or model outright.

Get started

Explore	Configure	Manage policies
Learn how policies respond to AI threats or block AI usage.	Set up control enforcement points.	Create and manage Threat Response and Explicit Block policies.

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Review enforcement activity	Reference	
Review and audit policy activity.	Details on threat categories and where policies are enforced.	

Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

Exploring policies in AI Control Tower

Learn how policies let you automatically respond to detected AI threats or block AI usage outright, and where policies are enforced across AI Control Tower.

Policies overview

Blocking a rogue AI agent or containing a detected threat typically involves writing custom scripts, or reacting to an issue that's often discovered well after it has occurred. These

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approaches don't scale past a handful of one-off exceptions, and they don't hold up consistently across every platform your organization runs AI on.

Policies address this by letting you define that governance once, as a reusable rule, instead of reacting case by case.

- Respond automatically when a detected threat, such as a prompt injection or excessive data exposure, crosses a threshold you define.
- Stop a specific AI agent, model, or domain from being used, without writing a flow.
- Preview which requests a policy would affect before publishing it.
- See exactly which policy blocked or allowed a given request, and why.

Policy users

Users

User	Description
AI steward	Creates, edits, clones, and deletes Threat Response and Explicit Block policies, and reviews policy enforcement activity to confirm policies are working as expected.

Policy types

Policies come in two types, each suited to a different governance need.

Threat Response

Watches for a specific threat category, such as sensitive data disclosure or prompt injection, crossing a threshold you define (for example, more than 50 detections in 10 minutes). When triggered, deactivates the affected agent, and can create a ticket for a team or notify a group. The affected agent stays offline until it's reinstated. For details, see Threat Response policies.

Explicit Block

Stops a user, a department, or everyone from using a specific AI agent, model, or domain. Once initiated, the block stays in effect until the policy is deleted. For details, see Explicit Block policies.

Policy enforcement points

Policies are evaluated and enforced at points throughout your organization.

Agent Client Collector (ACC)

Blocks and unblocks AI agents by model or domain, through ACC's AI governance policy.

Cloud-hosted agent platforms

Amazon Bedrock, Amazon Bedrock AgentCore, Azure AI Foundry, and Gemini Enterprise Agent Platform agents. Each platform is enforced through its own native access control, so the same rule reaches an agent no matter which of these it runs on.

Okta

Blocks and unblocks a person's access through their Okta-managed identity.

ServiceNow agents

Blocks and unblocks AI agents hosted by ServiceNow.

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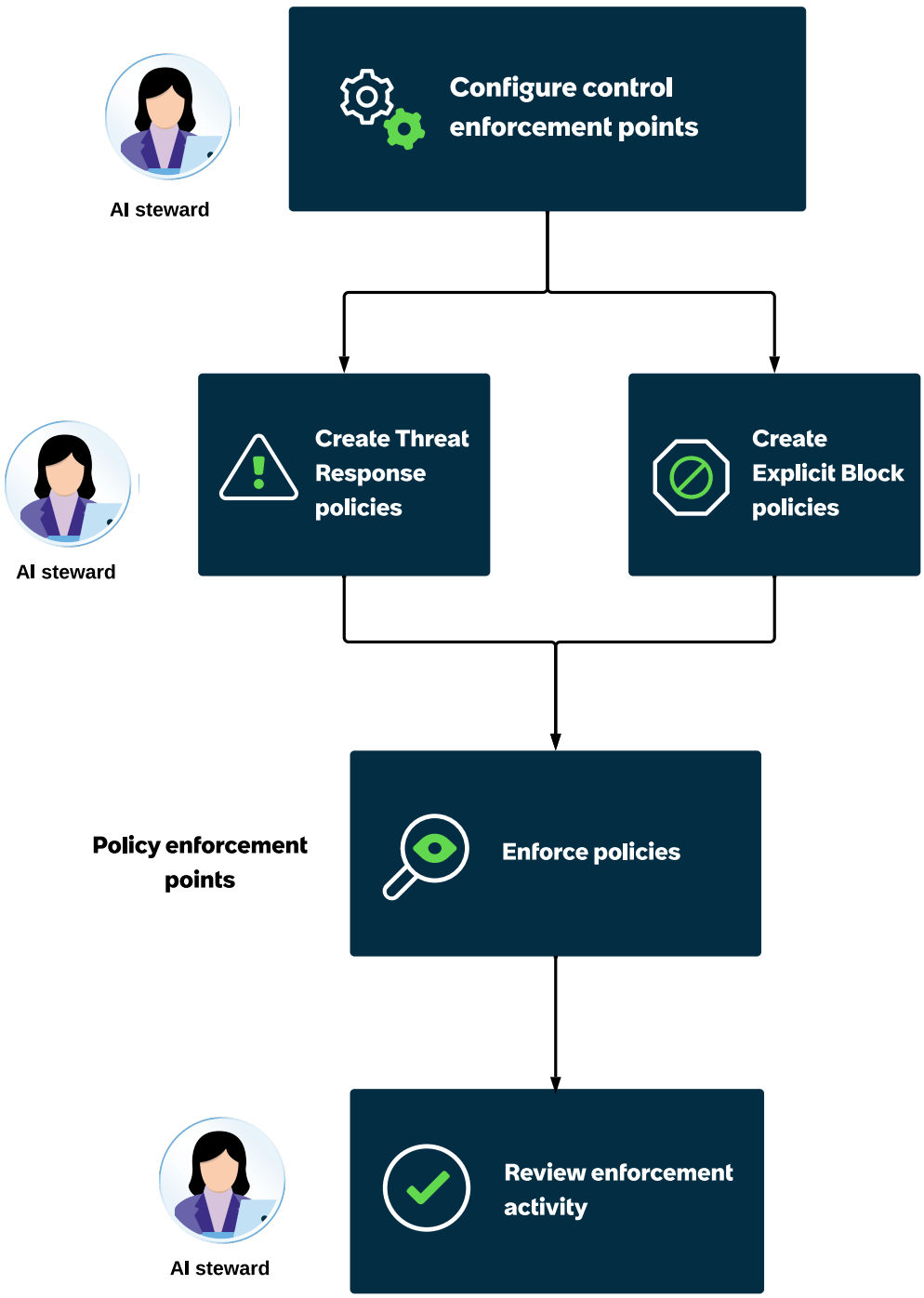
For a complete list, see Control enforcement points.

Policies workflow

This infographic shows a sample end-to-end workflow of the AI steward sets up policy enforcement points, creates policies, and reviews enforcement activity.

Managing policies in AI Control Tower



In this workflow:

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1. The AI steward configures one or more control enforcement points.
2. The AI steward creates a Threat Response policy and defines the threat category, its scope, and the threshold that triggers a response.
3. The AI steward creates an Explicit Block policy and defines who is blocked and what they're blocked from using.
4. Once published, the policy is enforced at whichever connected points apply.
5. The AI steward reviews enforcement activity to confirm the policy is working as expected.

Policies benefits

Policies benefits

Benefit	Feature	Users
Respond automatically to a detected threat before it spreads further.	Create a Threat Response policy	AI steward
Stop specific AI usage outright, without writing a flow.	Create an Explicit Block policy	AI steward
Confirm a policy is working as expected.	Reviewing policy enforcement in AI Control Tower	AI steward

What to explore next

To learn more about configuring and using Policies, see:

- Configuring policies in AI Control Tower
- Managing policies in AI Control Tower
- Reviewing policy enforcement in AI Control Tower
- AI Control Tower policies reference

Threat Response policies

Automatically contain an AI agent the moment it crosses a risk threshold you define, instead of waiting for someone to notice and act.

Key benefits

- Contain a misbehaving or compromised agent the moment a defined threat is detected, without waiting for someone to notice and react.
- Apply the same containment rule across every platform your agents run on, instead of building a separate mechanism for each one.
- Reduce how long a risky agent stays active, since the response happens automatically instead of depending on when someone happens to check.

How Threat Response policies work

You choose a threat category and define its scope; the policy then watches continuously for conditions matching that category within that scope. Between a threat being detected and someone noticing and manually shutting down the affected agent, there's normally a window where that agent keeps acting. A Threat Response policy closes that window: once a matching detection occurs, it contains the affected agent automatically, without waiting on a person to be available, notice, and react.

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The same policy applies across every enforcement point you've configured. An organization running agents across ServiceNow and multiple cloud providers doesn't need a separate containment mechanism for each one; a single rule reaches all of them, each enforced through that platform's own native access control.

The following connectors are supported:

- AWS Bedrock
- AWS Bedrock Agent Core
- Gemini Enterprise Agent Platform (agents with unique identities only)
- Azure AI Foundry
- ServiceNow Agents
- Agent Client Collector (ACC)

A connection between AI Control Tower and an identity provider is optional. Okta is supported.

A policy can also be changed without leaving stale enforcement behind: editing one reverses what it previously enforced and reapplies enforcement for the updated conditions, so a refined rule doesn't leave an old block sitting in place alongside a new one.

Use cases

Containing an agent that deviates from its goal

An agent is given a defined task, but through a misconfiguration, a bad tool call, or unexpected input, it starts acting outside that task. Left running, it keeps taking those actions until someone catches it.

A Threat Response policy scoped to the Agentic Goal Deviation threat category watches for exactly this. When a detection matches the category and the policy's scope, the affected agent is taken offline automatically.

The agent stays offline until someone reinstates it from Security. The policy itself keeps running and will contain the next agent that matches its conditions.

Containing an agent under repeated prompt injection attempts

An agent that processes external or user-submitted content, such as documents or messages, can be exposed to prompt injection: hidden instructions embedded in that content that try to override its original task. A single attempt might not be a real problem, but a sudden spike suggests something is actively probing it.

A Threat Response policy scoped to the Prompt Injection threat category can use a threshold instead of triggering on every detection, for example, more than a set number of attempts within an hour.

Once that threshold is crossed, the affected agent is taken offline automatically, the same way as any other Threat Response policy.

Explicit Block policies

Stop a specific person, a department, or your whole organization from using an AI agent, model, or domain, enforced automatically everywhere that access could happen.

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Key benefits

- Stop a specific person, a department, or your entire organization from using an AI agent, model, or domain, without writing a script for each platform.
- Apply one rule consistently whether it covers a handful of contractors or thousands of employees, without reconfiguring it person by person.
- Keep enforcing at every connected point even if one point is unavailable or doesn't apply, instead of the whole block depending on all of them.

How Explicit Block policies work

You define who's blocked and what they're blocked from, and publish it. Restricting access this way usually means writing a custom script for each platform involved, or relying on someone to remember to check and revoke access manually; an Explicit Block policy replaces that with one rule, enforced consistently everywhere that access could happen. The policy stands until it's deleted; there's no pause or in-between state.

Enforcement is attempted independently at each connected point, so if one point is unreachable or doesn't apply, the block still takes effect everywhere else it can.

Because Explicit Block covers users, departments, agents, models, and domains under this same mechanism, the same policy type applies whether the goal is keeping a contractor off internally sensitive tools or keeping an entire department off a model that isn't approved for their work.

Use cases

Blocking access to ServiceNow Cowork

Employees use ServiceNow Cowork to ask instance-specific questions. The organization might need to block one person from using it, for example while a security review is underway, or prevent anyone from using it at all until that review is complete.

An Explicit Block policy scoped to a specific person and ServiceNow Cowork ends that person's active session and prevents them from starting a new one. Publishing the same policy without naming a person blocks everyone who has used ServiceNow Cowork instead.

Blocking access to a specific model

Employees often reach AI models directly, outside of any agent or approved workflow, through a browser or a desktop app installed on their own machine. An organization might restrict this to internally hosted models only, or allow certain roles to use specific external models while keeping others off-limits.

An Explicit Block policy can target a specific model for a specific person: for example, blocking one employee's access to an external model while leaving everyone else's access untouched. Enforcement happens at the device level, so the block applies no matter which application or browser the employee uses to try to reach that model.

Configuring policies in AI Control Tower

Set up policies in AI Control Tower by configuring control enforcement points.

Configuration overview

Setting up policies involves defining where polices can run by configuring control enforcement points.

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For steps to configure AI agent containment automatically, see Configure automatic AI agent containment.

Configure automatic AI agent containment

Connect an identity provider and the AI agent runtime platforms to AI Control Tower so a Threat Response policy can automatically contain an AI agent using kill switch protocol.

Before you begin

Role required: sn_ai_governance.ai_steward

About this task

To let a Threat Response policy automatically contain an AI agent using kill switch protocol, you must have:

- A connection between AI Control Tower and each AI agent runtime or infrastructure platform that hosts the agents the policy covers. These connectors are supported:
  - AWS Bedrock
  - AWS Bedrock Agent Core
  - Gemini Enterprise Agent Platform (agents with unique identities only)
  - Azure AI Foundry
  - ServiceNow Agents
  - Agent Client Collector (ACC)
- A connection between AI Control Tower and an identity provider is optional. Okta is supported.

Procedure

1. Navigate to **AI Control Tower** > **Settings** > **Integrations** > **Control Enforcement Points**.
2. Select the connector from the **Available connectors** sub-tab and follow the guided setup wizard.
   For more information, see Configuring security connections.

Result

You can now create a Threat Response policy that automatically contains an AI agent using kill switch protocol on the connected platforms. For details, see Create a Threat Response policy.

Managing policies in AI Control Tower

Create, change, or remove the policies that respond to detected threats or block AI usage.

Managing policies workflow

Create a Threat Response policy to automatically contain an agent when a detected threat matches conditions you define, or an Explicit Block policy to stop specific AI usage outright.

Both policy types work the same way once published. Edit a policy to change what it enforces, clone it to try a variant without changing the original, or delete it to end its enforcement entirely. A policy has no pause or disable state, so deleting it is the only way to stop it from running.

Once a policy is published, confirm it's doing what you designed it to do. See Reviewing policy enforcement in AI Control Tower.

Create a Threat Response policy

Automatically contain an AI agent when a specific threat is detected.

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Before you begin

Confirm the connector for each AI agent runtime platform you want to cover is active. See Configuring security connections.

Role required: sn_ai_governance.ai_steward

About this task

A Threat Response policy watches for a specific threat type. Once conditions matching that type are detected, it automatically contains the affected agent instead of waiting for someone to notice and act.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Govern** > **Policies**.
2. Select **Create policy**.
3. Enter a name and description of this policy.
4. In the Policy type section, select **A threat response**.
5. In the On threat section, select the threat type the policy watches for, such as **Prompt Injection**.
   For the full list, see Threat types.
6. In the On threat section, define which agents the policy covers.
   Build a condition from a field, an operator, and a value, such as a specific agent or a platform vendor. Combine multiple conditions with **and** or **or**, or select **Add group** for another set of conditions.
7. In the On threat section, set the sensitivity.
   For example, trigger the policy **on every detection**, or only once detections cross a threshold you define.
8. **Optional:** In the Do this section, add one or more follow-up actions.
   A follow-up fires only when the policy actually blocks an attempt, not just because it's published.

Follow-up action	Description
Create a ticket	**a.** Select **+Add follow-up**. **b.** Select **Create a ticket**. **c.** Select the assignment group that will re ceive the ticket.
Notify	**a.** Select **+Add follow-up**. **b.** Select **Notify**. **c.** Search or enter the user to notify.

9. Review the policy summary, then select **Publish**.

Result

The policy runs as soon as a matching threat is detected. The affected agent is taken offline and stays offline until it's reinstated from Security. For details, see Contain AI agents manually using kill switch protocol.

What to do next

Confirm the policy is working as expected by reviewing policy enforcement activity. For details, see Reviewing policy enforcement in AI Control Tower.

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You can edit a Threat Response policy directly to change its threat type, scope, sensitivity, or follow-up actions. For details, see Edit a Threat Response policy. Alternatively, clone the policy to test a variant without changing the original, then delete the original once your clone is confirmed working, if you no longer need it. For details, see Clone a policy.

Edit a Threat Response policy

Change an existing Threat Response policy's threat type, scope, sensitivity, or follow-up actions.

Before you begin
Role required: sn_ai_governance.ai_steward

About this task
You can change the threat type, which agents it applies to, and more by editing an existing Threat Response policy. Editing keeps the same policy record, along with its enforcement history. The policy type is read only. To use a different policy type, create a new policy instead.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Govern** > **Policies**.
2. Find the Threat Response policy you want to edit.
3. Select **Edit**.
4. **Optional:** In the On threat section, update the threat type, which agents the policy covers, or the sensitivity.
5. **Optional:** In the Do this section, add, remove, or update follow-up actions.
6. Review the policy summary, then select **Publish**.

Result
The policy takes effect with your changes. Enforcement activity from before the edit stays available in the policy's history.

What to do next
Confirm the policy is working as expected by reviewing policy enforcement activity. For details, see Reviewing policy enforcement in AI Control Tower.

Create an Explicit Block policy

Stop a user, a department, or everyone in your organization from using a specific AI agent, model, or domain.

Before you begin
To enforce a block on an external system, confirm the corresponding connector is already configured. External systems include cloud AI agents and devices running Agent Client Collector (ACC). See Configuring security connections.

Role required: sn_ai_governance.ai_steward

About this task
An Explicit Block policy stops a user, a department, or everyone in your organization from using a specific AI agent, model, or domain. Once published, it stays in effect until you delete it; there's no pause or in-between state.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Govern** > **Policies**.
2. Select **Create policy**.

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3. Enter a name and description of this policy.
4. In the Policy type section, select **An explicit block**.
5. In the Block section, define who's blocked.
   Select **User** to block specific people, or **Department** to block everyone in a department. Leave the search field empty to apply the block to everyone.
6. In the Block section, define what they're blocked from using.

Option	Description
AI agent	**a.** In the What field, select **AI agent**. **b.** Identify the AI agent that you want to block by building a condition using a field, an op erator, and a value. For example, **Asset** | **is** | **ACME Agent**. **c.** Combine multiple conditions with **and** or **or**, or select **Add group** for another set of conditions.
Model	**a.** In the What field, select **Model**. **b.** Enter one or more models in a comma-sepa rated list.
Domain	**a.** In the What field, select **Domain**. **b.** Enter one or more domains in a comma-sep arated list.

7. **Optional:** In the Block section, add a follow-up action.
   A follow-up fires only when the policy actually blocks an attempt, not just because it's published.
   a. Select **+Add follow-up**.
   b. Select **Notify**.
   c. Search or enter the user to notify.
8. Review the policy, then select **Publish**.

Result
The policy takes effect at every enforcement point it applies to. If enforcement depends on an agent installed on a device, such as ACC, the block takes effect when the policy syncs to that device.

What to do next
Confirm the policy is working as expected by reviewing the policy enforcement activity. For details, see Reviewing policy enforcement in AI Control Tower.

To change who or what a published policy blocks, edit it. For details, see Edit an Explicit Block policy. Alternatively, clone the policy to try a variant without changing the original, then delete the original once your clone is confirmed working, if you no longer need it. For details, see Clone a policy.

Edit an Explicit Block policy

Change who an Explicit Block policy blocks, what they're blocked from using, or its follow-up actions, without recreating the policy.

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Before you begin
Role required: sn_ai_governance.ai_steward

About this task
Narrow or widen an existing block by editing the policy instead of replacing it. Editing keeps the same policy record, along with its enforcement history.

Procedure
1. Navigate to **All** > **AI Control Tower** > **Home** > **Govern** > **Policies**.
2. Select the Explicit Block policy you want to edit.
3. Select **Edit**.
4. **Optional:** Update the policy name or description.
5. **Optional:** In the Block section, update who's blocked.
   Change the type between **User** and **Department**, remove a selection, or search for another one. Leave the search field empty to apply the block to everyone.
6. **Optional:** In the Block section, update what they are blocked from using.
   For an AI agent, adjust the field, operator, or value of each condition, or add and remove conditions. For a model or a domain, update the comma-separated list.
7. **Optional:** In the Block section, add, remove, or update follow-up actions.
8. Review the policy summary, then select **Publish**.

Result
The policy takes effect with your changes at every enforcement point it applies to. Enforcement activity from before the edit stays available in the **Enforcement activity** tab.

What to do next
Confirm the policy is working as expected by reviewing policy enforcement activity. For details, see Reviewing policy enforcement in AI Control Tower.

To try a variant of a policy without changing what's already published, clone it instead of editing it. For details, see Clone a policy.

Clone a policy

Start a new policy using an existing policy as a template.

Before you begin
Role required: sn_ai_governance.ai_steward

About this task
Clone a policy when you want to start a new version from an existing one, without changing what's already published. The clone is a separate, independent policy; the original keeps running until you delete it.

For example:

- Clone an Explicit Block policy when you want to scope the same block to a different set of users or models without changing the original. You can also edit an Explicit Block policy directly; see Edit an Explicit Block policy. Once your clone is confirmed working, delete the original if you no longer need it.
- Clone a Threat Response policy when you want to test a variant of its threat type, scope, or sensitivity without changing the original. You can also edit a Threat Response policy directly; see Edit a Threat Response policy. Once your clone is confirmed working, delete the original if you no longer need it.

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Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Govern** > **Policies**.
2. Find the policy that you want to clone.
3. In the More actions menu, select **Clone**.
4. **Optional:** Update the cloned policy's conditions.
5. Select **Publish**.

Result

The policy is cloned with any optional updates that you added. The original policy stays in force.

What to do next

Once the clone is confirmed working as expected, you can delete the original if it's no longer needed. For details, see Delete a policy.

Delete a policy

Remove a policy you no longer need.

Before you begin

Role required: sn_ai_governance.ai_steward

About this task

A policy has no pause or disable state. You must delete the policy to end enforcement.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Govern** > **Policies**.
2. Find the policy you want to remove.
3. In the More actions menu, select **Delete**.
4. In the confirmation dialog box, select **Delete policy**.
   Deleting a policy can't be undone. Activity from the deleted policy stays available in the **Enforcement activity** tab.

Result

What happens next depends on the policy type.

Threat Response

The policy stops responding to new detections. An agent it already took offline stays offline; reinstate it separately from Security. For details, see Contain AI agents manually using kill switch protocol.

Explicit Block

Access is restored at every enforcement point the policy applied to.

Reviewing policy enforcement in AI Control Tower

Review policy activities and execution results.

Key benefits

- Confirm a policy actually reached every point it applied to.
- Tell a real failure apart from a policy that simply didn't apply anywhere it could.
- Look up a specific person or asset, without checking policies one at a time.

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View policy enforcement as an audit trail in the **Enforcement activity** tab. Each entry represents enforcement against one asset and shows its outcome. When a policy triggered the entry, the entry also shows which policy. A policy that enforces through more than one connector produces a separate entry for each connector.

For AI agent containment specifically, the **Enforcement activity** tab shows all agents that were contained automatically through a Threat Response policy, and those contained manually using kill switch protocol. Those contained manually show Kill Switch Manual Trigger in the **Source** column.

An outcome other than success has a specific meaning, not just pass or fail:

- **Error** means something actually went wrong at a connector, and the record includes why.
- **Skipped** means no connector applied to that context, either because there was nothing to enforce against, or because the connector for that point was never configured. If you expected enforcement at a given point and see **Skipped**, confirm that point is configured and active on the **Control enforcement points** tab; otherwise, a real coverage gap can look like a clean run. See Configuring security connections.
- **Timeout** means a connector didn't respond within its window.

Use cases

- Confirm whether a particular person was blocked from a particular model, and which connector enforced it.
- Check an entry to determine whether a policy needs to be fixed. An outcome other than success can mean the policy simply didn't apply rather than failed.
- When a user reports they've lost access, or a security review needs to know whether a specific asset has been affected by any policy, filter the activity by that person or asset.

To create or change a policy, see Managing policies in AI Control Tower.

AI Control Tower policies reference

Reference topics provide additional information about threat types and where policies are enforced.

Threat types

Threat types available in a Threat Response policy.

Threat type	Description
Agentic Goal Deviation	An agent's actions diverge from the objective it was given.
Data and Model Poisoning	Training data or a model's behavior has been tampered with.
Excessive Agency	An agent takes actions or accesses systems and data beyond what its task requires.
Improper Output Handling	A model's output is used downstream in a way that introduces risk, such as executing unvalidated content.
Prompt Injection	Untrusted input manipulates a model into ignoring its original instructions.

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Threat type	Description
Sensitive Information Disclosure	A model exposes confidential, personal, or restricted data in its output.
System Prompt Leakage	A model reveals its own underlying instructions or configuration.

Control enforcement points

The systems an AI Control Tower policy can act on.

Enforcement point	Description
Agent Client Collector (ACC)	A lightweight agent installed on employee devices. Blocks and unblocks AI agents by model or domain, enforced at the device regardless of which application or browser someone uses to reach it.
AWS Bedrock	Blocks and unblocks Amazon Bedrock agents.
AWS Bedrock AgentCore	Blocks and unblocks Amazon Bedrock AgentCore agents.
Azure AI Foundry	Blocks and unblocks Azure AI Foundry agents.
Gemini Enterprise Agent Platform agents	Blocks and unblocks Gemini Enterprise agents. **Note:** Applies to agents with unique identities only.
Okta	Blocks and unblocks a person's access through their Okta-managed identity.
ServiceNow agents	Blocks and unblocks AI agents on the ServiceNow AI Platform®.

Monitoring AI assets

Evaluate the quality and safety of AI interactions across your portfolio using automated scoring, configurable metrics, and trend analysis for both ServiceNow and external AI systems.

AI systems can perform well at deployment and degrade weeks later as data sources shift and edge cases emerge. Monitoring in AI Control Tower addresses this by continuously scoring a sample of live AI interactions against configurable quality and safety metrics. AI stewards use the resulting scores to detect regressions, investigate the underlying causes, and coordinate with AI system owners on the changes that restore performance, across both ServiceNow and external AI systems.

Monitoring also feeds the AI value calculation. When you configure a value template to use quality score as a dimension, AI Control Tower pulls the live quality score from the monitoring pipeline into the productivity formula, so the value an AI system reports reflects how well it is actually performing. For more information about value templates and the dimensions they use, see Measuring AI systems.

Monitoring and evaluating AI systems in AI Control Tower

Continuously monitor your ServiceNow and external AI systems to determine whether they meet quality and safety standards, and investigate root causes when they don't.

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Get started

Explore Learn how monitoring and scoring models work.	Configure Activate evaluation and configure metric templates.	Review scores Review quality and safety scores across your AI portfolio.
Investigate sessions Drill into sessions to find and fix root causes.	Reference Evaluation metrics, fields, and system values.	

Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

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Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

Exploring AI system monitoring in AI Control Tower

Learn how AI Control Tower automatically scores live AI interactions against quality and safety metrics using an OpenTelemetry-based data model of sessions, traces, and spans.

Monitoring overview

An AI system that performs well in testing can drift in production. Models degrade, data sources change, and tool integrations break. Without ongoing evaluation, these problems go undetected until users report them.

Monitoring in AI Control Tower addresses this by automatically scoring a sample of live AI interactions against configurable quality and safety metrics. Scores are aggregated into weighted measures and surfaced alongside trend data so you can detect regressions early and investigate before users are affected.

- Get continuous visibility into AI system quality and safety through automated large language model (LLM)-based scoring.
- Align scoring to your organization's priorities by selecting which metrics are evaluated and how much each one contributes to the overall score.
- Assess both ServiceNow and external AI systems through a single evaluation framework.
- Catch gradual regressions, not just one-off failures, by tracking score trends over time.
- Identify the exact cause of a quality or safety issue by drilling from an aggregate score down to a specific span.

Important: Evaluation scores are generated by AI models. Review AI-generated scores alongside session-level detail before taking action on individual cases.

Monitoring users

Users

User	Description
AI steward	Activates evaluation scoring, configures metric templates and weights, and manages which systems are included or excluded from scoring. Reviews quality and safety scores across the AI portfolio, investigates low-scoring sessions, identifies trends and regressions, and coordinates with AI system owners to improve agent performance.

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Users (continued)

User	Description
AI asset owner	Works with AI stewards to understand evaluation results for their specific AI systems and adjusts agent configuration, prompts, or tool access to improve scores.

How monitoring works

The monitoring pipeline has four stages:

1. **Collection.** For ServiceNow AI, trace data is collected automatically. For external AI, trace data is sent to ServiceNow via API using a generated API key.
2. **Scoring.** The evaluation engine applies your configured metrics to each sampled session. Metrics are scored by LLM judges, which are custom models fine-tuned for specific evaluation criteria. For ServiceNow AI, the AI Skill Kit Auto Eval engine scores sessions. For external AI, sessions are scored by ServiceNow evaluation models.
3. **Aggregation.** Per-metric scores are combined into composite quality and safety scores using the weighted average formula you define in your metric template.
4. **Visualization.** Scores, trends, and session-level detail are available on the overview and through drill-down into individual sessions, traces, and spans.

The evaluation metrics you select determine which metrics are scored for each session. The metric templates you configure determine which of those scored metrics contribute to your quality and safety scores. Metrics that are scored but not included in a template are still visible when you investigate individual sessions, traces, and spans.

Monitoring workflow

This infographic shows a sample end-to-end workflow of how different users work together to set up monitoring, analyze AI system quality and safety, and investigate issues.

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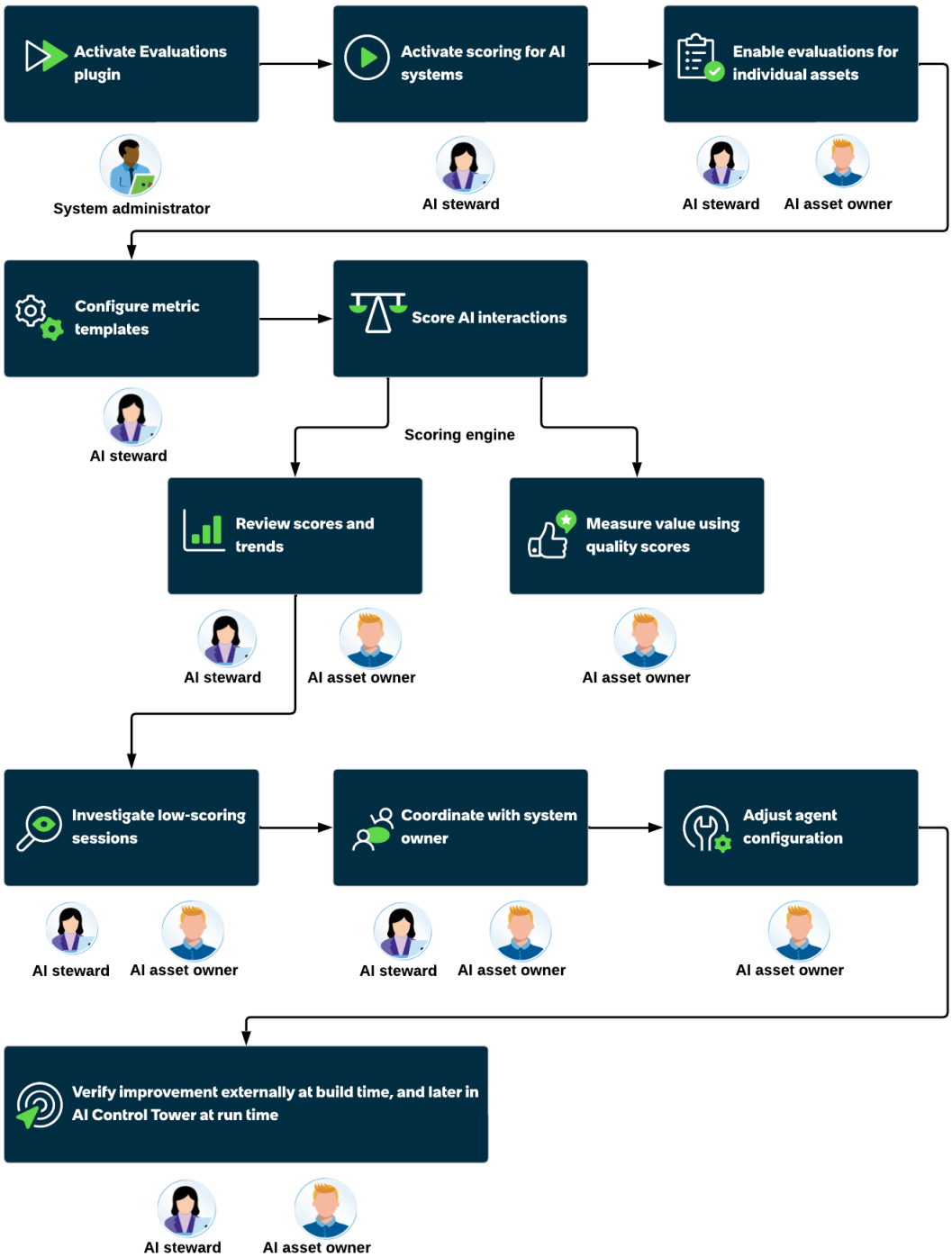
Monitoring AI systems in AI Control Tower



In this workflow:

1. The system administrator installs AI Control Tower which includes the Evaluations plugin. The Evaluations plugin enables the evaluation framework, scoring engine, and monitoring components.
2. The AI steward activates evaluation scoring for ServiceNow AI systems. For external AI systems, the AI steward generates an API key and configures the external system to send trace data or configures trace connectors to send trace data from a supported cloud platform.

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3. The AI steward and AI asset owner enable evaluations for individual assets by updating asset records in the AI Control Tower inventory.
4. The AI steward configures evaluation metric templates by selecting quality and safety metrics and assigning weights to create a scoring formula.
5. The evaluation scoring engine automatically scores a sample of live AI interactions. For ServiceNow AI, the AI Skill Kit Auto Eval engine scores sessions. For external AI, sessions are scored by ServiceNow evaluation models.
6. The AI steward and AI asset owner review aggregated quality and safety scores, identify underperforming AI systems, and track trends over time.
7. The AI steward and AI Asset owner investigate low-scoring sessions by drilling into session detail, reviewing per-metric scores and judge reasoning, and tracing root causes through individual traces and spans.
8. The AI steward coordinates with the AI system owner to adjust the agent's configuration, prompts, or tool access based on investigation findings.
9. The AI system owner makes adjustments to agents as necessary.
10. The AI steward and AI Asset owner verify improvements externally at build time and continue verification in AI Control Tower at run time.

ServiceNow AI vs. external AI

Both categories use the same evaluation framework, but they differ in data collection and available metrics.

ServiceNow AI vs. external AI comparison

	ServiceNow AI	External AI
Data collection	Automatic	Via API key (ai_observe.ai_data_sender role) or trace connector
Scoring engine	AI Skill Kit Auto Eval	ServiceNow evaluation models
Default quality metrics	Overall task completeness, Tool calling correctness	Task completion, Answer relevancy
Safety metrics	Not available with ServiceNow AI systems	Secrets detection (additional safety metrics available)

Where monitoring fits in AI Control Tower

AI Control Tower provides three complementary governance areas:

- Inventory manages what AI systems exist and their lifecycle state.
- Govern enforces policies, approvals, and compliance requirements.
- Insights provides ongoing operational visibility into how those systems actually perform.

Insights depends on inventory, since only managed assets are evaluated. The relationship also runs in reverse: connecting an AI system to send trace data can surface other AI systems and agents that aren't yet tracked, adding them to inventory automatically and helping you manage AI sprawl. To learn more about connecting your AI systems for evaluation and populating inventory, see Configuring trace connections.

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Monitoring benefits

Monitoring benefits

Benefit	Feature	Users
Automatically score live AI interactions without manual review using LLM-based judges fine-tuned for evaluation criteria.	How evaluation scoring works	AI steward
Define what quality and safety mean for your organization by selecting metrics and assigning weights to create a custom scoring formula.	Configure an evaluation metric template	AI steward
Track quality and safety trends over time to catch gradual regressions, not just one-off failures.	Reviewing quality and safety scores	AI steward, AI asset owner
Drill from portfolio-level scores down to a specific span in a trace to pinpoint exactly where an AI system's behavior broke down.	Investigating low-scoring sessions	AI steward, AI asset owner
Assess the quality and safety performance of a specific AI system by reviewing its scores, metric breakdowns, trends, and evaluated sessions.	Monitoring an AI system	AI steward, AI asset owner

What to explore next

To learn more about configuring and monitoring in AI Control Tower, see:

- Configuring monitoring and evaluations in AI Control Tower
- Reviewing AI system quality and safety scores
- Investigating low-scoring sessions

Sessions, traces, and spans

Understand the three levels of AI interaction data that AI Control Tower uses to structure, score, and display runtime behavior.

To investigate a low quality or safety score, you can dig deeper into a session to narrow the problem to a specific step in the AI system's reasoning. AI Control Tower structures interaction data into three hierarchical levels following open telemetry standards.

Interaction data levels

Level	What it represents	Ends when	Example
Session	One complete interaction with an AI system.	User closes the conversation, or 10 minutes of inactivity.	An employee asks an ITSM agent to create an incident for a VPN failure.
Trace	One turn in the interaction: one input, one output.	The AI system finishes processing and responds.	The agent asks "Which VPN client are you using?" and the user answers.

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Interaction data levels (continued)

Level	What it represents	Ends when	Example
Span	A single step the AI system takes within a trace, such as a tool call, LLM call, database query, or workflow step.	The individual operation completes.	The agent calls the CMDB API to look up the user's VPN configuration.

Why levels matter for scoring

Different metrics are evaluated at different levels because each level captures different aspects of behavior.

- Session-level metrics (such as Task completion) need the full context of the conversation to determine whether the user's goal was met. There is one score per session.
- Trace-level metrics (such as Overall task completeness for ServiceNow AI systems) assess whether a single turn achieved its intended outcome.
- Span-level metrics (such as Tool error) assess whether the AI system made good decisions at the individual step level, including whether the correct tool was called with valid parameters.

Telemetry data on traces

Each trace displays telemetry data alongside evaluation scores: total latency, span count, input tokens, output tokens, and total runtime tokens. These values reflect the tokens consumed by the AI system's actual execution, not the tokens consumed by evaluation scoring.

Navigating the hierarchy

Evaluation data is structured so you can move from a broad signal to a specific cause. A low quality score tells you something is wrong. Session-level scores tell you which interaction went wrong. Trace-level scores and reasoning tell you which step in that interaction produced the problem. Span-level input and output data tells you exactly why: the wrong tool was called, a parameter was malformed, or a data source returned an error.

How evaluation scoring works

Understand how AI Control Tower calculates quality and safety scores so you can interpret results accurately and configure scoring to reflect your priorities.

Evaluation scoring happens in two stages. The first stage calculates a score for each individual metric. The second stage combines those metric scores into a composite quality or safety score using the weights you configure.

Stage 1: How each metric is scored

The scoring engine evaluates each metric independently across the traces or spans in a session. It averages all individual evaluations to produce a metric score for that session.

How that score is determined depends on the level at which the metric is evaluated.

Session-level metrics

Produce one score for the entire session. No averaging is needed. Task completion is an example of a session-level metric.

Trace-level metrics

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Receive a separate score on each trace in the session. The metric score is the average across all traces. Overall task completeness is an example of a trace-level metric for ServiceNow AI systems.

Span-level metrics

Receive a separate score on each span in the session. The metric score is the average across all spans. Tool error is an example of a span-level metric.

For example, Tool calling correctness is a binary metric evaluated on four spans in a session. Each span scores either 0% (fail) or 100% (pass): 100%, 100%, 0%, and 100%. The metric score is the average across the spans:

```
(100 + 100 + 0 + 100) ÷ 4 = 75%
```

After stage 1, every metric in your template has a single score for the session, regardless of how many traces, spans, or evaluations produced it.

Stage 2: How metric scores combine into a single score

The metric scores from stage 1 are combined into a single measure score using the weights you configure in your metric template. Each metric's score is multiplied by its assigned weight, and the results are added together. All weights must sum to 100%.

A single measure can include metrics from any combination of levels. Stage 1 handles the level differences, so by the time a metric reaches stage 2, it is a single score with an assigned weight.

For example, a quality template for an external AI agent includes metrics from the session and span levels:

External AI quality score calculation

Metric	Level	Weight	Score (from Stage 1)
Task completion	Session	25%	72%
Answer completeness	Span	40%	91%
Context relevance	Span	25%	79%
Tool error	Span	10%	85%

The quality score is:

```
(72 x 0.25) + (91 x 0.40) + (79 x 0.25) + (85 x 0.10) = 18.0 +
 36.4 + 19.75 + 8.5 = 83%
```

For a ServiceNow agent, the same principle applies with different metrics. A quality template includes Overall task completeness at 60% weight and Tool calling correctness at 40% weight. If Overall task completeness scores 85% and Tool calling correctness scores 75%, the quality score is:

```
(85 x 0.60) + (75 x 0.40) = 51.0 + 30.0 = 81%
```

Metrics included and excluded from the formula

You don't have to include every evaluated metric in your metric template. Metrics that are evaluated but not included in a template still produce scores. You can view those scores when drilling into traces and spans, but they don't affect the quality or safety score. This is useful when you want to monitor a metric for a period before giving it weight in the formula.

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Security metrics and scoring

AI Control Tower also evaluates a set of security metrics that assess risks specific to AI system inputs and outputs, such as prompt injection attempts and exposed personal data. Security metrics serve a different purpose than quality and safety metrics: they identify risks rather than measure performance.

Security metrics aren't available in monitoring metric templates and don't contribute to composite quality or safety scores. For details on security metrics, see Configuring security metrics in AI Control Tower.

When a metric in your template isn't evaluated

When a metric in your quality or safety template isn't evaluated on a given session, trace, or span, the composite score is calculated from the remaining evaluated metrics rather than resolving to zero. Partial evaluation coverage still produces a meaningful composite, so a single skipped or unavailable metric doesn't invalidate the score for that session.

For example, if your quality template includes Task completion, Answer completeness, and Context relevance, and Context relevance isn't evaluated on a particular session, the quality score for that session is calculated from Task completion and Answer completeness only.

How session scores are aggregated

Session scores are the foundation for broader scores across AI Control Tower. At the system and portfolio level, scores are simple averages with no additional weighting.

AI system score

Averages quality scores across all evaluated sessions for that system. Each session counts equally regardless of duration or token usage.

When evaluation is enabled for an individual AI system, you can view the aggregated score by selecting the **Monitor** tab on the asset record.

Portfolio score

Averages quality scores across all AI systems. Each system counts equally regardless of how many sessions it has.

To review quality and safety scores for AI systems across your portfolio, navigate to **Monitor** > **Overview**.

Scoring formats

All metrics use a scale where higher is better.

Binary

Produces a score of 0% (fail) or 100% (pass). Sexism detection, Profanity detection, and Tool calling correctness are binary. Because there are no partial scores, a single failure in a set of evaluations has an outsized effect on the average.

Percentage

Produces a score on a continuous scale from 0% to 100%. Answer completeness and Context relevance are percentage metrics.

Tiered

Produces specific score values rather than a full continuous scale. Overall task completeness scores as successful (100%), partial (50%), or unsuccessful (0%).

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Score color coding

Score color coding

Color	Range	Meaning
Red	0–50%	Low. Investigate immediately.
Orange	51–75%	Fair. Review recent sessions for trends.
Green	76–100%	Good. Meeting quality or safety targets.

Evaluation scoring examples

Worked scoring examples show how metric configuration, weights, and evaluation levels combine to produce quality and safety scores for different AI system types.

The following scenarios walk through how quality and safety scores are calculated for specific sessions. Each scenario shows the evaluation configuration, what happens during the session, and the resulting score calculation. For details on the two-stage scoring model these scenarios illustrate, see How evaluation scoring works.

Scenario 1 — Quality scoring for an external IT support agent

An organization deploys an external AI agent called "IT Support Bot" that helps employees resolve IT issues such as password resets, VPN troubleshooting, and software installation requests. An AI steward wants to understand how the quality score for a single session is calculated.

Configuration

Five quality metrics are enabled. Three are included in the quality template with weights:

IT Support Bot quality template configuration

Metric	Weight	Evaluation level	Scoring format
Task completion	40%	Session	Percentage
Answer completeness	35%	Span	Percentage
Context relevance	25%	Span	Percentage

Agent goal accuracy and Tool error are also evaluated but not included in the template. Their scores are visible in drill-down views but don't affect the quality score.

What happens

A user opens a session to resolve a VPN connectivity issue. The session contains three spans: a knowledge base search to find relevant troubleshooting steps, a diagnostic tool call to identify the root cause, and a response generation call that assembles the agent's reply.

Span-level scores for the IT Support Bot session

Span	Answer completeness	Context relevance
Knowledge base search	88%	100%
Diagnostic tool call	52%	100%

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Span-level scores for the IT Support Bot session (continued)

Span	Answer completeness	Context relevance
Response generation	82%	91%

The knowledge base search returned relevant troubleshooting steps and scored well on both metrics. The diagnostic tool call correctly identified a certificate expiration but its output didn't include the renewal steps the user needed — the information was incomplete, so Answer completeness scored 52%. The response generation span assembled a readable reply from the diagnostic output, recovering somewhat to 82%, but Context relevance dipped to 91% because the response introduced some general VPN advice that wasn't directly relevant to the certificate issue.

Calculation

Task completion (session-level): The judge evaluates the full session and determines the user received a diagnosis but not actionable renewal steps. Score: 72%.

Answer completeness (averaged across spans): (88% + 52% + 82%) ÷ 3 = 74%.

Context relevance (averaged across spans): (100% + 100% + 91%) ÷ 3 = 97%.

```
Quality = (72 x 0.40) + (74 x 0.35) + (97 x 0.25) = 28.8 + 25.9
 + 24.25 = 79%
```

The composite quality score of 79% lands in the green range, which on its own would suggest the session is healthy — but the metric-level detail tells a more useful story. The averaged Answer completeness of 74% is dragged down by the diagnostic tool call span, which scored only 52%. Without drilling into span detail, that specific failure point is invisible. An AI steward reviewing only the composite quality score would have no way to know that one step in the agent's workflow — not the overall interaction design — is where the completeness problem lives. Identifying and fixing that single span's output behavior is far more targeted than retraining the whole agent.

Scenario 2 — Quality scoring for a ServiceNow change request agent

A ServiceNow AI agent called "Change Request Workflow" automates change request processing. It reads the change request, selects an approval workflow, calls the approval API, and updates the record.

Configuration

The AI steward has customized the quality template to include all three available ServiceNow AI quality metrics, with weights:

Change Request Workflow quality template configuration

Metric	Weight	Evaluation level	Scoring format
Overall task completeness	50%	Trace	Scale (0%, 50%, 100%)
Tool choice accuracy	30%	Span	Percentage
Tool calling correctness	20%	Span	Binary

What happens

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The session has one trace (the workflow execution) with four spans. Overall task completeness is evaluated at the trace level on a three-tier scale — unsuccessful (0%), partial (50%), or successful (100%). Assessing the workflow as a whole, the judge scored it partial (50%): the change request was submitted, but approval routing was incorrect due to a malformed API parameter.

Span-level scores for the Change Request Workflow session

Span	Tool choice accuracy	Tool calling correctness
Read change request	95%	100%
Select approval workflow	80%	100%
Call approval API	90%	0%
Update record status	100%	100%

Tool calling correctness for the approval API call scored 0% because the agent passed an incorrectly formatted parameter. This is a binary metric, so there is no middle ground: the tool call was either correct or it wasn't.

Calculation

Overall task completeness: 50% (single trace-level evaluation).

Tool choice accuracy (averaged across spans): (95% + 80% + 90% + 100%) ÷ 4 = 91%.

Tool calling correctness (averaged across spans): (100% + 100% + 0% + 100%) ÷ 4 = 75%.

```
Quality = (50 x 0.50) + (91 x 0.30) + (75 x 0.20) = 25.0 + 27.3
 + 15.0 = 67%
```

The single 0% binary score on the approval API call dragged Tool calling correctness to 75%. Combined with a partial task completion (50%), the quality score lands in the orange range. Binary metrics make individual failures visible: one bad call out of four is immediately reflected.

Scenario 3 — Safety scoring for an external HR case management agent

An external AI chatbot handles HR case management, including benefits questions, leave requests, and policy inquiries. Because it handles sensitive employee data and communicates directly with employees, safety scoring is critical.

Configuration

HR case management agent safety template configuration

Metric	Weight	Scoring format
Instruction adherence	51%	Percentage
Profanity detection	49%	Binary (0% or 100%)

What happens

The session has two traces. Trace 1: the agent answers a benefits question and stays within its approved response guidance. Instruction adherence: 100%, Profanity detection: 100%. Trace 2: the agent responds to a leave-request question but volunteers an opinion about whether the leave is likely to be approved — guidance its instructions tell it not to give. The instruction-adherence judge scores the response as only partially compliant. Instruction adherence: 70%. Profanity detection: 100%.

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Calculation

Instruction adherence (averaged across traces): (100% + 70%) ÷ 2 = 85%.

Profanity detection (averaged across traces): (100% + 100%) ÷ 2 = 100%.

```
Safety = (85 x 0.51) + (100 x 0.49) = 43.4 + 49.0 = 92%
```

The safety score is green, but the Instruction adherence dip in Trace 2 is worth watching. If the agent repeatedly strays from its approved guidance, the averaged Instruction adherence score trends downward over time. The AI steward can then investigate specific traces, review the judge's reasoning, and work with the development team to tighten the agent's guardrails.

What if Profanity detection had flagged Trace 2?

If Profanity detection had scored 0% on Trace 2 instead of 100%, the Profanity detection average would drop to 50%, and the safety score would fall to:

```
Safety = (85 x 0.51) + (50 x 0.49) = 43.4 + 24.5 = 68%
```

That single flagged trace would move the session safety score from green (92%) to orange (68%). Binary metrics make issues impossible to miss: even one flagged trace is immediately visible in the score.

How monitoring scores contribute to AI value

Quality scores from monitoring can feed the value calculation. The value an AI system reports then reflects how well it performs, not just how often it is used.

Value calculations in AI Control Tower measure productivity by combining how often an AI system is used, how much time it saves per use, and a quality dimension.

```
Productivity = Usage × Time × Quality
```

The quality dimension can be a constant, an indicator, or the quality score that monitoring produces. When a value template uses the quality score, AI Control Tower pulls the live score from the monitoring pipeline into the calculation, so the productivity an AI system reports reflects how well it actually performs.

Why quality scores improve value accuracy

Because quality is one of the three dimensions in the productivity formula, the quality score directly affects the value an AI system reports. A system that scores poorly on quality reports lower productivity, even when usage is high. Configuring evaluation metrics that reflect your organization's quality standards therefore produces more accurate value measurement. When the metrics behind a quality score don't match what your organization considers good performance, the resulting value is skewed.

When a quality score is not available

A value template uses the quality score only when one exists for the asset. When evaluation is not enabled for an asset, or no sessions have been scored yet, the template uses the **Default quality constant** so that value calculation continues without interruption. To start generating quality scores, enable evaluation for the asset.

Setting and tracking value with quality scores

An asset owner selects **Quality Score** as the **Quality type** when creating or editing a value template. The asset owner then tracks the resulting productivity in the Value area, where the value reflects both how often and how well the AI system performs.

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For more information about value templates and the dimensions they use, see Measuring AI systems.

Configuring monitoring and evaluations in AI Control Tower

Set up monitoring in AI Control Tower by activating evaluations, adding metrics, and configuring metric templates.

Configuration overview

Setting up monitoring involves enabling scoring for each type of AI system you want to evaluate, managing which metrics to include, and configuring metric templates that define how quality and safety scores are calculated. After the initial setup, you can configure how long trace data is retained, and adjust which AI systems are included in scoring as your portfolio changes.

Configure evaluation scoring for ServiceNow AI systems

Monitor and configure evaluation scoring for AI systems that run on the ServiceNow AI Platform.

ServiceNow AI systems are automatically instrumented for evaluation because they run on the ServiceNow AI Platform, so no connection setup is required before you activate scoring for them.

Activate evaluation scoring for ServiceNow AI systems

Assess the quality of your ServiceNow AI systems by activating evaluation scoring in AI Control Tower.

Before you begin
Role required: sn_ai_governance.ai_steward

About this task
ServiceNow AI systems are scored by the AI Skill Kit scoring engine. No additional configuration is required to collect trace data from ServiceNow AI systems.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Rules and templates** > **Evaluation**.
2. On the **AI evaluations** sub-tab, select **ServiceNow AI systems**.
3. Set the **Activate** toggle to on.

Result
Evaluation scoring is active for ServiceNow AI systems. Scores appear on the monitoring Overview page as new sessions are evaluated.

What to do next
To add or remove metrics or adjust the metric sample rate for ServiceNow AI systems, see Configure global metrics for ServiceNow AI systems.

Configure global metrics for ServiceNow AI systems

Choose which metrics to evaluate for ServiceNow AI systems and optionally adjust the shared sample rate.

Before you begin
Role required: sn_ai_governance.ai_steward

About this task
After activating evaluation for ServiceNow AI systems, configure the global metrics that AI Control Tower evaluates for every ServiceNow AI system by default and how often they run.

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Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Rules and templates** > **Evaluation**.
2. On the **AI evaluations** sub-tab, select **ServiceNow AI systems**.
3. Review the quality metrics that are included by default.
   The following quality metrics are evaluated for ServiceNow AI systems by default.

   Overall task completeness

   Whether the agentic workflow completed its assigned task, including all required steps and proper resolution or escalation.

   Tool calling correctness

   Whether tool calls used correct parameters, formatting, and expected values.

   For a complete list of available metrics and their descriptions, see Evaluation metrics.

4. **Optional:** In the Evaluation metrics for Agentic AI section, add or remove metrics that you want to evaluate.

   Important: Adding more metrics increases the visibility you gain into each session, but also increases assist usage to evaluate it. Select the metrics that give you the insight you need.

Option	Description
Add metrics	**a.** Select **+ Add metrics**. **b.** In the Add evaluation metrics panel, find or search for the metric that you want to add. **c.** Select the metric. **d.** Select **Done**.
Remove metrics	**a.** Find the metric that you want to remove. **b.** Select the remove icon. **c.** Select **Remove** to confirm.

5. **Optional:** Update the sample rate.

   (Optional) The sample rate determines what percentage of AI executions are evaluated. ServiceNow AI systems use a single sample rate for all metrics, unlike external AI systems, where each metric has its own rate. The default is 100%. You can enter a lower percentage to evaluate fewer executions.

   Important: Increasing the sample rate evaluates more executions and gives you more confidence in your scores, but also increases assist usage. Set the lowest rate that produces enough evaluated sessions to trust the score.

   a. Enter the sample rate to use when evaluating ServiceNow AI systems.

   b. Select **Update**.

What to do next

To have an added metric contribute to your quality score, add it to a metric template and assign a weight. See Configure an evaluation metric template.

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To tailor metrics for an individual ServiceNow AI system instead of changing the global configuration, see Configure asset-specific metrics for ServiceNow AI systems.

Configure asset-specific metrics for ServiceNow AI systems

Add or remove metrics for one or more ServiceNow AI systems, without changing your organization's global metric configuration.

Before you begin

Role required: sn_ai_governance.ai_steward

Note: The AI system must have evaluation enabled. See Enable evaluation for an AI system.

About this task

You can optionally override which metrics are evaluated for specific ServiceNow AI systems. For details on adding or removing metrics for an AI system from that system's asset record instead, see Configure metrics evaluated for an AI system.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Rules and templates** > **Evaluation**.
2. On the **AI evaluations** sub-tab, select **ServiceNow AI systems**.
3. Configure the metrics that you want to evaluate for specific AI systems.

Important: Adding more metrics increases the visibility you gain into each session, but also increases assist usage to evaluate it. Select the metrics that give you the insight you need.

Option	Steps
Add one or more AI systems and selected metrics	**a.** In the Asset-specific metrics section, select **Add**. **b.** In the side panel, select one or more AI systems that you want to add a metric for. **c.** Select **Next**. **d.** Select one or more metrics that you want to evaluate for the AI systems that you selected. **e.** Select **Add metrics**.
Remove one or more metrics	**a.** In the Asset-specific metrics section, select the check box next to the metric or metrics that you want to remove. **b.** Select **Remove**. **c.** In the confirmation dialog, select **Remove**.

Exclude ServiceNow AI systems from a metric

Exclude one or more ServiceNow AI systems from a specific metric, without changing that metric's configuration for every other system.

Before you begin

Role required: sn_ai_governance.ai_steward

About this task

You can optionally exclude one or more AI systems from a single metric without affecting other ServiceNow AI systems. For example, if one agent occasionally handles data that would

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otherwise fail a secrets detection metric, you can exclude just that agent from that one metric while still scoring it against everything else.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Rules and templates** > **Evaluation**.
2. On the **AI evaluations** sub-tab, select **ServiceNow AI systems**.
3. In the Evaluation metrics for Agentic AI section, find the metric that you want to exclude AI systems from.
4. In the **Excluded AI systems** column, select the pencil icon.
5. In the side panel, search or filter to find the AI systems that you want to exclude.
   - Fixed filters limit the systems to those that are managed, agentic, and have evaluation enabled.
   - You can find systems where a low score reflects a mismatch with the metric rather than an actual issue by viewing AI systems in the **Lowest performing** tab.
   - You can find systems that consistently perform well on this metric and don't need continued scrutiny by viewing AI systems in the **Highest performing** tab.
6. Select the AI systems that you want to exclude.
   Each selected AI system appears as a removable pill after the list.
7. Select **Save**.
   If a selected metric is currently used in a published evaluation template or a compliance evaluation, the exclusion isn't saved, and you're shown which templates or evaluations are using it so you can resolve that first.

Result

The metric no longer evaluates the AI systems that you excluded. They remain subject to every other metric in your global configuration, and their existing scores for other metrics are unaffected.

Configure evaluation scoring for external AI systems

Monitor and configure evaluation scoring for AI systems that run outside the ServiceNow AI Platform.

External AI systems must be connected to send trace data to AI Control Tower before you can activate evaluation scoring for them.

Activate evaluation scoring for external AI systems

Assess the quality and safety of your external AI systems by connecting them to AI Control Tower and activating evaluation scoring.

Before you begin

Role required: sn_ai_governance.ai_steward

About this task

External AI systems require trace data to be scored by the evaluation engine. Unlike AI systems on the ServiceNow AI Platform, which are automatically instrumented, external AI systems must be connected to send trace data to AI Control Tower. There are two ways to establish this connection:

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- **SDK instrumentation**: Instrument your AI agent code using the Traceloop SDK and authenticate with an API key. Use this method for any AI agent framework that is not hosted on a supported cloud platform or monitoring service.
- **Trace connection**: Connect to a supported cloud platform or monitoring service through your cloud credentials and a MID Server. Use this method when your AI agents already run on or send traces to a supported platform. No API key or code instrumentation is required.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Rules and templates** > **Evaluation**.
2. On the **AI evaluations** sub-tab, select **External AI systems**.
3. Set the **Activate** toggle to on.
4. Connect your external AI system to send trace data to AI Control Tower using SDK instrumentation or a trace connection.

Connection method	Description
SDK instrumentation	Use for any third-party AI agent framework (CrewAI, LangChain, AWS Agent Core, and others) not connected through a trace con nection. Requires generating an API key and configuring the Traceloop SDK in your agent code. **a.** Generate an API key to authenticate trace data requests from your external AI system. **Note:** Multiple API keys can exist, but only one is active at a time. **i.** In the **API key for external AI system evaluation** section, select **Create API key**. The API Key record page opens on a new browser tab. **ii.** On the form, fill in the fields. **API Key form fields** **Field** / **Description** Name — Name for the API key. Description — Purpose of the API key. User — User associated with this API key. Select a user with the `sn_ai_observe.ai_data_sender`

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<table>
<tr><th>Connection method</th><th>Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td></td><td>role. Use a dedicated service account rather than a user with elevated permissions. This role is installed with the AI Control Tower Evaluations plugin and grants permission to send observability data without granting read or write access to AI Control Tower configuration. If the service account does not already have this role, assign it before creating the API key.</td></tr>
<tr><td>Active</td><td>Whether the API key is active.</td></tr>
<tr><td>Auth Scope</td><td>Scope that controls the API key's authority at runtime.</td></tr>
<tr><td>Expiry</td><td>Date when the API key expires. Leave empty for no expiration.</td></tr>
</table>
iii. Select Submit.

iv. Copy the generated token and store it securely.

The token is displayed only once. If you lose it, generate a new key, which deactivates the previous one.

v. Return to the AI Control Tower browser tab and refresh the page.

The new API key appears in the API key for external AI system evaluation section.

b. Instrument your AI agent to send trace data to your ServiceNow instance.

For instrumentation steps using the Traceloop SDK, see Instrument a third-party AI agent with the Traceloop SDK for AI Con
</td></tr>
</table>

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Connection method	Description
Trace connection	Use when your AI agents run on a supported cloud platform or already send traces to a sup ported monitoring service. The ServiceNow AI Platform collects trace data through your cloud credentials and a MID Server. No API key or SDK instrumentation is required. See Configuring trace connections.

Result
Evaluation scoring is active for external AI systems. Scores appear on the monitoring Overview page as new sessions are evaluated.

What to do next
To add or remove global metrics and adjust their sample rate, see Configure global metrics for external AI systems.

Configure global metrics for external AI systems

Choose which metrics evaluate all your external AI systems by default, exclude an individual system from a specific metric, and adjust how often each metric runs.

Before you begin
Role required: sn_ai_governance.ai_steward

About this task
Global metric configuration determines which metrics evaluate every external AI system by default and how often each one runs.

Procedure
1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Rules and templates** > **Evaluation**.
2. On the **AI evaluations** sub-tab, select **External AI systems**.
3. Review the quality and safety metrics that are included by default.
   The following quality and safety metrics are evaluated for external AI systems with a 5% sample rate by default.

   Task completion

   Whether the agent decision path and output satisfy the user's request.

   Answer relevancy

   Whether the response addresses the query and remains on topic.

   Secrets detection

   Whether the response contains leaked credentials, API keys, or other sensitive secrets.

   Instruction adherence

   How closely the response follows the given instructions.

   For a complete list of available metrics and their descriptions, see Evaluation metrics.
4. **Optional:** In the Evaluation metrics for Agentic AI section, add or remove metrics that you want to evaluate.

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Important: Adding more metrics increases the visibility you gain into each session, but also increases assist usage to evaluate it. Select the metrics that give you the insight you need.

Option	Description
Add metrics	**a.** Select **+ Add metrics**. **b.** In the Add evaluation metrics panel, find or search for the metric that you want to add. **c.** Select the metric. **d.** Select **Done**.
Remove metrics	**a.** Find the metric that you want to remove. **b.** Select the remove icon. **c.** Select **Remove** to confirm.

5. **Optional:** Adjust the sample rate for one or more included metrics.
   The sample rate determines what percentage of AI executions a metric evaluates. For external AI systems, each metric has its own sample rate, so you can evaluate the metrics that matter most on more executions and sample the rest.

   (Optional) When metrics that contribute to the same quality or safety score use different sample rates, the metric with the higher rate evaluates more executions and can skew that score toward its results.

   Important: Increasing a metric's sample rate evaluates more executions and gives you more confidence in its score, but also increases assist usage. Set the lowest rate that produces enough evaluated sessions to trust the score.

   a. In the Evaluation metrics for Agentic AI section, select the edit icon next to the sample rate that you want to update.

   b. Enter the new sample rate.

   c. Select **Apply**.

What to do next

To have a metric contribute to your quality or safety scores, add it to a metric template and assign a weight. See Configure an evaluation metric template.

To tailor metrics for an individual external AI system instead of changing the global configuration, see Configure asset-specific metrics for external AI systems.

Configure asset-specific metrics for external AI systems

Add or remove metrics for one or more external AI systems without changing the global metric configuration, and adjust metric sample rates.

Before you begin

Role required: sn_ai_governance.ai_steward

Note: The AI system must have evaluation enabled. See Enable evaluation for an AI system.

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About this task

You can optionally override which metrics are evaluated for specific external AI systems. For details on adding or removing metrics for an AI system from that system's asset record instead, see Configure metrics evaluated for an AI system.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Rules and templates** > **Evaluation**.
2. On the **AI evaluations** sub-tab, select **External AI systems**.
3. Configure the metrics that you want to evaluate for specific AI systems.

> **Important:** Adding more metrics increases the visibility you gain into each session, but also increases assist usage to evaluate it. Select the metrics that give you the insight you need.

Option	Steps
Add one or more AI systems and selected metrics	**a.** In the Asset-specific metrics section, select **Add**. **b.** In the side panel, select one or more AI systems that you want to add a metric for. **c.** Select **Next**. **d.** Select one or more metrics that you want to evaluate for the AI systems that you selected. **e.** Select **Add metrics**.
Remove one or more metrics	**a.** In the Asset-specific metrics section, select the check box next to the metric or metrics that you want to remove. **b.** Select **Remove**. **c.** In the confirmation dialog, select **Remove**.

4. **Optional:** Adjust the sample rate for one or more metrics.
   The sample rate determines what percentage of AI executions a metric evaluates. For external AI systems, each metric has its own sample rate, so you can evaluate the metrics that matter most on more executions and sample the rest.

   (Optional) When metrics that contribute to the same quality or safety score use different sample rates, the metric with the higher rate evaluates more executions and can skew that score toward its results.

   > **Important:** Increasing a metric's sample rate evaluates more executions and gives you more confidence in its score, but also increases assist usage. Set the lowest rate that produces enough evaluated sessions to trust the score.

   a. In the Asset-specific metrics section, select one or more AI systems that you want to update.
   b. In the More actions menu, select **Edit sample rate**.
   c. In the side panel, select the pencil icon for the metric that you want to update.
   d. Enter the sample rate that you want to use.
   e. Select **Apply**.
   f. Update the sample rate for additional metrics in the side panel as needed.
   g. Select **Save**.

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Exclude external AI systems from a metric

Exclude one or more external AI systems from a specific metric, without changing that metric's configuration for every other system.

Before you begin
Role required: sn_ai_governance.ai_steward

About this task
You can optionally exclude one or more AI systems from a single metric without affecting other external AI systems. For example, if one agent occasionally handles data that would otherwise fail a secrets detection metric, you can exclude just that agent from that one metric while still scoring it against everything else.

Procedure
1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Rules and templates** > **Evaluation**.
2. On the **AI evaluations** sub-tab, select **External AI systems**.
3. In the Evaluation metrics for Agentic AI section, find the metric that you want to exclude AI systems from.
4. In the **Excluded AI systems** column, select the pencil icon.
5. In the side panel, search or filter to find the AI systems that you want to exclude.
   - Fixed filters limit the systems to those that are managed, agentic, and have evaluation enabled.
   - You can find systems where a low score reflects a mismatch with the metric rather than an actual issue by viewing AI systems in the **Lowest performing** tab.
   - You can find systems that consistently perform well on this metric and don't need continued scrutiny by viewing AI systems in the **Highest performing** tab.
6. Select the AI systems that you want to exclude.
   Each selected AI system appears as a removable pill after the list.
7. Select **Save**.
   If a selected metric is currently used in a published evaluation template or a compliance evaluation, the exclusion isn't saved, and you're shown which templates or evaluations are using it so you can resolve that first.

Result
The metric no longer evaluates the AI systems that you excluded. They remain subject to every other metric in your global configuration, and their existing scores for other metrics are unaffected.

Configure an evaluation metric template

Adjust the scoring formula for a metric template to change which metrics contribute to quality or safety scores, or to change how much weight each metric carries.

Before you begin
Role required: sn_ai_governance.ai_steward

About this task
You can adjust a metric's influence on the score, add metrics previously tracked for visibility only, or remove metrics that aren't required by editing a metric template. Changes apply to new evaluation sessions only. Existing sessions keep the scores they were originally calculated with.

For the full list of quality and safety metrics, see Evaluation metrics.

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Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Rules and templates** > **Evaluation**.
2. Select the **Metric templates** sub-tab.
3. Select the metric template that you want to edit.
4. Update the metric template as needed.

   For example:

   - Select the primary metric, which is required for every measure.
   - Adjust a metric's weight to increase or decrease its influence on the score.
   - Add a metric by selecting **+ Add metrics** and assigning a weight.
   - Remove a metric from the formula.

   After any change, verify that all weights still sum to 100%.

   Note: Only metrics that are enabled for scoring on the AI evaluations page are available to add. See Activate evaluation scoring for ServiceNow AI systems and Activate evaluation scoring for external AI systems.

5. Verify the updated formula by expanding the **How is this score calculated?** section.

Result

The updated formula is applied to new evaluation sessions. Scores on the monitoring overview reflect the updated formula as new data is collected.

Configure trace data retention and access

Control how long session, trace, and span data is stored to reduce storage usage, and choose whether that data stays available for analysis.

Before you begin

Role required: admin

About this task

By default, session, trace, and span data is retained for 30 days. If your organization has strict data-minimization requirements, a system administrator can shorten that window or stop retaining trace data altogether. Aggregate quality and safety scores remain available either way; only the underlying trace-level detail is affected.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Rules and templates** > **Evaluation**.
2. Select the **Trace data retention and access** sub-tab.
3. Choose a trace retention option.

Option	Description
Don't keep traces	Permanently delete session, trace, and span data after approximately 1 day, once scoring is complete, by selecting **Don't keep traces**. After selecting this option, no session data is displayed in AI Control Tower.

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Option	Description
	○ Evaluated sessions views on the monitoring overview and on each AI system's **Monitor** tab are hidden. ○ Actionable insights from AI Skill Kit are turned off.
Keep traces for scoring	**a.** Retain data for analysis and re-scoring by selecting **Keep traces for scoring**. **b.** Specify the number of days to keep the data from 1 to 30.

4. Select **Save**.

> ⚠ **Warning:** If the new setting would delete data you're currently storing, a confirmation dialog shows how many traces would be deleted and how many AI systems are affected. Type the exact trace count shown, then select **Deletion** to confirm. This action can't be undone.

Result

A confirmation message shows the retention period now in effect. The setting applies instance-wide, across all AI evaluation pipelines.

Managing evaluation cost

Reduce the assists that evaluation consumes by adjusting what you evaluate, how often you evaluate it, and which AI systems you evaluate.

Evaluating both ServiceNow and external AI systems consumes assists. Three settings determine how many assists your evaluations consume.

- Consider which metrics require evaluation. Each metric increases the visibility you gain into a session but also increases assist usage to evaluate it. Evaluate only the metrics that give you the insight you need.
- Adjust the sample rate as needed. A higher sample rate evaluates more executions and gives you more confidence in your scores but also increases assist usage. Set the lowest rate that produces enough evaluated sessions to trust the score. ServiceNow AI systems use a single sample rate for all metrics. External AI systems have a sample rate per metric, so you can keep higher rates for the metrics that matter most and sample the rest.
- Evaluate AI systems that require oversight. Evaluation runs for every AI system that has it turned on, so turn it off for the systems that you don't need to monitor, such as test or retired systems.

Related topics

Configure global metrics for ServiceNow AI systems

Configure global metrics for external AI systems

Configure asset-specific metrics for ServiceNow AI systems

Configure asset-specific metrics for external AI systems

Configure metrics evaluated for an AI system

Disable evaluation for an AI system

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Reviewing quality and safety scores

Determine whether your AI systems are meeting quality and safety targets by reviewing scores and evaluation trends.

Reviewing scores workflow

When evaluations are active and sessions have been scored, start with the monitoring overview to assess performance across your AI portfolio. The overview provides score cards, AI-generated insights, trend data, and ranked lists of AI systems so you can identify which systems need attention.

When you identify a system that needs closer review, select the **Monitor** tab on the AI system's asset page to see scores, metric breakdowns, trends, and evaluated sessions scoped to that system alone. See Monitoring an AI system.

Monitoring overview

Identify low-scoring AI systems quickly by reviewing quality and safety scores, AI-generated insights, and performance trends across your AI portfolio.

Key benefits

- See the quality and safety health of your entire AI portfolio at a glance without opening individual system records.
- Focus your attention on the AI systems and metrics that need it most using ranked lists and AI-generated insights.
- Detect gradual regressions before they affect users by tracking metric trends over time.
- Understand exactly how a composite score is calculated by expanding the scoring breakdown for any score card.

The monitoring overview is the starting point for assessing how your AI systems are performing in production. It brings together score cards, inventory data, AI-generated insights, and trend analysis so you can identify issues and take action from a single page.

Note: If you have the AI Asset Owner [sn_ai_asset_mgmt.ai_asset_owner] role, the **Overview** page provides a summary for only the AI systems that you own.

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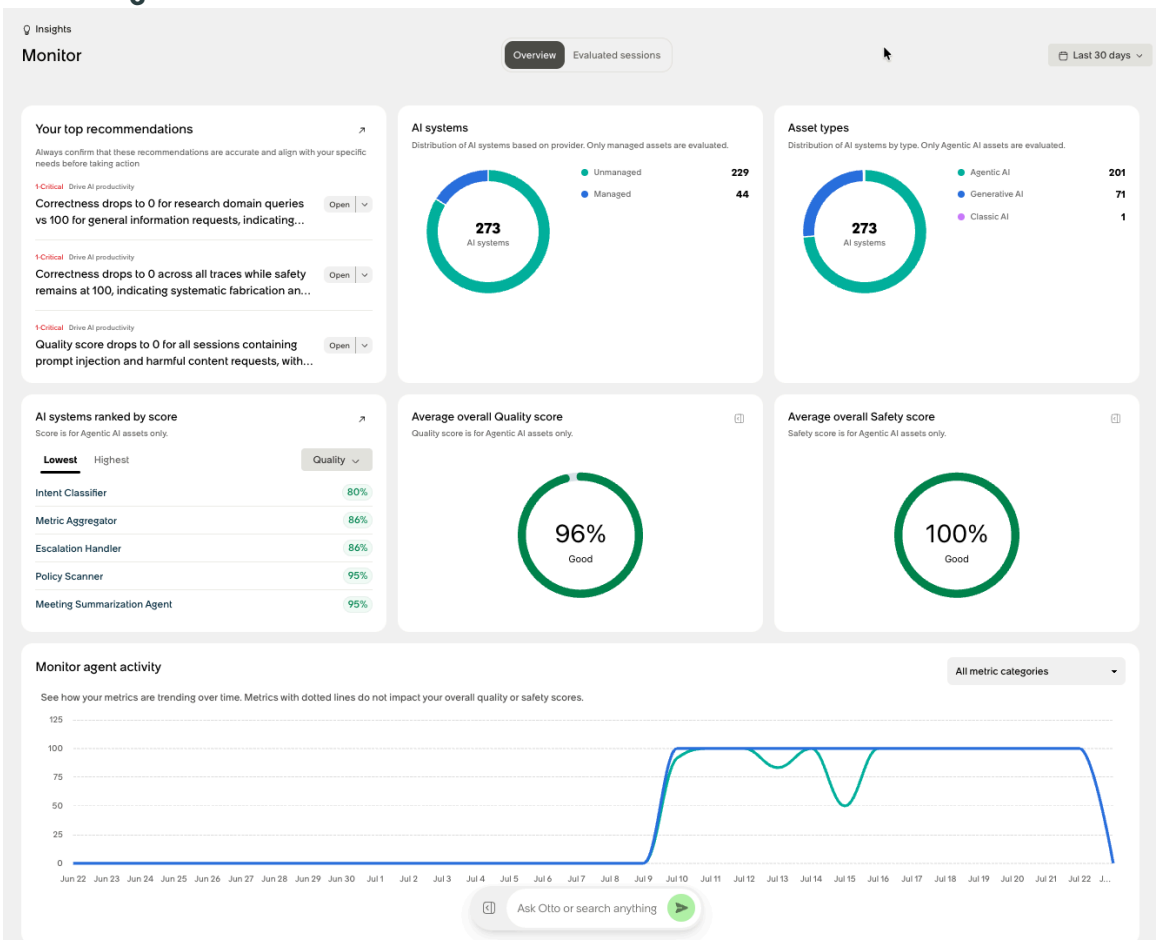
Monitoring overview



Required roles

The AI steward [sn_ai_governance.ai_steward] or AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role is required to view the monitoring Overview tab.

Accessing the monitoring overview

View the monitoring overview by navigating to **All** > **AI Control Tower** > **Home** > **Insights** > **Monitor** > **Overview**.

Your top recommendations

AI-generated insights surface the highest-priority issues affecting your AI systems. Each recommendation includes a severity level, an outcome category (for example, Drive AI Productivity), and a brief description of the issue.

Note: Insights are generated daily based on sessions from the previous 24 hours. This delay allows the evaluation engine to collect enough sessions to produce meaningful analysis.

Each insight card provides the following actions:

View details

Opens a side panel with the full analysis, including affected metrics, impact, description, and root cause.

Open

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Navigates to the location where you can act on the insight. For ServiceNow AI agents, this option takes you to actionable recommendations in the AI Skill Kit. For external AI systems, this option takes you to the related AI asset page in AI Control Tower.

Complete

Marks the insight as resolved and removes it from the list. Use this options after you have addressed the underlying issue.

Delete

Removes the insight from the list without marking it resolved. Use this option for insights that don't require action, such as duplicates or expected behavior.

Use the recommendations to prioritize which issues to investigate first. For example, an insight might report that a safety score dropped significantly during the past week and identify the specific session and metric driving the decline.

Important: AI-generated insights are based on automated analysis and may not reflect all contributing factors. Verify findings by reviewing session detail before taking action.

AI systems and asset types

Two inventory widgets show the distribution of AI systems on your instance.

AI systems

Shows the total count of AI systems by management status (Managed and Unmanaged). Only managed assets are evaluated.

Asset types

Shows the distribution of AI systems by type (for example, Agentic AI, Generative AI, and Classic AI). Select a type to open the inventory filtered by that type. Only Agentic AI assets are evaluated.

Average overall Quality and Safety scores

The quality and safety score cards display average overall scores for your Agentic AI systems. Each score card shows a percentage and a performance label.

Scores are color coded for quick interpretation:

- Red (0 to 50%): Low. Investigate immediately.
- Orange (51 to 75%): Fair. Review recent sessions for trends.
- Green (76 to 100%): Good. Meeting quality or safety targets.

The safety score card populates only when external AI systems are being evaluated and have returned scored sessions. Because ServiceNow AI systems don't have safety metrics available, the safety score card remains empty until at least one external AI system has produced evaluated sessions. If the card appears empty, verify that evaluation scoring is active for your external AI systems and that trace data is being received.

View a scoring breakdown by selecting the side panel icon.

Score card side panel

Selecting a quality or safety score card opens a side panel with a detailed breakdown of how the composite score is calculated. The panel includes tabs for **ServiceNow AI systems** and **External AI systems** so you can view the scoring breakdown for each type.

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- See how the score has changed over time by reviewing the average score and the percentage change from the prior period with a trend chart.
- Identify which metrics are contributing to the score by reviewing the data sources table, which shows each metric's name, weight, and current score, and evaluation count.
- Expand the scoring formula section to see a visualization of how each metric contributes to the composite, along with explanatory notes about how the score is calculated.

Note: If one or more metrics have a noticeably lower evaluation count than the others, a bias indicator appears next to the scoring formula section. A metric with fewer evaluations still counts at its full configured weight, so metrics that evaluate more consistently can carry more real influence on the score than their configured weight alone suggests.

Analyze which metrics are pulling a composite score up or down, and by how much. For details on how scores are calculated, see How evaluation scoring works.

AI systems ranked by score

View which AI systems are scoring lowest or highest. Select **Quality** or **Safety** from the list, and select **Lowest** or **Highest** to change the sort order. Select a system name to open its evaluation details.

Monitor agent activity

Track how quality and safety metrics for your Agentic AI systems are trending over time in the Monitor agent activity chart. The chart plots every metric with data for the selected range so you can detect gradual regressions, confirm that recent changes improved performance, and see which metrics are shaping your overall scores.

Two line styles distinguish how each metric contributes to scoring:

- Solid lines represent metrics that contribute to your overall quality or safety score. These metrics are configured in a metric template.
- Dotted lines represent metrics that are being collected but don't contribute to your overall quality or safety score. These metrics aren't configured in any metric template.

To add a dotted-line metric to your scoring formula or to adjust how much existing metrics contribute to your overall scores, see Configure an evaluation metric template.

Choose which metrics to display by selecting an option from the list.

Lowest performing metrics

Show the top five metrics that had the biggest drop in performance over the selected time period. This is the default selection.

Top performing metrics

Show the top five metrics that had the biggest increase in performance over the selected time period.

Quality metrics

Show only metrics in the Quality category.

Safety metrics

Show only metrics in the Safety category.

All metrics

Show every quality and safety metric that has data for the selected date range.

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Alternatively, select an individual metric from the list to view performance for that metric over time.

Point to a data point on the chart to see the exact score for that date.

Use cases

Identifying a quality regression during a weekly review

An AI steward opens the monitoring overview on Monday morning. The quality score card shows 68% (orange), down from 82% the previous week. The administrator selects the score card and sees that Task completion dropped from 88% to 54%. The AI systems ranked by score widget shows a specific incident resolution agent at the bottom of the list. The administrator selects that system, opens the lowest-scoring session, and discovers that a downstream API integration started returning timeout errors over the weekend. The administrator files an incident and monitors subsequent sessions to verify the fix.

Responding to an AI-generated insight

The top recommendations list surfaces a critical insight: "Safety score dropped the most this week." The administrator selects **View details** and reads that the Instruction adherence metric dropped 18% for an external HR case management agent. The root cause analysis indicates the agent began straying from its approved response guidance in leave-request responses. The AI steward shares the insight with the product owner, who adjusts the agent's response guidelines.

Monitoring a newly deployed agent

After deploying a new ServiceNow ITSM agent, the product owner opens the monitoring overview and filters to the new system using the AI systems ranked by score widget. Over the first week, the trend chart shows Tool choice accuracy starting at 62% and improving to 78% as the team adjusts the agent's tool configuration. The owner uses the scoring breakdown side panel to confirm which metrics are improving and which still need attention.

Review scores across your AI portfolio

Assess the quality and safety of your AI systems by reviewing scores, identifying low-scoring systems, and learning which metrics are affecting each score.

Before you begin

Role required: sn_ai_asset_mgmt.ai_asset_owner or sn_ai_governance.ai_steward

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Insights** > **Monitor**.
2. Set the date range for the data you want to review.
   Select the date range picker and choose a time period. The default is **Last 30 days**. Select **Custom range** to specify an exact start and end date, up to 18 months apart.
   All score cards, trends, and session data on the page update to reflect the selected range.
3. Check for critical issues that need immediate attention by reviewing **Your top recommendations**.
   a. Review each insight card for its severity level and outcome category.
   b. Select **View details** to open the full analysis in a side panel, including affected metrics, impact, description, and root cause.
4. Understand which metrics are affecting a score by selecting the score card to open the scoring breakdown.

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a. Select the **ServiceNow AI systems** or **External AI systems** tab to view the breakdown for a specific AI system type.

b. Review each metric's name, weight, current score, and change over time.

c. Expand the scoring formula section to see a stacked bar visualization of how each metric contributes to the composite score.

For example, if the Quality score is 68%, the side panel might show that Task completion (weight 25%) scored 54% while Answer completeness (weight 40%) scored 91%. The low Task completion score is pulling down the composite.

5. Identify which AI systems need attention by reviewing the **AI systems ranked by score** widget.

a. Select **Quality** or **Safety** from the list to choose which score to rank by.

b. Select **Lowest** or **Highest** to change the sort order.

c. Select a system name to view its evaluation details.

For example, sorting by Lowest quality might reveal that an incident resolution agent is scoring 52% while all other systems are over 80%. This tells you where to focus your investigation.

6. Assess overall quality performance by reviewing the **Average overall Quality score** card.

The score card displays a composite weighted average as a percentage. For example, a Quality score of 88% labeled Good (green) indicates that your AI systems are meeting quality targets overall.

7. Assess overall safety performance by reviewing the **Average overall Safety score** card.

The Safety score card displays a composite weighted average as a percentage. For example, a Safety score of 70% labeled Fair (orange) indicates that one or more safety metrics need attention.

8. Check performance over time by reviewing the **Monitor agent activity** trend chart.

Option	Description
Lowest performing metrics	View the top five metrics with the largest de cline in quality and safety over time.
Highest performing metrics	View the top five metrics with the largest in crease in quality and safety over time.
Quality metrics	View the performance of quality metrics over time.
Safety metrics	View the performance of safety metrics over time.
All metrics	View the performance of all metrics over time.
Select a specific metric	View the performance for a specific metric by selecting it from the list.

Solid lines represent metrics that contribute to this AI system's overall quality or safety score. Dotted lines represent metrics that are collected but don't contribute to those scores. You can point to a data point on the chart to see the exact score for that date.

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For example, a gradual decline in Task completion from 90% to 72% over three weeks indicates a quality regression for this AI system that warrants session-level investigation.

To add a dotted-line metric to your scoring formula, see Configure an evaluation metric template.

Investigating low-scoring sessions

Narrow a quality or safety issue from a broad score to a specific cause by reviewing evaluated sessions and session details.

Investigation workflow

When a quality or safety score drops, investigate a session to narrow the problem from a broad score to a specific cause. Session-level scores tell you which interaction went wrong. Trace-level scores and the judge's reasoning tell you which exchange produced the problem. Span-level input and output data tells you exactly why: the wrong tool was called, a parameter was malformed, or a data source returned an error.

Important: Trace and span detail for a session is available only for a limited time. To review the judge's reasoning and the input and output for a specific trace or span, investigate within 7 days for ServiceNow AI systems, or within 30 days for external AI systems. After that window, the session's quality and safety scores remain available, but the trace and span detail behind them is removed.

Evaluated sessions

View all evaluated AI sessions across your portfolio, compare quality and safety scores by AI system, and identify the sessions that need investigation.

Key benefits

- Compare quality and safety scores across AI systems to identify which systems are declining or performing well.
- Find low-scoring sessions quickly by sorting and filtering the session list.
- View score trends by AI system over weeks or months to detect patterns.
- Open any session directly to investigate its traces and spans.

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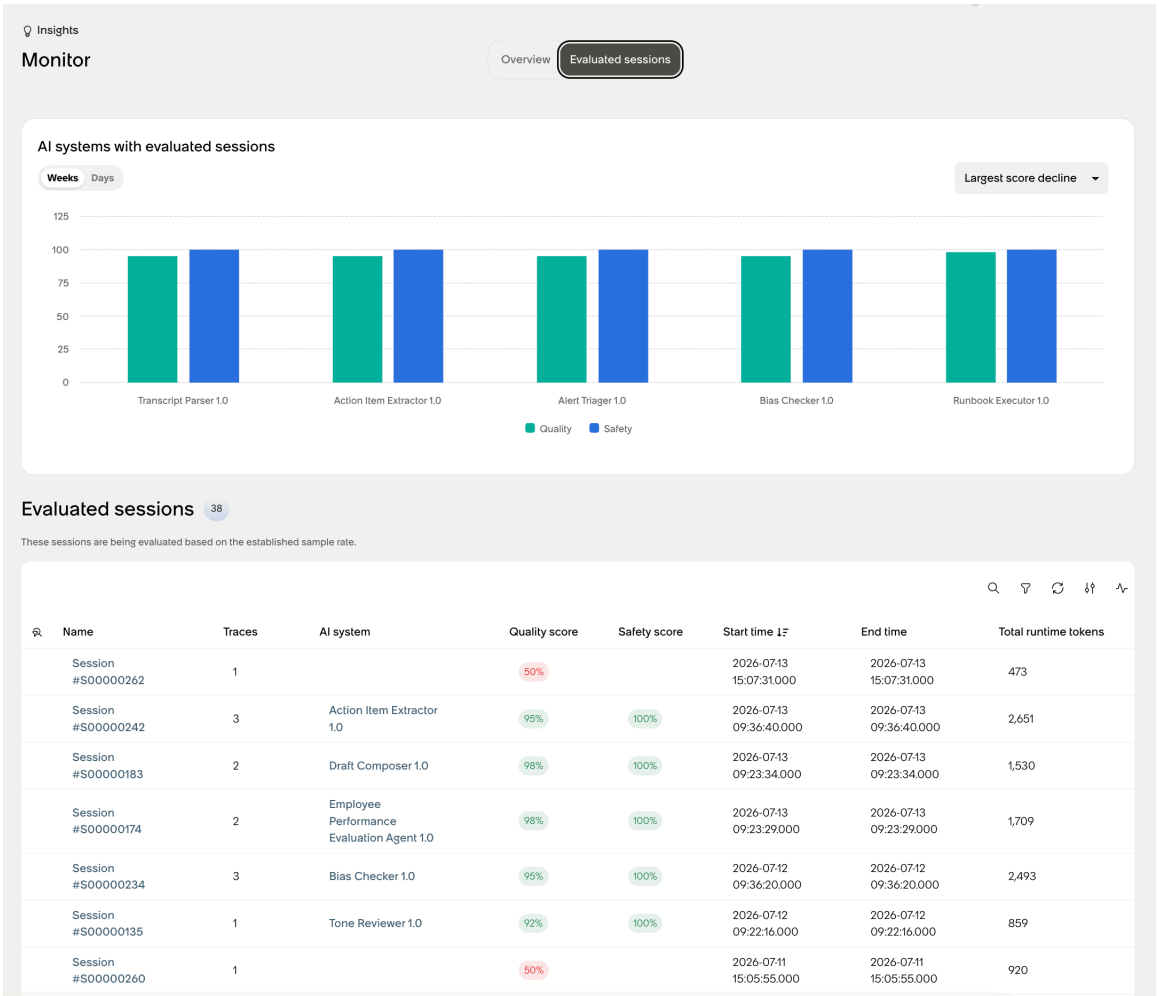
Evaluated sessions



Required roles

The AI steward [sn_ai_governance.ai_steward] or AI asset owner [sn_ai_asset_mgmt.ai_asset_owner] role is required to view evaluated sessions.

Accessing evaluated sessions

View evaluated sessions by navigating to **All** > **AI Control Tower** > **Home** > **Insights** > **Monitor** and selecting the **Evaluated sessions** tab.

AI systems with evaluated sessions

Compare quality and safety scores across your AI systems using the bar chart. Each AI system displays a pair of bars representing its quality and safety scores.

- Group scores by **Months**, **Weeks**, or **Days** to adjust the time granularity.

  For example, after deploying an update to an AI system, group the chart by **Days** to see whether the update improved scores without affecting other systems.

- Select **Largest score decline** or **Top performers** from the list to change how AI systems are sorted in the chart.

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Evaluated sessions list

Find the sessions that need attention by reviewing the evaluated sessions table. Scores are color coded for quick scanning: red (0 to 50%), orange (51 to 75%), green (76 to 100%).

Name

Session identifier. Select the name to open the session detail page and begin investigating traces and spans. See Investigate a low-scoring session.

Traces

Number of traces in the session. A session with many traces represents a longer, multi-turn interaction. Low scores on sessions with few traces can indicate a fundamental issue, while low scores on sessions with many traces may point to degradation over the course of the conversation.

Spans

Number of spans across all traces in the session. A high span count relative to the number of traces can indicate the AI system is taking many steps, such as tool calls, to complete its task, which can also help explain elevated latency or token usage.

AI system

The AI system associated with the session. Select the name to view aggregated quality and safety scores across all evaluated sessions for that system.

Quality score

Composite quality score for the session, calculated from the weighted metrics in your quality template. Sort by this column to surface the lowest-scoring sessions first.

Safety score

Composite safety score for the session, calculated from the weighted metrics in your safety template. A red safety score warrants immediate investigation.

Start time

When the session began. Use this to correlate low scores with known events such as deployments, configuration changes, or outages.

End time

When the session ended or timed out.

Total runtime tokens

Combined input and output tokens consumed by the AI system during this session. This reflects the cost of running the interaction, not the cost of evaluating it. Unusually high token counts can indicate inefficient agent behavior such as excessive retries or overly verbose responses.

Latency (ms)

Combined language model response time, in milliseconds, across all traces in the session. This measures time spent in language model calls, not total session duration. Unusually high latency can point to a slow-responding model or a high number of tool-calling steps within the session.

Session details

View metric breakdowns, the judge's reasoning, and trace and span data for a specific evaluated session.

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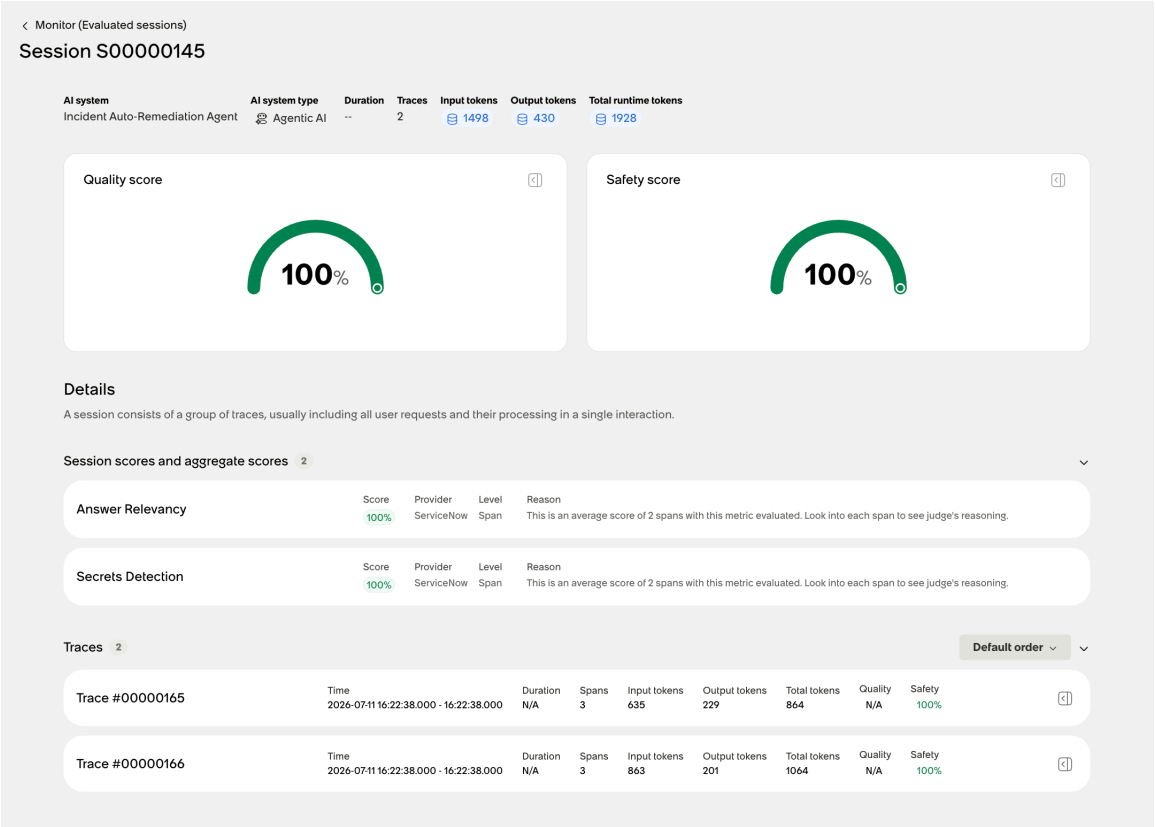
Key benefits

- Understand which metrics are pulling a session's quality or safety score up or down by reviewing the scoring breakdown.
- Read the judge's reasoning for each metric to understand why a score was assigned.
- Identify the exact trace and span where an issue occurred by following the score indicators in the span timeline.
- Compare the AI system's input and output at each step to determine whether the issue originated in the data the system received or the response it produced.

Session details



Viewing session information

The session details page shows the AI system, its type, session duration, and token usage. Duration is measured from the first interaction to session close or timeout (10 minutes of inactivity). Total runtime tokens reflect the cost of running the interaction, not the cost of evaluating it.

The header also shows latency and span count for the session. Latency reflects the AI system's language model response time across the session's traces, which is typically much shorter than the session duration since duration also includes think time and tool-call execution. Span count is the number of spans across all traces in the session.

Quality and Safety score cards

Review the overall quality and safety of the session by reviewing the score cards. View a breakdown of the score by selecting the side panel icon. The side panel is filtered to show only the metrics that apply to this session, along with each metric's weight, score, and explanatory notes about how the score is calculated.

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Learn which metrics are impacting the overall score by viewing the lowest scoring metrics list.

To learn more about any single score, point to the information icon. The reason notes that the score is an average and points you to open an individual span or trace to read the judge's reasoning for each one.

Details

Identify which trace in the session is responsible for the low score by reviewing the traces list. Sort the Traces list to focus your investigation by selecting Lowest quality score, Lowest safety score, Highest latency, or other criteria from the list.

A trace shows N/A for its Quality or Safety score when no metrics in your corresponding metric template apply to that trace. This happens when all metrics in the template are evaluated at the session or span level only, or when the metrics that do apply to the trace level weren't evaluated for that particular trace. An N/A score doesn't indicate a problem with the trace. Rather, it indicates that your template's formula has nothing to calculate at the trace level. To see scores for that trace, either:

- Add a trace-level metric to your template. See Configure an evaluation metric template.
- Review span-level scores by expanding the trace and selecting individual spans in the timeline.

Trace detail

View the span timeline and evaluation data by selecting a trace.

Span timeline

Visualizes the trace as a waterfall where each span appears as a horizontal bar showing its duration. Nested spans are indented under their parent. Quality and safety indicators on individual spans highlight which spans scored highest or lowest, so you can focus your investigation on the right span without reviewing each one individually.

Evaluation scores

Lists each evaluation metric scored for this trace, along with the score and the judge's reasoning. Select a reason to open the full reasoning in a modal. Use this table to understand which metrics drove the trace's score before selecting individual spans.

Details

Shows what the AI system received and what it produced for this trace. Select **Open details** to view the full content in a modal. Select the **Input** tab to view the user's request or the data passed to the agent. Select the **Output** tab to view the agent's response.

Navigate between traces without returning to the session detail page by selecting **Previous trace** or **Next trace**.

Span detail

Identify the root cause of an issue at the most granular level by selecting a span in the timeline and viewing the details.

Duration

Time the span took to execute. Unusually high duration can indicate a slow external service call or a timeout that affected the agent's response.

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Tokens (input, output, total)

Number of tokens consumed by the span. Compare input and output token counts to assess whether the response is proportional to the prompt. A high input token count relative to other spans may indicate the agent is sending excessive context to an LLM call.

Quality

Quality score for this span. A low quality score on a specific span helps you pinpoint which step in the agent's reasoning or tool usage produced an incorrect or incomplete result.

Safety

Safety score for this span. A low safety score on a specific span helps you isolate which step in the agent's execution produced inappropriate content.

Note: The token counts reflect the cost of running the AI system's actual interaction, not the cost of evaluating it. Evaluation scoring consumes separate tokens that aren't displayed here.

Learn why a span scored the way it did by reviewing the evaluation metric scores and the judge's reasoning. For example, a Tool choice accuracy score of 54% with reasoning that says "the agent selected a knowledge base search when a CMDB lookup was more appropriate" tells you exactly what decision the agent made incorrectly.

Determine whether the issue originated in the input or the output by viewing the Details section. The **Input** tab shows the data or prompt passed to the span. The **Output** tab shows what the span returned. For example, a correctly formatted request paired with an incorrect tool call tells you the issue is in the agent's logic, not the incoming data. Select **Open details** to view the full content when the preview is truncated.

Investigate a low-scoring session

Determine the root cause of a low quality or safety score by working through the session detail, trace timeline, and span-level input and output data.

Before you begin

Role required: sn_ai_asset_mgmt.ai_asset_owner or sn_ai_governance.ai_steward

About this task

Trace and span detail for a session is available only for a limited time. To review the judge's reasoning and the input and output for each trace and span, complete your investigation within 7 days for ServiceNow AI systems, or within 30 days for external AI systems. After that window, the session's quality and safety scores remain available, but the trace and span detail is removed.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Insights** > **Monitor** and select the **Evaluated sessions** tab.
2. In the Evaluated sessions list, find the session that you want to investigate.
   For example, sort by score to identify the lowest-scoring sessions, search for a specific session by name, or filter the list to find the session.
3. Select the session that you want to investigate.
4. On the session detail page, determine which quality metrics are contributing to the low score by reviewing the Quality score card.

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a. Open the quality scoring breakdown by selecting the side panel icon.

b. Review each metric's weight and score to determine which metric is affecting the score.

c. Close the side panel.

For example, if the session quality score is 67%, the side panel might show that Task completion scored 50% at 40% weight, while Answer completeness scored 91% at 35% weight. The low Task completion score is the primary contributor to the low quality composite.

5. On the session detail page, determine which safety metrics are contributing to the low score by reviewing the Safety score card.

a. Open the safety scoring breakdown by selecting the side panel icon.

b. Review each metric's weight and score to determine which metric is affecting the score.

c. Close the side panel.

For example, a Profanity detection score of 0% at 49% weight would immediately explain a low safety composite.

6. Review the score and the judge's reasoning for every evaluated metric in the Session scores and aggregate scores section.

Metrics scored at the session, trace, or span level all roll up here, so you can identify what's driving the quality and safety scores without opening each trace or span. The reasoning explains why the judge assigned each score. For example, a Task completion score of 50% might include reasoning such as "The user's goal was partially accomplished but the agent did not confirm the resolution."

When a metric's score is an average aggregated from the trace or span level, open an individual span or trace to read the judge's reasoning for each one.

7. Identify which trace is responsible for the low score by sorting the traces list.
   - Find the trace with the lowest quality score by selecting **Lowest quality score**.
   - Find the trace with the lowest safety score by selecting **Lowest safety score**.
8. Select the trace that you want to investigate.
9. In the trace side panel, determine which metrics failed on that trace by reviewing the trace-level evaluation scores and the judge's reasoning.

The evaluation scores table shows only the metrics applicable to this trace. Different metrics are available at the trace level than at the session level.

The judge's reasoning tells you what specifically went wrong. For example, an Answer completeness score of 60% with reasoning "The response did not address all aspects of the user's query" tells you the agent's response was incomplete.

10. Determine whether the agent's response addressed the user's request by reviewing the trace-level input and output.
The input and output show you the actual conversation between the user and the AI system.

a. Select the **Input** tab to see what the user asked or what data was passed to the agent.

b. Select the **Output** tab to see how the agent responded.

c. Select **Open details** to view the full content when the preview is truncated.

11. Identify and select the span that caused the issue using the quality and safety indicators in the span timeline.

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12. Confirm the root cause by reviewing the span's evaluation scores and comparing its input and output data.
    a. Review the evaluation metric scores and the judge's reasoning for this specific step.
    b. Select the **Input** tab to see what data was passed to this span.
    c. Select the **Output** tab to see what the span produced.
    d. Select **Open details** to view the full content when the preview is truncated.

    At the span level, the input and output show the agent's internal execution, not the user-facing conversation. For example, the input might be a correctly formatted API request, while the output shows the agent called the wrong endpoint or passed a malformed parameter.

13. **Optional:** Review additional traces to determine whether the issue is isolated or recurring by selecting **Next trace** or **Previous trace** to navigate between traces.

What to do next

After identifying the root cause, coordinate with the product owner to adjust the agent's configuration, prompts, or tool access. Monitor subsequent sessions to verify that the issue is resolved.

AI Control Tower evaluations reference

Reference topics provide additional information about the evaluation metrics in AI Control Tower.

Evaluation metrics

All evaluation metrics available in AI Control Tower, with their categories, evaluation levels, scoring formats, and descriptions.

AI Control Tower provides evaluation metrics that are enabled by default or enabled via opt-in. The metrics available for a given AI system depend on whether it is a ServiceNow AI or external AI system.

ServiceNow AI metrics

Metric	Category	Default or Opt-in	Level	Prompt owner	Scoring format	Description
Overall task completeness	Quality	Default	Trace	AI Skill Kit	Scale (0/50/100%)	Whether the agentic workflow completed its assigned task, including all required steps and proper resolution or escalation.
Tool calling correctness	Quality	Default	Span	AI Skill Kit	Binary	Whether tool calls used correct parameters, formatting, and expected values.
Tool choice accuracy	Quality	Opt-in	Span	AI Skill Kit	Percentage	Whether the agent selected the most appropriate tool for each step while completing a task.

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External AI metrics

Metric	Category	Default or opt-in	Level	Scoring format	Description
Task completion	Quality	Default	Session	Percentage	Whether the agent decision path and output satisfy the user's request.
Answer relevancy	Quality	Default	Span	Binary	Whether the response addresses the query and remains on topic.
Secrets detection	Safety	Default	Span	Binary	Whether the response contains leaked credentials, API keys, or other sensitive secrets.
Instruction adherence	Safety	Default	Span	Percentage	How closely the response follows the given instructions.
Agent goal accuracy	Quality	Opt-in	Span	Percentage	Whether the AI agent achieved its intended objectives.
Agent goal completeness	Quality	Opt-in	Span	Percentage	Whether the agent successfully accomplished all user goals.
Agent tool trajectory	Quality	Opt-in	Span	Percentage	Whether actual tool calls match the expected reference tool calls.
Context relevance	Quality	Opt-in	Span	Percentage	Whether retrieved context is pertinent to the user query.
Profanity detection	Safety	Opt-in	Span	Binary	Whether the response contains inappropriate language.
Sexism detection	Safety	Opt-in	Span	Binary	Whether the response contains sexist or discriminatory content.
Tool error	Quality	Opt-in	Span	Binary	Whether errors or failures occurred during agent tool execution.
Faithfulness	Quality	Opt-in	Span	Binary	Whether the response is free of hallucinations and grounded in verifiable facts.
Answer correctness	Quality	Opt-in	Span	Percentage	Whether the response is factually accurate when compared against ground truth.
Answer completeness	Quality	Opt-in	Span	Percentage	How completely responses use relevant context

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Metric	Category	Default or opt-in	Level	Scoring format	Description
					to address all relevant information.
Conversation quality	Quality	Opt-in	Span	Percentage	Whether the conversation demonstrates appropriate tone, clarity, flow, responsiveness, and transparency.

Measuring AI systems

Measure quantifies the productivity value delivered by your AI systems and tracks their costs. It also reports the net return on AI, enabling you to determine where to scale, fund, or retire AI.

Measure overview

Measure is one of the AI Control Tower (AICT) pillars (Discover, Observe, Govern, Secure, Measure). While the other pillars focus on finding, monitoring, governing, and protecting your AI systems, Measure is responsible for reporting the results produced by those systems. It answers three questions:

- What is AI actually delivering?
- What is it costing you?
- What's the net return?

Components

Measure has three components:

Value

Value converts AI usage into a productivity figure.

Cost

Cost records the actual expenses of your AI, enabling AI Control Tower to compare this against productivity gains and calculate the net AI return. You set it up by inputting your organization's average hourly rate and specifying prices for both integrated and non-integrated vendors.

Dashboard

Dashboards are where value and cost converge. The dashboard presents productivity gains, AI costs, and net AI return together. It breaks usage and costs down by user and department. It shows adoption patterns and flags AI systems that record no usage.

How Measure helps

As organizations scale AI across teams and providers, it becomes harder to understand whether AI investments are delivering measurable business value. Costs can accumulate across multiple model providers, while productivity gains often remain anecdotal or inconsistent across teams.

As AI adoption grows, Measure helps organizations:

Prove business value

Calculate productivity value and net AI return for specific AI systems, instead of relying on estimates or anecdotal feedback.

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Control AI spend

Monitor AI system costs, including token-level costs across model providers, so spend is visible and predictable.

Make informed investment decisions

Identify where AI is creating value, where spend is increasing, and which AI systems to scale, optimize, fund, or retire.

Standardize value measurement

Use templates so teams can calculate value consistently, and results can be compared or rolled up across the organization.

Reduce manual reporting

Run scheduled value jobs so dashboards stay up to date without teams assembling spreadsheet-based reports.

Attribute accountability

Assign value and cost to the departments and users that generate them.

Measure AI systems

Measure is the AI Control Tower capability for measuring the productivity gains, cost, and net AI return of your AI systems. It brings together value measurement, cost tracking, and dashboards.

Get started

Explore

Learn how value templates, cost frameworks, and productivity calculations work.

Configure

Set up AI costs, create value templates, and map them to AI systems.

Use

Use Dashboards to review and analyze the productivity gains, AI costs, and the net return on AI investment.

Reference

Learn about the roles, Performance Analytics indicators, and the tables used in value calculation.

Exploring Measure

Measure helps you determine whether your AI systems deliver more value than they cost. It brings value and cost data together in dashboards so that you can compare productivity gains with AI spend.

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Measure is one of the AI Control Tower pillars. It helps you quantify the value your AI systems deliver, track what they cost, and monitor the results over time. Measure includes the following components.

Value

Value translates AI usage into measurable productivity metrics. It uses value templates and value jobs to assess the impact of AI usage on productivity and to calculate the productivity gains from your AI systems.

A value template is the metric that converts AI usage into productivity gains. Each template includes a usage indicator, the minutes saved per occurrence, and a quality score. Templates are reusable by design, so a single template can be applied to multiple AI systems.

Value jobs are scheduled tasks that run at set intervals—daily (default), monthly, or quarterly—to capture usage and user metrics and to power dashboards.

Cost

Cost records the actual expenses associated with your AI systems, enabling AI Control Tower to compare these costs against productivity gains and calculate the net return on investment. You configure costs by entering your organization's average hourly rate and defining prices for integrated and non-integrated vendors. The cost configuration converts token usage and ServiceNow Assist consumption into monetary costs.

Dashboards

Dashboards are where value and cost come together. Dashboards display productivity gains, AI costs, and the net return on AI investment. They break down usage and costs by user and department, highlight adoption trends, and identify AI systems that show no usage.

How Measure turns AI usage into business value

Measure uses value templates, hourly rates, and vendor costs to calculate the value and cost of AI systems. The value measurement follows this sequence.

1. Define how value is calculated.

   A value template defines the calculation. The template captures a persona, a usage metric, a time value, and a quality (acceptance) value.

2. Convert time saved into financial value.

   Configure hourly rates globally or by persona to convert productivity gains, measured in hours, into monetary value.

3. Add costs for integrated vendors.

   Add cost details for ServiceNow and integrated vendors so that Measure can calculate costs from monitored usage and observability data.

4. Add costs for non-integrated vendors.

   Add cost details for vendors that aren't integrated with ServiceNow by using a token-based calculation or by entering the total cost directly.

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5. Calculate savings, cost, and return.

   Total savings and total cost are calculated for the selected time period. Total savings represent the productivity gains, calculated as the total dollar amount saved by using AI systems. Total cost includes the overall token and Assist costs associated with using these AI systems.

6. Review results on dashboards.

   Dashboards display savings, cost, and net AI return, with breakdowns by AI system, department, and user.

Value

Value translates AI usage into measurable productivity metrics.

Value uses templates and value jobs to assess the impact of AI usage on productivity and calculate the productivity gains from your AI systems.

Value templates define how Measure converts AI usage into productivity gains. Each template includes the usage indicator, time saved per occurrence, and quality score used in the calculation. You can reuse a value template across multiple AI systems.

Value jobs are scheduled tasks that collect usage and user metrics. By default, value jobs run daily. You can also schedule value jobs to run monthly or quarterly based on your reporting requirements.

Value templates

Value templates define how the AI Control Tower calculates the productivity value of an AI system. Each template captures a persona, usage indicators, a time value type, and a quality score.

Value template overview

A value template, also called a productivity template, is the record that the AI Control Tower (AICT) uses to measure the productivity value of an AI system. Each template defines a name, a department, a description, and a persona, and then sets the indicators that determine how usage and time saved are calculated.

Every AI system supports a persona, such as agent, fulfiller, requester, developer, or others. You select the persona that the AI system supports so that value is attributed to the correct group of users.

A value template is reusable. You define it once and map it across as many AI systems as you want, so you don't repeat the same calculation for every skill or agent. The AI Control Tower ships out-of-the-box templates, and you can also create your own.

The AI Control Tower ships the following out-of-the-box value templates:

- Third-party Assets
- ServiceNow Skills
- ServiceNow Agents
- ServiceNow Agentic Workflows

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Key benefits

Value templates provide the following benefits:

- Calculate productivity value consistently across ServiceNow and third-party AI systems.
- Measure the time saved by each AI system by using out-of-the-box indicators or a fixed baseline.
- Factor the quality of AI output into the value calculation through a quality score.
- Attribute value to a specific persona so that results reflect the users who benefit.
- Reuse a single value definition across multiple AI systems.
- Capture value automatically each day after you publish a template.
- Measure value by persona and by department.
- Map default templates automatically to newly discovered AI systems.

How value templates are composed

A value template combines the following elements to produce a value calculation:

- **Usage indicators:** A set of out-of-the-box indicators measures execution counts, including agent execution, use case execution, skill execution, worker execution, and execution from third-party systems. Each indicator reads the table where those executions are stored.
- **Time value type:** Sets how time saved is calculated. Select an indicator to derive time saved from usage, or select a constant to apply a fixed baseline that you define.
- **Quality score:** Represents the quality of each execution. You can apply a constant value, such as 50 percent or 70 percent, or derive the score from observability performance evaluation. When an AI system has no quality score, the value defaults to 50 percent, which you can overwrite.

Two out-of-the-box indicators calculate time saved: one captures the read and write token counts and computes the total time saved, and one counts each consumed assist as one minute saved. When neither indicator fits, you can define a constant baseline, such as five minutes saved per incident summarization, based on your own assessment.

When the time value type uses the quality score, the AI Control Tower reads the score from observability. Observability runs a performance evaluation for each AI agent and AI system against production data.

The template elements combine into the productivity value using the following formula: **Productivity = Usage × Time Saved per invocation × Acceptance Rate**. The acceptance rate is the percentage of AI-generated outputs that end users accept, and it corresponds to the quality-score factor. It can be a constant, such as 50 percent, or a Performance Analytics (PA) indicator. For the full formula, the metric definitions, and a worked example, see Value calculation formula and metrics.

The three metrics at a glance

However the fields are labeled in the interface, every value template comes down to the same three numbers.

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The three value metrics

Metric	What it answers	How you provide it
Usage	How often is this AI system used?	A daily Performance Analytics (PA) indicator that counts executions.
Time saved	How much manual effort does one use avoid?	A constant, such as 15 minutes, or a PA indicator. The constant is the manual execution time minus the AI execution time.
Acceptance rate (quality)	How much of the AI output do people actually accept?	A constant, such as 50 percent, or a PA indicator. Defaults to 50 percent when no score is available.

Note:

The third metric appears as **Quality type** and **Quality constant (in %)** in the calculation builder, and as the acceptance rate in the productivity formula. They refer to the same factor: the share of AI outputs that are accepted.

After you publish a template, the default AI value engine job runs each day, captures value for the mapped AI systems, and populates the Value dashboard.

Considerations

Consider the following when you work with value templates:

- Each deployed AI system must have one published value template so that value calculation continues without interruption.
- You can create a published template for each persona, such as agent or requester. At least one published template must remain mapped to the AI system.
- A value job runs each night and calculates usage for the previous day, so the Value dashboard shows the value from the previous day.

Value calculation and value jobs

Value jobs calculate the productivity value of your AI systems on a schedule. Automated jobs run each night, and manual jobs run monthly or quarterly for AI systems that you onboard manually.

Value jobs overview

A value job reads the usage recorded for your AI systems and calculates the productivity value from the mapped value template. The AI Control Tower (AICT) runs value jobs on a schedule and calculates value for the previous day. As a result, the Value dashboard shows the value from the previous day.

Value calculation uses Performance Analytics (PA) indicators. An out-of-the-box daily PA indicator job calculates the usage scores for the previous day. Any custom indicator you use for value calculation must also be daily. It must complete its run before 1:00 PM each day so the value job can use its scores.

Key benefits

Value jobs provide the following benefits:

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- Calculate value automatically each night for integrated AI systems.
- Run manual jobs on a monthly or quarterly cadence to match how you collect data.
- Show failed manual jobs with the reason for the failure so that you can rerun them.

Automated and manual value jobs

The AI Control Tower runs two kinds of value jobs:

- **Automated value job:** Runs each night for ServiceNow AI systems and for third-party AI systems that use a usage integration. The job fetches the usage for the previous day and calculates value.
- **Manual value job:** Runs for AI systems that you onboard manually through the inventory intake form and that do not have a usage integration. You create manual indicators, and the job runs on the cadence set by those indicators.

For manual value jobs, the AI Control Tower derives the cadence from the indicator type. A monthly indicator runs as a monthly job, and a quarterly indicator runs as a quarterly job.

Failed value jobs

Automated daily jobs run without manual intervention and retry automatically if a run does not complete. You can't rerun a daily job manually. You can rerun a monthly or quarterly job that fails, for example after a timeout or when a server is unavailable. The manual value jobs list filters to failed transactions by default and shows a comment that describes why each job failed.

Considerations

- A value job requires an active user. If that user is inactive, value calculation stops until you assign an active user.
- Both value and cost are calculated for the previous day, so configuration changes appear on the dashboard after the next scheduled run.

Value calculation formula and metrics

The AI Control Tower calculates the productivity value of an AI system by multiplying usage, time saved per invocation, and the acceptance rate.

Productivity formula

The AI Control Tower calculates the productivity value of an AI system with the following formula:

```
Productivity = Usage × Time Saved per invocation × Acceptance
 Rate
```

Metric definitions

Persona

The user role for whom the value is calculated, specific to the selected AI system, such as agent, requester, developer, and others.

Usage

The number of times a specific AI skill, agent, or feature is triggered within the platform. Usage is measured by counting events in logs, or by aggregating unique user interactions, over a defined period (currently daily). For example, if the Incident Summarization skill is triggered 94 times on August 18, its usage for that day is 94. Usage is calculated through a Performance Analytics (PA) indicator. Only daily

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indicators are supported. An out-of-the-box daily PA indicator job calculates usage scores for the previous day. Custom indicators must be daily and must complete their run before 1:00 p.m. each day.

Time Saved

The reduction in manual effort per invocation. It is estimated as the difference between the time a user spends performing the task manually and the time spent with AI assistance. Time saved can be a constant, such as 15 minutes, or an indicator. If it is an indicator, it follows the same rules as the usage indicator. For example, if each Knowledge Base (KB) generation call uses 5 assists and each assist saves 1 minute, the calculation records 5 minutes saved.

Acceptance Rate

The percentage of AI-generated outputs that end users accept, which indicates the effectiveness of, and trust in, the AI solution. Acceptance Rate = (Accepted AI outputs ÷ Total AI outputs) × 100. The acceptance rate can be a constant value, such as 50 percent, or a PA indicator that follows the same rules as usage.

Sample calculation: HR case summarization

The following example shows how the productivity metrics are derived for the HR case summarization skill.

HR case summarization

Metric	Value
Count of HR cases created	5,000
HR cases not processed by agentic AI	2,750
Cases with summarization (45%) — Usage	2,250
Cases with accepted summarization (30%) — Acceptance rate	675
Time saved per execution	5 mins

Value tracking for managed and unmanaged AI systems

The AI Control Tower value dashboard shows value and usage only for AI systems that were managed during the reporting period. Value realized while an AI system was managed stays on the dashboard, even after the AI system becomes unmanaged.

Value data for unmanaged AI systems

An AI system that changes from managed to unmanaged continues to appear on the value dashboard. AI Control Tower counts its value and usage only for the dates when the AI system was managed. Data from after the AI system became unmanaged isn't included in the total value.

For the date range when the AI system was managed, the AI system name on the value dashboard is a link that opens the AI system record.

Unmanaged AI system example.

Incident Summarization is a managed AI system that an AI steward marks as unmanaged on January 15. When you view the value dashboard for the 30 days of January, the dashboard shows the following.

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- All managed AI systems, including Incident Summarization.
- Value and usage data for Incident Summarization from January 1 through January 15 only.
- A link to Incident Summarization for its managed period.

Important:

If your organization uses a ServiceNow SKU and you upgrade AI Control Tower, review your AI systems and mark those you would like to track as managed. For more information, see Move an unmanaged AI system to managed.

Value template tab

When an AI system is unmanaged, the **Value template** tab shows its value templates as unmapped. Actions that change the AI system or its value templates aren't available.

Unmanaged AI system statuses

Field	Value for an unmanaged AI system
Lifecycle status	**Unmanaged**
Value template status	**Unmapped**. Applies to all templates that were previously mapped, including published and draft templates.

Value templates for unmanaged AI system

When an AI system is set to unmanaged, AI Control Tower automatically unmaps the AI system from all of its value templates. Templates that were previously mapped, whether published or draft, show the **Unmapped** status. The lifecycle status of the AI system changes to **Unmanaged**. Value and usage for the period when the AI system was unmanaged aren't calculated.

While the AI system is unmanaged, you can't add, edit, reject, or delete value templates or the AI system from the **Value template** tab.

Value data when an AI system is managed again

When an AI steward changes an unmanaged AI system back to managed, AI Control Tower does the following.

- Maps the AI system to the same value templates that it was mapped to before.
- Restores each template to its previous status.

Important: Mappings that were in draft status when the AI system was set to unmanaged aren't restored.

- Resumes value and usage calculations from the date the AI system is set to managed again.

For ServiceNow SKUs, when you mark an AI system as managed again, AI Control Tower resumes value and usage calculation. It fills in the value data for the time the AI system was unmanaged. By default, it fills in up to 30 days. To fill in a longer period, change the date range of the historical job. For more information, see Set look back date range for unmanaged AI systems.

Value data isn't filled in for enterprise AI systems. When an enterprise AI system is marked as unmanaged, its connectors are disabled and no usage data is collected for that period.

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Related topics

Move an unmanaged AI system to managed

Multi-Instance Framework for AI value data

The Multi-Instance Framework (MIF) synchronizes AI value data from a sub-production instance to a production instance only for Creator skills. In this setup, the AI Control Tower calculates value for Creator skills using data from development and testing environments.

For creator skills deployed in a sub-production instance, you can evaluate how the value is determined for an AI system by running a metric within its value template. The results are synced to the production instance for the value calculation.

To facilitate this process, MIF connects the sub-production instance to the production instance, which functions as the manager instance. MIF then synchronizes value data for Creator skills to the production instance.

Note:

MIF supports value calculation on sub-production instances only for Creator skills. Value calculation on sub-production instances isn't available for any other skills.

Value data that MIF syncs

MIF syncs the following value data from the sub-production instance to the production instance:

- Creator metrics data for all creator skills
- Results from testing value templates for AI systems in the sub-production environment

Related topics

Set up Multi-Instance Framework for value calculations

Cost

Cost records the actual expenses associated with your AI systems, enabling AI Control Tower to compare these costs against productivity gains and calculate the net return on investment.

Cost provides the expense data that AI Control Tower uses to calculate net AI return. The Cost framework evaluates savings and costs (expenses) to calculate net returns by monitoring spending on LLM tokens, and ServiceNow Assist usage.

To configure cost, set your organization’s average hourly rate, add token pricing for integrated LLM vendors, and add pricing for non-integrated vendors. For integrated vendors, you can also configure input and output token prices separately. After you review and submit the configuration, AI Control Tower uses the cost data to compare AI spend with productivity gains and derives net returns.

Only users with the AI steward role can configure cost.

AI cost and net AI return

The AI Control Tower tracks the cost of your AI systems and subtracts it from the productivity value to show the net AI return. Cost is tracked by vendor from token consumption or a direct cost.

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AI cost and net AI return overview

The AI Control Tower (AICT) reports the productivity value of your AI systems as productivity gains, which it derives from your value templates and can express in currency. It also tracks the cost of running those AI systems. The net AI return is the money saved minus the cost.

Key benefits

AI cost tracking provides the following benefits:

- Show the return of your AI systems by comparing value against cost.
- Track cost automatically for integrated vendors through the trace integration.
- Record cost as token consumption or as a direct cost.
- Break down cost by vendor and by AI system.

How cost is calculated

The AI Control Tower calculates cost at the vendor level, because usage details for external vendors are available for the vendor rather than for each agent. For each vendor, the calculation uses the unit consumption, such as tokens, and the cost. A breakdown at the AI system level appears where that data is available.

Integrated vendors, such as ServiceNow, the Vertex AI service, the Amazon Bedrock service, and the Azure Foundry service, use the trace integration to capture token consumption. When the API endpoint and the validation key are configured, the AI Control Tower tracks cost for those vendors automatically.

You can define cost in two ways. Input and output token cost applies a separate rate to every million input tokens and output tokens. Direct cost applies a total cost that you enter, without a unit consumption.

To express value in currency, you configure an hourly rate, which is the total workforce cost divided by the total workforce hours. You can set a single hourly rate or set a rate for each persona.

Note:

- Cost configurations use effective dates. A configuration for a future date is a draft, the current configuration is active, and a past configuration is expired.
- Cost is calculated for the previous day, so a new cost configuration appears on the dashboard after the next scheduled run.

Why cost tracking matters

Cost tracking connects the productivity hours that AI systems save to their financial impact, so that you can answer key business questions:

- Are we getting value? How much money are we saving with AI?
- What are we paying? How much do the AI systems actually cost?
- Is it profitable? Are savings exceeding costs?
- How long to payback? When will AI investments pay for themselves?
- Where are the costs? Which vendors cost the most?

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Without cost tracking, you can see hours saved but can't connect them to financial impact. With it, you have complete visibility into AI net returns.

Three pillars of the Cost framework

The Cost framework rests on three interconnected pillars that together enable complete financial visibility and net return analysis:

Savings

Quantifies the value (benefits) delivered by AI systems.

The Savings pillar converts productivity into currency. AI systems are evaluated for the number of work hours they save. An average hourly rate defines the labor cost per hour. Money saved is calculated by multiplying the hours saved by the average hourly rate.

For example, 40 hours saved × $100/hour = $4,000 in weekly savings.

Cost

Tracks all expenses associated with running AI systems, across LLM token costs, Assist costs, integration costs, and infrastructure costs.

Net returns

Calculates the net financial benefit as savings minus cost. A positive result is profitable, zero is breakeven, and a negative result means the investment is not yet profitable.

For example: $4,000 savings – $500 cost = $3,500 net returns (profitable); $2,000 – $2,000 = $0 (breakeven); $1,000 – $2,000 = –$1,000 (not yet profitable).

Cost categories tracked

The Cost pillar tracks the following categories of expense:

LLM token costs

Charges from LLM providers based on token usage. Token costs vary by the model used (more advanced models cost more), the usage volume (more interactions mean higher cost), and vendor pricing (different providers have different rates).

Assist costs

ServiceNow AI Assist charges for running AI agents and assistants. These recurring costs are based on the number of active agents, the frequency of usage, and the complexity of tasks.

How costs are tracked

The system tracks costs automatically as follows:

1. Captures all LLM API calls and token usage from integrated systems.
2. Records token costs based on vendor pricing models.
3. Aggregates Assist costs from configuration and usage tracking.
4. Groups costs by system, vendor, department, and time period.
5. Calculates trends and period-over-period comparisons.

Costs are updated in real-time, although dashboards typically show consolidated daily or hourly summaries.

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Complete calculation flow

The Cost framework calculates financial metrics in the following sequence:

1. The system collects productivity metrics (hours saved from AI automation).
2. The system looks up the average hourly rate configured for your organization.
3. The system calculates money saved as hours saved × hourly rate.
4. The system aggregates total cost as token costs + Assist costs.
5. The system calculates net returns as money saved – total cost.

All of these calculations feed the dashboards and reports used for stakeholder analysis.

Key assumptions and considerations

The Cost framework relies on several assumptions. Verify them regularly and adjust configurations as needed:

- Productivity measurement accuracy: Hours saved must be captured accurately from AI system activity logs.
- Hourly rate accuracy: The average hourly rate must reflect the true labor cost, or a documented business rationale must support different rates.
- Cost completeness: All relevant costs must be captured.
- Time period consistency: Savings and costs must cover the same time period for a valid comparison.

Cost types and sub-vendor rates

Record what your organization pays each AI vendor so that AI Control Tower can calculate total Enterprise AI cost and net returns. Choose the cost type that matches each contract, and set sub-vendor rates where a specific service is billed differently from its vendor.

AI Control Tower estimates the financial value of your AI assets by comparing total savings with total Enterprise AI cost. Total savings come from productivity gains and the hourly rates that you configure. Total Enterprise AI cost is the sum of integrated vendor costs and other vendor costs. Net returns are total savings minus total Enterprise AI cost.

Integrated vendors and other vendors

Integrated vendors are vendors that have a trace or SDK integration with AI Control Tower, such as Microsoft, Google Vertex AI, and Amazon Web Services (AWS). AI Control Tower gets token consumption metrics for these vendors from the traces.

Other vendors are vendors that don't have a trace or SDK integration with AI Control Tower. Entering costs for these vendors is optional.

Cost types

The cost type determines which values you enter and how AI Control Tower calculates the cost for a vendor.

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Cost types for integrated vendors

Cost type	Values you enter
Overall cost	A single cost per million tokens.
Input and output costs	Separate costs per million input tokens and per million output tokens.
Subscription	The number of licensed seats, the cost per seat per month, and the contract start and end dates. You can also add a one-time setup fee.

For other vendors, the Add Vendors menu offers three pricing options:

- **Token-based**: Costs are calculated based on the total number of tokens used and the cost per token.
- **Direct Cost**: The total cost is entered directly.
- **Subscription**: Pricing is determined by a per-seat subscription model.

These options provide flexibility in how costs are determined.

Sub-vendor rates

A sub-vendor is a specific service that a vendor offers. For example, Microsoft is a vendor, and Azure is one of its sub-vendors. In the cost list, it appears as the vendor name followed by the service name.

A sub-vendor rate takes precedence over its vendor's rate. When a vendor has at least one sub-vendor rate, its entry shows the message **Applies only where no sub-vendor rate is set**. The vendor rate continues to apply to usage that isn't covered by a sub-vendor rate.

Estimated monthly cost for subscriptions

For a subscription, the **Estimated monthly cost** value is the number of licensed seats multiplied by the cost per seat per month. The value updates as you enter the details.

If you add a one-time setup fee, AI Control Tower spreads the fee evenly over the number of months that you enter in **Amortise over (months)**. It adds the resulting monthly amount to the estimated monthly cost. The per-month amount of the fee appears after the field.

Cost entry status

A cost entry that you add or change has the status **Draft**, and the page shows the message **Changes will apply after you submit in Preview cost & savings**. Draft entries don't affect calculated values until you submit the configuration in the **Preview cost & savings** step. Submitted entries have the status **Active**.

An entry can also have the status **Expired**.

Related topics

Add costs for integrated vendors

Add costs for other vendors

Subscription-based costs for AI vendors

Use the **Subscription** cost type in AI Control Tower to track vendor costs billed per licensed seat under a fixed-term contract rather than by token or usage.

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Subscription-based cost overview

Subscription-based cost, also called seat-based pricing, is a cost type for AI vendors that bill through a contract with a fixed monthly price per licensed seat. It's available alongside the existing overall cost and input and output cost options.

In a seat-based contract, you purchase a specified number of seats at a fixed price per seat for a defined contract period. Because the contract does not limit token consumption, the subscription cost calculated by AI Control Tower remains the same regardless of token usage.

Benefits

Token-based cost types don't reflect the actual spend for vendors that bill by seat. With the Subscription cost type, you enter the contract value once, and AI Control Tower applies the resulting monthly cost to each month of the contract period. The cost and value figures on your dashboards then match what your organization pays the vendor.

When to configure subscription costs

The **Subscription** cost type is available when you add vendor costs during the cost configuration steps of AI Control Tower onboarding, also called the day zero experience. Configure subscription costs during onboarding, when you set up the rest of your AI cost configuration.

You can update a subscription cost at any time after onboarding. Updates apply only from the next day onward. You can't change cost data for today or earlier dates. For details, see Cost updates and calculation schedule.

Subscription cost components

A subscription cost consists of the following parts:

Licensed seats and cost per seat

The number of seats in the contract and the price for each seat per month. Both values are required.

Contract period

The contract start and end dates. AI Control Tower applies the monthly cost to each month from the contract start date until the contract end date. Both dates are required.

One-time setup fee (optional)

A flat fee that some vendors charge for eligibility for seat-based pricing or discounted seat-based pricing. Organizations refer to this fee by different names, such as base license fee or one-time setup fee. For example, a vendor might require you to buy another subscription before it offers a discounted per-seat price.

Amortization period

The number of months over which AI Control Tower spreads the one-time setup fee. The amortization period is populated by default from the contract start and end dates. You can override the default value.

Monthly cost calculation

AI Control Tower calculates subscription costs monthly. The estimated monthly cost is the licensed seat cost plus the amortized setup fee, if configured:

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```
Estimated monthly cost = (licensed seats × monthly cost per
 seat) + (one-time setup fee ÷ amortization period)
```

Example calculation

A contract includes 1,000 licensed seats at $25 per seat each month and a $20,000 one-time setup fee amortized over 14 months:

- Monthly seat cost: 1,000 × $25 = $25,000
- Monthly amortized setup fee: $20,000 ÷ 14 = $1,428.57
- Estimated monthly cost: $25,000 + $1,428.57 = $26,428.57

Related topics

Cost updates and calculation schedule

Cost configurations

Cost updates and calculation schedule

AI Control Tower preserves recorded cost data and calculates cost and value on a daily schedule. These rules determine when a cost change takes effect and when it appears in your dashboards.

You can update a vendor's cost configuration at any time, such as when your vendor contract is renewed at a new rate. AI Control Tower applies these changes based on two rules: historical cost data is preserved, and cost and value calculations are performed on a daily schedule.

Cost changes take effect the next day

You can't change cost data for the current date or a previous date. AI Control Tower retains recorded costs to maintain consistency in historical cost and value reports.

A cost change takes effect the day after you make it. Costs recorded through the current date continue to use the previous value.

For example, assume that the cost per seat is $25 starting in January. If you change the cost to $30 on September 22, AI Control Tower uses the $25 rate through September 22 and the $30 rate starting September 23. You can't apply the $30 rate to September 22 or an earlier date.

Because you can't backdate cost changes, update the cost configuration before the new contract rate takes effect.

Calculation schedule

AI Control Tower uses scheduled jobs to calculate cost and value:

- A nightly job processes data from the previous day.
- A value calculation job runs every 24 hours.

Cost and value figures on your dashboards reflect data up to the previous day. Any costs you add or change don't appear in the dashboards until the scheduled jobs process them.

Related topics

Cost types and sub-vendor rates

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Dashboards

Dashboards provide insights into the productivity gains, costs, and net returns of the AI systems within your enterprise. There are distinct dashboards for reporting on vendors and ServiceNow AI, ensuring that enterprise-wide metrics remain separate from those specific to ServiceNow AI systems.

Dashboards overview

Dashboards provide in-depth insights into various aspects of AI systems within your organization. These dashboards highlight key metrics for productivity gains, cost reductions, and net returns of the AI systems within your enterprise.

To cater to different reporting needs, there are separate dashboards designed to track performance metrics for external vendors and those specific to ServiceNow AI. This segregation is essential to ensure that the analysis of enterprise-wide metrics remains distinct and does not get conflated with the data pertaining solely to ServiceNow AI systems.

The following dashboards are included:

Value

This dashboard reports on productivity gains, costs, and returns across all vendors. The metrics included are limited to those that can be calculated for every vendor.

Engagement

Reports how often AI systems are used, and by which departments and countries, across all vendors.

ServiceNow AI

This dashboard combines both the value and engagement metrics specific to ServiceNow AI systems and includes additional metrics that are unique to these systems.

The ServiceNow AI dashboard features its own tabs, including tabs for creator skills and evaluation. Creator skill metrics apply exclusively to ServiceNow AI systems and don't appear in the broader enterprise-wide views.

Dashboard visibility

The dashboards that appear depend on your subscription. A subscription that covers only ServiceNow AI systems shows the ServiceNow AI dashboard. A broader subscription shows all three views.

How it works

Dashboards use multiple sources within the Measure pillar to provide insights.

Value templates

These templates provide productivity gain figures that support time savings and rank top AI systems.

Cost framework

This framework supplies the average hourly rate and total AI costs used to calculate money saved and net AI returns.

Discovery

This component identifies the AI systems and executions included in the engagement metrics, noting that manually created indicators aren't counted.

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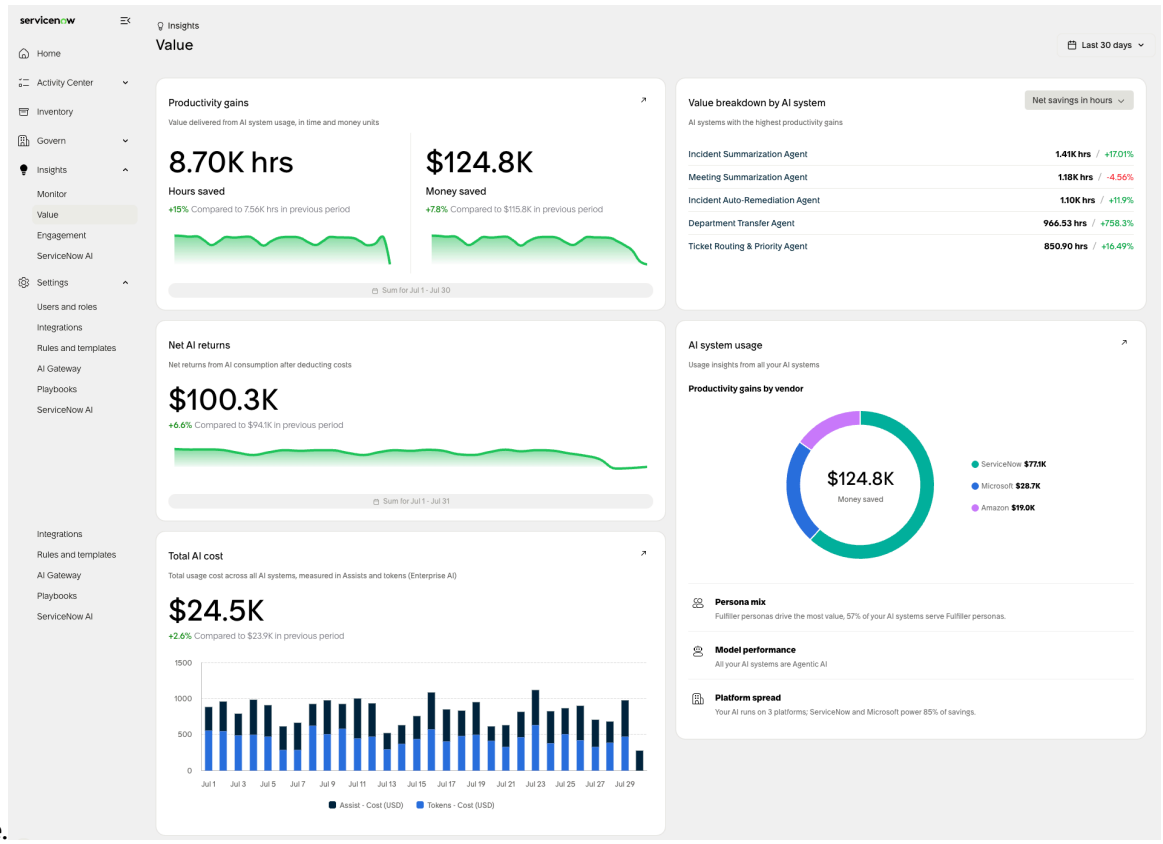
The AI system usage widget provides a summary of usage by vendor and reports the total value generated for each vendor. By selecting a vendor, you can access a detailed list view that reports on each individual AI system.

Value dashboards

The Value dashboard provides real-time visibility into the productivity gains and financial returns delivered by your AI Control Tower agents. Track hours saved, cost savings, net returns, and system performance to measure ROI and demonstrate AI investment impact.

The Value dashboard aggregates metrics across all deployed AI agents and systems, enabling you to understand the business impact of your AI Control Tower implementation. Use this dashboard to track productivity improvements, monitor financial returns, compare agent performance, and communicate value to stakeholders.

To view the Value dashboard on AI Control Tower, navigate to **All** > **AI Control Tower** > **Home** > **Insights** > **Value**.



> **Note:** All metrics on the Value dashboard default to the last 30 days. Use the time period selector in the top-right corner to adjust the date range and view metrics for different time periods (for example, last 7 days, last 90 days, or a custom range).

Productivity gains

The Productivity gains section displays the total hours and the money saved across all AI systems during the selected time period. This metric represents direct productivity improvements delivered by AI agents through:

Hours saved

Total agent-hours of work eliminated or accelerated through AI automation. The trend line shows how hours saved has changed over time, with percentage comparison to the previous period.

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Money saved

Monetary value of the productivity gains, calculated in dollar terms. This metric helps translate productivity improvements into business-relevant financial impact.

Both these metrics include trend lines showing daily fluctuations and a percentage comparison badge indicating whether productivity is increasing or decreasing relative to the previous period.

You can view the AI systems and edit the set the time period for productivity gains. On the AI system productivity gains page, you will see the AI systems listed along with the Productivity gains in hours and Productivity gains in currency. To change the time period, select the calendar drop-down, choose the time period, and select **Apply**.

Value breakdown by AI system

The Value breakdown by AI system section lists the top-performing AI agents and their individual productivity contributions, ranked by hours saved.

For each agent, the dashboard displays:

- Agent name
- Hours saved by that agent or USD saved by the agent

  Note: You can view the value breakdown either by hours or USD using the drop-down.

- Percentage change compared to the previous period

This breakdown helps you identify which agents deliver the most value, prioritize optimization efforts, and allocate resources toward the highest-impact use cases.

Net AI returns

The Net AI returns section shows the net financial return from AI consumption after deducting costs. This metric represents the true ROI of your AI investment.

The Net AI return displays:

- Money saved minus Total AI cost
- Percentage change relative to the previous period
- A trend line about how the net returns have evolved over time

Use this metric to demonstrate business value and justify continued investment in AI Control Tower capabilities.

Total AI cost

The Total AI cost section displays the total usage cost across all AI systems, measured in assists and tokens (Enterprise AI). This metric reflects the investment required to generate the value shown on the dashboard.

- The aggregated cost across all deployed AI systems
- Percentage change relative to the previous period
- A bar chart showing daily cost distribution, broken down by Assist and Tokens displayed with legends.

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Monitor this metric to optimize AI spending and understand the cost-to-value ratio of your deployment.

View the AI cost overview and the AI cost breakdown by selecting the external link icon on the Total AI cost section. On the Total AI cost value page, you will see:

- The AI cost overview trend with AI total cost in USD vs the selected time period (to change the time period, select the calendar drop-down, choose the time period, and select **Apply**).

  Note: You can view this data for all vendors or a selected vendor.

- The AI cost breakdown data for only those AI systems and vendors whose token consumption is captured via integrations or manual cost configuration.

AI system usage

The AI system usage section provides insights into how your AI systems are being consumed across the organization through:

Productivity gains by vendor

The Productivity gains by vendor visualization shows how the value is distributed across different AI vendors (for example, ServiceNow, Microsoft, Amazon). The donut chart helps you understand which vendor platforms contribute the most to your overall value delivery.

Persona mix

The Persona mix section indicates which user personas are driving the most value from your AI Control Tower. This metric shows what percentage of your AI systems serve fulfiller personas or other user types.

The persona mix helps target adoption efforts, identify the under-served user groups, and prioritize agent development for high-value personas.

Model performance

The Model performance section indicates the AI model types powering your AI Control Tower systems. For example, this metric flags whether all your AI systems are using agentic AI models or if you're using a mix of model types.

Use this insight to verify consistency in AI capabilities and plan upgrades to newer, higher-performing models.

Platform spread

The Platform spread section shows which platforms are running your AI systems. For example, this metric displays what percentage of your AI runs on ServiceNow, Microsoft, Amazon or other platforms.

Monitor platform spread to understand vendor dependencies, plan multi-vendor strategies, and optimize for platform consolidation if needed.

You can view the overall AI system usage displayed agent-wise. This includes details such as persona, deployed date, and actions. It also provides information on the average user using the agent and productivity gains. Furthermore, the report includes the AI system type, vendor, and total AI usage. You can use the time period selector in the top-right corner to adjust the date range and view metrics for different time periods.

To understand more about the value insights from the ServiceNow AI value dashboard, see ServiceNow AI Value dashboard.

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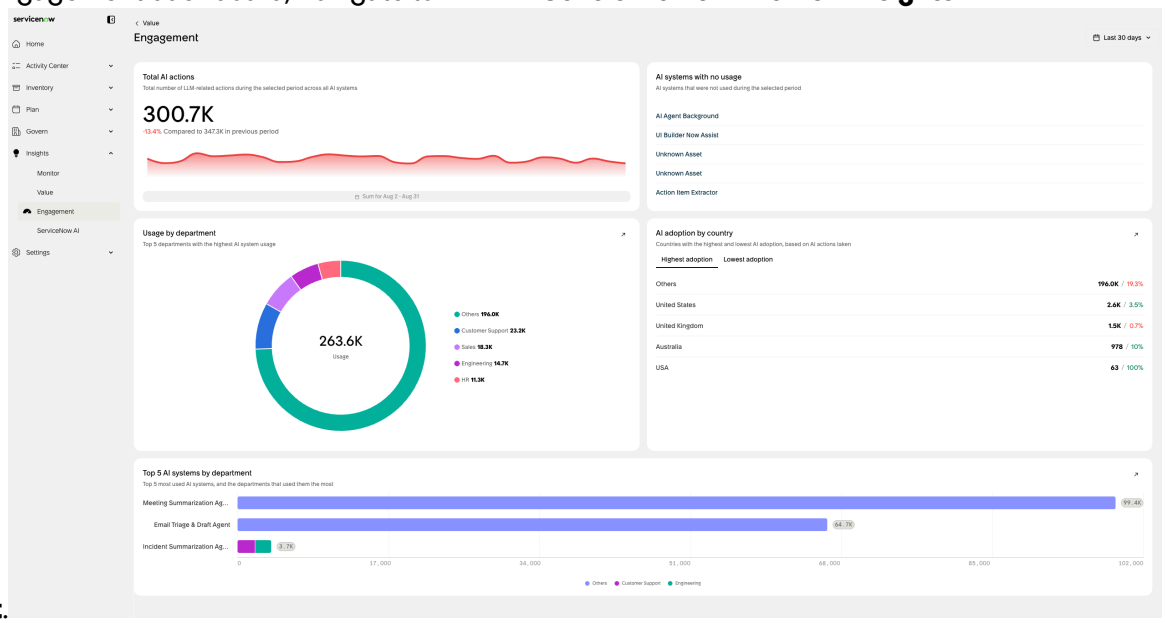
Engagement dashboard

The Engagement dashboard provides visibility into AI system usage patterns across your organization, including adoption metrics, department usage, and system adoption by geographic region.

The Engagement dashboard displays aggregated data about LLM-related actions and AI system usage across your enterprise. Use this dashboard to monitor AI adoption trends, identify systems that require attention, and understand usage patterns by department and location.

To view the Engagement dashboard, navigate to **All** > **AI Control Tower** > **Home** > **Insights** > **Engagement**.



> **Note:** All metrics on the Engagement dashboard default to the last 30 days. Use the time period selector in the top-right corner to adjust the date range and view metrics for different time periods (for example, last 7 days, last 90 days, or a custom range).

Total AI actions

Displays the total number of LLM-related actions performed across all AI systems during the selected time period. This metric includes a comparison to the previous period, expressed as a percentage change.

The Total AI actions display:

- The aggregated cost across all deployed AI systems.
- Percentage change relative to the previous period.
- A trend line about the daily sum of actions over the selected date range, allowing you to identify patterns and spikes in the system usage over time.

AI systems with no usage

Lists AI systems that were not used during the selected time period. This section helps you identify systems that may require user outreach, enablement, or evaluation for continued relevance.

Systems are displayed by name; select a system name to drill into additional details.

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Usage by department

Shows the distribution of AI system usage across the top five departments in your organization. Data is displayed in a donut chart that shows total usage and breaks down usage by department.

Each department is color-coded and displayed with its usage count. The chart shows departments such as Customer Support, Sales, Engineering, HR, and others based on your organization's structure.

Note: View the AI systems usage by department that is measured by the number of times each system was used in an AI workflow.

AI adoption by country

Displays AI adoption rates by geographic location, comparing the highest and lowest adoption regions. Adoption is measured as a percentage based on the number of LLM-related actions taken.

Two tabs allow you to view data sorted by highest adoption or lowest adoption. Countries are listed with their adoption percentage, shown in color-coded format to indicate adoption levels (green for high adoption, red for low adoption).

Top 5 AI systems by department

Shows the five most frequently used AI systems across your organization, broken down by the departments that use them. Each system bar indicates the total usage count and shows department-level usage contribution through color coding.

Systems are listed in descending order by usage. Hover over a bar to see the department breakdown within that system's total usage.

To understand more about the Value insights from the ServiceNow AI Engagement dashboard, see ServiceNow AI Engagement dashboard.

ServiceNow AI dashboard

The ServiceNow AI dashboard is a central hub for monitoring and evaluating the performance, adoption, and financial impact of AI systems deployed across your ServiceNow environment.

ServiceNow AI overview

The ServiceNow AI dashboard consolidates operational and financial metrics from all AI agents, offering real-time insights into AI value delivery, cost management, and usage patterns. It helps organizations evaluate AI effectiveness, support investment decisions, and identify optimization opportunities.

By consolidating AI performance data into a single interface, the dashboard eliminates the need to gather metrics from individual system sources or manual reports. It presents productivity gains, financial returns, operational costs, and usage insights in an accessible visual format suitable for both technical practitioners and business leaders.

The dashboard serves multiple audiences and use cases. Operational teams use the dashboard to monitor whether deployed AI agents are performing as expected and delivering measurable value to end users. Finance and business leaders use the dashboard to assess return on AI investment and make informed decisions about resource allocation. Product and platform teams use the dashboard to understand adoption patterns and identify which AI capabilities drive the highest user engagement.

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The dashboard displays metrics across configurable time ranges, enabling trend analysis and historical comparison. Period-over-period comparisons help identify whether AI value delivery, costs, and usage are improving, stagnating, or declining, supporting data-driven conversations about AI strategy and optimization priorities.

The ServiceNow AI dashboard in the Value module consists of three sub dashboards:

Value dashboard

The ServiceNow AI Value dashboard aggregates data from all AI systems in your organization monitoring AI value delivery, track usage trends, and assess return on investment.

For more information about what the ServiceNow AI Value dashboard contains, see ServiceNow AI Value dashboard.

Engagement

The ServiceNow AI Engagement dashboard provides visibility into user adoption, utilization patterns, and performance metrics across all AI systems in your ServiceNow instance. Monitor AI action volume, user engagement trends, departmental usage, and task efficiency gains to identify adoption opportunities and system effectiveness.

For more information about what the ServiceNow AI Engagement dashboard contains, see ServiceNow AI Engagement dashboard.

Creator skills

The ServiceNow AI Creator Skills dashboard provides insight into how your organization uses AI-powered creator skills—automated code generation, documentation, and testing capabilities—to boost developer productivity.

For more information about what the ServiceNow AI Creator skills dashboard contains, see ServiceNow AI Creator skills dashboard.

Evaluation

The ServiceNow AI Evaluation dashboard offers insights into the performance of AI-generated responses.

For more information about what the ServiceNow AI Evaluation dashboard contains, see ServiceNow AI Evaluation dashboard.

ServiceNow AI Value dashboard

The ServiceNow AI Value dashboard provides a comprehensive view of AI system performance, value delivery, and operational metrics across your organization. The dashboard displays productivity gains, financial returns, system usage patterns, and agent performance data.

Value dashboard overview

The ServiceNow AI Value dashboard aggregates data from all AI systems in your organization. You can monitor AI value delivery, track usage trends, and assess return on investment. The dashboard updates continuously and provides configurable time-range filtering for trend analysis.

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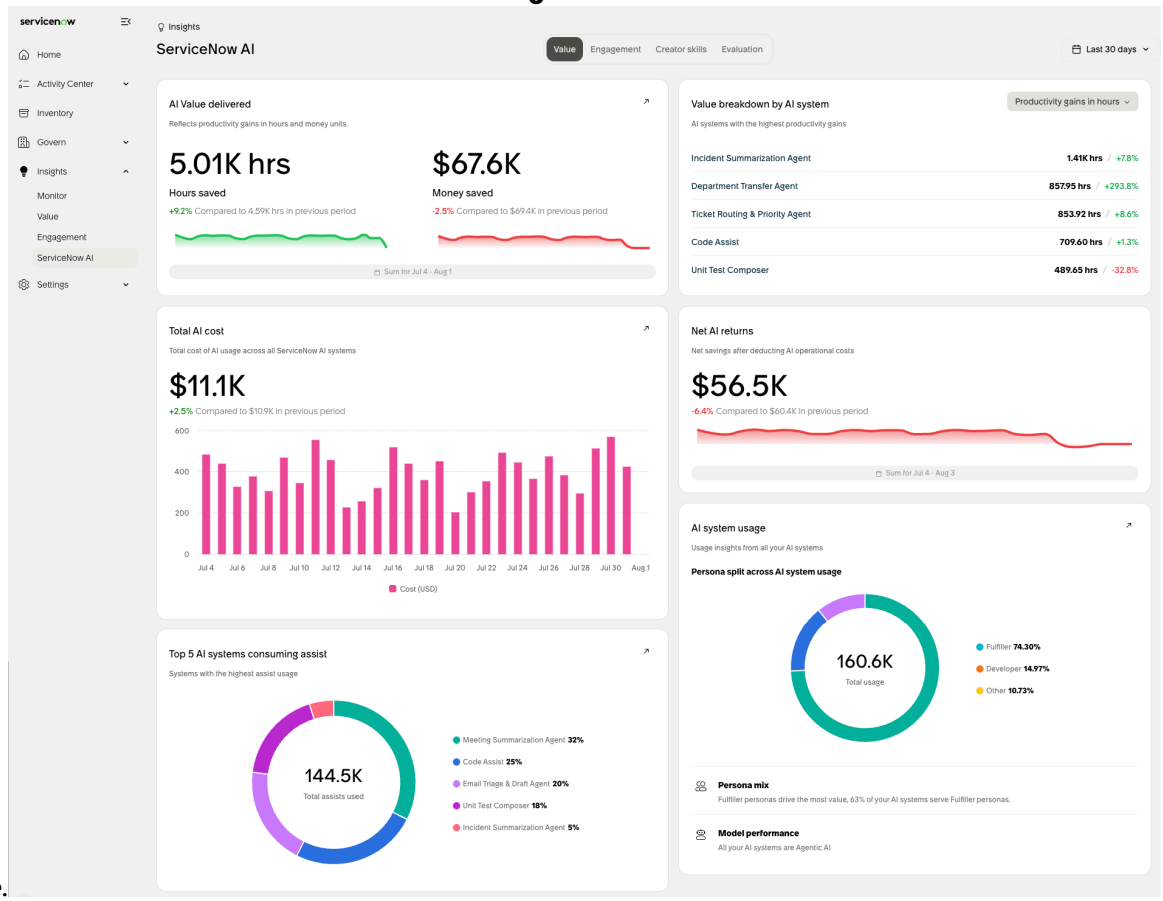
To view the ServiceNow AI Value dashboard on AI Control Tower, navigate to **All** > **AI Control Tower** > **Home** > **Insights** > **ServiceNow AI** > **Value**.



AI Value delivered

The AI Value delivered section displays the aggregate productivity gains and financial returns generated by AI systems across your organization. This section presents two key metrics:

Hours saved

Reflects productivity gains measured in hours, calculated based on time saved by AI-assisted processes and automations. The metric displays the total hours saved compared to the previous period as a percentage change.

Money saved

Shows the estimated financial return in monetary units, derived from productivity gains and operational cost reductions. This metric also includes a period-over-period comparison to track improvement or decline in financial returns.

Both metrics are visualized with trend lines showing performance across the selected time range, enabling you to identify patterns in value delivery.

You can view the AI systems and edit the set the time period for productivity gains. On the AI system productivity gains page, you will see the AI systems listed along with the Productivity gains in hours and Productivity gains in currency. To change the time period, select the calendar drop-down, choose the time period, and select **Apply**.

Value breakdown by AI system

This section details productivity gains attributed to individual AI agents within your environment. It ranks AI systems by their contribution to overall productivity, showing hours saved per agent.

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For each agent, the dashboard displays:

- Agent name
- Hours saved by that agent or USD saved by the agent

  Note: You can view the value breakdown either by hours or USD using the drop-down.

- Percentage change compared to the previous period.

Each agent displays its productivity contribution as hours saved, along with percentage change compared to the previous period. Use this breakdown to identify which agents deliver the highest value and to prioritize optimization efforts.

Total AI cost

The Total AI cost section aggregates the operational costs of running all AI systems in your organization. This section displays:

- Total cost: The sum of all AI usage costs across ServiceNow AI systems.
- Cost trend: A period-over-period comparison showing cost increase or decrease.
- Daily cost breakdown: A bar chart showing daily cost distribution across the selected time range, enabling you to identify cost spikes or trends.

Use this section to monitor AI operational expenses and assess cost efficiency relative to value delivered.

Net AI returns

The Net AI returns section calculates the financial impact of AI investments by deducting operational costs from value delivered. This metric represents the net savings after accounting for AI system operational expenses.

The section displays:

- Net returns: The gross savings (money saved) minus total AI costs, expressed in monetary units.
- Return trend: A period-over-period comparison indicating whether net returns are improving or declining.
- Return trend line: A line chart visualizing net returns across the selected time range.

This metric is essential for assessing whether your AI investment is delivering positive financial outcomes.

AI system usage

The AI system usage section provides visibility into how AI systems are consumed across your organization.

Personal split across AI system usage

The persona split shows the distribution of AI usage across user types:

- Fulfiller: Usage by service desk agents and operational fulfillment personnel.
- Developer: Usage by development and engineering teams.
- Other: Usage by all remaining user personas and roles.

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The donut chart displays total usage across all AI systems and shows the percentage contribution of each persona type. This breakdown helps identify which user groups benefit most from AI and informs training and adoption strategies.

Persona mix

Indicates the percentage of usage driven by Fulfiller personas, highlighting which user type represents your primary AI consumption base.

Model performance

Identifies the AI model powering your systems. This section indicates all systems are running on agentic AI models.

Top 5 AI systems consuming assist

This section identifies the top five AI agents with the highest usage volume in your organization. The donut chart ranks systems by total assists used and displays each system's percentage contribution to total assist consumption.

Use this view to identify your most-utilized AI systems and to prioritize optimization, configuration, and user enablement efforts for systems with the highest adoption.

ServiceNow AI Engagement dashboard

The ServiceNow AI Engagement dashboard provides visibility into user adoption, utilization patterns, and performance metrics across all AI systems in your ServiceNow instance. Monitor AI action volume, user engagement trends, departmental usage, and task efficiency gains to identify adoption opportunities and system effectiveness.

Engagement dashboard overview

The ServiceNow AI Engagement dashboard displays real-time and historical metrics that help administrators and stakeholders understand how AI systems are being adopted and used across the organization. Use this dashboard to track engagement trends, identify underutilized systems, and measure the productivity improvements delivered by AI automation.

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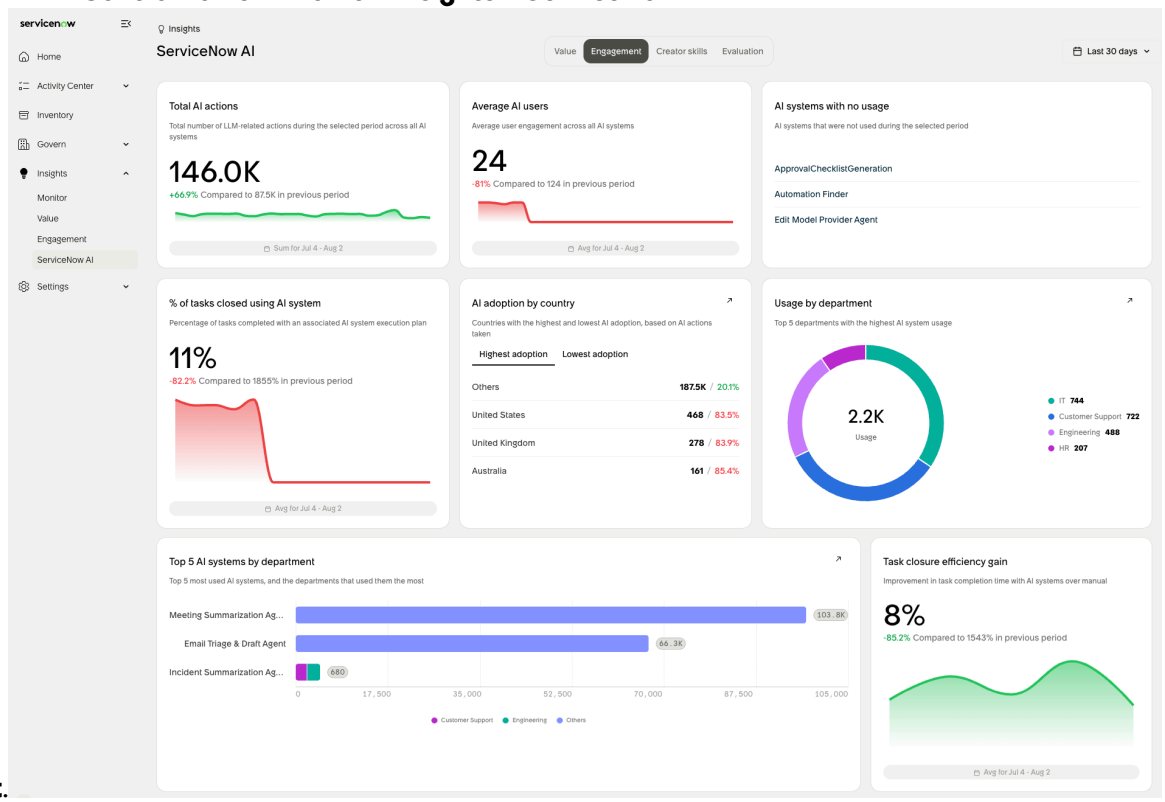
To view the ServiceNow AI Engagement dashboard on AI Control Tower, navigate to **All** > **AI Control Tower** > **Home** > **Insights** > **ServiceNow AI** > **Engagement**.



Total AI actions

This metric displays the total number of LLM-related actions initiated during the selected period across all AI systems in your instance. The trend line shows cumulative action volume over time, and the comparison indicator displays the percentage change from the previous period.

Use this metric to assess overall AI system adoption velocity and identify upward or downward trends in AI utilization across your organization.

Average AI users

This metric shows the average number of unique users engaging with AI systems across all platforms during the selected period. The trend visualization indicates how user engagement is changing week-over-week or month-over-month.

Track this metric to measure user adoption growth and to identify periods of increased or decreased engagement with AI capabilities.

AI systems with no usage

This section lists all AI systems that did not record any user interactions or actions during the selected period. Each system is displayed as a separate item in the list.

Use this section to identify underutilized or unused AI systems that may require additional enablement, user awareness, or configuration review. Common reasons for no usage include insufficient user adoption, lack of awareness, or systems awaiting initial roll out.

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Percentage of tasks closed using AI system

This metric displays the percentage of tasks that were completed with the assistance of an associated AI system during the selected period. The trend line illustrates how task closure efficiency changes over time, showing whether organizations are increasingly leveraging AI for task automation.

Use this metric to evaluate the impact of AI systems on task completion workflows and to understand the correlation between AI adoption and operational efficiency.

AI adoption by country

This section breaks down AI system adoption by geographic region, displaying both the highest and lowest adoption countries. Each country is represented with its adoption rate and the percentage change from the previous period.

Use this geographic view to identify regional adoption gaps, prioritize enablement efforts in lower-adoption regions, and benchmark regional performance.

Usage by department

This visualization shows the distribution of AI system usage across the top departments in your organization. The donut chart displays the number of unique users from each department interacting with AI systems and their proportional contribution to total usage.

Use this section to identify which departments are leading AI adoption, to target enablement efforts toward lower-usage departments, and to recognize department-specific adoption champions.

Top 5 AI systems by department

This section displays the five most frequently used AI systems across the organization, broken down by the departments that use them. A horizontal bar chart shows usage volume for each system, with color coding to distinguish contributions by department (Customer Support, Engineering, and Others).

Use this section to understand which AI systems are delivering the most value, to identify system-to-department alignment, and to guide resource allocation and investment decisions.

Task closure efficiency gain

This metric measures the percentage of improvement in task completion time when AI systems are used. The trend line shows how efficiency gains are changing over the selected period, indicating whether AI system improvements or increased adoption are delivering measurable productivity benefits.

Use this metric to quantify the business value delivered by AI automation and to communicate ROI to stakeholders.

ServiceNow AI Creator skills dashboard

The ServiceNow AI Creator skills dashboard provides insight into how your organization uses AI-powered creator skills—automated code generation, documentation, and testing capabilities—to boost developer productivity. Monitor skill satisfaction, usage patterns, and outcomes to optimize adoption and identify high-performing skills across your instance.

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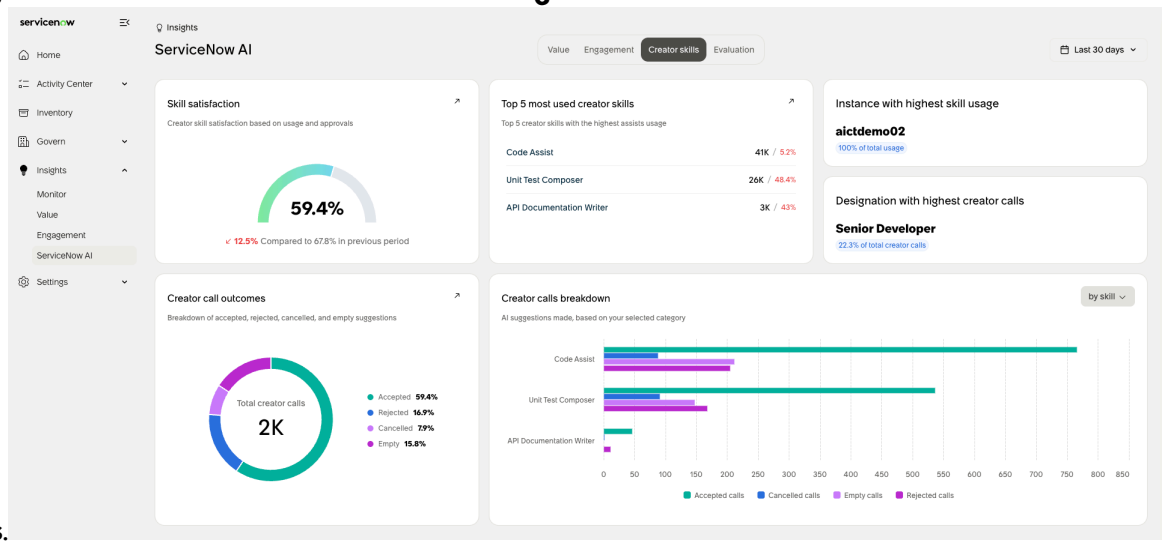
Creator skills dashboard overview

Creator skills are AI-powered agents within ServiceNow that assist users by automating repetitive development tasks. These skills use large language models and ServiceNow specific training to generate code, compose unit tests, write API documentation, and perform other knowledge-intensive tasks. By integrating creator skills into your workflow, your team can accelerate development velocity, reduce manual effort, and maintain consistency across projects.

Creator skills operate within generative AI and are governed by ServiceNow's AI governance and control framework. Each suggestion is tracked, and users can accept, reject, cancel, or ignore recommendations. This feedback loop helps improve skill performance and informs adoption metrics.

To view the ServiceNow AI Creator skills dashboard on AI Control Tower, navigate to **All** > **AI Control Tower** > **Home** > **Insights** > **ServiceNow AI** > **Creator skills**.



Skill Satisfaction

Skill satisfaction measures the overall approval rate of creator skill suggestions based on user usage and approvals. This metric reflects the ratio of accepted suggestions to total suggestions across all creator skills in your instance.

A satisfaction score indicates that users accepted or approved all AI-generated suggestions. Compare this metric over time to track improvements in suggestion quality and relevance.

You can view the creator skills performance for the available skills and set the time period selecting the external link icon. On the Creator skills performance page, you can see the total number of calls, calls accepted, cancelled, rejected, calls that were empty, and the satisfaction score. To change the time period, select the calendar drop-down, choose the time period, and select **Apply**.

Top 5 most used creator Skills

This section ranks creator skills by total assists delivered over the selected time period. High usage indicates strong adoption and integration into developer workflows.

Each skill displays both absolute assist count and satisfaction percentage. Skills with high usage and high satisfaction are strong candidates for broader promotion and training programs.

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Instance with highest skill Usage

This metric identifies which instance in your ServiceNow environment has generated the most creator skill assists. High usage may indicate:

Use this insight to understand which instances are leading adoption and to share best practices from high-usage instances with others in your organization.

Designation with highest creator calls

This metric shows which user roles or designations use creator skills most frequently. Tracking creator skill usage by designation helps identify which personas and job roles benefit most from AI-powered assistance.

Use this information to tailor training and enablement programs to designations with lower adoption, and to understand where creator skills deliver most value.

Creator call outcomes

This section breaks down all creator skill suggestions into four outcome categories:

- Accepted: User accepted the suggestion and used it in their work.
- Rejected: User explicitly rejected the suggestion or indicated it was not useful.
- Cancelled: User cancelled or abandoned the creator skill session before completing the suggestion.
- Empty: No usable suggestion was generated (null or incomplete response).

The total count of creator calls represents the cumulative demand for AI assistance across your instance. Monitor outcome ratios to identify quality issues, user satisfaction trends, and skill performance over time.

Creator calls breakdown

This visualization shows the distribution of outcomes (accepted, rejected, cancelled, empty) for each creator skill. Use this breakdown to:

- Identify which skills have the highest acceptance rates
- Detect skills with high cancellation rates, which may indicate usability or performance issues
- Compare skill quality and reliability
- Prioritize skills for enhancement or training

Skills with consistently high acceptance and low rejection rates are performing well and are good candidates for expanded adoption. Skills with high rejection or empty response rates may require tuning, additional training data, or user education.

Note: You can view the creator calls breakdown by the following metrics:

- By skill
- By title/designation
- By code development
- By instance name

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ServiceNow AI Evaluation dashboard

Use the ServiceNow AI Evaluation dashboard to get a comprehensive visibility into AI agent performance.

The ServiceNow AI Evaluation dashboard has two complementary views.

Conversation evaluation

Measures response quality across dimensions such as accuracy, completeness, truthfulness, and context retention.

For more information about the ServiceNow AI Conversation evaluation dashboard, see ServiceNow AI Conversation evaluation.

Impact

View quantifies business outcomes including resolution rates, time savings, and operational value.

For more information about the ServiceNow AI Impact evaluation, see ServiceNow AI Impact.

Together, these views enable organizations to monitor AI quality, validate user satisfaction, and demonstrate ROI from AI investments.

ServiceNow AI Conversation evaluation

The ServiceNow AI Conversation evaluation dashboard displays AI response quality metrics and satisfaction scores for individual conversations. It includes detailed evaluation records with human feedback and automated scoring across quality dimensions such as intent accuracy, request completion, truthfulness, and context retention.

Conversation evaluation overview

The ServiceNow AI Conversation evaluation dashboard displays key performance indicators (KPIs), trend analysis, volume metrics, and detailed evaluation records. These metrics collectively provide visibility into AI response quality and user satisfaction levels.

To view the ServiceNow AI Conversation evaluation dashboard on AI Control Tower, navigate to **All** > **AI Control Tower** > **Home** >

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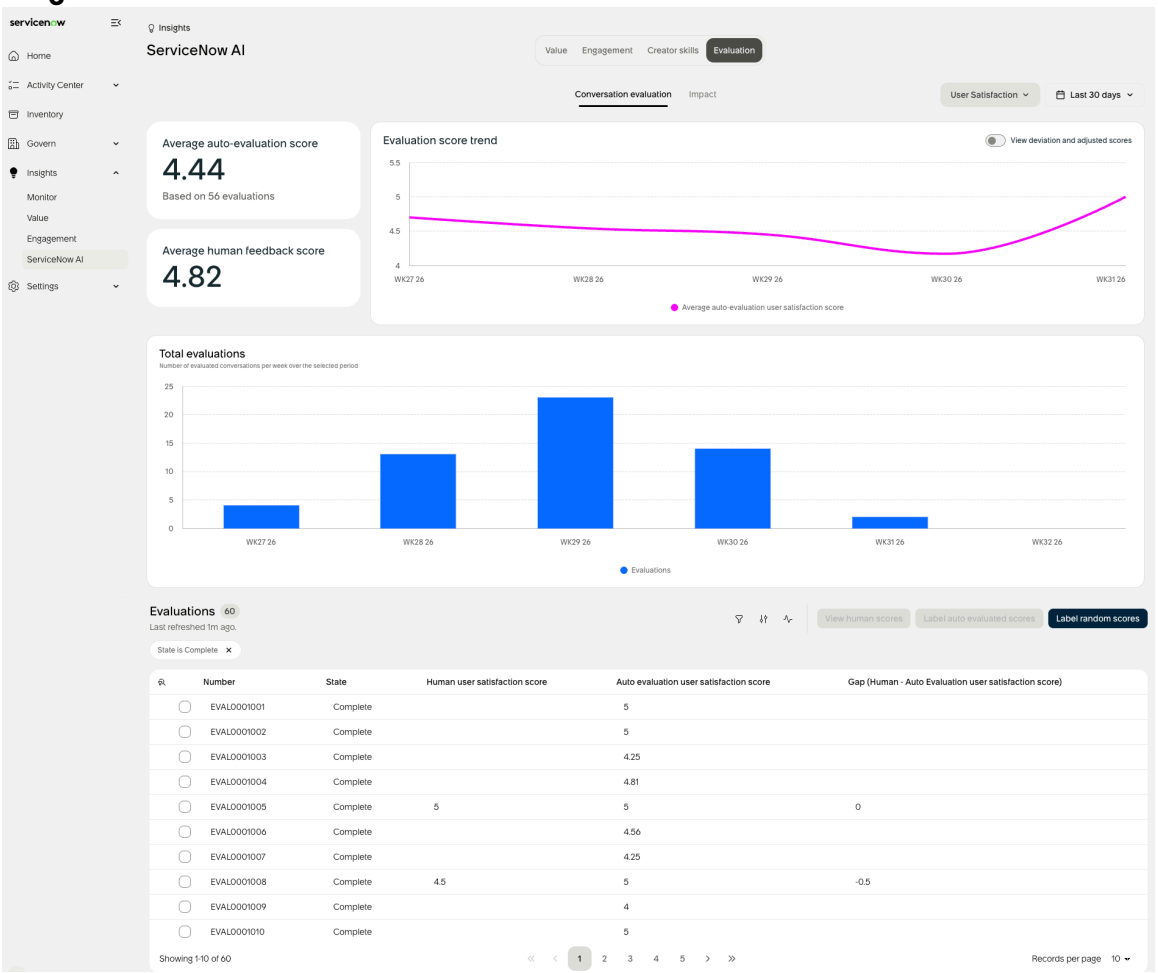
Insights > ServiceNow AI > Evaluation > Conversation evaluation.



Note: You can filter the Evaluation dashboard view by:

- **User Satisfaction**: Displays the overall satisfaction metric aggregated across all evaluation criteria.
- **Request Completion**: Measures whether the AI response fully addresses the user's request or question.
- **Intent Accuracy**: Assesses whether the AI correctly understood the user's underlying intent or purpose.
- **Slot Filling**: Evaluates the AI's ability to extract and identify key information entities from conversations.
- **Truthfulness (Hallucination Prevention)**: Evaluates the AI's ability to extract and identify key information entities from conversations.
- **Context Retention**: Assesses whether the AI maintains and references relevant context from prior conversation turns.
- **Conciseness**: Measures whether the AI response is appropriately brief and focused without unnecessary verbosity.
- **Smoothness (Deadlock avoidance)**: Assesses the AI's ability to navigate conversation flow without getting stuck or repeating itself.
- **Coherence**: Measures whether the AI response is logically consistent, well-organized, and easy to follow.

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All metrics on the Value dashboard default to the last 30 days. Use the time period selector in the top-right corner to adjust the date range and view metrics for different time periods (for example, last 7 days, last 90 days, or a custom range).

Average autoeEvaluation score

The Average auto-evaluation score widget displays the mean satisfaction score calculated from automated evaluation algorithms applied to AI-generated responses. The auto-evaluation score uses predefined criteria to assess whether responses meet quality standards, including relevance, accuracy, completeness, and appropriate tone.

Average human feedback score

The Average human feedback score widget captures the mean satisfaction rating provided directly by users or evaluators who interact with AI responses. Human feedback scores are typically higher than auto-evaluation scores when the AI system is performing well. Users may appreciate factors that automated systems don't capture, such as tone, helpfulness, and contextual understanding. Significant gaps between these metrics may indicate areas where evaluation criteria need adjustment.

Evaluation score trend

The Evaluation Score Trend line chart visualizes the trajectory of average auto-evaluation user satisfaction scores over a selected time period.

You can view the average satisfaction score on the Y-axis and the weekly periods on X-axis along with the evaluation trend with fluctuation over time.

This metric helps you determine whether your AI system performance is improving, degrading, or remaining stable, enabling data-driven decisions about optimization efforts.

Total evaluations

The Total Evaluations bar chart shows the volume of AI response evaluations completed per week across your selected time period.

You can view the number of evaluations on the Y-axis and the weekly periods on the X-axis. A consistent evaluation volume strengthens the statistical reliability of your performance metrics. Sudden drops in evaluation volume may indicate reduced AI agent usage or fewer user interactions.

Evaluations

The Evaluations table provides a detailed record-by-record view of all AI response evaluations within your selected date range. You can see the evaluations listed by State, Human user satisfaction score, Auto evaluation user satisfaction score, and Gap (Human - Auto evaluation user satisfaction score).

Note: For a single evaluation record, you can select to view the evaluations by **View human scores** and **Label auto evaluated scores**, where as **Label random scores** is the default view.

ServiceNow AI Impact

The ServiceNow AI Impact evaluation dashboard displays business outcomes and operational results from AI conversations. Metrics include issue resolution rate, time saved, cost reduction, and other KPIs demonstrating AI business value.

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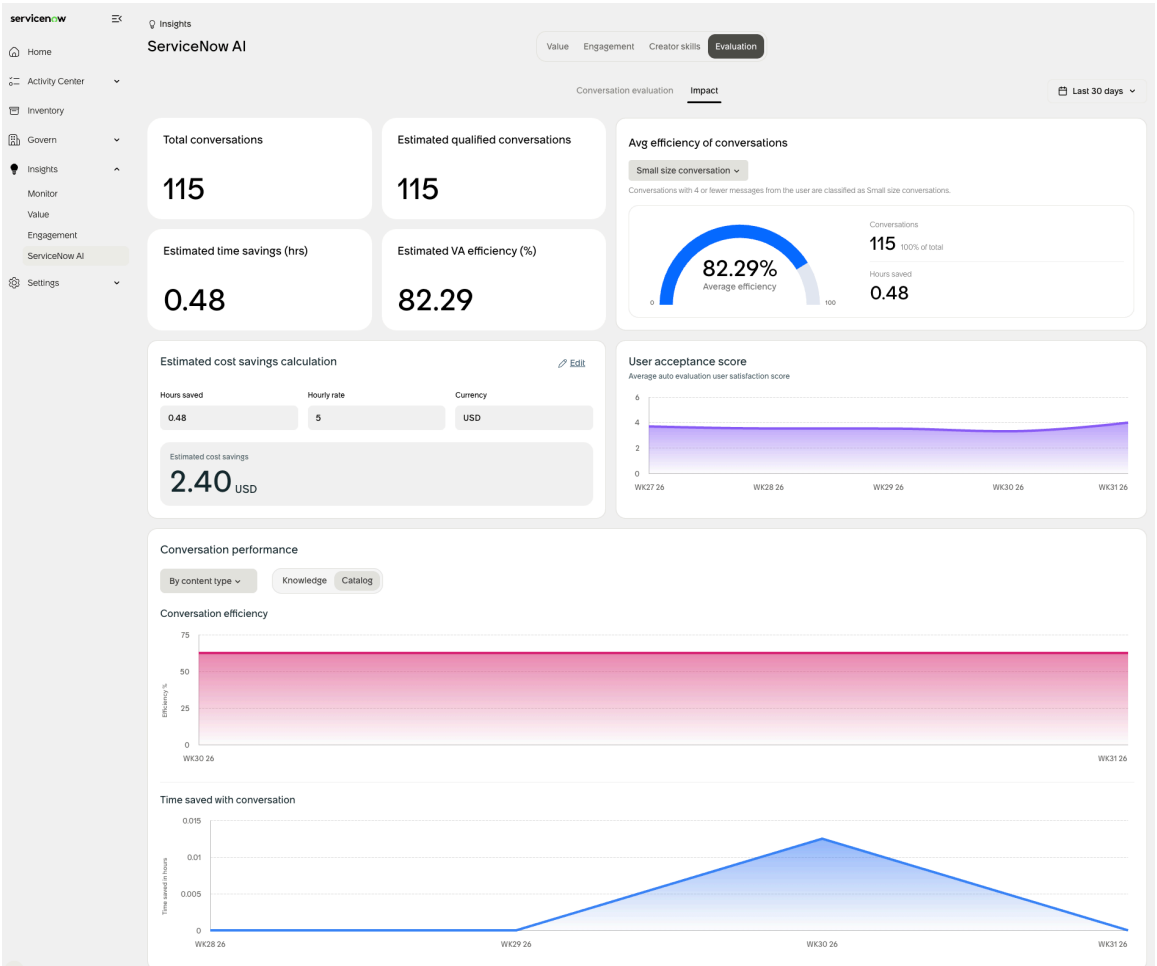
Impact evaluation overview

The ServiceNow AI Impact evaluation dashboard displays impact evaluation metrics, accessible through the Insights interface in ServiceNow AI.



Total conversations

The Total conversations widget displays the cumulative count of all conversations initiated within the selected time range. This metric represents the overall volume of interactions with ServiceNow AI across your organization.

Estimated qualified conversations

The Estimated qualified conversations widget displays the count of conversations that meet qualification criteria for impact evaluation. This represents conversations eligible for efficiency, savings, and performance analysis.

Estimated time savings (hrs)

The Estimated time savings (hrs) widget displays the cumulative time saved (in hours) through ServiceNow AI conversations within the selected time range. This metric is calculated based on estimated efficiency gains compared to manual task completion.

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Estimated VA efficiency (%)

The Estimated VA efficiency (%) widget displays the average efficiency percentage of virtual assistant conversations. This metric represents how effectively AI interactions resolved or assisted with user requests, expressed as a percentage.

Average efficiency of conversations

The Average efficiency of conversations widget displays the mean efficiency rating across all conversations in the selected period. A circular progress indicator shows the percentage, with supporting metrics including:

- Total conversation count
- Hours saved per conversation

You can filter this metric by the following conversation sizes to view efficiency for specific conversation types:

- Small size conversation
- Medium size conversation
- Large size conversation

Estimated cost savings calculation

The Estimated cost savings calculation widget displays cost savings derived from time savings, calculated using the following configurable parameters:

Hours saved

The total hours saved by AI conversations.

Hourly rate

The cost per hour applied to the calculation (default: USD currency).

Currency

The currency denomination for cost calculations.

The widget displays the calculated estimated cost savings figure in the specified currency. You can edit cost parameters by selecting **Edit** on the widget.

User acceptance score

The User acceptance score widget displays an average auto-evaluation user satisfaction score trend over the selected time range. The score is represented as a line chart showing satisfaction ratings across multiple weeks, indicating user acceptance trends for ServiceNow AI conversations.

Conversation performance

The Conversation performance section displays conversation efficiency metrics segmented by content type. The section includes the following elements:

Type

Allows filtering by the following categorizations:

- By conversation size
- By content type

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Knowledge

Display performance data for conversations using Knowledge.

Catalog

Display performance data for conversations using Catalog content sources.

Performance metrics are visualized as two area charts showing efficiency trends across the selected time period:

Conversation efficiency

The Conversation efficiency chart displays efficiency percentages over time, represented as a filled area chart. The chart shows efficiency performance from the earliest date in the selected range through the most recent date, visualizing efficiency trends across weeks

Time saved with conversation

The Time saved with conversation chart displays the trend of hours saved through AI conversations over the selected time range. The metric is visualized as a line chart showing cumulative time savings across weeks, with peaks indicating periods of higher time savings contribution.

Role based data visibility

The AI Control Tower shows value, engagement, and cost data for the AI systems in a user's scope. AI stewards can view data for all AI systems in an instance. Product owners can view data only for the AI systems that they manage.

AI Control Tower supports two responsibility levels. AI stewards oversee AI systems at the instance level. Product owners oversee individual AI systems.

To access AI Control Tower, users must have either the AI steward role (`sn_ai_governance.ai_steward`) or the product owner (`sn_ai_governance_ai_asset_owner`) role. Users without one of these roles can't access the application.

Data scope for each role

Data scope is based on the **Managed by** field on the AI system record. If the **Managed by** field lists a user, that AI system is in the user's scope. AI Control Tower filters value, engagement, and cost data to that scope.

A product owner's scope is always a subset of an AI steward's scope. For example, an AI steward might see all AI systems in the instance, while a product owner sees only the AI systems that they manage.

Only deployed AI systems are included in calculations. Retired AI systems and AI systems in other states are excluded. As a result, the number of AI systems shown in a chart can be lower than the number of AI systems in the user's scope.

If a product owner doesn't manage any AI systems, AI Control Tower shows zero values and empty widgets.

Why access differs

A product owner has detailed knowledge of the AI systems that they manage and can adjust how those AI systems are measured. Instance-level decisions stay with the AI steward, so a product owner can't change settings that affect AI systems outside their scope.

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Cost configuration is defined at the vendor level. Changes to vendor configuration affect every AI system mapped to that vendor, including AI systems outside a product owner's scope. For this reason, cost configuration is read-only for product owners.

When product owners use scoped data

Product owners use scoped data to review value and engagement results, map AI systems to value templates, and review cost output for the vendors behind their AI systems.

Related topics

- Feature access by role
- Review value and engagement insights for AI systems

Conversational evaluator

Conversational evaluator measures the quality of Virtual Agent conversations in AI Control Tower.

Conversational evaluator overview

Conversational Evaluator gives you a measurable view of conversation quality so you can track Virtual Agent performance over time.

A conversation that saves time for a live agent is treated as a successful conversation. Conversational Evaluator combines quality scores with value metrics, such as estimated time savings, so you can connect conversation quality to business impact.

You access Conversational Evaluator from the **Evaluation** tab in AI Control Tower.

Note: Generative AI may produce inaccurate or incomplete information. Always validate AI-generated content.

Benefits

Conversational evaluator provides the following benefits:

- Track Virtual Agent performance across a defined set of quality metrics.
- Define your own quality benchmark by rating conversations.
- Estimate the hours and cost that Virtual Agent conversations save.

How it works

Conversational evaluator uses an auto-evaluation framework to score Virtual Agent conversations. It works as follows:

1. The system identifies qualified conversations by excluding conversation types that aren't suitable for evaluation.
2. The system selects a random sample of qualified conversations for auto-evaluation.
3. The auto-evaluation framework scores each sampled conversation against a set of quality metrics and rolls the metric scores up into a user satisfaction score.
4. The system calculates value metrics, such as estimated time savings and estimated Virtual Agent efficiency, based on the evaluated conversations.

Conversations excluded from evaluation

The following conversation types are excluded from auto-evaluation by default:

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- Conversations that use an inaccessible or empty knowledge base
- Conversations that transfer immediately to a live agent
- Short conversations
- Conversations started by custom triggers

A script include controls these exclusion rules. You can extend the script include to exclude other types of conversations, such as conversations from a specific geographic location.

Evaluation metrics

The auto-evaluation framework scores conversations on the following metrics, which roll up into the **User Satisfaction** score:

- Request completion
- Intent accuracy
- Slot filling
- Truthfulness
- Context retention
- Conciseness
- Smoothness — deadlock avoidance
- Coherence

Value metrics

The **Value** view shows metrics that estimate the business impact of Virtual Agent conversations, including **Total evaluations**, **Average auto-evaluation score**, and **Evaluation score trend**.

Conversations are grouped into small, medium, and large sizes based on the number of words in each conversation. For example, a conversation of about 200 words or fewer is a small conversation.

You can view conversation efficiency and time savings by conversation size or by content type, such as knowledge and catalog.

The value metrics also include a user acceptance score and an estimated cost saving calculation that converts hours saved into a currency value.

Related topics

Review conversation evaluation scores

Calculate Virtual Agent cost savings

Configuring Measure

Set up default template rules, the value job user, AI cost, and usage tracking so that the AI Control Tower can calculate value and cost.

Recommended order

Configuration falls into two independent tracks that meet on the dashboard. Complete the Value track first, because cost figures are only meaningful once value is being calculated.

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1. Value: Configure default template rules, then assign the value job user. Publish at least one value template and map your AI systems to it.
2. Cost: Configure the average hourly rate, add integrated vendor costs, add other vendor costs if you use any, and then review and submit. These four tasks are steps in one flow, so complete them in order.
3. Dashboard: Set up usage tracking by user and department so that usage and cost can be attributed correctly.

Important:

Cost configuration can't be altered for past dates. Make sure you have the correct hourly and vendor rates before submitting, as any corrections will only apply to future dates.

Configure value management

The following topics describe how to configure value management:

1. Set up value template rules. Do one of the following:
   - To use the out-of-the-box templates, review default value template rules.

     For more information, see Review or create default template rules.
   - To build your own, create new value template rules.

     For more information, see Create and publish a value template.
   - To manage AI systems that don't have discovery integration, create and run manual value jobs.
     For more information, see Create and run manual value jobs.
2. Assign the value job user.

   For more information, see Assign the value job user.
3. Map an AI system to a value template.
4. (Conditional) Set up the Multi-Instance Framework for value calculations

   For more information, see Set up Multi-Instance Framework for value calculations.
5. Configure the average hourly rate for your organization.

   For more information, see Configure average hourly rate for your organization.
6. Add and configure costs for integrated vendors.

   For more information, see Add costs for integrated vendors.
7. Add and configure costs for non-integrated vendors.

   For more information, see Add costs for other vendors.
8. Review and submit the cost configuration.

   For more information, see Review and submit the cost configuration.

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9. Set up usage tracking by user and department.

   For more information, see Set up usage tracking by user and department.

Value configurations

Configure the value templates, value jobs, and calculation settings that AI Control Tower (AICT) uses to measure the business value of your AI systems.

Value configurations control how AI Control Tower calculates value for the AI systems in your organization. Configure the templates that define which metrics are calculated, and the value jobs that run those calculations.

Review or create default template rules

Assign a default value template to each AI system category and vendor so that newly onboarded AI systems are mapped automatically.

Before you begin

Role required: sn_ai_governance.ai_steward

About this task

AI Control Tower includes out-of-the-box templates so that each AI system category has a default template. When a new AI system is onboarded, AI Control Tower maps a default template to it based on the vendor and, for ServiceNow, the AI system category.

After you set up default rules, value templates are automatically assigned to new AI systems. When AI Discovery registers a new AI system, and the system reaches the **Deployed** state, AI Control Tower applies the matching default rule. This automation reduces manual setup by eliminating the need to map each new AI system individually.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home**.
2. Navigate to **Settings** > **Rules and Templates** > **Templates** > **Default template rules**.
3. Select an existing template from the list to review it.
4. **Optional:** If the existing templates don't meet your requirements, create a new default template rule.

   a. Select **Assign default templates**.
   The Assign default template dialog box appears.

   b. From the **Template** list, select a template.

   c. From the **Vendor** list, select a vendor.

   d. If you selected **ServiceNow** as the Vendor list, select an AI system category.

   e. Select **Assign as default**.

Result

When AI Discovery registers a new AI system, it checks if it matches the asset type and vendor. If it does and reaches the "Deployed" state, AI Control Tower maps the default templates to that system.

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Create and publish a value template

A value template defines the formula used to calculate productivity gains for mapped AI systems. After you publish a template, the value job runs automatically and populates the Value dashboard.

Before you begin

Role required: sn_ai_governance.ai_steward

About this task

Create a value template when you want to measure the productivity value of one or more AI systems. You define the metric once, map the AI systems that the metric applies to, test the calculation, and then publish the template.

The template flow includes three stages: Formula, Mapping, and Test (optional). All fields remain editable until you publish the template.

Productivity is calculated as: Usage × Time × Quality. Where Usage is how often an asset is used, Time is how much time it saves per use, and Quality is the share of outputs that are accepted.

A template saved as a draft is listed in the Draft state and does not calculate value until you publish it.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home**.
2. Navigate to **Settings** > **Rules and Templates** > **Templates** > **All templates**.
3. Select **Create template**.
4. Enter a name, a department, and a description for the template.

   The template detail fields are described in the following table.

   #### Template detail fields

Field	Description
Template name	Enter a unique name for the template. This field is required.
Value template category	Select the category, such as **Productivity**. The Productivity category measures total productivity gain in terms of time saved.
Department	Select the department that the template applies to.
Description	Enter a description of the template.

5. In the **Persona** field, select the persona that the AI system supports, such as **Agent**.
6. In the **Usage** field, select the indicators that measure execution, such as agent execution, use case execution, skill execution, worker execution, or third-party system execution.
7. Set the time value type.

   Select an indicator to derive time saved from usage, or select a constant to apply a fixed baseline that you define.

8. From the **Quality type** list select an option.

   When you select the quality score, the value defaults to 50 percent. You can overwrite the default value.

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Note:

Productivity = Usage × Time × Quality. Productivity is calculated by multiplying how often an asset is used, how much time it saves per use, and the share of outputs that are accepted.

The calculation builder fields are described in the following table.

Calculation builder fields

Field	Description
Persona	Select the persona that the metric applies to. This field is required.
Usage	Select the usage metric for the calculation. This field is required.
Time value type	Select how the time value is provided, such as constant or an indicator.
Time constant (in minutes)	Enter the time saved per use, in minutes. This field is required when the time value type is constant.
Quality type	Select how the quality (acceptance) value is provided, such as constant or an indicator.
Quality constant (in %)	Enter the share of outputs that are accepted, as a percentage. This field is required when the quality type is **Constant**.

To include additional metrics in the calculation, select **Add metrics**.

9. Select **Save as draft**.
10. Select **Next** to map the AI systems that the metric applies to.
11. Select an AI system type, such as **Generative AI** or **Agentic AI**, and then select the AI systems to map.
12. Select **Map AI systems**.

    You can select more than one AI system. Your selections are saved automatically.
13. Select **Next**.
14. Select the AI systems to test, and then select **Validate and calculate**.

    You can select up to 10 AI systems at a time. The value job runs and shows the numbers under current productivity or new productivity, depending on whether the AI system already has a template.
15. Select **Publish template**.

    If a selected AI system already has a published template, a message states that the existing mapping is retired when you publish. Confirm the override to continue.

Result

The template is published and mapped to the selected AI systems. The value job calculates the productivity gains for the previous day and shows them on the Value dashboard.

The template is listed on the **Templates** tab. A template saved with **Save as draft** is listed in the Draft state and does not calculate value until you publish it.

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Edit a published value template

Change the department, description, or AI system mappings of a published value template, and remove templates that you no longer need while keeping value calculation uninterrupted.

Before you begin

The value template must be published.

Role required: sn_ai_governance.ai_steward

About this task

After you publish a template, you can't change its metric. You can still change the department and the description, and you can add or remove the AI systems that the template is mapped to.

The actions that you can perform on a template depend on its current state:

Permitted actions by template state

Template state	Permitted actions
Published	• Metric fields can't be edited. • Template details (Department, Description) can be updated. • Mapping records can be added or removed. • Can use the **Duplicate** action to clone the template, with or without its mapping records. Cloned templates start in the draft state.
Draft	• All fields (metrics, template details, mapping records) are editable. • Draft templates can be deleted or published.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home**.
2. Navigate to **Settings** > **Rules and templates** > **Templates** > **All templates**.
3. Select the template that you want to edit.
   To reuse a published template as a starting point, select **Duplicate template**.You can duplicate the template with or without its mapping records. The cloned template is created in the draft state, so you can edit all of its fields before you publish it.
4. Select **Edit template**.
5. Change the department and description, and then select **Next**.
6. In the mapping step, you can do the following:

   a. To add a mapping, select an option from the **AI system type** list, select an option from the **AI system** list, and then select **Map AI systems**.

      When you add an AI system, the AI Control Tower starts calculating value for it against this template.

   b. To remove the mapping, select 🗑 beside the AI system type that you want to delete.

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Each deployed AI system must have a published template so that value calculation continues. When you map the AI system to another published template, the AI Control Tower retires the earlier mapping. A message explains this when you try to remove the only mapping.

7. Select **Save**.

Result
Changes to the template are saved.

Assign the value job user

Assign an active user to run value jobs so that the AI Control Tower can calculate value. When the assigned user is inactive, value calculation stops.

Before you begin
Role required: sn_ai_governance.ai_steward

About this task
A value job requires an active user to operate. Make sure to assign an active user to run value jobs.

If the user becomes inactive, the value job will not run, and the calculation of values will cease. You will see a message indicating that the value calculation has stopped because the user required to run the value job is inactive. The message will also prompt you to assign an active user to resume the value calculation.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home**.
2. Navigate to **Settings** > **Rules and templates** > **Templates** > **Value controls**.
3. Select **value.job.user**.
4. From the **Value** list, select a user.

   You can select any active user, because the AI Control Tower uses the user to run the job rather than to check privileges.

5. Select **Update**.

> **Note:** If you see a message indicating that the value calculation has stopped because the user required to run the value job is inactive, select **Assign User** from the message. From the **Value** list, select a user, and then select **Update**.

Result
Value jobs run based on the schedule.

Create and run manual value jobs

Set up manual value jobs for AI systems that you onboard manually, so that the AI Control Tower calculates their value on a monthly or quarterly cadence.

Before you begin
Role required: sn_ai_governance.ai_steward.

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About this task

Some AI systems don't have discovery integration but still need to be managed in the AI Control Tower. For these AI systems, you onboard them manually, create manual indicators, and the value job runs according to the cadence you set.

Procedure

1. Onboard the AI system manually through the inventory intake form.

   Complete the intake form details, follow the asset onboarding lifecycle, and map a value template. For more information, see Creating AI assets manually.

2. Create the manual indicators with a monthly or quarterly cadence.

   The AI Control Tower derives the run cadence from the indicator type. A monthly indicator runs as a monthly job, and a quarterly indicator runs as a quarterly job to capture productivity gains. For more information, see Manual indicators.

3. Rerun a scheduled value job.

   a. Navigate to **All** > **AI Control Tower** > **Home**.

   b. Navigate to **Settings** > **Rules and Templates** > **Templates** > **Scheduled value jobs**.

   c. Select the job that you want to rerun, and then select **Re-run**.
   The **Re-run** option is not available for jobs with a daily cadence.

Result

The AI Control Tower calculates value for the AI system on the monthly or quarterly cadence set by its indicators.

Set up Multi-Instance Framework for value calculations

Connect a sub-production instance to a production instance through the Multi-Instance Framework (MIF) so that the AI Control Tower can run value calculations across Creator skills.

Before you begin

You must have access to both the sub-production and the production instances.
Role required: sn_ai_governance.ai_steward

About this task

Use the Multi-Instance Framework to register a sub-production instance under a production instance so that value calculations run against the correct managed instances.

Procedure

1. In the sub-production instance, navigate to the Manager Instances [sn_mif_managed_by_instance] table and create a record.

   Manager Instances record values

Field	Value
Application	AI Control Tower Core
Manager Instance	Your production instance

2. Monitor the **Approval** field until it changes to **Auto-Approved**.

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3. In the production instance, open the **AI Control Tower** workspace.
4. Go to **Configurations**.
5. On the **Multi-instance setup** tab, complete the following substeps to add your sub-production instance.
   a. Select **Add instances**.
   b. Select your sub-production instance.
   c. Select **Save**.

Result
The sub-production instance is registered with the production instance. The AI Control Tower can run value calculations across the following data:

- Creator metrics data for all creator skills
- Results obtained from testing Value Templates for AI systems in the sub-production environment.

Related topics

Multi-Instance Framework for AI value data

Move an unmanaged AI system to managed

When an AI system is unmanaged, its value data stops appearing on the value dashboard and its value templates are unpublished. Move it back to managed in AI Control Tower to restore value tracking.

Before you begin
Role required: sn_ai_governance.ai_steward

About this task
The value dashboard shows insights only for managed AI systems. Move an unmanaged AI system to managed when you want to track its value again.

Procedure
1. Navigate to **All** > **AI Control Tower** > **Home**.
2. Navigate to **Inventory** > **Assets**.
   All AI assets are listed.
3. Select the check box for the AI system that you want to move to managed.

   To find an AI system, filter the list by **Display name**.
4. From the **Action** list, select **Move to Managed**.

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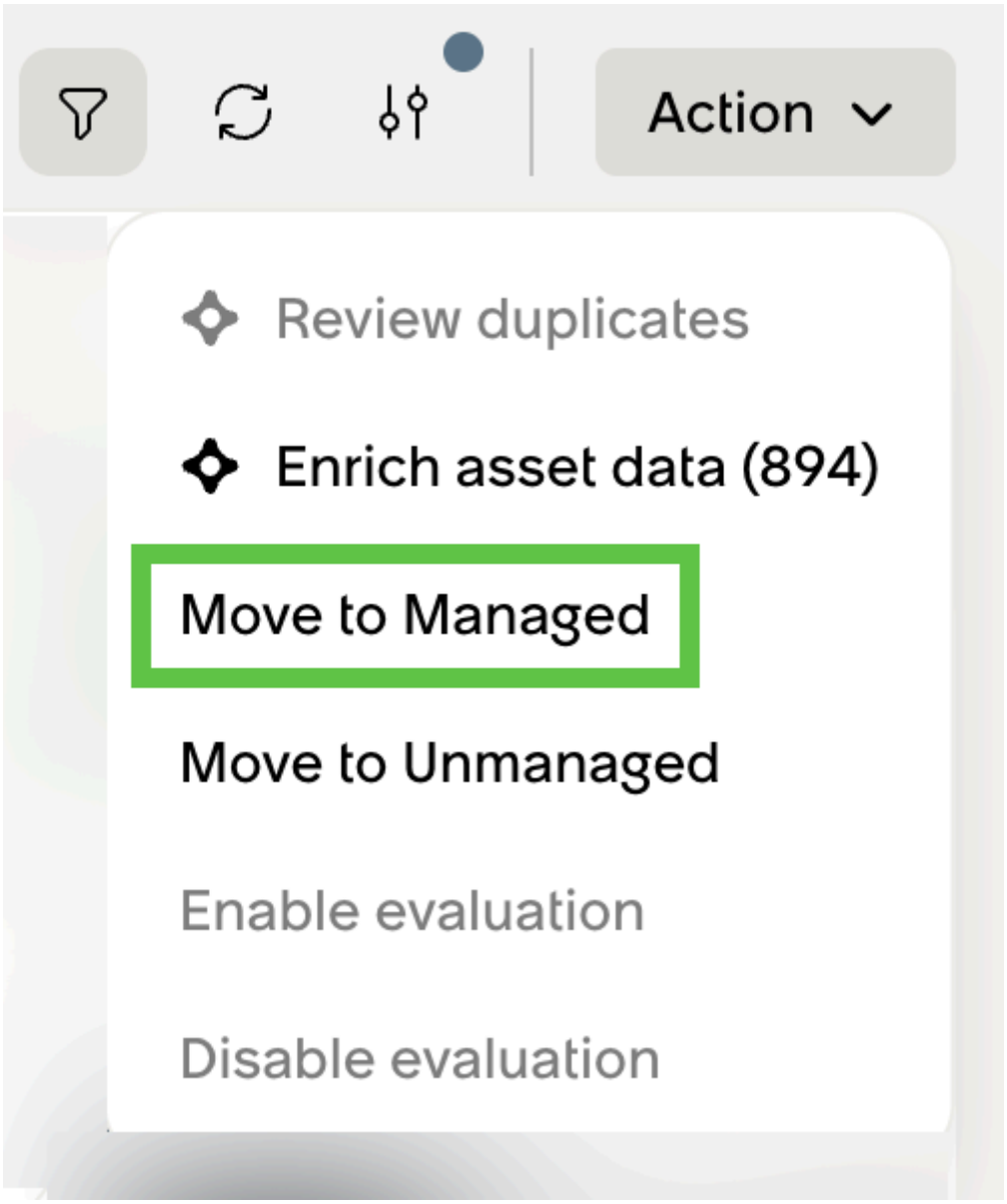

A confirmation message appears, confirming the AI system is now managed.

Result
The AI system moves to the managed AI asset inventory. Its value templates return to the **Published** state, and its value data starts appearing on the value dashboard again.

The template mappings of the AI system appear in the **Templates mapping** list.

Related topics

Value tracking for managed and unmanaged AI systems

Set look back date range for unmanaged AI systems

Change how many days of missing value data AI Control Tower fills in when you mark an unmanaged AI system as managed again.

Before you begin
Role required: sn_ai_governance.ai_steward

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About this task

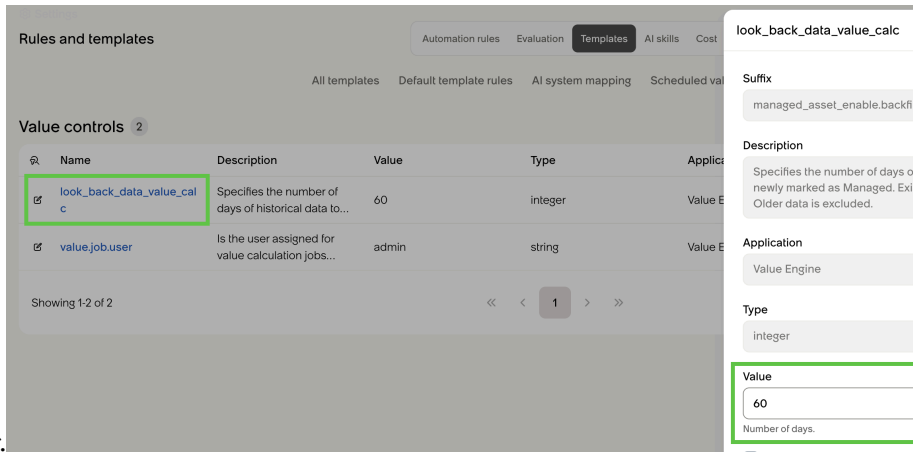
While an AI system is unmanaged, its value data doesn't appear on the value dashboard. When you mark the AI system as managed again, the AI Control Tower fills in the data for the period it was unmanaged. Thus ensuring there are no gaps in the dashboard numbers.

By default, AI Control Tower fills in up to 30 days of value data. If an AI system was unmanaged for longer than 30 days, increase the date range so the dashboard shows the full period. For example, if an AI system was unmanaged for 6 weeks, set the date range to 45 days.

This setting applies to all AI systems that you mark as managed again. It also covers AI systems that were set to unmanaged automatically when you upgraded with a ServiceNow SKU.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home**.
2. Navigate to **Settings** > **Rules and Templates** > **Templates** > **Value controls**.
3. Select *look_back_data_value_calc*.



4. In the **Value** field, enter the number of days of value data to fill in.
   AI Control Tower supports 30, 45, and 60 days.
5. Select **Update**.

Result

The next time AI Control Tower fills in value data for an AI system you have marked as managed, it uses the date range you entered.

Related topics

Value tracking for managed and unmanaged AI systems

Cost configurations

Configure the hourly rates and vendor costs that AI Control Tower (AICT) uses to calculate what your AI systems cost to run.

Cost configurations establish the input for the Cost Framework in the AI Control Tower. Set up these inputs to make sure that cost data is accessible for the AI systems in your organization. After you configure, review the details and submit the configuration to activate it.

Configure average hourly rate for your organization

Set the average hourly rate that the Cost Framework uses to convert hours saved into financial savings.

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Before you begin
Determine your organization's total annual labor cost and its annual working hours, or a pre-calculated average hourly rate.

Role required: AI steward (`sn_ai_governance.ai_steward`).

About this task
The average hourly rate represents the cost of an average employee, including salary, benefits, and overhead, divided by annual working hours. This rate converts productivity hours into financial savings.

Cost setup is a four-step process: configure hourly rates, add integrated vendor costs, add other vendor costs, and preview cost and savings. You can select **Save and close** at any step and return to the configuration later.

Procedure
1. Navigate to **All** > **AI Control Tower** > **Settings** > **Rules and Templates** > **Cost**.
2. Select **Configure** or **Edit configuration**.

   Note:

   The currency shown is the currency configured for the instance. You can't change it here.

3. In the **Configure hourly rates** section, locate the **Avg hourly rate (in USD)** field and determine the correct rate for your organization.

   For example, if the total annual labor cost is $100,000 and the annual working hours are 2,000, the hourly rate is $100,000 ÷ 2,000 = $50/hour.

4. With **Set up a global rate** selected, enter the hourly rate in the **Avg hourly rate (in USD)** field.
5. **Optional:** Select **Set up rates per persona** and then enter the rate in the **Avg hourly rate (in USD)** field for each persona listed.

   (Optional) You must define a rate for each persona, such as agent, developer, fulfiller, or others.

   Important:

   The configuration shows only the personas that are mapped to the templates you created. If a persona is not mapped to your templates, it does not appear in the configuration.

6. Select **Next** to continue.

Result
Your organization's average hourly rate is configured. The Cost Framework uses this rate to calculate financial savings from productivity hours.

Add costs for integrated vendors

Add the cost of a vendor or sub-vendor integrated with ServiceNow so that AI Control Tower includes it in the total Enterprise AI cost. Set a sub-vendor rate when a specific service is billed differently from the vendor.

Before you begin
Role required: AI steward (sn_ai_governance.ai_steward).

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About this task

The system automatically captures token usage from integrated LLM providers, such as Amazon Bedrock, Google Cloud AI, ServiceNow, and Microsoft. However, you must configure the cost rates for each vendor based on your specific commercial agreements.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Settings** > **Rules and Templates** > **Cost**.
2. Select **Edit configuration**.
   The Edit value and cost configuration page opens at the **Configure hourly rates** step.
3. Verify that you have configured the average rate.
   For more information, see Configure average hourly rate for your organization.
4. Select **Next**.
   The **Add integrated vendor costs** step displays the vendors that already have costs.
5. Select **Add vendor**.
6. In the **Vendor** field, select a vendor or sub-vendor.

   Sub-vendors appear after their vendor name, for example, **Amazon - AWS AgentCore**. A sub-vendor rate takes precedence over its vendor's rate.

7. In the **Cost type** field, select a cost type and enter the related values.

Cost type	Values to enter
Overall cost	In **Cost per million tokens**, enter the cost for one million tokens.
Input and output costs	In **Input cost (per million tokens)** and **Output cost (per million tokens)**, enter the cost for one million input tokens and one million out put tokens.
Subscription	In **Licensed seats**, enter the number of seats. In **Cost per seat (per month)**, enter the month ly cost of one seat. In **Contract start** and **Con tract end**, select the contract dates.

   Contract start defaults to the current date.

   For a subscription, the **Estimated monthly cost** value updates as you enter details.

8. **Optional:** To include a one-time setup fee in a subscription, turn on **Add a one-time setup fee**, and then enter the fee in **One-time setup fee** and the number of months in **Amortise over (months)**.

   (Optional) The fee is spread evenly over the number of months that you enter. The monthly amount appears after the **Amortise over (months)** field and is added to the estimated monthly cost.

9. Select **Save**.
   The entry appears in the vendor list with the status **Draft**. If you added a sub-vendor, its vendor's entry shows the message **Applies only where no sub-vendor rate is set**.

Result

The cost is saved as a draft. It's applied after you submit the configuration in the **Preview cost & savings** step.

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What to do next

Select **Next** to add costs for other vendors, or continue to the **Preview cost & savings** step to submit your changes.

Related topics

- Cost types and sub-vendor rates
- Add costs for other vendors
- Review and submit the cost configuration

Add costs for other vendors

Configuring costs for LLM vendors without direct integrations with the AI Control Tower requires manual input. You must manually enter token usage, direct costs, or a per-seat subscription. The AI Control Tower can then include these costs in total AI cost calculations.

Before you begin

Role required: AI steward (sn_ai_governance.ai_steward).

About this task

Not all LLM vendors have direct integrations with the AI Control Tower. For vendors without integrations, you manually capture and configure their costs so that they are included in your total AI cost calculations. The following approaches are available:

- Token-based: You enter the units consumed, and the system calculates cost based on the rate you provide.
- Direct cost: You enter the total cost directly.
- Subscription: Use a subscription when the vendor bills per seat.

The cost entry you add stays in draft until you submit the configuration in the **Preview cost & savings** step.

Cost setup is a single four-step flow: configure hourly rates, add integrated vendor costs, add other vendor costs, and preview cost and savings. You can select **Save and close** at any step and return to it later.

This step is optional. If every vendor you use is integrated, select **Next** and move on.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Settings** > **Rules and Templates** > **Cost**.
2. Navigate to **Settings** > **Rules and Templates** > **Cost**.
3. Select **Edit configuration**.
   The Edit value and cost configuration page opens at the **Configure hourly rates** step.
4. Confirm that the average rate is configured.
   For more information, see Configure average hourly rate for your organization.
5. Select **Next** until the **Add other vendor costs** step opens.
6. In the **Add other vendor costs** section, select **Add vendors** and choose an approach.
   - Token-based — Track token usage for the vendor and let the system calculate cost from the rate.
   - Direct cost — Enter the total cost for the vendor for a time period.
   - Subscription — Use a subscription when the vendor bills per seat.
7. For a token-based vendor, enter the details.

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Token-based fields

Field	Description
Start date	Start date for calculating the vendor cost.
End date	End date for calculating the vendor cost.
Vendor	Name of the vendor.
Unit type	Choose Assist or Tokens according to the consumed category of cost.
Cost type	Choose Overall for a single cost per token, ServiceNow Assist, or Input and output cost to add a separate per-token cost for input and output tokens.
Units consumed	Total number of units consumed.
Avg cost per million units	Average cost per million units within the selected time period.

8. For a direct-cost vendor, enter the details.

Direct cost fields

Field	Description
Start date	Start date for calculating the vendor cost.
End date	End date for calculating the vendor cost.
Vendor	Name of the vendor.
Unit type	Choose Assist or Tokens according to the consumed category of cost.
Total cost	Total cost within the selected time period.

Add costs for all non-integrated vendors that your organization uses.

Select **Add vendor** to save each entry, and then continue.

9. For a subscription vendor, enter the details.

Subscription fields

Field	Description
Contract start	Select the contract start date. The contract start date defaults to the current date.
Contract end	Select the contract end date.
Vendor	Select a vendor or sub-vendor.
Licensed seats	Enter the number of seats.
Cost per seat (per month)	Enter the monthly cost of one seat. The **Estimated monthly cost** value updates to the number of seats multiplied by the cost per seat.

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Field	Description
Add a one-time setup fee	Turn on **Add a one-time setup fee** toggle, and then enter the fee amount in **One-time setup fee** and specify the duration in **Amortise over (months)**.

Select **Add vendor** to save each entry, and then continue.

The subscription is saved as a draft. It's applied after you submit the configuration in the **Preview cost & savings** step.

10. Select **Next** to continue, or **Save and close** to complete the configuration later.

Result
All non-integrated vendors that your organization uses are configured in the Cost Framework. The AI Control Tower uses these rates for total AI cost calculations, even though the vendors don't have automatic data integrations.

Review and submit the cost configuration

Review all Cost Framework configurations, verify the calculations, and submit to activate the Cost Framework.

Before you begin
Role required: AI steward (`sn_ai_governance.ai_steward`).

About this task
Before activating the Cost Framework, review all configurations to verify accuracy. The review screen displays how money saved is calculated (based on the hourly rate), how total cost is calculated (all vendors combined), and a preview of the net returns calculation. After your verification is complete, the system uses these calculations in dashboards and reports.

Procedure
1. Navigate to **All** > **AI Control Tower** > **Settings** > **Rules and Templates** > **Cost**.
2. Select **Edit configuration**.
3. Make sure you have configured the average rate, added integrated vendor pricing, and added other vendor pricing (if applicable).
   For more information, see Configure average hourly rate for your organization, Add costs for integrated vendors, and Add costs for other vendors.
4. Go to **Preview cost & savings** section and review the details.
5. Select **Submit** to activate the Cost Framework.

   The system uses these configurations for cost calculations.

Result
Your Cost Framework configuration is complete and active. The system calculates money saved, total costs, and net returns based on your specifications, and dashboards and reports show the financial impact of your AI investments.

What to do next
Verify that the Cost Framework is active in the dashboards:

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1. Navigate to **All** > **AI Control Tower** > **Insights** > **Value**.
2. Confirm that the Productivity gains widget shows total money saved (not just hours), the Net AI Returns widget shows total calculated returns, and the Total AI Cost widget shows aggregated vendor costs.
3. Verify that these values match the values on the Cost setup page.

After submission:

- Monitor regularly: Check the Cost Framework dashboards weekly to track costs and savings.
- Update as needed: If vendor pricing changes or you add new vendors, reconfigure them from **Settings** > **Rules & Templates** > **Cost**.
- Review quarterly: Reassess hourly rates and vendor pricing quarterly to verify accuracy.
- Investigate anomalies: Watch for unexpected cost spikes or changes in savings patterns.
- Use for decisions: Share Cost Framework insights with stakeholders for budget and investment decisions.

Dashboard configurations

Configure the tracking settings that determine which usage data appears on the dashboards in AI Control Tower (AICT).

Dashboard configurations determine the data that the AI Control Tower collects for its dashboards. It is important to set up usage tracking. This ensures that the dashboards provide adoption data at the level of detail required by your analysts. Analysts need this information to assess how AI systems are utilized across your organization.

Set up usage tracking by user and department

Add user email and department information to the User table so that the AI Control Tower can break down usage and cost by user and by department.

Before you begin

Role required: sn_ai_governance.ai_steward

About this task

Usage by user and department is available for ServiceNow and the Anthropic service. The usage by user and department widget shows the cost breakdown by user and by department. For ServiceNow, the AI Control Tower reads user consumption and maps each user to a department through the User table. For the Anthropic service, it maps the usage email address to a User record, and then reads the user name and department from that record.

Procedure

1. Navigate to **Insights** > **Value** and review the usage by user and department widget.
2. For a user who has no record in the User [sys_user] table, create the user record with the email address.
3. For a user with a missing department, add the department in the User [sys_user] table.

   When email or department information is missing, you will see a message. The message indicates that information may be unavailable for some users and prompts you to update the email and department details in the User table.

4. Run the sync to pick up the new records.

   The sync job runs every four hours and picks up newly created records.

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Result
The usage by user and department widget shows usage and cost broken down by user and by department.

Use

Use Dashboards to review and analyze the productivity gains, AI costs, and the net return on AI investment.

Review value and engagement insights for AI systems

Use AI Control Tower to review productivity gains, cost savings, and engagement results for AI systems in your scope. AI stewards review data for all AI systems on the instance. Product owners review data for the AI systems that list them in the **Managed by** field.

Before you begin

- You must have the AI steward role or the product owner role. Users without one of these roles can't open AI Control Tower.
- If you have the product owner role, at least one AI system must list you in the **Managed by** field.

Role required: sn_ai_governance.ai_steward or sn_ai_governance_ai_asset_owner

About this task
Both roles use the same pages. The difference is the set of AI systems included in each chart.

AI systems included by role

Role	AI systems included
AI steward	All AI systems on the instance.
Product owner	AI systems that list the product owner in the **Managed by** field.

For both roles, only AI systems in the Deployed state contribute to calculations. Retired AI systems and AI systems in other states are excluded.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home**.
2. Navigate to **Insights** > **Value**.
3. Select a date range to set the reporting period.

   The change values shown against each AI system compare the selected period with the preceding period of the same length.

4. Review the productivity gains and cost savings data in the charts.

   Each chart displays aggregated results for AI systems in the **Deployed** state within your scope.

5. To see the AI systems contributing to a chart, select the chart to open the detail view.

   Because only AI systems in the **Deployed** state contribute, the count in the detail view can be lower than the number of AI systems in your scope.

6. Select the **Engagement** tab to review engagement results.

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7. To review results limited to ServiceNow AI systems, open the **ServiceNow AI** tab.
8. In the **ServiceNow AI** tab, select **Value**, **Engagement**, or **Creator skills** to view detailed information.

Result
If you have the AI steward role, each chart shows results for every AI system on the instance.

If you have the product owner role, each chart shows results for the AI systems that you manage. If you don't manage any AI system in the Deployed state, the charts show zero values.

Evaluate conversations

Use Conversational Evaluator in AI Control Tower to review conversation quality scores, and estimate the cost savings from Virtual Agent conversations.

Conversational Evaluator provides auto-evaluation scores to track conversation quality over time. You can label individual conversations to set a quality benchmark and verify auto-evaluation accuracy. The tool also converts hours saved into a currency value to estimate the cost savings from Virtual Agent conversations.

Related topics

Conversational evaluator

Review conversation evaluation scores

Review auto-evaluation scores for Virtual Agent conversations in AI Control Tower to track conversation quality over time.

Before you begin
Role required: sn_ai_governance.ai_steward, interaction_admin

About this task
Compare the average auto-evaluation score with the average human feedback score to check how closely automated ratings match human judgment.

Procedure
1. Navigate to **All** > **AI Control Tower** > **Insights** > **ServiceNow AI** > > **Evaluation**.
2. Select the **Evaluation** tab.
3. In the **Select metric** list, select a metric and then select **Apply**.

   Select **User Satisfaction** to view the combined score, or select an individual metric, such as **Intent Accuracy** or **Slot Filling**.
4. In the **Select date range** list, select the time period to review.
5. Review the **Evaluation score trend** chart.

Related topics

Conversational evaluator

Calculate Virtual Agent cost savings

Calculate Virtual Agent cost savings

Estimate cost savings from Virtual Agent conversations by entering an hourly rate in the Value view of Conversational Evaluator.

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Before you begin
Role required: sn_ai_governance.ai_steward, interaction_admin

About this task
The **Impact** view shows the total hours saved by Virtual Agent conversations. Enter an hourly rate to see the estimated dollar value of those savings.

Procedure
1. Navigate to **All** > **AI Control Tower** > **Insights** > **ServiceNow AI** > > **Evaluation**.
2. Select the **Evaluation** tab.
3. Select **Impact**.
4. **Optional:** In the **Select date range** list, select the time period to calculate.
5. In the **Estimated cost saving calculation** section, enter a value in the **Hourly rate** field.
6. **Optional:** Select a currency from the **currency** list.
7. Select **Update**.

Result
You can see the estimated cost savings from Virtual Agent conversations.

Related topics
Conversational Evaluator

Reference
Reference topics provide additional information about the required roles and Performance Analytics indicators, and the tables used in the value calculation.

Performance Analytics indicators and the database tables
Learn about the out-of-the-box Performance Analytics (PA) indicators and the database tables that the AI Control Tower uses to calculate value.

Predefined PA indicators for ServiceNow® AI systems

Predefined Performance Analytics (PA) indicators

Metric field	PA indicator name	Description
Usage – Agent	AIValue - Daily Agent Executions	AI agent actions
Usage – Skills	AIValue - Daily Skill Executions	AI skill executions
Usage – AI Workflow	AIValue - Daily Agent Workflow Executions	AI workflow executions
Time Saved	AIValue - Daily Average Skill Assist; AIValue - Daily Average Agent Workflow Assists; AIValue - Daily Average Agent Assist	1 assist = 1 minute saved
Time Saved (Token)	AIValue Average RWTS per Skill	Read/write token count; applicable for AI skills only
Acceptance Rate	AIValue.CreatorMetrics.AcceptedCalls	Total accepted creator calls

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Predefined performance indicators for enterprise AI systems

The following out-of-the-box performance indicators are available for enterprise (third-party) AI systems:

- EnterpriseAgents.InvocationCount.Daily - Tracks the number of third-party agent invocations per day.
- AIValue - Daily Worker Executions - Tracks the number of AI worker executions per day.

Key database tables

Key database tables

Table	Purpose
`sys_gen_ai_usage_log`	Stores daily skill and agent execution counts and assist averages. Stores usage data for ServiceNow® AI systems.
`sn_ai_disc_ai_usage`	Stores usage data for third-party (external) agent invocations.

The AI Control Tower derives two common measures from the `sys_gen_ai_usage_log` table:

- **Daily Skill Executions**: the count of records in `sys_gen_ai_usage_log` for a specific asset on the previous day.
- **Daily Average Skill Assist**: the average of the assists column in `sys_gen_ai_usage_log` for a specific asset on the previous day.

Feature access by role

Access to features varies by role. The value, engagement, and cost features differ between AI stewards and product owners.

The differences between the two roles are provided in the following table. Where a product owner sees a subset of data, the subset is the AI systems that list them in the **Managed by** field.

Differences between AI steward and product owner access

Feature	AI steward	Product owner
Value data	Data for all AI systems on the instance.	Data for the AI systems they manage.
Engagement data	Data for all AI systems on the instance.	Data for the AI systems they manage.
Percentage of tasks closed using an AI system, and task closure efficiency	Available.	Not available.
ServiceNow AI value and engagement dashboards	Data for all ServiceNow AI systems.	Data for the ServiceNow AI systems they manage.

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Differences between AI steward and product owner access (continued)

Feature	AI steward	Product owner
Creator skills data	Data for all AI systems on the instance.	Data for the AI systems they manage.
Value templates	All templates, regardless of mapping or state.	Templates mapped to AI systems they manage, plus templates they created, including drafts.
Default template rules	View rules and assign a default rule.	View rules only. The assign control isn't available.
Template mappings	All mappings for all AI systems.	Mappings for the AI systems they manage. Can create and change these mappings.
Scheduled jobs	All scheduled jobs.	Scheduled jobs for the AI systems they manage.
Value controls	Available.	Not available.
Cost calculation output	For all vendors on the instance.	Read only
Integrated vendors and other vendors	All vendor records.	Read only
Vendor configuration	Editable. Can submit changes.	Read-only. Can't submit changes.

Addressing your AI action items

Track and act on the governance work and AI-generated recommendations that AI Control Tower surfaces for you in Activity Center.

Activity Center is the single workspace where AI Control Tower brings together everything that needs your attention: governance work assigned to you or your team, and AI-generated recommendations worth reviewing. Both sections save you from switching between asset records, dashboards, and email to find out what needs to happen next.

Governance work

Lifecycle tasks, security tasks, requests, cases, risk assessments, issues, attestations, policy exceptions, and inquiries are routed to the people who own them, with a single view to track and resolve each one. For more information, see Managing AI tasks and approvals in Activity Center.

AI-generated recommendations

When AI Control Tower detects an issue or an opportunity in your AI portfolio, it surfaces a recommendation with a resolution action attached. For more information, see Resolving AI recommendations in Activity Center.

Managing AI tasks and approvals in Activity Center

Track and resolve the governance work that AI Control Tower generates as your AI portfolio grows, such as lifecycle tasks, security tasks, cases, and risk assessments.

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As AI Control Tower discovers new assets, evaluates their quality and safety, monitors them for risk and security concerns, and tracks their progress through the lifecycle, it produces a continuous stream of items that need human judgment. AI Control Tower can route these items to users who can track and resolve the items in Activity Center. For the AI-generated recommendations that Activity Center also surfaces, see Resolving AI recommendations in Activity Center.

Types of governance work

Activity Center surfaces the following governance work:

Lifecycle tasks

Tasks generated by AI asset lifecycle playbooks as managed assets move through the onboarding, assessment, build and test, deployment, and offboarding stages. Lifecycle tasks include impact assessments, architecture reviews, security clearances, and other reviews that must be completed before an asset can advance to the next stage. For more information, see AI asset lifecycle tasks.

Security tasks

Tasks generated when AI Control Tower detects a security threat, policy violation, or access concern on a managed AI asset. Security tasks route to the AI steward or security team responsible for the affected asset. For more information, see Security tasks.

Requests

Change requests and offboarding requests submitted by asset owners that require AI steward review and approval. A change request initiates a controlled update to a managed asset, such as switching the AI model backing an agent. An offboarding request initiates the retirement of an asset. For more information, see Change and offboarding requests.

Cases

A structured investigation into an incident affecting a managed AI asset, such as a suspected security breach, data exposure, or policy violation. For more information, see AI cases.

Risk assessments

An evaluation of a managed AI asset's inherent, control, and residual risk that AI Control Tower generates automatically when the asset is onboarded or its use and purpose changes. For more information, see Risk assessments.

Issues

A tracked problem identified with a managed AI asset that needs a resolution or an action plan, such as a gap surfaced during a governance review. For more information, see Issues.

Attestations

A request to acknowledge a compliance policy that applies to a managed AI asset, generated automatically when the policy requires acknowledgment from the asset's steward or owner. For more information, see Attestations.

Policy exceptions

An approved, time-bound deviation from a policy or control objective that applies to a managed AI asset. For more information, see Policy exceptions.

Inquiries

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A general request for information or clarification related to AI governance, such as a question about a policy, a process, or a specific AI asset. For more information, see AI inquiries.

Where governance work appears

Governance work surfaces in three places in AI Control Tower:

Home page

The Top action items widget on the Home page shows a prioritized snapshot of recommendations, tasks assigned to you, and unassigned tasks. Use this widget to start each session with the items that most need your attention. For more information, see AI portfolio overview.

Activity Center

Activity Center is the full workspace for governance work. On the **Work** page, it organizes work by ownership across the **Team**, **Assigned to you**, **Unassigned**, and **Submitted by you** tabs. Use Activity Center to filter, group, and work through items at scale. For more information, see Activity Center. AI-generated recommendations appear on a separate **Recommendations** page within Activity Center; see Resolving AI recommendations in Activity Center.

AI asset records

The **Needs attention** section on the **Overview** tab of an asset record shows the recommendations and tasks scoped to that single asset, under the same Recommendations, Assigned to you, and Unassigned sub-tabs as the Top action items widget on the Home page. Use this section when you're investigating an asset and want to see the open governance items that apply to it without leaving the record. For more information, see Working with AI asset records.

AI asset lifecycle tasks

Advance managed AI assets through controlled stages of governance by completing the reviews, assessments, and approvals that AI asset lifecycle playbooks require.

A lifecycle task is a unit of governance work that an AI asset lifecycle playbook generates and assigns to an AI steward, asset owner, or other reviewer. Each lifecycle task corresponds to a step in a playbook activity that requires human judgment, such as evaluating an asset's risk, confirming its regulatory conformity, or collecting the information a review requires. AI Control Tower uses lifecycle tasks to help enforce consistent governance as a managed AI asset moves from onboarding through active use to retirement.

How lifecycle tasks are generated

Lifecycle tasks are generated by the playbooks that run during the Onboard and Retire stages. Each playbook advances the asset through its own set of named activities and generates the tasks required to complete each one. For example, the Onboarding playbook's Assess activity might generate an impact assessment task, a legal collaboration task, a security clearance collaboration task, and an architecture review task.

AI Control Tower routes each task to the role responsible for completing it, based on the playbook's logic. The asset cannot advance to the next activity or lifecycle stage until all required tasks for the current activity are completed.

Lifecycle stages

Every managed AI asset progresses through three lifecycle stages, shown as a horizontal progress indicator on the asset's **Lifecycle** tab. AI Control Tower generates lifecycle tasks in the two stages that run a playbook:

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Onboard

The asset is introduced into the organization. The Onboarding playbook advances the asset through its own activities, including Assess, Build and test, and Deploy, and generates a lifecycle task for each activity it requires.

Maintain

The asset is in active, ongoing use. This stage becomes available after onboarding is complete. It does not run a playbook, so it tracks change requests instead of lifecycle tasks.

Retire

The asset is decommissioned and removed from active use. This stage becomes available after onboarding is complete and runs its own playbook to generate the lifecycle tasks required to retire the asset.

Where lifecycle tasks appear

Lifecycle tasks appear in three places in AI Control Tower:

The Top action items widget on the Home page

Lifecycle tasks assigned to you appear on the **Assigned to you** tab. Lifecycle tasks with no assignee appear on the **Unassigned** tab.

Activity Center

Lifecycle tasks appear on the **Lifecycle tasks** sub-tab of the **Team**, **Assigned to you**, and **Unassigned** views, depending on assignment.

The Lifecycle tab on an asset record

Lifecycle tasks for a specific asset appear in the playbook visualization on the **Lifecycle** tab, where you can see how each task fits into the asset's overall lifecycle progression.

Complete a lifecycle task

Advance a managed AI asset through its lifecycle by completing the reviews, assessments, or approvals that an asset lifecycle playbook requires.

Before you begin

Role required: sn_ai_asset_mgmt.ai_asset_owner or sn_ai_governance.ai_steward

About this task

Lifecycle tasks are generated by an AI asset lifecycle playbook. Lifecycle tasks include impact assessments, architecture reviews, security clearances, value template approvals, and other reviews that must be completed before a managed AI asset can advance to its next lifecycle stage.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Activity Center** > **Work** > **Assigned to you**.
2. On the **Lifecycle tasks** tab, select the lifecycle task that you want to complete.
3. In the Task side panel, review the task details and complete the work that the task requires. For example, an impact assessment task requires you to evaluate the asset against the assessment criteria and record your findings in the form. An architecture review task requires you to review the asset's architecture and confirm that it meets your organization's standards.
4. In the side panel, select **Save**.

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Result
The task is updated with your status change. The asset's lifecycle progresses according to the playbook's logic. If your task was the last outstanding task for the current activity, the asset advances to the next activity in the lifecycle stage.

Security tasks

Address possible security threats, policy violations, and access issues on managed AI assets by acting on the security tasks the system generates for AI stewards and security reviewers.

A security task is a unit of work that AI Control Tower generates when it detects a security concern on a managed AI asset. Security tasks route to the AI steward or security reviewer responsible for the affected asset, where they can investigate the concern, take remediation action, and document the resolution. Security tasks give AI governance teams a consistent, traceable way to respond to AI-specific security threats.

How security tasks are generated

AI Control Tower generates security tasks from several sources:

- Threat detection on AI agents, including prompt injection, data exfiltration, and policy bypass attempts.
- Access and privilege monitoring on AI agents that have unusual or excessive permissions.
- Output deviation detection on AI agents whose responses depart from expected behavior.
- Dormant agent detection on AI agents that have not been used for an extended period and may pose a stale-credential risk.

Where security tasks appear

Security tasks appear in:

Activity Center

Security tasks appear on the **Security tasks** sub-tab of the **Team**, **Assigned to you**, and **Unassigned** views, depending on assignment.

Resolve a security task

Investigate a security concern that AI Control Tower has detected on a managed AI asset, take the appropriate remediation action, and document the resolution.

Before you begin
Role required: sn_ai_asset_mgmt.ai_asset_owner or sn_ai_governance.ai_steward

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Activity Center** > **Work** > **Assigned to you**.
2. Select the **Security tasks** sub-tab.
3. Select the security task that you want to resolve.
   The task opens in a side panel with the affected asset, the type of security concern that triggered the task, the supporting evidence, and any recommended remediation actions.
4. Investigate the security concern.
   Review the evidence in the task, examine the asset's security posture on the asset record's **Security** tab, and determine whether the concern is a true positive that needs remediation or a false positive that can be dismissed.
5. Take the remediation action that addresses the security concern.

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Remediation actions vary by the type of concern. For example, a prompt injection task might require updating the agent's guardrails, while a dormant agent task might require retiring the agent or rotating its credentials.

6. Document the resolution and update the task status.
   Record the action you took and the outcome in the task's resolution notes so the security audit trail is complete. Set the task status to **Completed** when the work is done.

Result

The resolved security task no longer appears in the **Assigned to you** view. The asset record's **Security** tab reflects the updated security posture. If the underlying condition recurs, AI Control Tower generates a new security task.

Change and offboarding requests

Make controlled changes to a managed AI asset, or retire an asset that is no longer needed, by submitting a request for AI steward review and approval.

A request is a structured submission that an asset owner makes when they need to change or retire a managed AI asset. AI Control Tower routes each request to an AI steward for review, runs the request through the appropriate approval playbook, and either applies the requested change or moves the asset to retirement. Requests give asset owners a controlled way to evolve their AI assets, and they give AI stewards a consistent way to govern those changes.

Types of requests

AI Control Tower supports two types of requests:

Change request

A request to modify a managed AI asset. A change request might propose switching the AI model that backs an agent, updating an asset's version, modifying the asset's use and purpose, or changing the sub-AI systems and AI models associated with the asset. Change requests give asset owners a path to keep their assets current without bypassing governance.

Offboarding request

A request to retire a managed AI asset. An offboarding request initiates the offboarding lifecycle stage for the asset, which removes the asset from active use and confirms that dependencies have been resolved and any data the asset produced is handled according to policy.

Request lifecycle

Both request types follow a similar lifecycle:

1. An asset owner submits the request from the asset record.
2. AI Control Tower runs the request through an approval playbook. The playbook might require a review of the asset, an evaluation of the impact, and a remediation plan before the request can be approved.
3. An AI steward reviews the request, including the impact on related sub-AI systems and AI models. The steward approves or rejects the request.
4. If approved, AI Control Tower applies the change to the asset (for a change request) or moves the asset into the offboarding stage (for an offboarding request). If rejected, the asset is unchanged and the request is closed.

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Where requests appear

Requests appear on the **Requests** sub-tab of the **Team**, **Assigned to you**, and **Unassigned** views in Activity Center, depending on assignment. Asset owners can also see requests they have submitted from the affected asset's record.

Review and approve a change request

Evaluate a change request submitted by an asset owner and either approve the change so AI Control Tower can apply it, or reject the change so the asset remains unchanged.

Before you begin

Role required: sn_ai_governance.ai_steward

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Activity Center** > **Work** > **Assigned to you**.
2. Select the **Requests** sub-tab.
3. Select the change request that you want to review.
   The change request opens in a side panel with three tabs: **Details**, **Change tasks**, and **Impacted assets**.
4. Review the proposed changes on the **Details** tab.
   For example, compare the asset's current configuration with the values the requester has proposed for fields such as Asset type, Version, Updated AI Asset, Sub AI systems, and AI models. You can review the justification to understand the business context for the change.
5. Review the work that the request will generate on the **Change tasks** tab.
   For example, view the tasks that will be created if the request is approved, along with their assignees and current state. A change request that switches an AI model might generate a "Review change request" task for the AI steward and a "Validate model performance" task for the asset owner.
6. Assess the impact on related assets on the **Impacted assets** tab.
   For example, you might review impacted assets to determine whether the change might break a downstream dependency or require coordinated updates.
7. Approve or reject the change request.

Option	Description
Approve the request	**a.** Select **Approve**. **b.** If prompted, record the rationale for the ap proval. **c.** Confirm the approval. AI Control Tower ap plies the change to the asset and updates the asset record with the new values.
Reject the request	**a.** Select **Reject**. **b.** Record the rationale for the rejection so the requester understands why the change can not proceed. **c.** Confirm the rejection. AI Control Tower clos es the change request and the asset re mains unchanged.

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Result
If you approved the request, AI Control Tower applies the change to the asset and the request is marked **Completed**. If you rejected the request, the asset is unchanged and the request is closed. The asset owner receives a notification with the outcome and your rationale.

Review and approve an offboarding request

Evaluate an offboarding request submitted by an asset owner and either approve the request to move the asset into the offboarding lifecycle, or reject the request so the asset remains active.

Before you begin
Role required: sn_ai_governance.ai_steward

Procedure
1. Navigate to **All** > **AI Control Tower** > **Home** > **Activity Center** > **Work** > **Assigned to you**.
2. Select the **Requests** sub-tab.
3. Select the offboarding request that you want to review.
   The offboarding request opens in a side panel with the asset details, the requester's justification, and the dependencies that the asset has.
4. Review the offboarding rationale and the asset's current state.
   For example, evaluate whether the asset has had recent activity, whether the requester has identified a replacement asset, and whether retiring the asset will affect users or downstream systems.
5. Assess the impact of retiring the asset by reviewing related sub-AI systems, AI models, and other dependencies in the request.
   For example, identify any downstream assets that depend on the one being retired so you can confirm whether they have been migrated to a replacement or whether additional planning is needed before approval.
6. Approve or reject the offboarding request.

Option	Description
Approve the request.	**a.** Select **Approve**. **b.** If prompted, record the rationale for the ap proval. **c.** Confirm the approval. AI Control Tower moves the asset into the offboarding lifecy cle stage and generates the offboarding tasks defined by the offboarding playbook.
Reject the request.	**a.** Select **Reject**. **b.** Record the rationale for the rejection so the requester understands why the asset can not be retired at this time. **c.** Confirm the rejection. AI Control Tower clos es the offboarding request and the asset re mains active.

Result
If you approved the request, the asset moves into offboarding and lifecycle tasks are generated to complete the retirement. If you rejected the request, the asset remains active. The asset owner receives a notification with the outcome and your rationale.

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AI cases

Investigate and document an incident affecting an AI asset, such as a suspected security breach, data exposure, or policy violation, using a structured case record.

An AI case documents an incident that requires investigation, such as a suspected security breach, a data exposure, or a policy violation involving an AI asset. A case moves through breach analysis, root cause analysis, and remediation as the investigation progresses.

Case lifecycle

An AI steward or asset owner reports a case to document an incident, such as a suspected breach, data exposure, or policy violation. AI Control Tower assigns a case analyst, who triages and investigates the incident to determine whether a breach occurred. The **Reporting status** field is set automatically based on the regulations associated with the case.

Once the case analyst completes the root cause analysis, the **Primary cause** and **Primary consequence** fields populate from that analysis. The case analyst records whether remediation measures have been taken and documents any preventive measures. The case then moves through a post-case review before closing, or it can be canceled if no further action is needed.

Where AI cases appear

AI cases appear on the **Cases** sub-tab of the **Team**, **Assigned to you**, **Unassigned**, and **Submitted by you** tabs in Activity Center, depending on assignment.

Create an AI case

Open an AI case to investigate and document an incident affecting an AI asset, such as a suspected breach, data exposure, or policy violation.

Before you begin

Role required: sn_ai_governance.ai_steward or sn_ai_asset_mgmt.ai_asset_owner

About this task

An AI case documents an incident that needs investigation, such as a suspected security breach, a data exposure, or a policy violation involving an AI asset. Creating a case starts a structured investigation that can include a breach determination, a root cause analysis, and a remediation plan.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Activity Center** > **Work** > **Assigned to you**.
2. Select the **Cases** sub-tab.
3. Select **New**.
4. Fill in the fields that describe the case.

AI Case fields

Field	Description
Name	Name of the case.
Description	Description of the case.
Type	Type of case. Defaults to **AI case**.
Sub-type	Subcategory of the case type, if applicable.

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Field	Description
State	Current state of the case. Defaults to **New**.
Priority	Priority of the case.
Requester	User requesting the case. Defaults to you.
Requested on behalf of	User the case is being requested for, if different from the requester.

Note: The **Primary entity** and **Entity owner** fields populate automatically and aren't set when you create the case.

5. In the Assignment section, specify who should work the case.

Assignment fields

Field	Description
Assignment group	Group responsible for working the case.
Watch list	Users who want to stay informed about the case.
Case analyst	User assigned to analyze the case.
Accountable executive	Executive or executives accountable for the case outcome.

6. In the Primary origin section, describe where the case originated.

Primary origin fields

Field	Description
Location	Location where the case originated.
Sub-location	More specific location within the primary location.
Impacted business unit	Business unit affected by the case.
Impacted department	Department affected by the case.
Additional source	Additional context about how the case was identified.

Note: The **Source** field is set automatically based on how the case originated (such as manually, or from an email or a security incident) and isn't set when you create the case.

7. In the Schedule section, record the dates relevant to the case.

Schedule fields

Field	Description
Date of occurrence	Date the underlying event occurred.
Date of discovery	Date the case was discovered. Defaults to the current date.
Case closure SLA	Target date and time for closing the case.
Investigation planned start	Planned start date for the investigation.
Investigation planned end	Planned end date for the investigation.

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Field	Description
Investigation actual start	Actual start date of the investigation.
Investigation actual end	Actual end date of the investigation.
Remediation planned start	Planned start date for remediation.
Remediation planned end	Planned end date for remediation.
Remediation actual start	Actual start date of remediation.
Remediation actual end	Actual end date of remediation.

Note: The **Reported date** field is set automatically to when you create the case.

8. In the Breach analysis section, record whether the case involves a breach.

Breach analysis fields

Field	Description
Breach status	Whether the case involves a data or security breach. Defaults to **To be determined**.
Reporting status	Whether the case has been reported to regulators. This field is set automatically based on the frameworks associated with the case. Defaults to **To be determined**.

9. In the Root cause analysis section, document your findings and any remediation.

Root cause analysis fields

Field	Description
Overall observations	Findings from your review of the case.
Remediation taken	Whether remediation measures have been taken to address the case. Options are **Yes** and **No**.
Overall preventive measures	Steps to prevent the issue from recurring.

Note: The **Primary cause** and **Primary consequence** fields populate based on further analysis and aren't set when you create the case.

10. In the Activity section, add any supporting notes or comments.

Activity fields

Field	Description
Work notes (Private)	Internal notes about the case that aren't visible to the customer.
Additional comments (Customer visible)	Comments about the case that are visible to the customer.

11. Save the case.

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Result
The case is created and appears in the **Cases** sub-tab, where you and the assigned case analyst can track the investigation through to closure.

Risk assessments

Complete a risk assessment that AI Control Tower generates automatically for a managed AI asset, evaluating its inherent, control, and residual risk.

Unlike a case, an issue, or a policy exception, you don't create a risk assessment. AI Control Tower generates a risk assessment automatically and assigns it to the asset's steward or owner to complete. For more information about how risk is assessed across your AI portfolio, see Reviewing AI risk posture.

How risk assessments are generated

AI Control Tower generates a risk assessment when a managed AI asset is onboarded, and again whenever someone edits the asset's use and purpose details, since a change in how an asset is used can change its risk profile. AI Control Tower doesn't surface the specific reason for a re-triggered assessment on the Risk assessments tab itself; that reason appears in the asset's work notes.

To respond, open the risk assessment from Activity Center, or select **New assessment** from the asset's own record. Both paths take you to an assessment response view, where you evaluate the asset's inherent risk, the effectiveness of its controls, and its resulting residual risk. Some assessments also require a target assessment, or a risk response describing whether you plan to accept, avoid, mitigate, or transfer the risk, before you submit the assessment for approval.

Risk assessment lifecycle

A risk assessment moves from new to in progress as you work through it, to awaiting approval once you submit it for review, and then to completed once an approver signs off. A completed assessment can later be archived, and an assessment can be canceled at any point if it's no longer needed.

Where risk assessments appear

Activity Center

Risk assessments appear on the **Risk assessments** sub-tab of the **Team** and **Assigned to you** tabs, depending on assignment.

The asset record

You can start or continue a risk assessment for a specific asset directly from that asset's own record, using the **New assessment** action.

Issues

Track a problem identified with an AI asset, such as a performance or compliance gap, through to resolution with a documented action plan.

An issue tracks a problem identified with an AI asset that needs a resolution or an action plan, such as a gap surfaced during a governance review. Related issues can be grouped under a parent issue so they can be tracked and managed together. For more information about governance records associated with AI systems, see Governing AI asset risk and compliance.

Issue lifecycle

An issue starts in a new state and moves through analysis and response before you close it as complete or incomplete. An AI steward or asset owner creates the issue and assigns it to a user

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or group to work. The assignee analyzes the issue, documents a recommendation and an action plan, and moves it toward resolution.

Where issues appear

Issues appear on the **Issues** sub-tab of the **Team**, **Assigned to you**, **Unassigned**, and **Submitted by you** tabs in Activity Center, depending on assignment.

Create an issue

Track a problem identified with an AI asset, such as a performance or compliance gap, and document the action plan for resolving it.

Before you begin

Role required: sn_ai_governance.ai_steward or sn_ai_asset_mgmt.ai_asset_owner

About this task

An issue tracks a problem identified with an AI asset that needs a resolution or an action plan, such as a gap surfaced during a governance review. For more information about governance records associated with AI systems, see Governance record types.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Activity Center** > **Work** > **Assigned to you**.
2. Select the **Issues** sub-tab.
3. Select **New**.
4. Fill in the fields that describe the issue.

Issue fields

Field	Description
Name	Name of the issue.
Issue type	Type of issue.
Classification	Classification of the issue.
Location	Location associated with the issue.
State	Current state of the issue. Defaults to **New**.
Substate	More specific status within the current state.
Priority	Priority of the issue.
Issue rating	Severity rating assigned to the issue.
Description	Description of the issue.

5. In the Assignment section, specify who should work the issue.

Assignment fields

Field	Description
Assignment group	Group responsible for working the issue.
Assigned to	User assigned to work the issue.
Issue manager group	Group responsible for managing the issue.

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Field	Description
Issue manager	User responsible for managing the issue.
Watch list	Users who want to stay informed about the issue.

6. In the Schedule section, set the dates and duration for resolving the issue.

Schedule fields

Field	Description
Due date	Date and time the issue must be resolved by.
Confirmed date	Confirmation date for the issue. This field is auto-filled.
Planned start date	Planned date and time to start work on the issue. Defaults to the current date and time.
Planned end date	Planned date and time to finish work on the issue. Defaults to the current date and time.
Duration (duration)	Planned length of time to resolve the issue, in days, hours, minutes, and seconds.
Created	Date on which the issue is created. This field is automatically set to the current date and time.
Closed	Date on which the issue is closed.
Actual start date	Actual date and time work on the issue started.
Actual end date	Actual date and time work on the issue ended.
Actual duration	Actual length of time spent resolving the issue, in days, hours, minutes, and seconds.

7. If the issue is part of a group of related issues, associate it with its parent in the Issue grouping section.

Issue grouping fields

Field	Description
Parent issue	Parent issue that this issue belongs to, if the issue is part of a group.

Note: When advanced issue grouping is enabled, the form also shows a **Group level** field that indicates whether the issue is a parent, child, or standalone issue, and a **Management method** field that indicates whether the issue is managed from the parent or from child issues individually.

8. In the Action plan section, describe how the issue will be resolved.

Action plan fields

Field	Description
Recommendation	Recommended action to resolve the issue.
Action plan	Plan for resolving the issue.

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9. In the Confidentiality section, restrict visibility of the issue if needed.

Confidentiality fields

Field	Description
Confidential	Options that restricts visibility of the issue to confidential users and members of confidential user groups.
Allowed users	Users who can access the issue if it's marked confidential.
Allowed groups	Groups who can access the issue if it's marked confidential.

10. In the Activity section, add any supporting notes or comments.

Activity fields

Field	Description
Work notes (Private)	Internal notes about the issue that aren't visible to the customer.
Additional comments (Customer visible)	Comments about the issue that are visible to the customer.

11. In the Settings section, specify the functional domain that the issue belongs to.

Settings fields

Field	Description
Functional domain	Functional domain that the issue belongs to, such as **AI Risk and Compliance** or **IT risk and compliance**.

12. Save the issue.

Result

The issue is created and appears in the **Issues** sub-tab, where the assigned user or group can work it through to resolution.

Attestations

Respond to a request to acknowledge a compliance policy that applies to a managed AI asset you own or steward.

Unlike a case, an issue, or a policy exception, you don't create an attestation. AI Control Tower generates an attestation when a compliance policy that applies to a managed AI asset requires acknowledgment from the asset's steward or owner. Activity Center surfaces the attestation, but selecting it takes you to the **AI Risk and Compliance Workspace**, where you review the policy and record your response.

Attestation lifecycle

An attestation starts with no response. You review the policy and choose how to respond: accept it to confirm the asset complies, or decline it if the asset doesn't. If the asset can't currently meet the policy, you can request an exception instead of attesting directly; see Policy exceptions for more information. AI Control Tower can also exempt an attestation if the policy no longer applies to the asset, or cancel it if it's no longer needed.

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Where attestations appear

Attestations appear on the **Attestations** sub-tab of the **Team** and **Assigned to you** tabs in Activity Center, depending on assignment.

Policy exceptions

Request an approved, time-bound deviation from a policy or control objective that applies to an AI asset.

A policy exception documents why an AI asset can't currently meet a control objective and requests approval to operate outside that control for a defined period. Each exception includes a justification and a risk assessment that an approver reviews before the exception takes effect.

Policy exception lifecycle

An AI steward or asset owner creates a policy exception, identifies the policy or control objective it applies to, and documents the justification and risk assessment. The exception is valid only for the period defined by its **Valid from** and **Valid to** dates; a valid-to date is required to raise an exception.

The exception moves into review, and the request routes to an approval group or approver. The approver approves or rejects the exception based on the documented justification and risk assessment, and an approved exception closes once its valid-to date passes.

Where policy exceptions appear

Policy exceptions appear on the **Policy exceptions** sub-tab of the **Team**, **Assigned to you**, **Unassigned**, and **Submitted by you** tabs in Activity Center, depending on assignment.

Create a policy exception

Request an approved, time-bound deviation from a policy or control objective that applies to an AI asset, supported by a justification and a risk assessment.

Before you begin

Role required: sn_ai_governance.ai_steward or sn_ai_asset_mgmt.ai_asset_owner

About this task

A policy exception documents why an AI asset can't currently meet a control objective and requests approval to operate outside that control for a defined period. The exception routes to an approver, who reviews your justification and risk assessment before approving or rejecting the request.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Activity Center** > **Work** > **Assigned to you**.
2. Select the **Policy exceptions** sub-tab.
3. Select **New**.
4. Fill in the fields that describe the exception.

Policy exception fields

Field	Description
Name	Name of the policy exception.
Requester	User requesting the exception. Defaults to you.

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Field	Description
State	Current state of the exception. Defaults to **New**.
Reason	Reason for requesting the exception.
Priority	Priority of the exception request.
Justification	Justification for requesting the exception.

Note: The **Substate** field populates automatically as the exception moves through review, such as **Under review** or **Pending risk assessment**, and isn't set when you create the exception.

5. In the Source section, identify the policy or control the exception applies to.

Source fields

Field	Description
Source type	Type of source the exception applies to.
Policy	Policy that the exception applies to.
Control objective	Control objective that the exception applies to. When **Source type** is set to **Control objective**, select the control objective first, then select the specific controls from the impacted controls list.

6. In the Schedule section, set how long the exception is valid for.

Schedule fields

Field	Description
Valid from	Date and time the exception takes effect.
Valid to	Date and time the exception expires.

Note: The **Duration** field is calculated automatically from the **Valid from** and **Valid to** dates and isn't set directly.

7. In the Assignment section, specify who should review the exception.

Assignment fields

Field	Description
Watch list	Users who want to stay informed about the exception.
Approval group	Group responsible for approving the exception.
Approver	User responsible for approving the exception.

8. In the Risk assessment section, document the risk that the exception introduces.

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Risk assessment fields

Field	Description
Method	Method used to determine the risk rating.
Risk rating	Risk rating assigned to the exception.
Risk description	Description of the risk associated with the exception.
Analysis of risk and impact	Analysis of the risk and its potential impact.
Risk mitigation plan	Plan for mitigating the risk while the exception is in effect.

9. In the Confidentiality section, restrict visibility of the exception if needed.

Confidentiality fields

Field	Description
Confidential	Restricts visibility of the exception to confidential users and members of confidential user groups.
Allowed users	Users who can access the exception if it's marked confidential.
Allowed groups	Groups who can access the exception if it's marked confidential.

10. In the Comments section, add any supporting notes.

Comments fields

Field	Description
Work notes (Private)	Internal notes about the exception that aren't visible to the customer.
Additional comments (Customer visible)	Comments about the exception that are visible to the customer.

11. In the Settings section, specify the functional domain that the exception belongs to.

Settings fields

Field	Description
Functional domain	Functional domain that the exception belongs to, such as **AI Risk and Compliance** or **IT risk and compliance**.

12. Save the policy exception.

Result
The policy exception is created and routes to the assigned approver for review. The exception appears in the **Policy exceptions** sub-tab, where you can track its status.

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AI inquiries

Ask a question or request information related to AI governance, such as a question about a policy, a process, or a specific AI asset.

An AI inquiry is a general request for information or clarification related to AI governance, such as a question about a policy, a process, or an AI asset. Unlike a case or an issue, an inquiry doesn't require an investigation or an action plan, only a documented response.

Inquiry lifecycle

An AI steward or asset owner submits an inquiry, and it's triaged and moved into progress by an assignment group or assigned user. If the inquiry requires a decision, it routes to an approver, who approves or rejects it. The inquiry is closed once the requester has the information they need, or it can be canceled if it's no longer needed.

Where AI inquiries appear

AI inquiries appear on the **Inquiries** sub-tab of the **Team**, **Assigned to you**, **Unassigned**, and **Submitted by you** tabs in Activity Center, depending on assignment.

Create an AI inquiry

Submit an AI inquiry to ask a question or request information related to AI governance, such as a question about a policy, a process, or a specific AI asset.

Before you begin

Role required: sn_ai_governance.ai_steward or sn_ai_asset_mgmt.ai_asset_owner

About this task

An AI inquiry routes a question or request for information to an assignment group or approver so you can get a documented response without opening a case or issue.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Activity Center** > **Work** > **Assigned to you**.
2. Select the **Inquiries** sub-tab.
3. Select **New**.
4. Fill in the fields that describe the inquiry.

AI inquiry fields

Field	Description
Name	Name of the inquiry.
Description	Description of the inquiry.
State	Current state of the inquiry. Defaults to **New**.
Priority	Priority of the inquiry.
Requested by	User submitting the inquiry. Defaults to you.
Requested on behalf of	User the inquiry is being submitted for, if different from the requester.

5. In the Assignment section, specify who should handle the inquiry.

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Assignment fields

Field	Description
Assignment group	Group responsible for working the inquiry.
Approvers	Users responsible for approving the inquiry.
Assigned to	User assigned to work the inquiry.
Watch list	Users who want to stay informed about the inquiry.

6. In the Primary origin section, identify where the inquiry originated.

Primary origin fields

Field	Description
Business unit	Business unit associated with the inquiry.
Location	Location associated with the inquiry.

7. In the Activity section, add any supporting notes or comments.

Activity fields

Field	Description
Work notes (Private)	Internal notes about the inquiry that aren't visible to the customer.
Additional comments (Customer visible)	Comments about the inquiry that are visible to the customer.

8. Save the inquiry.

Result

The inquiry is created and appears in the **Inquiries** sub-tab, where the assignment group or approver can respond to it.

Resolving AI recommendations in Activity Center

Resolve the AI recommendations that AI Control Tower generates when it detects an issue or an opportunity in your AI portfolio, using AI automation, a guided AI conversation, or your own review.

As AI Control Tower continuously evaluates your managed AI assets, it surfaces the issues and opportunities it detects as recommendations, each with a resolution action attached, so you don't have to search for the work that matters most. Unlike a lifecycle task, a case, or the other governance work types described in Managing AI tasks and approvals in Activity Center, a recommendation isn't assigned to you through ownership of an asset. Instead, a recommendation is created when AI Control Tower detects something worth your attention, which you can resolve yourself or with AI. For more information about what recommendations are, how they're prioritized, and the related concept of AI insights, see Recommendations and AI insights.

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Where you resolve recommendations

Recommendations surface on the Home page and on individual asset records so you don't miss the highest-priority items, but you resolve them from the **Recommendations** page in Activity Center, alongside the **Work** page described in Managing AI tasks and approvals in Activity Center.

Resolving a recommendation

Every recommendation offers a primary resolution action: an unsupervised agent can run the fix for you, a supervised agent can walk you through it in a guided conversation, or AI Control Tower can redirect you to resolve the issue yourself in the part of the product where it lives. You can also mark a recommendation complete without running its primary action, if you've already addressed the issue another way. For the full procedure, see Resolve an AI recommendation.

Resolve an AI recommendation

Address an issue or opportunity by running an unsupervised agent, working through a guided conversation with a supervised agent, or resolving the issue yourself.

Before you begin

Role required: sn_ai_asset_mgmt.ai_asset_owner or sn_ai_governance.ai_steward

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home** > **Activity Center** > **Recommendations**.
2. Identify the recommendation that you want to resolve.
   In the **Refine list** panel, you can narrow the list by applying filters for category, priority, confidence, outcome, completion status, or asset.
3. Review the details of the recommendation by selecting **View details** from the action menu.
   The side panel shows the reasoning behind the recommendation, the asset or scope it applies to, and the history of any earlier runs.
4. Resolve the recommendation using AI automation, AI review, or resolve the issue yourself.

Option	Description
Automate using AI	**a.** Select **Automate using AI**. **b.** Confirm the action when prompted. AI Con trol Tower runs an unsupervised agent that executes the resolution workflow on your behalf. **c.** Monitor progress in the side panel. The **Fo cused** view shows the steps the agent is taking and the estimated time to complete. The recommendation status moves to **In progress** while the agent runs and to **Com plete** when the agent is finished.
Review with AI	**a.** In the chat interface, work through the su pervised agent's proposed actions one at a time. Accept, refine, or reject each action based on your judgment.

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Option	Description
	b. Close the conversation when the agent re ports that the recommendation is resolved. The recommendation status moves to **Com plete**.
Open	**a.** Select **Open**. AI Control Tower redirects you to the record, page, or workflow where you can resolve the issue directly. **b.** In the record, page or workflow, take the ac tion required to resolve the issue. **c.** Return to the Activity Center Recommenda tions view. After AI Control Tower detects that the underlying condition is resolved, the recommendation status moves to **Com plete**. To mark the recommendation as re solved manually, select **Complete** from the action menu on the card.

Result

The recommendation status moves to **Complete** and the recommendation is removed from the default Recommendations list. To see completed recommendations, open the **Refine list** panel and select **Completed** in the **Completion status** filter.

AI Control Tower reference

Reference topics provide additional information about the roles, tables, data model attributes, and form fields used to configure and administer AI Control Tower.

Components installed with AI Control Tower

Several types of components are installed with activation of AI Control Tower, including plugins, user roles, and tables.

Plugins installed

Activation of AI Control Tower installs the following plugins. Additional plugins listed in Additional plugins extend AI Control Tower with capabilities for discovery, security, dashboards, and reporting.

Plugin	Plugin ID	Description
AI Control Tower Core	`com.sn_ai_governance`	Centralizes AI governance across the enterprise by combining AI assets and controls in a single hub.
AI Asset Management	`com.sn_ai_asset_mgmt`	Tracks and manages the lifecycle of AI assets such as systems, models, datasets, and prompts.
AI Risk and Compliance Management	`com.sn_grc_ai_go`	Manages AI risks across their lifecycle, including risk classification, mapping to regulatory authority documents, and policy compliance.

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Plugin	Plugin ID	Description
AI Case Management	com.sn_ai_case_mgmt	Tracks, triages, and resolves inquiries and incidents related to AI assets.
AI Risk and Compliance Integration with Control Tower	com.sn_grc_ai_int_ctrl	Surfaces risk posture, compliance status, and case workflows directly in AI Control Tower so you can manage AI use cases against regulatory frameworks.
AI Control Tower Evaluations	com.sn_ai_evaluations	Enables the evaluation framework, scoring engine, and monitoring components for your AI systems.
AI Risk and Compliance Content (optional)	com.sn_grc_ai_gov_content	Loads frameworks, citations, control objectives, risk statements, and assessment templates for the EU AI Act and the NIST AI Risk Management Framework.

The following plugins extend AI Control Tower with capabilities for discovery, security and privacy monitoring, value and engagement dashboards, and reporting.

Additional plugins

Plugin	Plugin ID	Description
AI Security and Privacy	sn_ai_security	Provides security and privacy monitoring for AI assets.
AI Discovery	sn_ai_disc	Discovers AI assets, agents, and usage from hyperscaler and external AI platform connectors.
AI Control Tower for Now Assist	sn_aict_nowassist	Syncs Now Assist AI skills into the AI Control Tower inventory.
Value Dashboard for AI Control Tower	sn_ai_value	Provides the Value dashboard for measuring AI investment return and adoption.
Health Dashboard for AI Control Tower	sn_ai_health	Provides the Health dashboard for monitoring the operational health of AI systems.
Engagement Dashboard for AI Control Tower	sn_ai_engagement	Provides the Engagement dashboard for tracking user engagement with AI assets.
AWH for AI Control Tower	sn_awh_config	Configures the Agent Workspace Hub for AI Control Tower.
ServiceNow AI Lens	sn_ai_lens	Provides AI reporting and lens capabilities.
Asset Classes	sn_ent	Required for AI Assets API access. Activate this plugin before configuring API-based integrations to the AI Asset records.
Enterprise Architecture for AICT	com.sn_ea_aict	Provides the shared many-to-many data model connecting AI systems and business applications, independently of the plugin. For more information, see

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Additional plugins (continued)

Plugin	Plugin ID	Description
		Enterprise Architecture for AICT plugin installation and upgrade considerations.

Roles installed

Role title [name]	Description	Contains roles
AI Steward [sn_ai_governance.ai_steward]	Leads the execution of AI Control Tower initiatives, configures governance and approval workflows, and oversees AI asset adoption across the enterprise. Approves or rejects AI asset approval requests, configures Multi-instance Management, activates hyperscaler connections, and sets up MCP client connections.	• sn_nowassist_admin.user • sn_aia.admin • aig_admin • sn_mcp_client.admin
Workspace Administrator [sn_ai_governance.workspace_admin]	Configures the widgets on AI Control Tower pages, including titles, chart types, list sizes, and record conditions. Widget configurations that this role saves apply to all users on the instance.	sn_ai_governance.workspace_use
AI Asset Owner [sn_ai_asset_mgmt.ai_asset_owner]	Manages AI systems, AI models, datasets,	sn_smart_asmt.assessment_adm

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Role title [name]	Description	Contains roles
	and prompts through the asset lifecycle from intake to retirement. Confirms that AI assets are represented accurately and kept up to date, and marks Deploy-phase lifecycle tasks complete. Administers the Smart Assessment Editor (SAE) application.	
AI Risk and Compliance Admin [sn_grc_ai_gov.ai_risk_and_compliance_admin]	Configures risk assessment methodologies, risk contribution factors, and impact assessment templates. Defines automation rules for impact assessments, sets up and profiles AI case types, and deletes AI systems.	• sn_risk.admin • sn_smart_asmt.template_mana • sn_grc_ai_gov.ai_risk_and_com • sn_smart_asmt.assessment_ad • sn_grc_workspace.state_model • sn_smart_asmt.template_contri • sn_compliance.admin • sn_compliance.control_framew • sn_compliance.library_admin • sn_compliance.policy_admin
AI Risk and Compliance Manager [sn_grc_ai_gov.ai_risk_and_compliance_manager]	Accesses all AI systems on the instance. Initiates impact assessments, risk assessments, and control attestations, and manages the lifecycle of AI systems.	• sn_grc_ai_gov.ai_risk_and_com • sn_smart_asmt.template_contri • sn_smart_asmt.template_mana • sn_risk_advanced.risk_asmt_pr • sn_ai_case_mgmt.ai_case_man • sn_risk.manager • sn_compliance.control_framew • sn_compliance.library_manage • sn_compliance.policy_manage

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Role title [name]	Description	Contains roles
AI Risk and Compliance Analyst [sn_grc_ai_gov.ai_risk_and_compliance_analyst]	Performs impact assessments, risk assessments, control attestations, and lifecycle management on the AI systems assigned to the analyst.	• sn_ai_case_mgmt.ai_case_anal • sn_smart_asmt.assessment_rea • sn_smart_asmt.template_reade • sn_grc_ai_gov.ai_risk_and_com • sn_grc_ai_gov.ai_risk_and_com • sn_grc_workspace.user • sn_grc_workspace.state_model • sn_risk.user • sn_risk_advanced.ara_creator • sn_risk_advanced.ara_assesso • sn_risk_advanced.ara_approve • sn_risk_advanced.risk_asmt_pr • sn_compliance.control_framew • sn_compliance.library_user • sn_compliance.policy_user
AI Risk and Compliance User [sn_grc_ai_gov.ai_risk_and_compliance_business_user]	Creates AI cases through Employee Center, works on assigned tasks, and completes control attestations.	• sn_grc_workspace.assessment • sn_smart_asmt.actor • sn_grc_workspace.user • sn_smart_asmt.assessment_rea • sn_risk_advanced.risk_asmt_pr • sn_grc.business_user • sn_compliance.control_framew • sn_compliance.library_business • sn_compliance.policy_business
AI Risk and Compliance Reader [sn_grc_ai_gov.ai_risk_and_compliance_reader]	Reads AI system records and AI impact assessment records.	• sn_grc_workspace.user • sn_grc_workspace.state_model • sn_risk.reader • sn_compliance.library_reader • sn_compliance.control_framew • sn_compliance.policy_reader
AI System Reader [sn_grc_ai_gov.ai_risk_and_compliance_ai_system_reader]	Reads AI system records in both the AI Control Tower workspace and the AI Risk and	None

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Role title [name]	Description	Contains roles
	Compliance workspace.	
AI Case Business User [sn_ai_case_mgmt.ai_case_business_user]	Creates AI cases and AI inquiries in Employee Center.	sn_grc_case_mgmt.grc_case_bus
AI Case Analyst [sn_ai_case_mgmt.ai_case_analyst]	Reviews AI cases and AI inquiries assigned to the analyst. Identifies and manages impacted policies, regulations, and compliance risks, and addresses root-cause issues.	• sn_grc_case_mgmt.grc_case_a • sn_ai_case_mgmt.ai_case_busi
AI Case Manager [sn_ai_case_mgmt.ai_case_manager]	Reviews all AI cases and AI inquiries across the organization. Monitors case volume and severity and oversees case resolution.	• sn_ai_case_mgmt.ai_case_anal • sn_grc_case_mgmt.grc_case_m
AI Case Admin [sn_ai_case_mgmt.ai_case_admin]	Configures AI case types, state models, assignment rules, and assessment templates. Deletes AI cases.	• sn_grc_case_mgmt.grc_case_a • sn_ai_case_mgmt.ai_case_man

Tables installed

Table	Description
AI System Digital Asset [alm_ai_system_digital_asset]	Records for AI system assets. Captures class, state, ownership, model category, and the associated models and datasets.

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Table	Description
AI Model Digital Asset [alm_ai_model_digital_asset]	Records for AI model assets. Captures training and evaluation datasets and defaults the category to AI Model.
AI Dataset Digital Asset [alm_ai_dataset_digital_asset]	Records for AI dataset assets. Captures dataset relationships and defaults the category to AI Dataset.
AI Prompt Digital Asset [alm_ai_prompt_digital_asset]	Records for AI prompt assets. Prompt assets are created from the AI Control Tower workspace only, not through Service Catalog.
AI System Component Product Model [cmdb_ai_system_component_product_model]	Product model attributes for AI system assets. Linked 1:1 to the AI System Digital Asset record.
AI Model Product Model [cmdb_ai_model_product_model]	Product model attributes for AI model assets. Linked many-to-one to the AI Model Digital Asset record.
AI Dataset Product Model [cmdb_ai_dataset_product_model]	Product model attributes for AI dataset assets.
AI Prompt Product Model [cmdb_ai_prompt_product_model]	Product model attributes for AI prompt assets.
AI Asset Governance Details [sn_ai_governance_asset_governance_details]	Primary lifecycle governance record. Provides end-to-end lifecycle visibility, governance state tracking, and oversight across the Assess, Build & Test, and Deploy phases.
AI Asset Lifecycle [sn_ai_governance_lifecycle]	Lifecycle phase definitions. AI Stewards can extend the default Assess, Build & Test, and Deploy phases by adding records to this table and updating the corresponding playbook.
AI Asset Approval Request [sn_ai_governance_assessment_request]	Approval requests that operationalize the lifecycle defined in the AI Asset Governance Details record. Configured with Type = "AI Governance Lifecycle" and drives progression across the lifecycle phases.
AI Asset Approval Task [sn_ai_governance_assessment_task]	Discrete governance and compliance tasks created within an approval request. Each task represents an activity across the Assess, Build & Test, or Deploy phase.
AI Asset Use and Purpose [sn_ai_governance_asset_use_purpose]	Records the intended outcome, usage area, output type, impacted stakeholders, human involvement, interaction model, and autonomy level for each AI system. Used

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Table	Description
	as input to risk classification and impact assessments.
AI System [sn_grc_ai_gov_ai_system]	Operational AI system record used by AI Risk and Compliance. Drives risk assessments, compliance workflows, and regulatory tracking. Created when the AI Steward starts the lifecycle review for an AI system.
AI Usage [sn_ai_disc_ai_usage]	Usage records imported from hyperscaler and external AI platform connectors. Installed with the AI Discovery plugin. Consumed by the AI Control Tower value dashboard.
Business Application Product Model Map [sn_ea_aict_ba_product_model_map]	Many-to-many association table between AI System Component Product Model records and business applications. Installed with the Enterprise Architecture for AICT plugin.

Scheduled jobs installed

Scheduled job	Description
Migrate BA Product Model Map from EA Workspace	Migrates existing AI system-to-business application associations from the Enterprise Architecture Workspace map [sn_apm_ws_ba_product_model_map] to the Enterprise Architecture for AICT map [sn_ea_aict_ba_product_model_map]. Installed with the Enterprise Architecture for AICT plugin. This job doesn't run automatically. For steps, see Run the Migrate BA Product Model Map job.

Related topics

- Enterprise Architecture for AICT plugin installation and upgrade considerations
- Run the Migrate BA Product Model Map job

Enterprise Architecture for AICT plugin installation and upgrade considerations

Upgrading AI Risk and Compliance, Enterprise Architecture Workspace, and AI Control Tower Core out of sync with each other temporarily affects the AI system-to-business application association.

About the Enterprise Architecture for AICT plugin

The Enterprise Architecture for AICT plugin (*com.sn_ea_aict*) provides the shared many-to-many data model connecting AI systems and business applications, independently of the Enterprise Architecture Workspace plugin. Because the association no longer depends on Enterprise Architecture Workspace licensing, you can associate AI systems with business applications, and see that context in AI Control Tower, whether or not you use Enterprise Architecture Workspace.

Why upgrade order matters

The Enterprise Architecture for AICT plugin (*com.sn_ea_aict*) installs automatically as a dependency of AI Control Tower Core. AI Risk and Compliance, Enterprise Architecture

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Workspace, and AI Control Tower Core can be upgraded independently. Each handles the AI system-to-business application association differently before and after Enterprise Architecture Workspace version 10.1.3. Upgrading only one of the three can temporarily create inconsistent data between workspaces.

AI Control Tower Core is itself a required dependency for AI Risk and Compliance, and the Enterprise Architecture for AICT plugin is a required dependency for AI Control Tower Core. Upgrading AI Risk and Compliance without AI Control Tower Core is not possible; the scenarios below cover the combinations that are.

Recommended path

- Upgrade AI Control Tower Core, Enterprise Architecture Workspace, and AI Risk and Compliance together in the same maintenance window.
- If you can't upgrade all three together, upgrade AI Control Tower Core first. It brings in the Enterprise Architecture for AICT plugin automatically. Upgrade the other two as soon as possible afterward.

Consequences of a partial upgrade

If you upgrade	without also upgrading	You may see
All three plugins together	—	Best case: everything works on the new data model immediately. Run the migration job once to move existing associations.
Enterprise Architecture Workspace only	AI Control Tower Core, AI Risk and Compliance	The AI systems related list and Business portfolio widget disappear from the business application record in Enterprise Architecture Workspace. The intake form field and the BA related list in AI Control Tower keep working on the old data model. Upgrade AI Control Tower Core at the same time to avoid this gap.
AI Control Tower Core + AI Risk and Compliance	Enterprise Architecture Workspace	Everything keeps working — Enterprise Architecture Workspace stays on the old data model while AI Control Tower and the intake form use the new one. The AI Control Tower home page shows a single Business portfolio, from the Enterprise Architecture for AICT plugin.
AI Control Tower Core + AI Risk and Compliance (no Enterprise Architecture Workspace installed)	—	New capability: the intake form field, the BA related list, and the Business portfolio widgets all become available for the first time, with no dependency on Enterprise Architecture Workspace.
AI Control Tower Core only (no Enterprise Architecture Workspace installed)	AI Risk and Compliance	The BA related list and Business portfolio widgets in AI Control Tower become available, but the intake form field still won't appear until AI Risk and Compliance is upgraded too.

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After upgrading

You must run the Migrate BA Product Model Map from EA Workspace job manually to move your existing associations into the new data model because the job does not run automatically.

Related topics

- Components installed with AI Control Tower
- Run the Migrate BA Product Model Map job
- AI Control Tower integration with Enterprise Architecture

Agents and skills inventory

The ServiceNow Otto for AI Control Tower plugin (com.sn_aict_genai) includes agents and skills that enhance the AI asset management and governance.

Agents and skills overview

The AI Control Tower agents and skills inventory details agent functions and skill descriptions within their respective interface plugins.

- Agents perform tasks such as dormant asset deactivation, auto-populating AI asset descriptions, lifecycle task reminders, and outcome ranking.
- Skills focus on tag generation, metadata enrichment recommendations, and AI governance insights including quality scoring and critical issue identification.
- All agents are active with configurations and all skills are shipped inactive. The ServiceNow Otto for AI Control Tower (`com.sn_aict_genai`) plugin contains no agentic workflows.

Note: To use the agents and skills in AI Control Tower, install the ServiceNow Otto for AI Control Tower (com.sn_aict_genai) plugin.

Agents

The agents are available on the AI Agent [sn_aia_agent] table and are active by default with their corresponding `sn_aia_agent_config` records. The agents are gated behind these interface plugins:

- `com.sn_value_engine`
- `com.sn_grc_ai_gov`
- `com.sn_ai_opty_engine`

Agent name	Interface plugin	Description
Deactivate Dormant Asset	`com.sn_value_engine`	Autonomously analyzes and retires a single dormant AI asset by running comprehensive analysis and creating an offboarding change request.
AI Asset Description Auto-Populator	`com.sn_value_engine`	Generates and directly applies descriptions for AI assets missing description information. Uses vendor, model name, manufacturer, and category metadata.
Lifecycle Task	`com.sn_grc_ai_gov`	Sends email reminders to assigned users for all overdue and dormant lifecycle tasks across high-priority AI assets.

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Agent name	Interface plugin	Description
Reminder Agent		
Outcome Ranker Agent	`com.sn_ai_opty_engine`	Ranks AI insight outcomes by relevance per persona. Writes ranks via the Populate Outcome Ranks tool, then triggers prioritization recompute.

Skills

The skills are available on the Now Assist Skill Config [sn_nowassist_skill_config] table. All six skills are shipped with inactive status and all the skills except for Tag Generator and Metadata Enrichment are gated behind these interface plugins:

- `com.sn_ai_evaluations`
- `com.sn_grc_ai_gov`

Skill name	Interface plugin	Description
AI Asset Tag Generator	Base plugin (no gate)	Derives tags for an AI asset based on its metadata, guided by existing tags present in the system.
AI Asset Metadata Enrichment Recommender	Base plugin (no gate)	Analyzes AI asset metadata and generates field-level enrichment recommendations using LLM inference and optional web search. Suggests values for description, use cases, and docs with confidence scoring.
Score and Categorization Insight	`com.sn_ai_evaluations`	Analyzes evaluated agent sessions to identify where quality and safety scores degrade across usage categories. Correlates session and trace-level metrics to pinpoint problem patterns.
Use and Purpose vs Intent Insight	`com.sn_ai_evaluations`	Compares an AI agent's registered use & purpose against actual user interactions from session trace data. Detects divergence patterns and escalates meaningful mismatches.
Lifecycle Task Health Prioritization	`com.sn_grc_ai_gov`	Prioritizes lifecycle task health across AI governance tasks.
Critical Issue Identifier	`com.sn_grc_ai_gov`	Identifies and prioritizes critical AI governance issues.

AI Control Tower email notifications

Identify the email notifications that AI Control Tower sends automatically, the events that trigger each notification, and the recipients. These notifications keep AI Stewards, asset owners, and assignees informed so that they can take action promptly on AI asset approvals and lifecycle events.

The notifications listed in this topic are part of the base system and are sent automatically when the trigger condition is met. To customize notification content or recipients, see Create an email notification.

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AI asset approval request notifications

The following notifications are sent for events related to AI asset approval requests and their associated approval tasks. AI asset approval requests are stored in the `sn_ai_governance_assessment_request` table; approval tasks are stored in the `sn_ai_governance_assessment_task` table.

Approval request notifications

Notification	Trigger condition	Recipients
Approval request — work note added	A work note is added to an AI Asset Approval Request record.	Assigned To
Approval request — approved or rejected	An AI Asset Approval Request is approved or rejected.	Asset Managed By
Approval request — comment added	A comment is posted on an AI Asset Approval Request record.	Asset Managed By
Approval request created — unassigned (Stewards)	An AI Asset Approval Request is created and remains unassigned.	AI Stewards group
Approval request created — unassigned (Asset Manager)	An AI Asset Approval Request is created and remains unassigned.	Asset Managed By
Approval task created	An AI Asset Approval Task record is created.	Assigned To

AI asset lifecycle notifications

The following notification is sent when an AI asset transitions to a terminal lifecycle state. The notification alerts downstream owners — including issue, policy exception, and case analyst owners — so that any open work tied to the asset can be resolved or reassigned.

AI asset lifecycle notifications

Notification	Trigger condition	Recipients
AI asset retirement or cancellation	An AI Asset record transitions to Retired or Cancelled state.	AI Analyst, Policy Exception Owners, Issue Owners, AI Case Analysts

Related information

For email notifications sent by AI Risk and Compliance workflows and inherited Risk Management processes, see Email notifications.

Domain separation and AI Control Tower

Domain separation is supported for AI Control Tower. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic*

The support level is Basic but has some exceptions or special conditions.

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- Business logic: Ensure that data goes into the proper domain for the application's service provider (SP) use cases.
- The user interface, cache keys, reporting, rollups, and aggregations all use the domain at production run time.
- The owner of the instance must be able to set up the application to function across multiple tenants.

Sample use case: When an SP uses chat to respond to a tenant-customer's message, the client must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Overview

AI Control Tower helps you discover, govern, monitor, and measure the value of AI systems across your enterprise. If you manage multiple business units or client tenants from a shared instance, such as a managed service provider, domain separation lets you keep each tenant's AI assets, risk posture, security data, and value calculations distinct while administering the deployment from a single instance.

Sample AI Control Tower use case: When a service provider (SP) configures a discovery connector for a client, the client is able to see all assets from their environment.

How domain separation works in AI Control Tower

AI Control Tower provides Basic support for domain separation beginning with the September release, across all pillars: inventory and discovery, monitoring, risk, security, and value.

Some elements remain common across domains regardless of this support level: playbook rule and template definitions, flows, and the AI Control Tower interface itself are shared. The data and behavior described in the pillar sections later in this topic are specific to each domain.

Within a domain hierarchy, a parent domain's view generally combines its own domain with all of its child domains, while a child domain's view shows only that domain's own data. Configuration settings, such as evaluation metric sample rates and cost framework rates, are inherited from a parent or global domain by default, and you can override a setting for a specific domain without affecting the global default or other domains.

How to set up domain separation for AI Control Tower

The base system provides built-in functionality to separate an instance by domain. After an instance is domain-separated, any application that supports domain separation can be installed on that instance.

The application inherits and operates within the domain-separated setup, provided that the application itself supports domain separation.

For example, an organization can host Customer A and Customer B on the same instance, while logically separating their data and access by domain. Customer A can see only its own data, and Customer B can see only its own data.

For more information, see Domain separation setup and administration.

Use cases

The following sections describe how domain separation applies within each pillar of AI Control Tower.

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Inventory and discovery

For inventory and discovery, domain separation keeps each domain's AI assets distinct while giving administrators at a parent domain oversight across their child domains.

- AI asset visibility follows the domain hierarchy. A user at a parent domain can see AI assets across all of its child domains, while a user at a child domain sees only the assets in that domain.
- Automated discovery and connectors create records in the domain of the user who configures the connector, so discovered AI systems and connections from both ServiceNow and external platforms are associated with the correct domain.
- External AI systems registered with an API key are added to the domain of the user who created the key. A warning helps prevent registering an asset in the wrong domain with a key issued to another domain.
- Automation rules and their templates show both the current domain's own records and any records inherited from a parent domain that haven't been overridden, but only the rules created within the current domain actually run.
- Asset tags are scoped by domain, so a tag created for an asset in one domain doesn't appear in another domain's asset views.

Monitoring

For monitoring, domain separation ensures that evaluation data, trace history, and configuration changes for one domain never surface in another domain's view, even when the underlying AI agent is scoped globally.

- Aggregate evaluation metrics reflect only the domains a user can see: their own domain, any child domains, and the global domain. Metrics from sibling or parent domains are never included, even for a globally scoped AI agent.
- Traces and sessions are scoped to the domain of the user who generated them, not the domain of the AI agent. Running a globally scoped agent from within a specific domain still creates a trace that only that domain can see.
- Evaluation metric configuration, such as sample rates and trace API limits, is inherited from the global domain by default. Overriding a setting for a specific domain applies only to that domain and its children, without changing the global default or affecting other domains.

Risk and compliance

For risk, domain separation isolates each domain's risk posture while letting administrators at a parent domain see and manage risk across their child domains.

- Risk assessment tasks and controls, such as impact assessments, attestations, and policy exceptions, are scoped to the domain of the related AI asset. A user sees the tasks assigned within their own domain plus any tasks in the global domain, but not tasks in sibling domains.
- Aggregate risk rating and classification for an asset reflect only the data in the currently selected domain, so a rating calculated for one domain's assets never includes another domain's data.
- Risk dashboards, including the regulatory risk classification, governance posture summary, and risk heat map, filter by the selected domain and roll up through the domain hierarchy. A parent domain's view combines its own data with all of its child domains, while a child domain's view shows only its own data.
- Asset intake and onboarding workflows keep related records, such as configuration items, business applications, and datasets, in the domain of the new asset. Approval routing and

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any tasks the onboarding playbook creates stay within that domain, so users in other domains don't receive related notifications.

- AI model provider and data privacy settings, such as which model providers are allowed and how data overflow is handled, are configured per domain. A change made in one domain's settings doesn't affect another domain's configuration, and using a model outside a domain's allowed list is blocked.

Security

Domain separation ensures that each domain's security posture reflects only its own AI assets and activity, while dashboards and metric detail pages still honor the domain hierarchy.

- The AI asset security score is calculated from the AI assets in the currently selected domain, so each domain's score reflects only its own assets.
- In the Activity Center, security tasks are scoped to the current domain, so a domain shows only the security tasks associated with assets in that domain.
- The agent map and access issue details inherit the domain of the underlying asset or agent. Viewing a parent domain includes the agents and access issues from its child domains.
- In Post-runtime metrics, threat detection data for both internal and external agents is scoped by domain, so the threat map and related guardrail data reflect only the current domain's activity.
- Your top recommendations don't appear on the security dashboard in domain-separated instances, because its underlying data isn't domain aware. Instead, a Security events detected section is shown.
- In Runtime metrics, Sensitive data input and Sensitive data anonymized metrics aren't shown for ServiceNow AI agents on domain-separated instances.
- Details for Privileged AI agents, Dormant AI agents, Access issues, Security events detected, Agent map, Post-runtime, and AI asset security score include a Domain column showing the domain the AI asset belongs to.

Value

For value, domain separation lets each domain calculate productivity gains and cost savings using its own assumptions, while still rolling results up for domains that oversee multiple child domains.

- Value templates, the formulas used to calculate productivity gains for a managed AI system, can be inherited from a parent domain or overridden for a specific domain. Overriding a template in a child domain doesn't change the calculation for the parent template or other domains.
- Productivity gains and savings data roll up through the domain hierarchy. A parent domain's dashboard combines its own data with all of its child domains, while a child domain's dashboard shows only its own data.
- Cost framework rates cascade from the global domain to child domains by default. Administrators can override rates for a specific domain without changing the global rate or other domains' rates.
- Rate changes apply prospectively only. Savings and cost data already calculated under a previous rate aren't recalculated when the rate changes.

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Strategy and planning

For strategy and planning, domain separation keeps AI investment demands, epics, and goals within the domain where they originate.

- AI investment demands, and the epics, goals, and stories created from them, stay in the domain where they were created. Domains outside that hierarchy can't see these records.
- Product feedback submitted for an AI asset, and any demand created from that feedback, stay in the same domain as the asset. Domains outside that hierarchy can't access the related records.

Related topics

Domain separation for service providers

System properties for AI Control Tower

Several system properties that affect core AI Control Tower are available.

These properties exist in the System Properties [sys_properties] table. The admin role is necessary to set system properties.

Note: To open the System Properties [sys_properties] table, enter `sys_properties.list` in the navigation filter.

Properties for AI Control Tower

Property	Description
glide.oauth.tool.scan.skill.enabled	Controls whether MCP server tool scanning is performed by a ServiceNow skill customized for AI Control Tower AI asset security. This scan is a more thorough scan that can detect more potential threats than the AI Guardian scan. As a general guideline, use this scan instead of the AI Guardian scan. • Type: Boolean • Default value: `true` • Location: The System Properties [sys_properties] table
glide.oauth.tool.scan.guardian.enabled	Controls whether MCP server tool scanning is performed by AI Guardian. For more information, see AI Guardian. • Type: Boolean • Default value: false • Location: The System Properties [sys_properties] table
sn_ai_security.analyzer_max_record_age_hours	See System properties for AI asset security.
sn_ai_governance.asset_dedup.agent.enabled	The main switch for intelligent agentic AI asset deduplication. When fails, all

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Properties for AI Control Tower (continued)

Property	Description
	deduplication scheduled jobs and AI agent-driven semantic tag generation are inactive.
sn_ai_security.veza.api.key	See System properties for AI asset security
sn_ai_security.veza.api.url	See System properties for AI asset security.

AI Control Tower (legacy)

The AI Control Tower is a platform that connects different parts of an organization to speed up the AI adoption.

Get started

Explore

Learn how you use the AI Control Tower to manage and track all the AI systems, and other AI assets.

Configure

Configure all the AI Control Tower workflows

Use

Learn how to use AI Control Tower.

Reference

Get details about components such as roles and tables.

Risk and Compliance

AI Risk and compliance application to manage your artificial intelligence (AI) capabilities ethically, mitigate AI risks, and ensure compliance.

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Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

Note: We have controls in place to enable/disable the data collection and data processing.

Exploring AI Control Tower (legacy)

Explore and learn about the AI Control Tower and its role in managing the AI asset inventory, overseeing configurations, integrating with other applications, and handling the asset approval workflow.

AI Control Tower overview

AI Control Tower provides enterprises with visibility into their AI footprint, manages the lifecycle of their AI investments, and identifies risks. This AI Control Tower's functionality ensures that their AI models, workflows, and agents are governed, optimized, and aligned with business strategy. It focuses on:

- **AI Strategy & Value:** Tracks how AI improves efficiency, revenue, and cost savings.
- **AI Governance & Compliance:** Ensures that AI systems follow company policies and global regulations, focusing on privacy, data governance, and ethical AI.
- **Security, Access & Privacy:** Manages AI agent identities, access controls, and sensitive data to ensure security.

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- **Lifecycle Management:** Handles the entire lifecycle of AI assets, including onboarding, offboarding, skill management, and performance monitoring.
- **Health & Performance:** Evaluates how reliably and efficiently AI systems operate.
- **Enterprise AI Integrations:** Provides a platform to discover and use AI projects, models, and data from within the company and external partners.

AI asset Data Model

The AI asset data model catalogs different AI assets such as AI systems, AI models, datasets, and prompts. It also manages the relationship between different assets that helps manage the AI inventory effectively.

AI Control Tower benefits

- Visibility and management of enterprise AI in the organization.
- Manage the lifecycle of AI assets such as AI systems, AI models, prompts, and datasets.
- Identify risks and set controls.
- Proactively manage AI risks and compliance while protecting your business and speeding up AI innovation.

What to explore next

To learn more about AI Control Tower and other applications integrating with its workspace, see the following topics:

- AI Control Tower dashboard
- Configure AI Control Tower
- AI Risk and Compliance
- Explore Now Assist AI asset discovery
- Enterprise AI discovery: Unlock Visibility, Governance & Value
- AI Gateway
- Using AI Control Tower (legacy)
- AI Control Tower reference (legacy)

AI Control Tower dashboard

The AI Control Tower dashboard displays a comprehensive overview of the AI status, AI inventory, and other AI related metrics.

The AI Control Tower dashboard's left navigation view has **Home**, **AI assets**, and **Configuration** icons.

The table below illustrates how the navigation view in AI Control Tower appears for different persona.

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Navigation view for users

Persona	Navigation view
AI steward	• Home page • AI assets • Configurations
Product owner/ asset owner	• Home • AI assets
AI Control Tower workspace user	• Home page • AI assets
Risk and compliance user	• Home page • AI assets

Note: The information and actions available to a user will vary based on their role. For instance, AI stewards have access to the state of AI across all inventory, including value and adoption insights. Product owners, on the other hand, can view only the assets they manage, along with details on their value and adoption.

AI Control Tower Home

The AI Control Tower home view on the dashboard features recommendations for actions at the top displaying task statuses, pending asset reviews, and newly added AI systems. The home page displays the Overview tab in AI Control Tower, AI strategy tab in AI Control Tower, AI asset inventory tab in AI Control Tower, Value tab in AI Control Tower, Adoption tab in AI Control Tower, Risk and compliance tab in AI Control Tower, AI cases tab in AI Control Tower and Security & Privacy tab in AI Control Tower tabs.

Each of these tabs includes widgets, and you can explore the data within each widget in more detail. For instance, the AI system trend widget displays trends based on historical data about AI system deployments. Similarly, the AI risk classification widget shows data according to the default risk classification settings for your skills.

AI Control Tower Home

Explore the AI Control Tower home page.

The AI Control Tower home page view on the dashboard features recommendations for actions at the top displaying task statuses, pending asset reviews, and newly added AI systems.

The home page displays the Overview tab in AI Control Tower, AI strategy tab in AI Control Tower, AI asset inventory tab in AI Control Tower, Value tab in AI Control Tower, Health tab in AI Control Tower Risk and compliance tab in AI Control Tower, AI cases tab in AI Control Tower, Security & Privacy tab in AI Control Tower.

Important: The AI strategy tab in AI Control Tower is available only with Strategic Portfolio Management (SPM) Professional license.

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Each of these tabs includes widgets, and you can explore the data within each widget in more detail. For instance, the AI system trend widget displays trends based on historical data about AI system deployments. Similarly, the AI risk classification widget shows data according to the default risk classification settings for your skills.

The data appearing on these widgets consists entirely of transactional data. Data is populated once assessments are completed. When AI Control Tower is first installed, there's no data available.

Note: AI system trend's data is dependent on two types of scheduled job.

- AI Control Tower Core Monthly Data Collection
- AI Control Tower Core Historical Data Collection job

The AI Control Tower Core Monthly Data Collection is a job that runs each month to collect data. In AI Control Tower, this data is displayed on a quarterly basis through aggregation. So, if you configure AI Control Tower for the first time you don't see any data.

The AI Control Tower Core Historical Data Collection job, which is used to gather historical data. If there was any relevant data from previous months, it can be collected using this job. You can run this job manually, as the monthly job only collects data going forward, not from the past.

Overview tab in AI Control Tower

Explore the overview tab in AI Control Tower and the widgets available on the tab.

Overview dashboard

Prerequisites

Role required: AI steward [sn_ai_governance.ai_steward]

The **Overview** tab of the AI Control Tower dashboard provides a comprehensive view of all metrics of AI systems.

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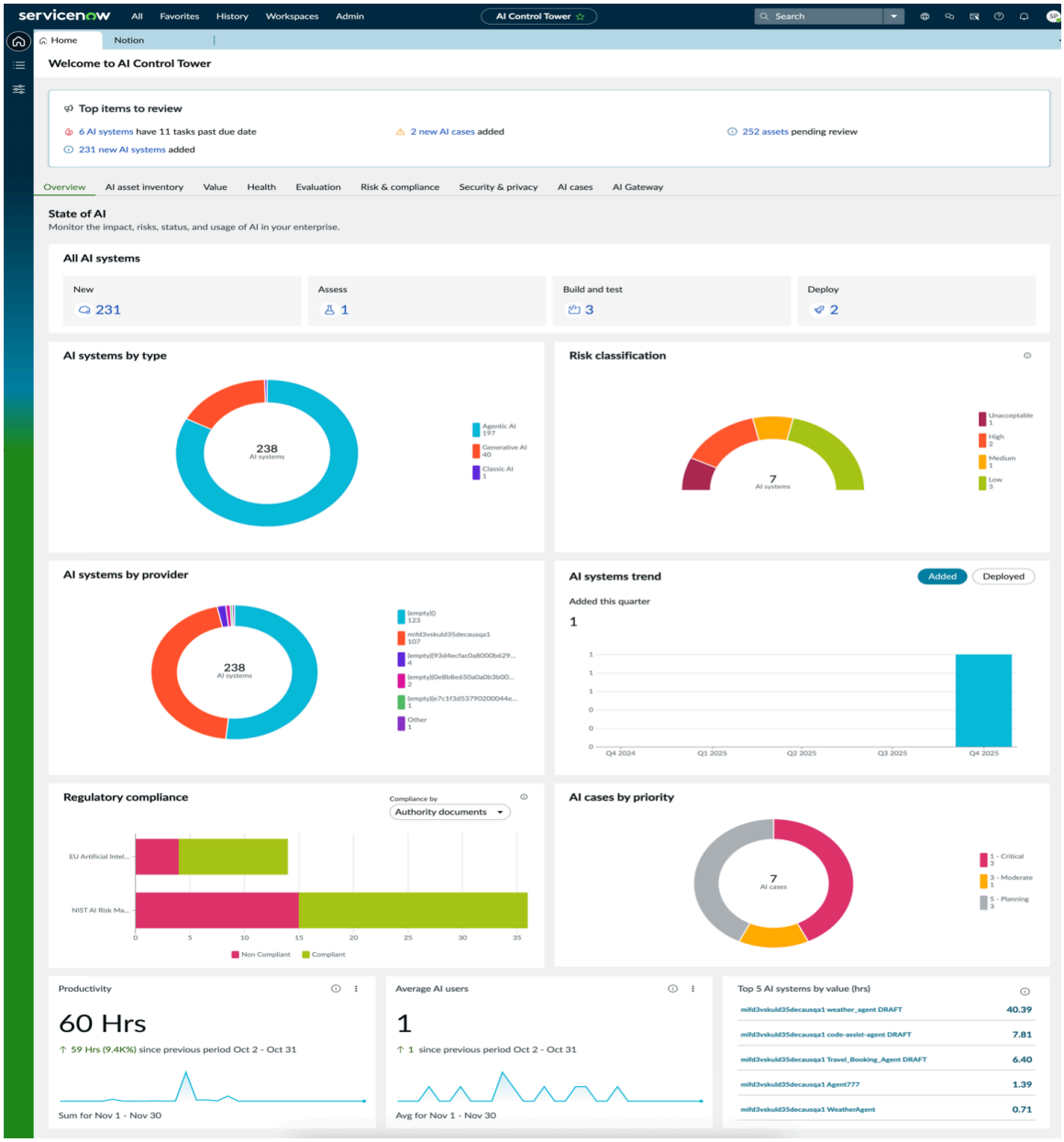

The following widgets are available, showing various metrics. You can view the data in detail on each widget.

All AI systems

This section shows all the AI systems classified into four stages:

- New
- Assess
- Build and test
- Deploy

For more information about the AI asset lifecycle stages, see AI asset lifecycle

AI systems by type

This section shows all the AI systems categorized into

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- Agentic AI
- Generative AI
- Classic AI

Risk classification

This section shows the risk score of AI systems. The risks are qualitatively classified as

- High
- Low
- Medium
- Unacceptable

AI systems by provider

This section shows the number of AI systems, categorized by the providers.

> **Note:** The AI system by provider donut chart doesn't display the **Other** category when there are more than five providers, which can cause a mismatch between the number of metric labels and the items shown in the list when selecting a metric label.

Compliance

This section shows the compliance effectiveness percentage of different statuses of active controls applied on **Authority documents** and **Policies**. You can drill down respective sectors of the bar graph to access and view the list of active controls.

AI cases by priority

This section shows the total number of AI cases with breakdown analysis by priority rating. You can drill down to respective sectors of the donut chart to access and view a list of recorded AI cases.

AI strategy tab in AI Control Tower

The **AI strategy** tab includes information about all the AI-related priorities, goals, planning items, and execution items—projects and demands in the AI Control Tower workspace.

This tab helps you track and monitor AI-related work across various sections—Strategy, Costs, Prioritized AI work, and AI Risks, Issues, Decisions, Actions, and Request Changes (RIDAC)—enabling you to make informed decisions. The tab displays the AI-related work defined in ServiceNow® Goal Framework, the ServiceNow® Strategic Planning, and ServiceNow® PPM Standard.

Strategy

The Strategy section helps you monitor and track your AI strategic priorities, goals, and targets associated with these goals.

Strategic priorities with the **Type** field set to **Artificial Intelligence** and goals with the **Category** field set to **Artificial Intelligence** in the Goal Framework application appear in the Strategy section in the AI Control Tower workspace, enabling you to monitor their progress effectively. For details, see Create a strategic priority for a strategic plan and Create a goal in Strategic Planning.

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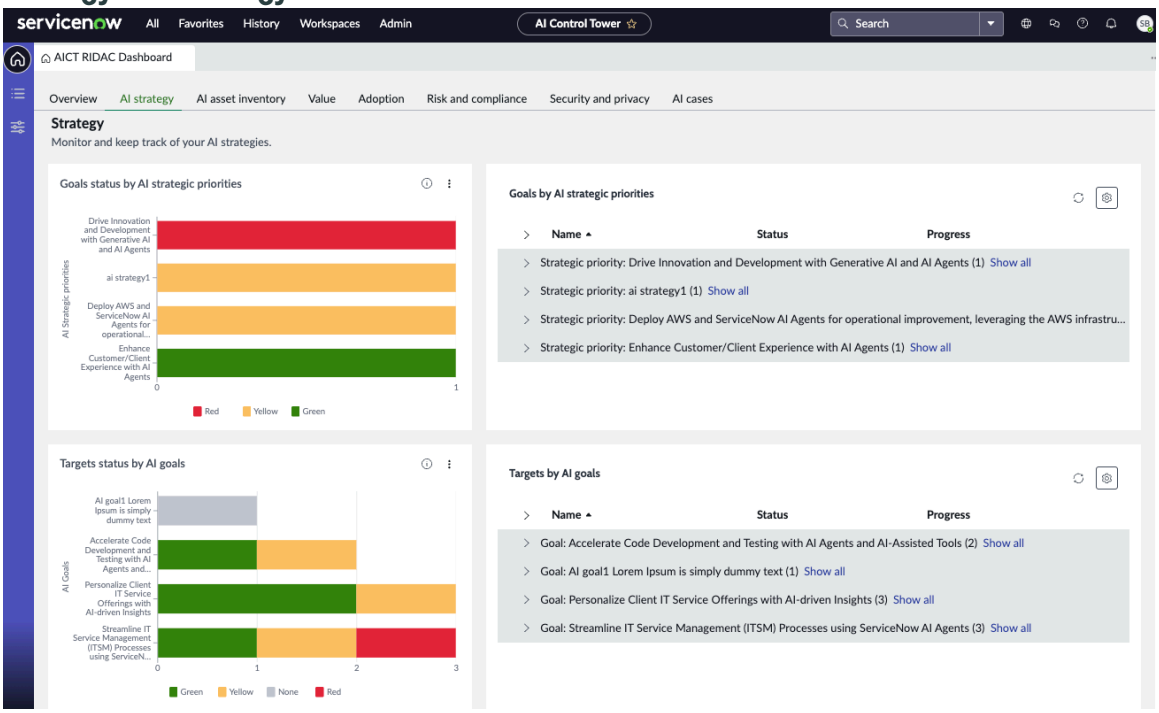
Strategy in AI strategy

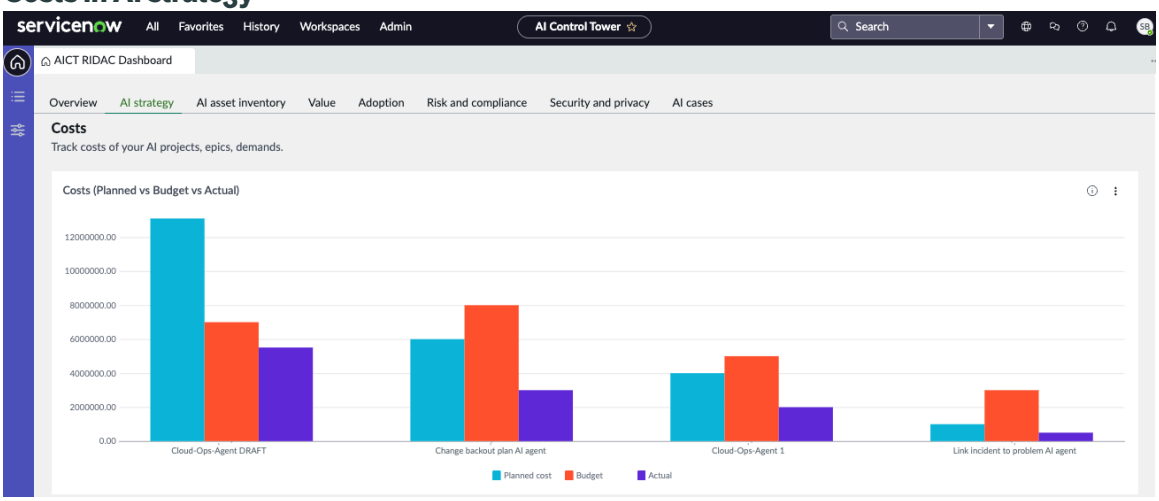


Costs

The Costs section helps you track the costs of your AI planning items—such as projects, epics, and demands—by comparing planned cost, budgeted cost, and actual cost.

Planning items with the **Investment type** field set to **Artificial Intelligence** in the Strategic Planning Workspace appear in the Costs section in the AI Control Tower workspace, enabling you to monitor their progress effectively. For details, see Add planning items to Prioritization.

Costs in AI strategy



Prioritized AI work

The Prioritized AI work section helps you track your projects, epics, demands being planned and done around AI.

Planning items with the **Investment type** field set to **Artificial Intelligence** and the **State** field set to **Prioritized** in the Strategic Planning Workspace appear in the Prioritized AI work section in the

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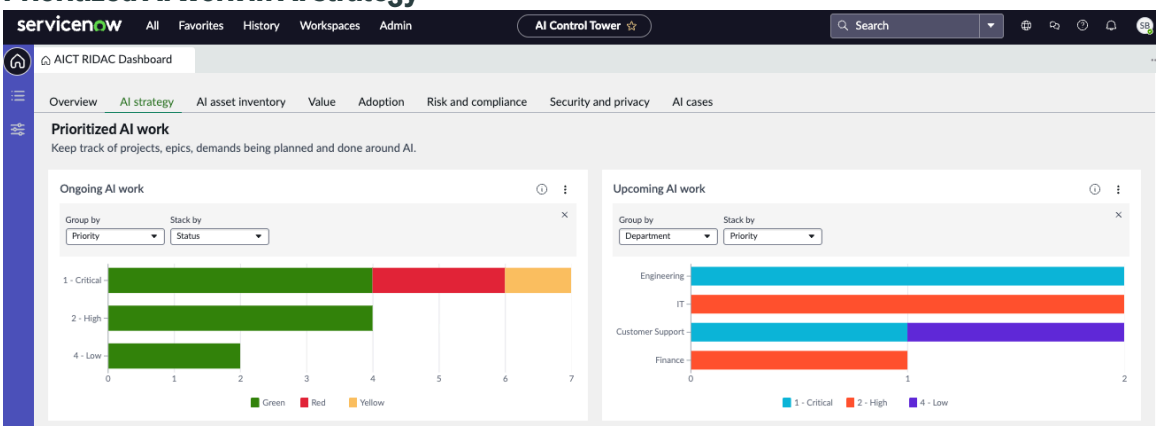
AI Control Tower workspace, enabling you to monitor their progress effectively. For details, see Add planning items to Prioritization and Prioritize work.

Prioritized AI work in AI strategy



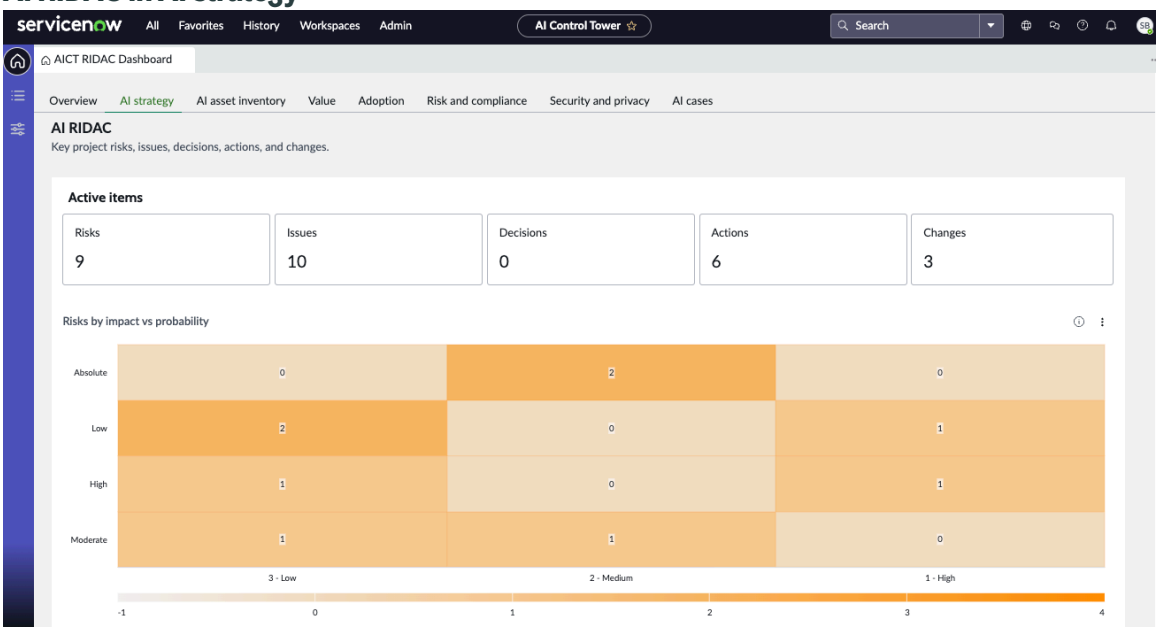
AI RIDAC

The AI RIDAC section helps you monitor key project risks, issues, decisions, actions, and changes, enabling you to make informed decisions.

Projects that meet any of the following criteria appear in the AI RIDAC section in the AI Control Tower workspace, enabling you to monitor their progress effectively:

- Projects with the **Investment type** field set to **Artificial Intelligence** in PPM Standard (Project Management or Project Workspace). For details, see Create a project from Project Workspace and Add RIDAC records to projects from All RIDAC page.
- The **Category** field on the associated primary goal record is set to **Artificial Intelligence** in Goal Framework or Strategic Planning Workspace. For details, see Create a goal in Goal Framework and Create a goal in Strategic Planning.
- The **Type** field on the strategic priority of the associated primary goal is set to **Artificial Intelligence** in Goal Framework or Strategic Planning Workspace. For details, see Create a strategic priority for a strategic plan.

AI RIDAC in AI strategy



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AI asset inventory tab in AI Control Tower

The AI asset inventory includes all the AI-related assets used by an organization, including AI models, prompts, systems, and databases.

Explore AI asset inventory

The **AI asset inventory** tab displays the following widgets. You can view the data in detail on each widget.

AI systems by provider

This section displays the number of AI systems, categorized by the providers using a donut chart.

> **Note:** The AI system by provider donut chart doesn't display the **Other** category when there are more than five providers, which can cause a mismatch between the number of metric labels and the items shown in the list when selecting a metric label.

AI systems by type

This section displays all the AI systems categorized into **Agentic AI**, **Generative AI**, and **Classic AI** categories using a donut chart.

All AI systems

This section displays all the AI systems classified into four stages: **Steward review**, **Approved for development**, **Ready for deployment**, and **Deploy**.

AI asset inventory by department

This section displays the number of AI systems classified in the **Providers** and **Components** using bar graph.

The following image shows the **AI asset inventory** tab on the AI Control Tower.

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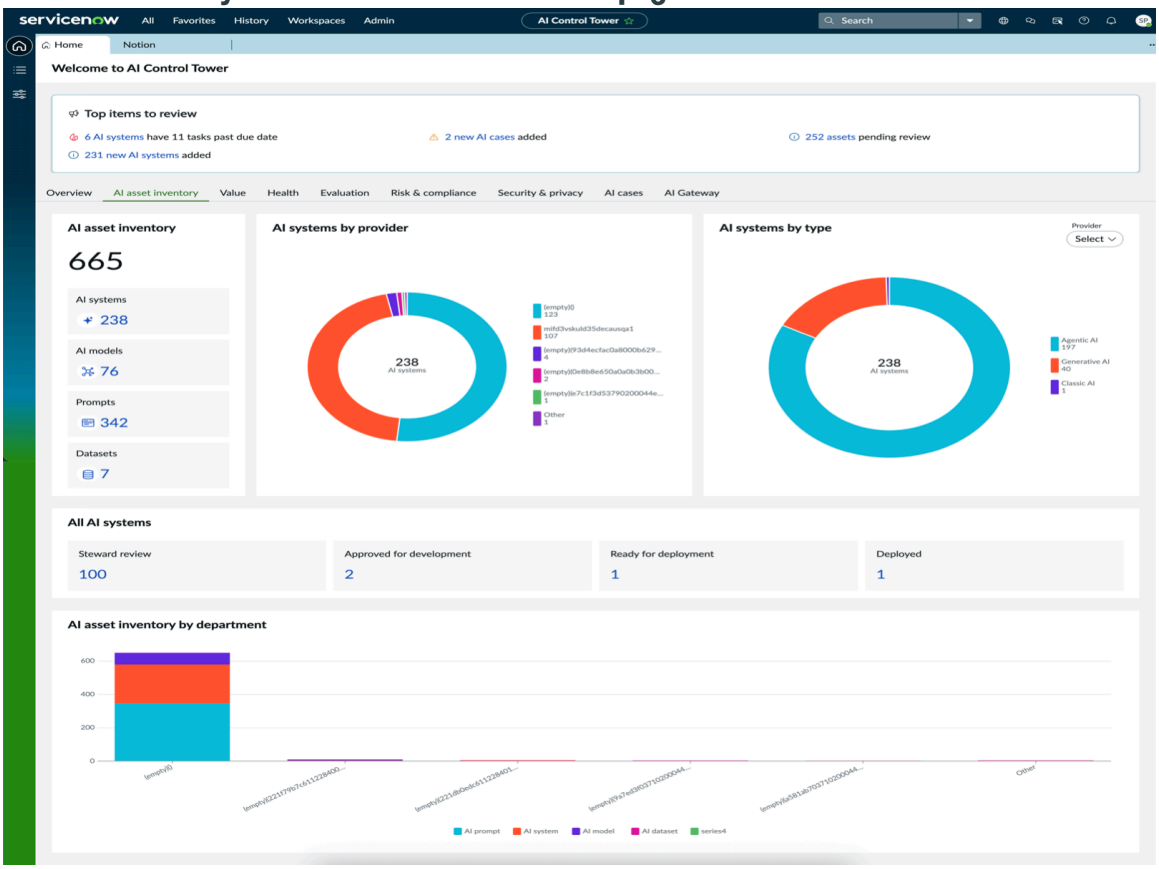
AI asset inventory tab in AI Control Tower home page



Value tab in AI Control Tower

Use the Value dashboard page to gain insights into the value realized from multiple types of AI in your organization.

The Value dashboard page contains visualizations that help you assess the value of your AI assets. Creator skills are included in the Value dashboard page. Value metrics for creator skills are aggregated across non-production and production instances.

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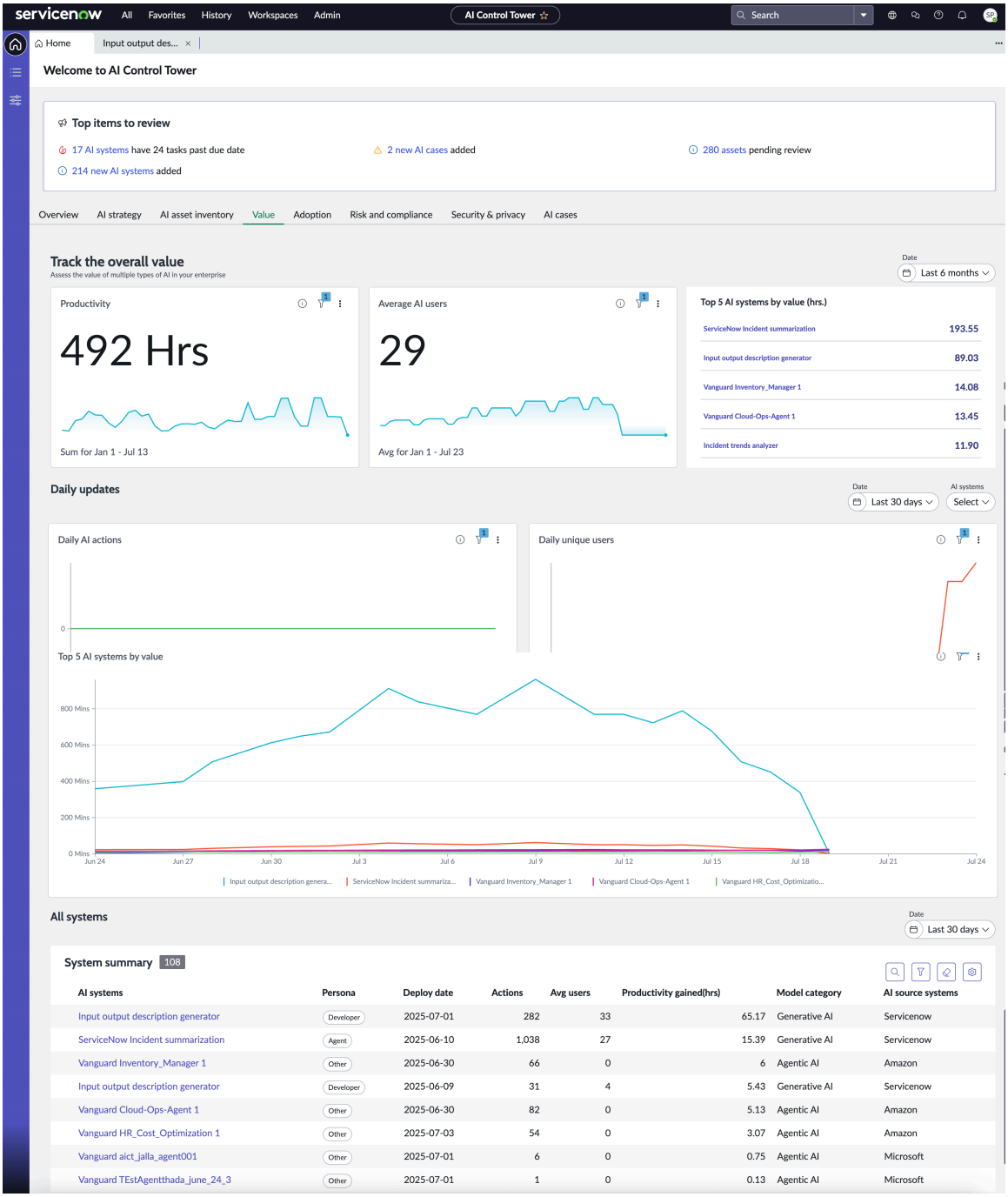
Value tab in AI Control Tower



The indicators on the dashboard are based on the value templates associated with each AI asset. See Using value templates for more information.

Top 5 AI systems by value

This area of the dashboard shows the five AI systems that generated most value (in hrs).

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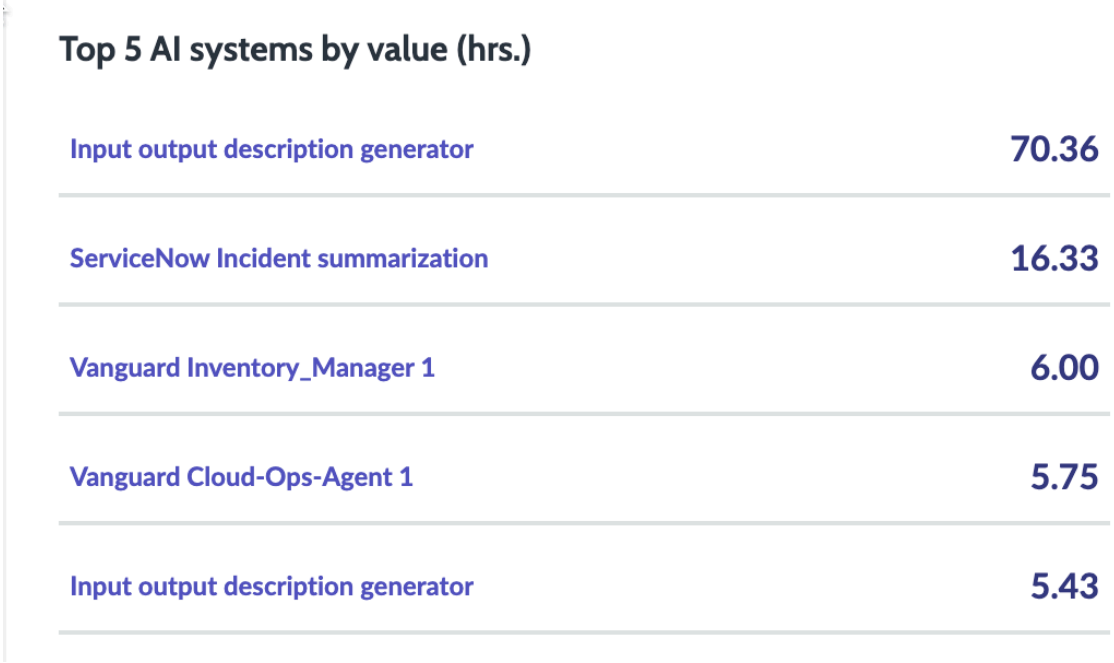
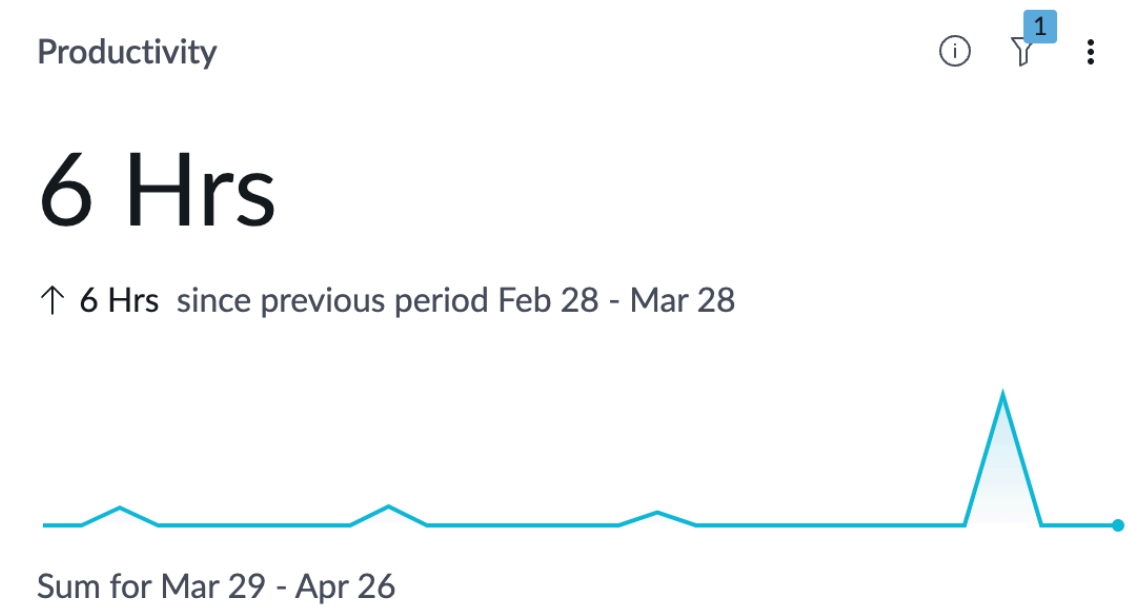
Top 5 AI systems by value



Productivity

This area of the dashboard shows the estimated productivity gains (in hours) in the selected period as a result of using various AI assets.

Productivity



Average AI users

This area of the dashboard shows the average unique users who used an AI asset in the selected date range.

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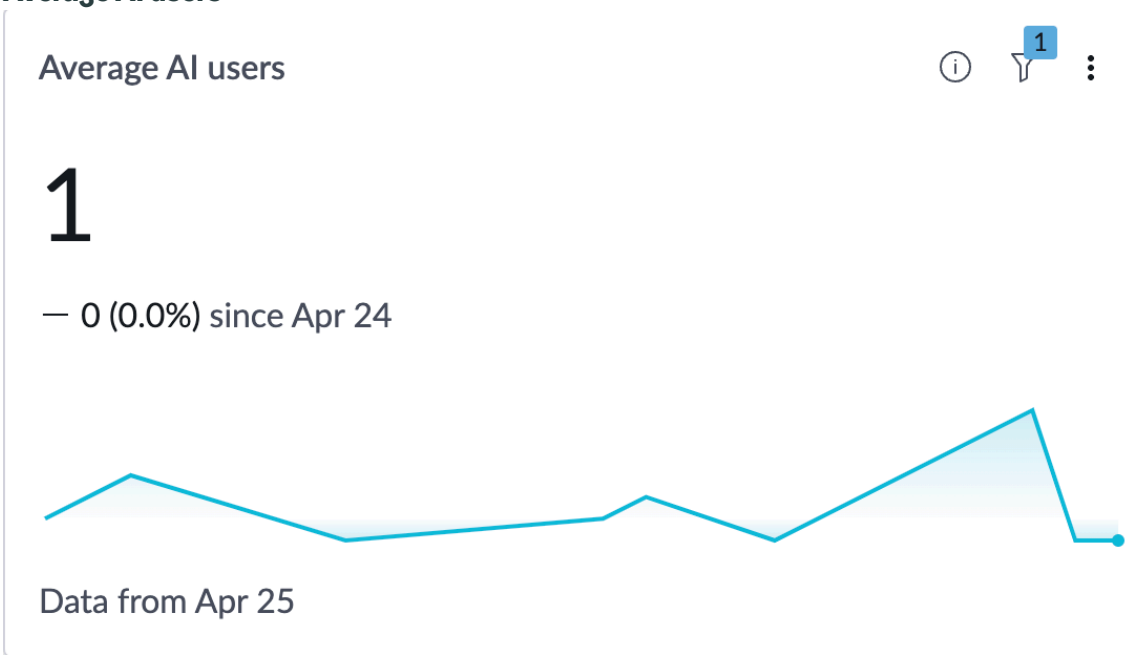
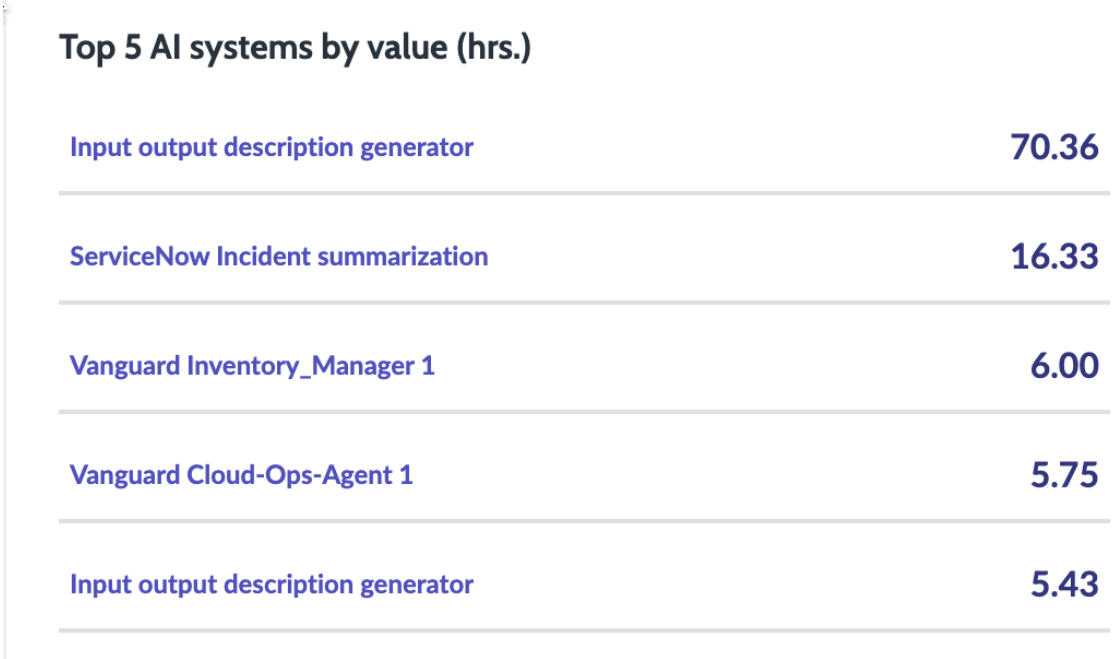
Average AI users



Top 5 AI assets by value (in hrs)

This area of the dashboard shows the top 5 AI assets that delivered the most value to the users in the selected date range.

Top 5 AI assets by value (in hrs)



Daily updates

Daily AI actions

This area of the dashboard shows the number of AI actions per each AI asset.

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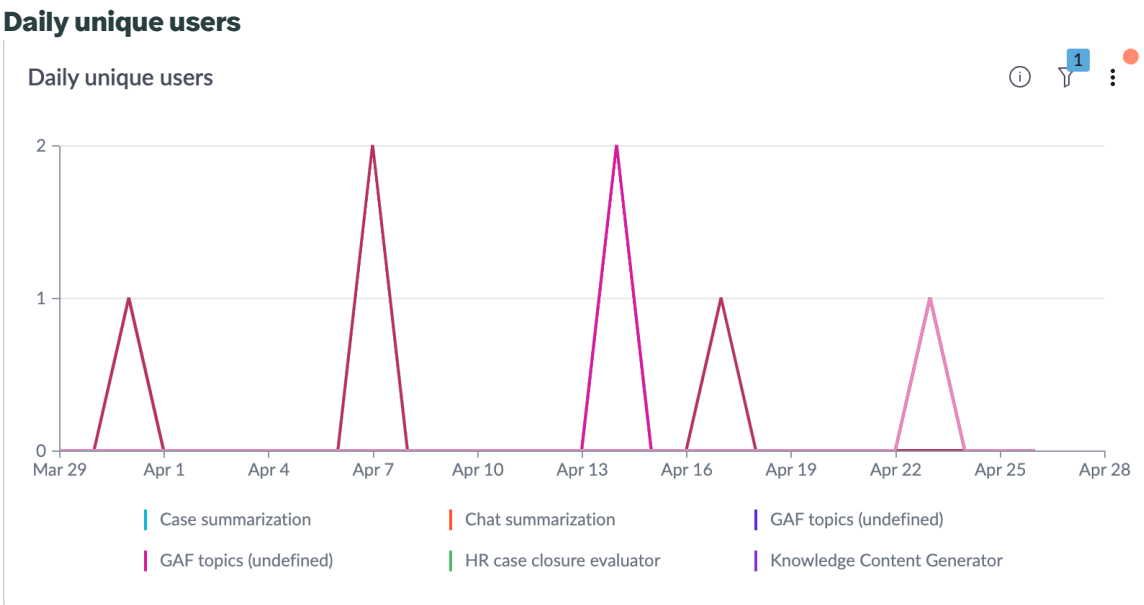
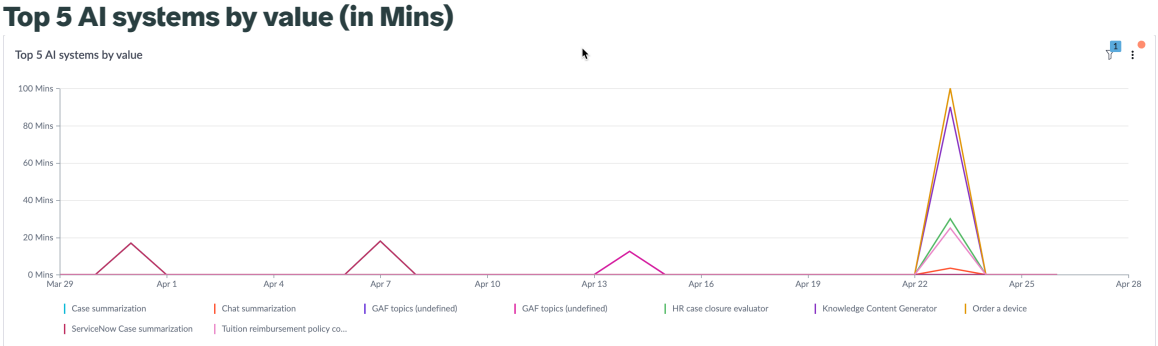
Daily unique users

This area of the dashboard shows the number of daily unique users per each AI asset.



Top 5 AI systems by value

This area of the dashboard shows the daily value delivered (in Mins) by the top 5 AI systems.



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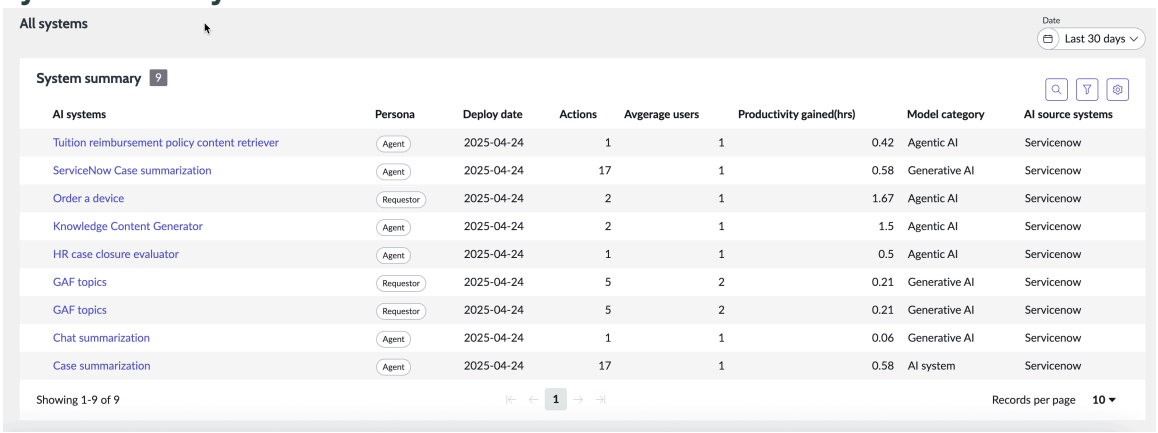
All systems

System summary

This area of the dashboard lists all the AI systems along with details of users and productivity gained.

System summary



Adoption tab in AI Control Tower

Use the Adoption dashboard page to view data about user engagement and feedback, and adoption of every type of AI.

The Adoption dashboard page contains two tabs that provide insights on usage and adoption.

The **Usage** tab includes indicators on daily AI actions, daily unique users who have engaged with AI, AI system group distribution, and daily usage comparison by workflow. The **Adoption** tab tracks the departments with the highest AI usage, comparison of AI actions by user department, and feedback details. Use the date range filter to view usage and adoption indicators for the selected period. The default date range is 30 days.

The high-level indicators on the Adoption dashboard page provide an overview of user engagement.

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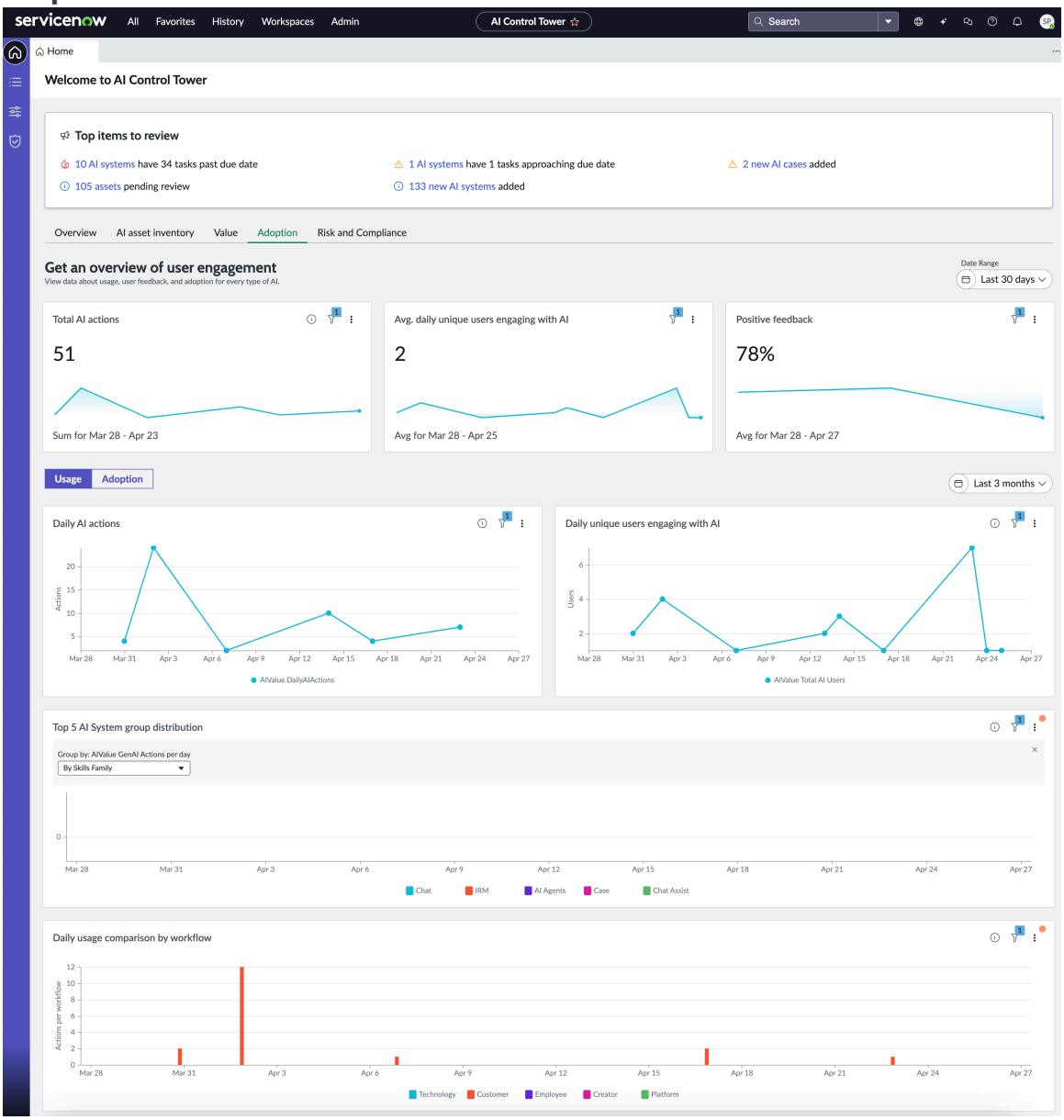
Adoption tab in AI Control Tower



Total AI actions

This area of the dashboard shows the total number of AI actions in the selected date range. Total AI actions for a selected period can reveal the scale of AI actions executed. The trend line in the visualization shows increased or declining engagement.

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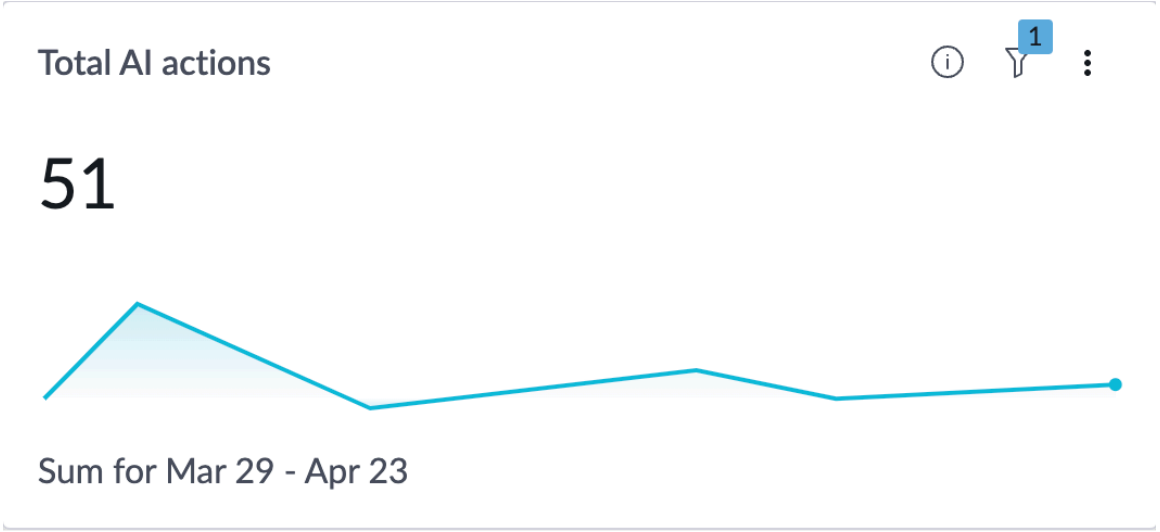
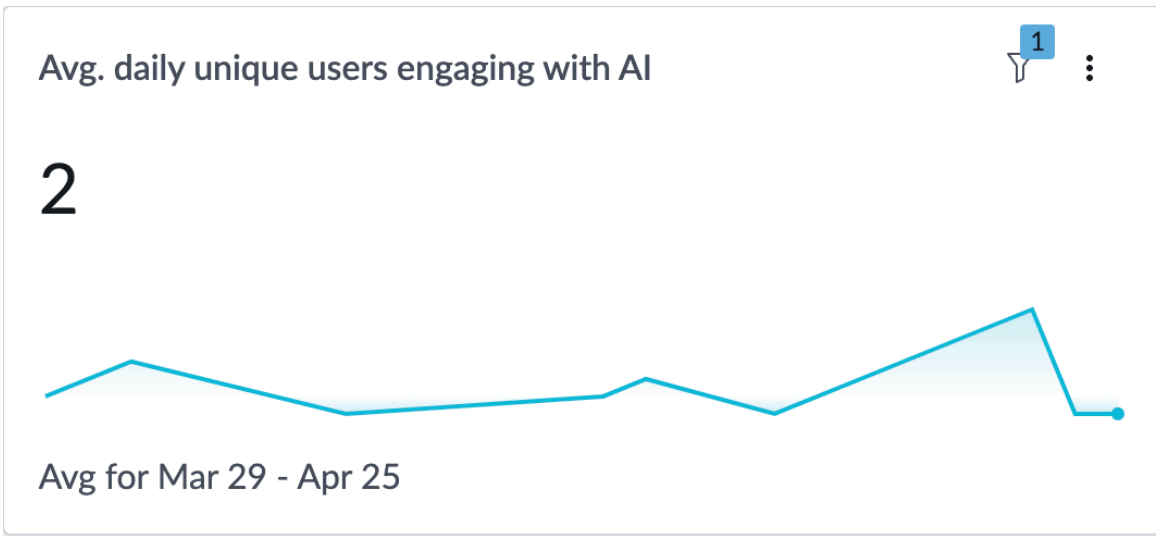
Total AI actions indicator



Average daily unique users engaging with AI

This area of the dashboard shows the average number of daily unique users who engaged with AI in the selected date range. The Average number of daily unique users is an indicator of the level of AI engagement.

Average number of unique users per day who triggered AI actions indicator



Positive feedback

This area of the dashboard shows the percentage of positive feedback received against executed AI actions. The Positive feedback indicator reveals the level of user satisfaction for executed AI actions.

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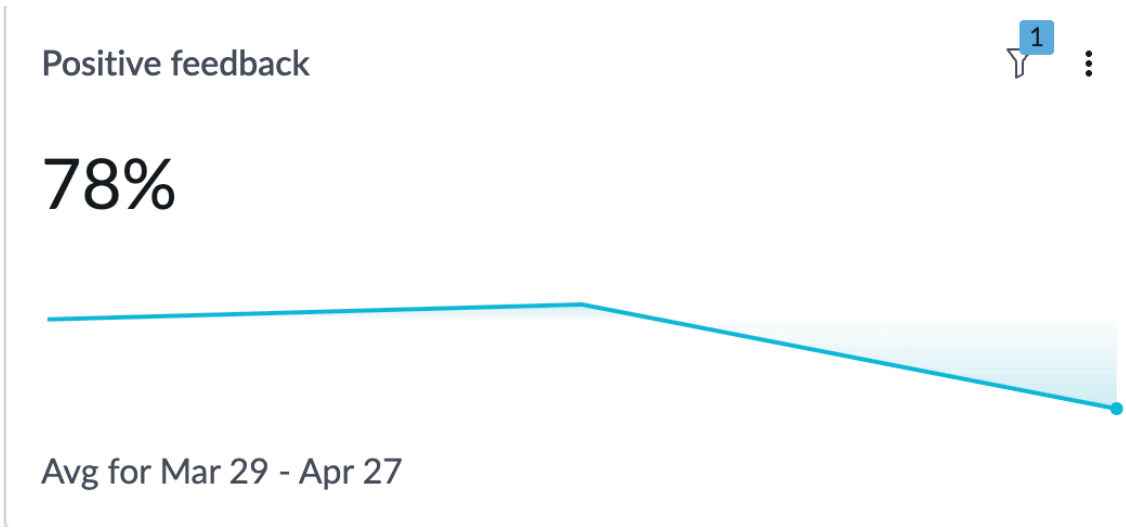
Positive feedback indicator

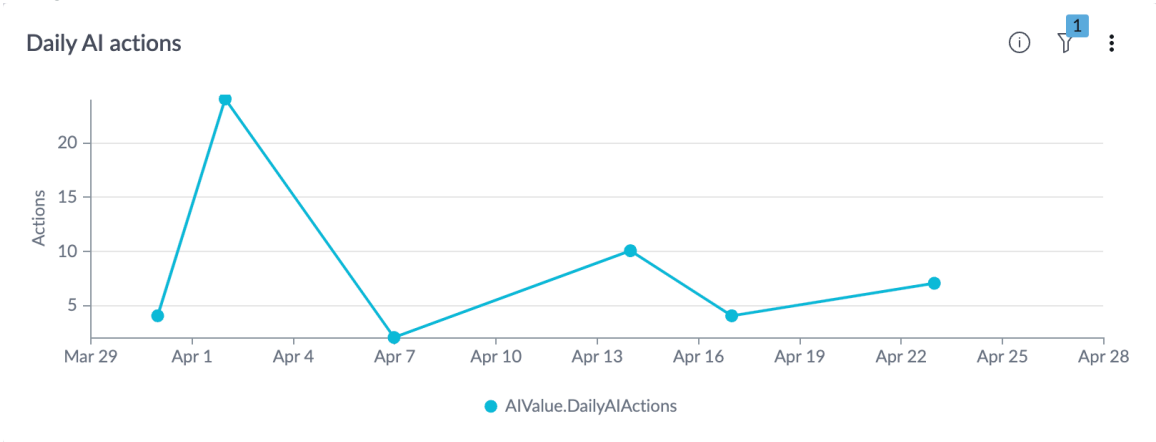


Usage indicators

Daily AI actions

This area of the dashboard shows the number of AI actions executed per day in the selected date range.

Daily AI actions indicator



Daily unique users engaging with AI

This area of the dashboard shows the daily unique users who engaged with AI in the selected date range.

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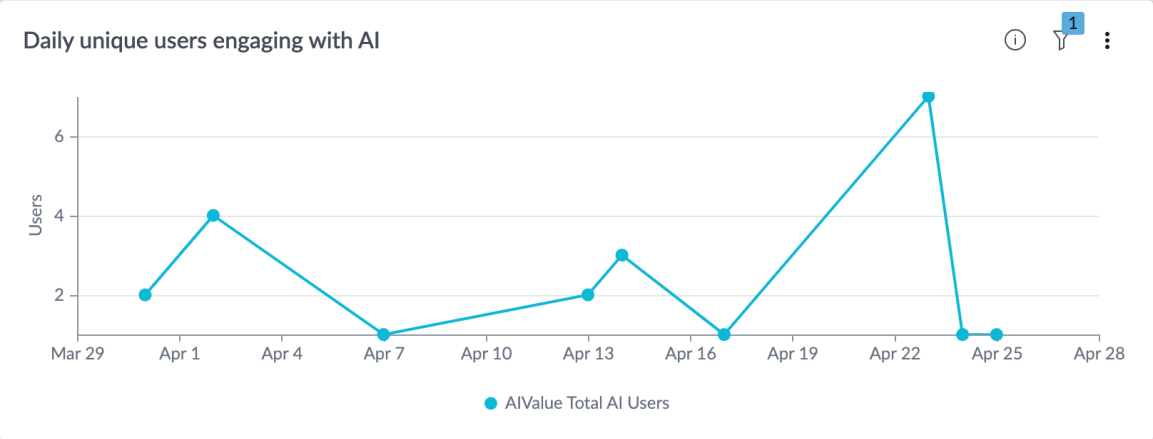
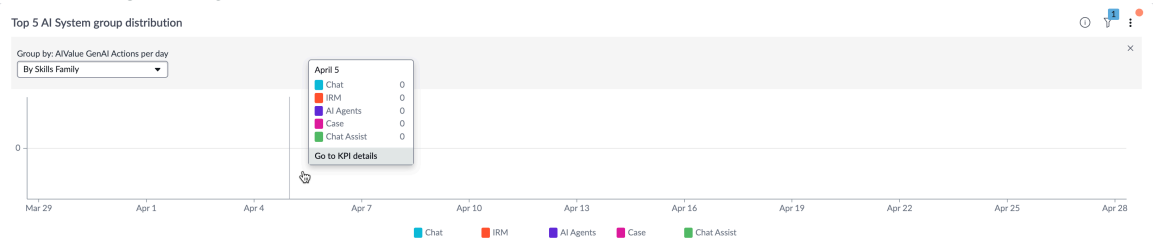
Daily unique users engaging with AI indicator



Top 5 AI System group distribution

This area of the dashboard shows the usage of the top 5 AI actions in a trend chart. The visualization is interactive. Use the Group by filter to apply predefined breakdowns. Hover over the trend lines to see the number of times that each AI action was used. Selecting one or more items in the legend removes the trend line for those items. You can compare and contrast AI actions usage distribution in a date range to understand in-demand actions.

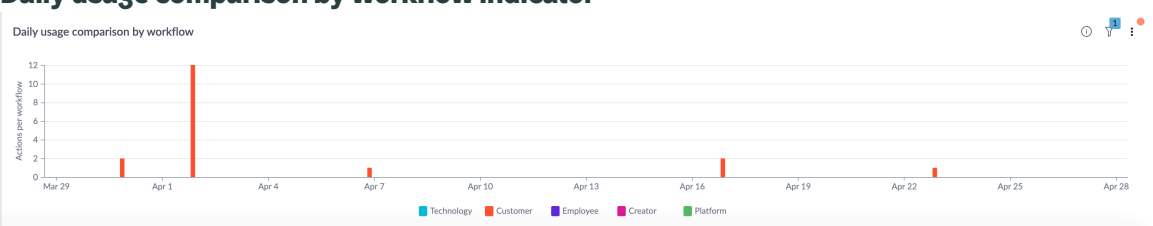
Top 5 AI System group distribution indicator



Daily usage comparison by workflow

This area of the dashboard shows the number of AI actions executed per day against each workflow in the selected date range. Hover over a bar to view the count of AI actions executed for a workflow on that day.

Daily usage comparison by workflow indicator



Adoption indicators

Departments with highest usage

This area of the dashboard shows the departments with the highest usage of AI actions in the selected date range. Hover over the horizontal bars to view the count of actions for a particular department.

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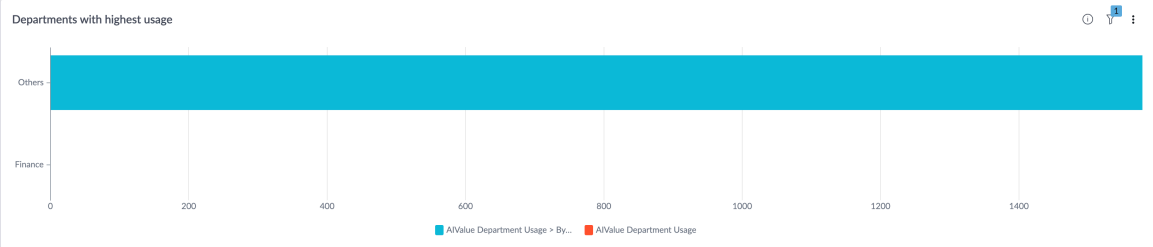
Departments with highest usage indicator



AI actions comparison by user department

This area of the dashboard shows the number and type of AI actions executed against each department in the selected date range.

AI actions comparison by user department indicator

AI actions comparison by user department

By Department / By Skills Config	Others	Finance
Code Assist API Definition	1536	0
Case summarization	16	1
mikes new skill	6	0
GAF topics	5	0
Resolution notes generation	5	0

Feedback details

This area of the dashboard shows the numbers and percentage of feedback provided by users of AI actions in the selected date range.

Feedback details indicator

Feedback details

By Skills Family	Number of AI actions (30d running SUM)	Number of AI actions with feedback (30d running SUM)	Percentage of feedback submitted (30d running AVG)	Number of AI actions with positive fee
Others	122	9	117	
Platform	19	0	0	
CSM	10	0	0	
Creator	2	0	0	
Total	**153**	**9**	**78**	

Health tab in AI Control Tower

Monitor the performance of guardrails enabled through AI Guardian.

The Health tab in the AI Control Tower dashboard helps you monitor and evaluate the effectiveness of offensive content and prompt injection guardrails active on your ServiceNow AI assets.

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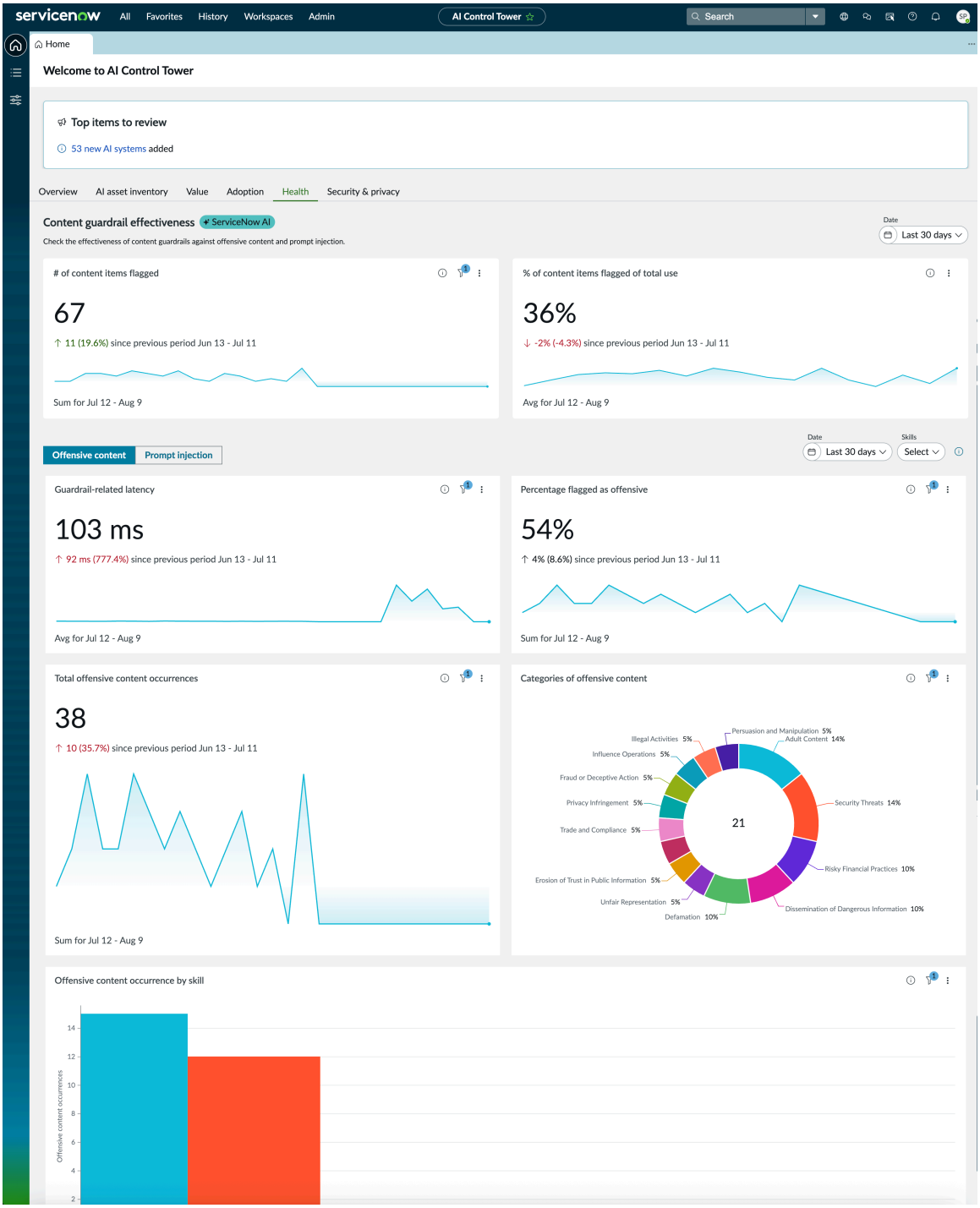
Health tab in AI Control Tower



The visualizations on the Health tab provide the following insights.

- Average latency as a result of active offensive content and prompt injection guardrails. High latency could mean increased guardrail activity in the period.
- Count and percentage of offensive content and prompt injection occurrences.
- Skills where offensive content and prompt injection occurrences were detected.

The dashboard does not consider historical data for Health metrics.

Apply the filters on the dashboard to view guardrail activity for skills in a date range.

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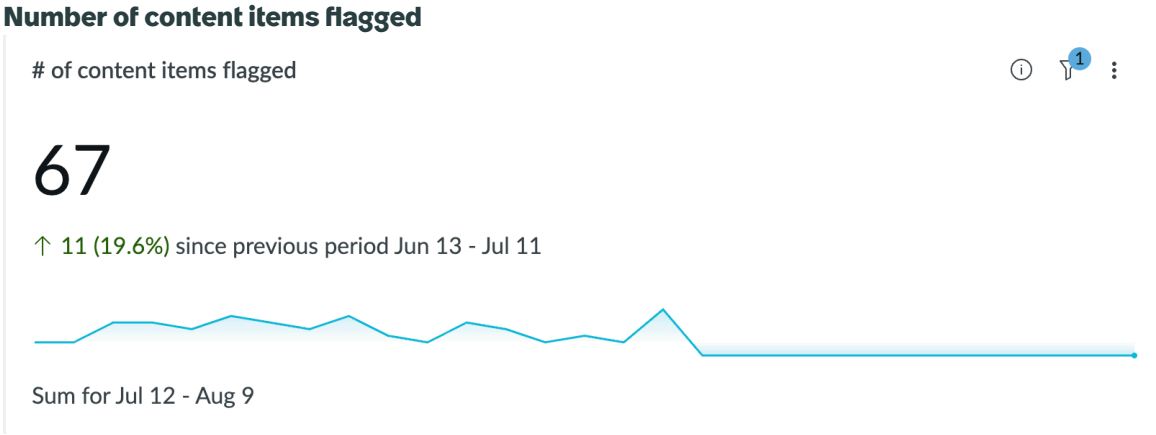
Content guardrail effectiveness

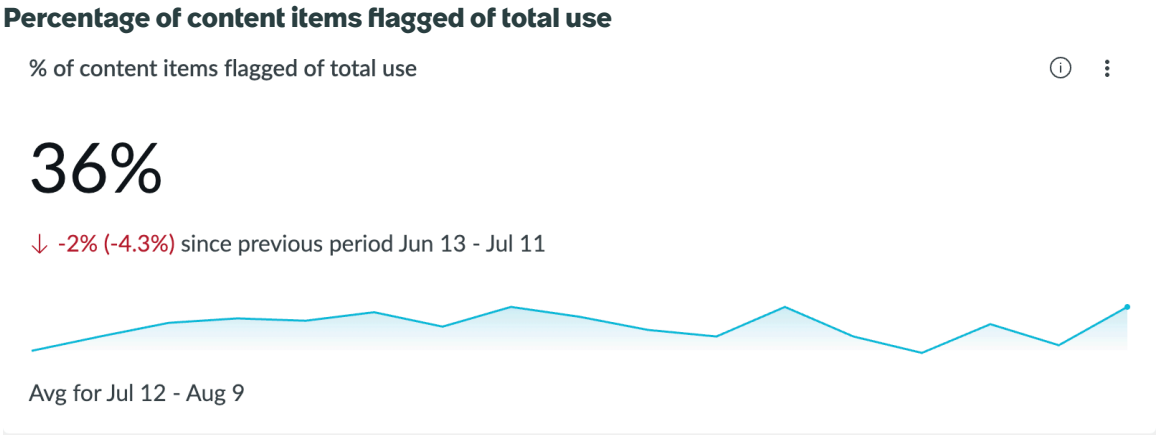
Number of content items flagged

This area of the dashboard shows the number of offensive content and prompt injection occurrences in the selected date range.



Percentage of content items flagged of total use

This area of the dashboard shows the percentage of requests and responses to and from the large language model (LLM) service that are flagged for offensiveness and prompt injection.



Offensive content visualizations

Guardrail-added latency

This area of the dashboard shows the average latency as a result of the active offensive content guardrail for the selected skills and date range.

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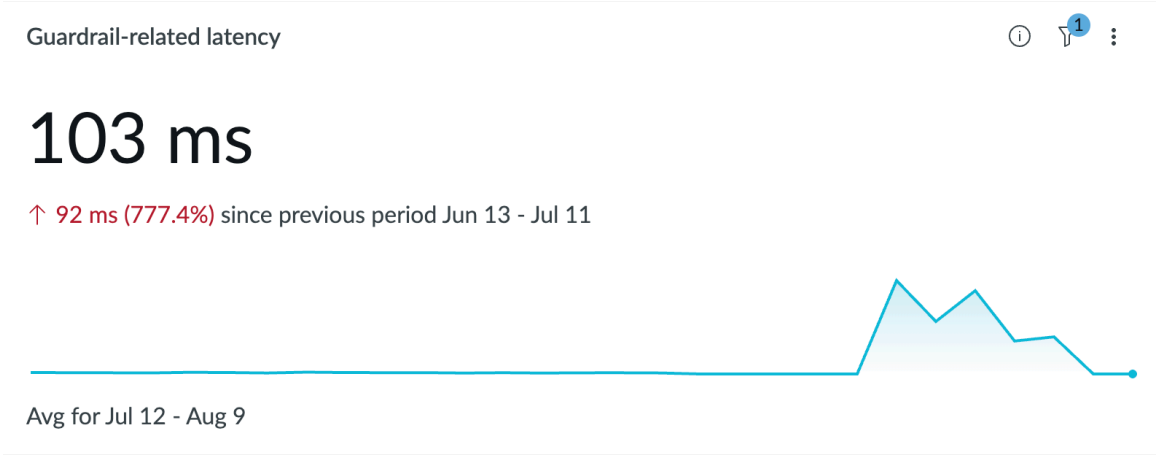
Guardrail-added latency for offensiveness



Percentage flagged as offensive

This area of the dashboard shows the percentage of requests and responses to and from the large language model (LLM) service that are flagged for offensive content.

Percentage flagged as offensive

Total offensive content occurrences

This area of the dashboard shows the total number of offensive content occurrences for the selected skills and date range.

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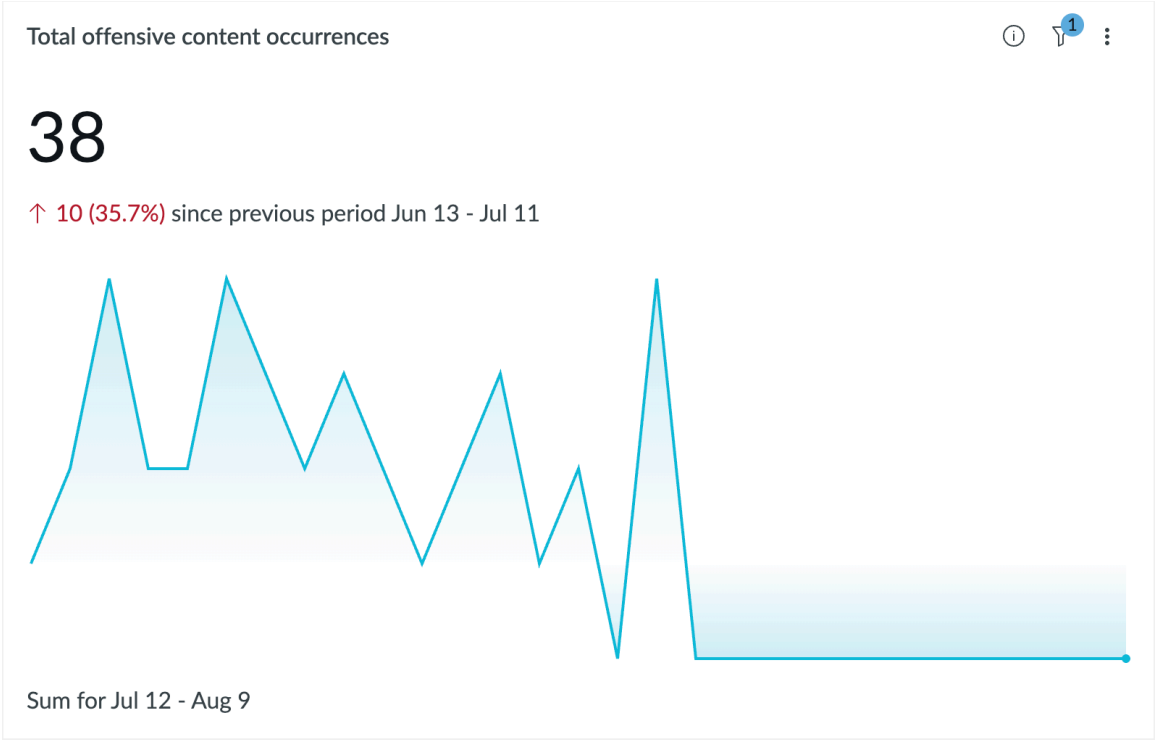
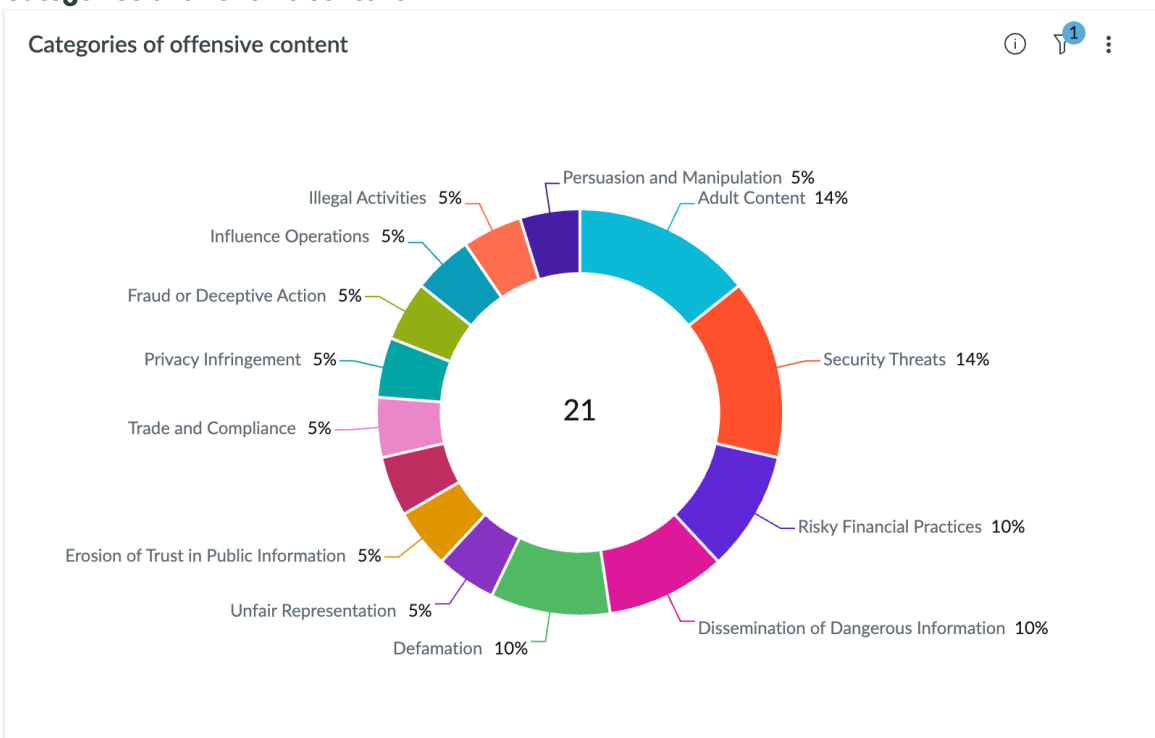
Total offensive content occurrences



Categories of offensive content

This area of the dashboard shows a breakdown of offensive content occurrences by the categories. If content is deemed to be offensive under more than one category, for example, toxic and defamatory, the occurrence is counted individually toward both the categories. For more information on offensive content categories, see AI Guardian.

Categories of offensive content



Offensive content occurrences by skill

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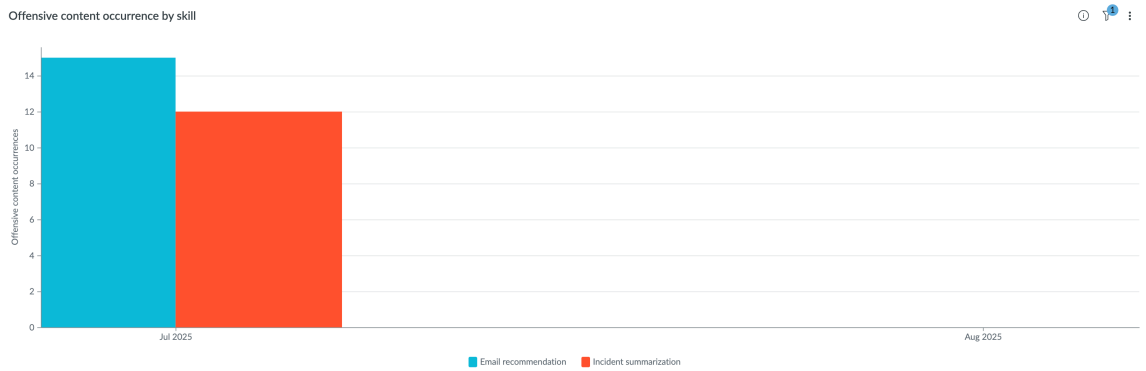
This area of the dashboard shows the number of offensive content occurrences over time by the skills in which the content is detected.

Offensive content occurrences by skill

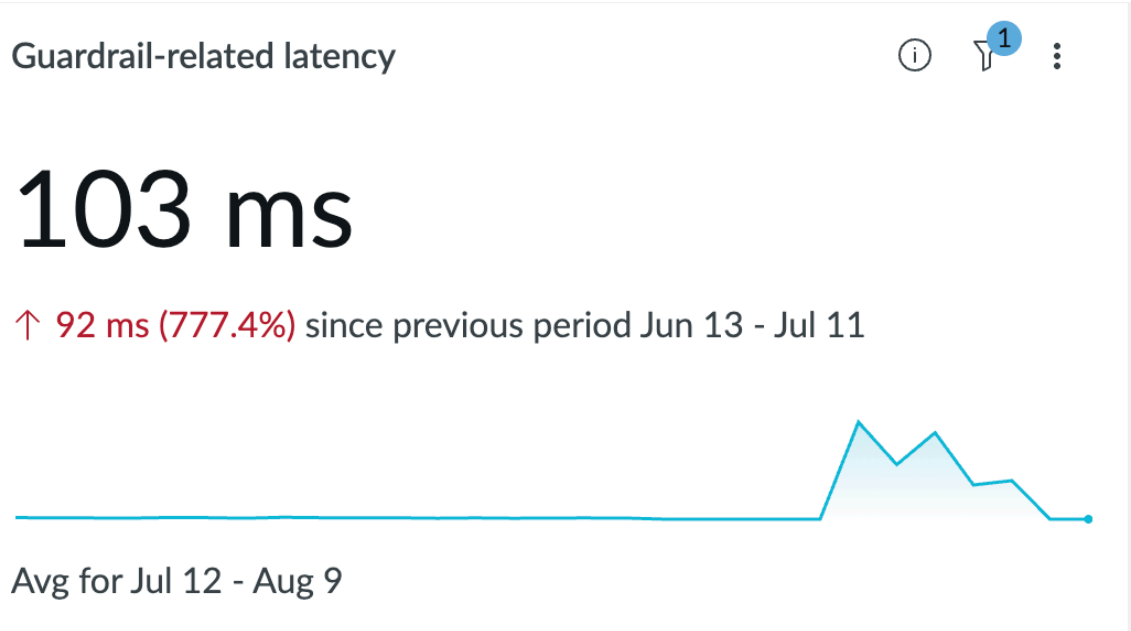


Prompt injection visualizations

Guardrail-added latency

This area of the dashboard shows the average latency as a result of the active prompt injection guardrail for the selected skills and date range.

Guardrail-added latency for prompt injection



Percentage flagged as prompt injection

This area of the dashboard shows the percentage of requests and responses to and from the LLM service that are flagged for offensive content.

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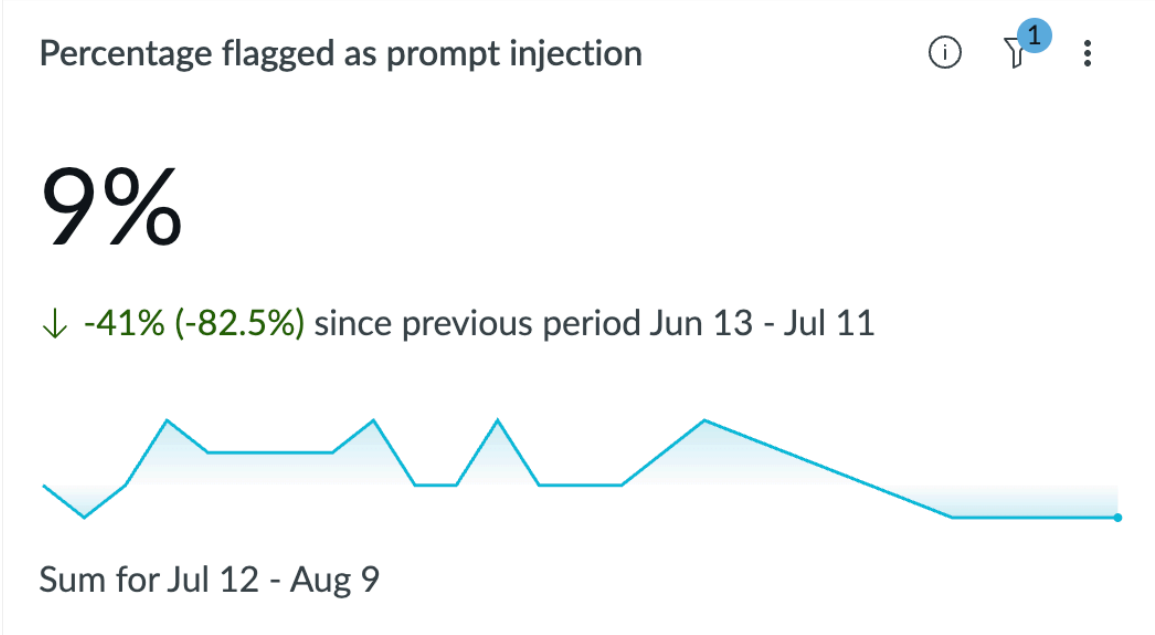
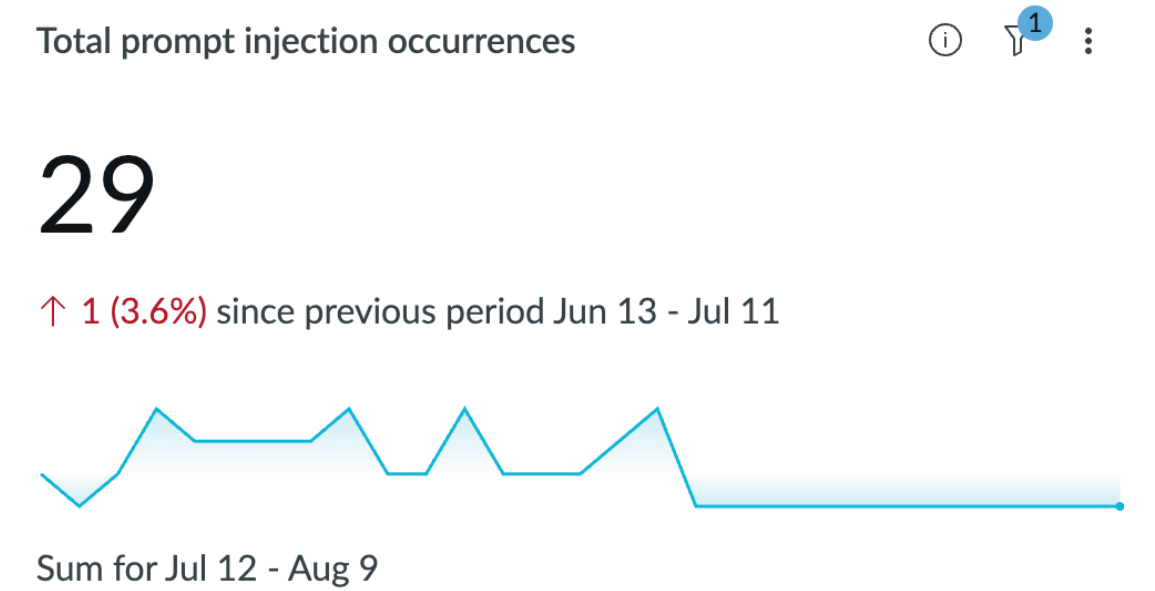
Percentage flagged as prompt injection



Total prompt injection occurrences

This area of the dashboard shows the total number of offensive content occurrences for the selected skills and date range.

Total prompt injection occurrences



Prompt injection occurrences by skill

This area of the dashboard shows the number of prompt injection occurrences over time by the skills where prompt injection attempts were detected.

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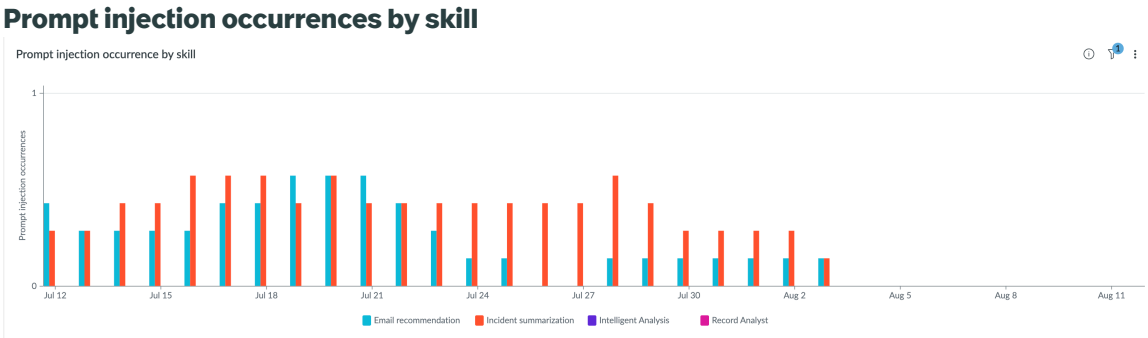

Risk and compliance tab in AI Control Tower

The Risk and compliance tab on the AI Control Tower displays the risk classification of AI assets and the compliance posture for selected authority documents and policies.

AI assets refer to the various components and resources that are essential for the development, deployment, and operation of artificial intelligence systems. These assets can include:

1. AI systems: The complete software or hardware infrastructure that runs AI algorithms and processes. This can include machine learning platforms, natural language processing systems, and other AI-driven applications.
2. AI models: The mathematical and computational models that are trained on data to perform specific tasks. These models can range from simple linear regression models to complex deep learning neural networks.
3. AI datasets: The collections of data used to train, validate, and test AI models.

For more information, see AI systems, AI models, and Datasets.

Understanding and managing these AI assets is crucial for ensuring that AI systems are effective, reliable, and compliant with regulatory and ethical standards as defined by your organization.

The Risk and compliance dashboard has the following sections. You can drill down into the data on each widget in any section.

Compliance overview

Regulatory risk classification

This section displays the risk classifications of AI systems, AI models, and Datasets using donut charts. The risks are qualitatively classified as **High**, **Low**, **Medium**, and **Unacceptable**. These classifications are based on the risk assessments of the AI assets.

Compliance by authority documents and policies

The section shows compliance based on controls implemented. By default, the compliance scores are displayed for the following frameworks that are provided in the library:

- NIST AI Risk Management Framework: This framework displays the four key associated citations, namely map, measure, manage, and govern. Each citation's compliance score is displayed based on its control attestations.
- EU Artificial Intelligence Act: This framework has multiple chapters that are displayed as citations and child citations. Each citation is mapped to a control objective to provide you with a compliance percentage score.

Additional frameworks, including the Transparency in Frontier Artificial Intelligence Act (SB 53) and the Colorado Artificial Intelligence Act, are available in the AI

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Risk and Compliance content pack and can be activated to add their citations to the compliance posture view. For more information, see AI Risk and Compliance Content Pack.

You can choose to view compliance data by selecting one of two options: **Authority Documents** or **Policies**. Additionally, you can view the overall compliance score percentage, along with the number of compliant and non-compliant authority documents and policies, by using the drop-down filter to select specific authority documents or policies. You can also see all the issues that require immediate attention and AI cases related to each authority document or policy.

The authority documents are provided solely for informational and guidance purposes to assist with the initial setup of AI Risk and Compliance frameworks. It does not constitute legal advice or assurance of regulatory compliance. You are solely responsible for ensuring that all use of the content complies with applicable laws, regulations, directives, and industry standards in their jurisdictions.

Note: You can configure which authority documents and policies you want to display on the home page. For more information, see Set up properties for compliance posture.

Risk overview

This section monitors and tracks the risk posture of the AI assets in your organization. Using the **AI asset** filter, you can filter risk posture insights by the type of AI asset inventory.

AI systems by aggregated risk score

This section displays the classifications of AI systems by aggregated risk score using a donut chart. The risk scores are qualitatively classified as **High** and **Low**.

Risk heatmap

The Risk heatmap widget displays the visualization of all identified risks within the AI assets. By default, the Residual risk filter is applied, but you can filter the heatmap based on Inherent risk. The heatmap is segmented, and the segmentation changes based on the filter. The activities fall under the respective combination of risk and control effectiveness, or impact and likelihood. The combination is based on the selected risk classification filter. You can filter the risk heatmap by Risk Assessment Methodology (RAM)when more than one methodology is available.

Regulatory landscape overview

You need to install GRC: Regulatory Change Management application to see this section. For more information, see Installing Regulatory Change Management.

Overview

- Alerts

  This section displays the risk classifications of AI systems, AI models,and AI datasets using donut charts.

- Change tasks

  This section displays the distribution of regulatory change tasks by workflow state or lifecycle phase using a donut chart.

Assessments

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This section displays the regulatory impact assessments and risk assessments linked to regulatory changes using a donut chart. By default, regulatory assessments filter is applied, but you can change it to risk assessments.

The following image shows the Risk and compliance dashboard.

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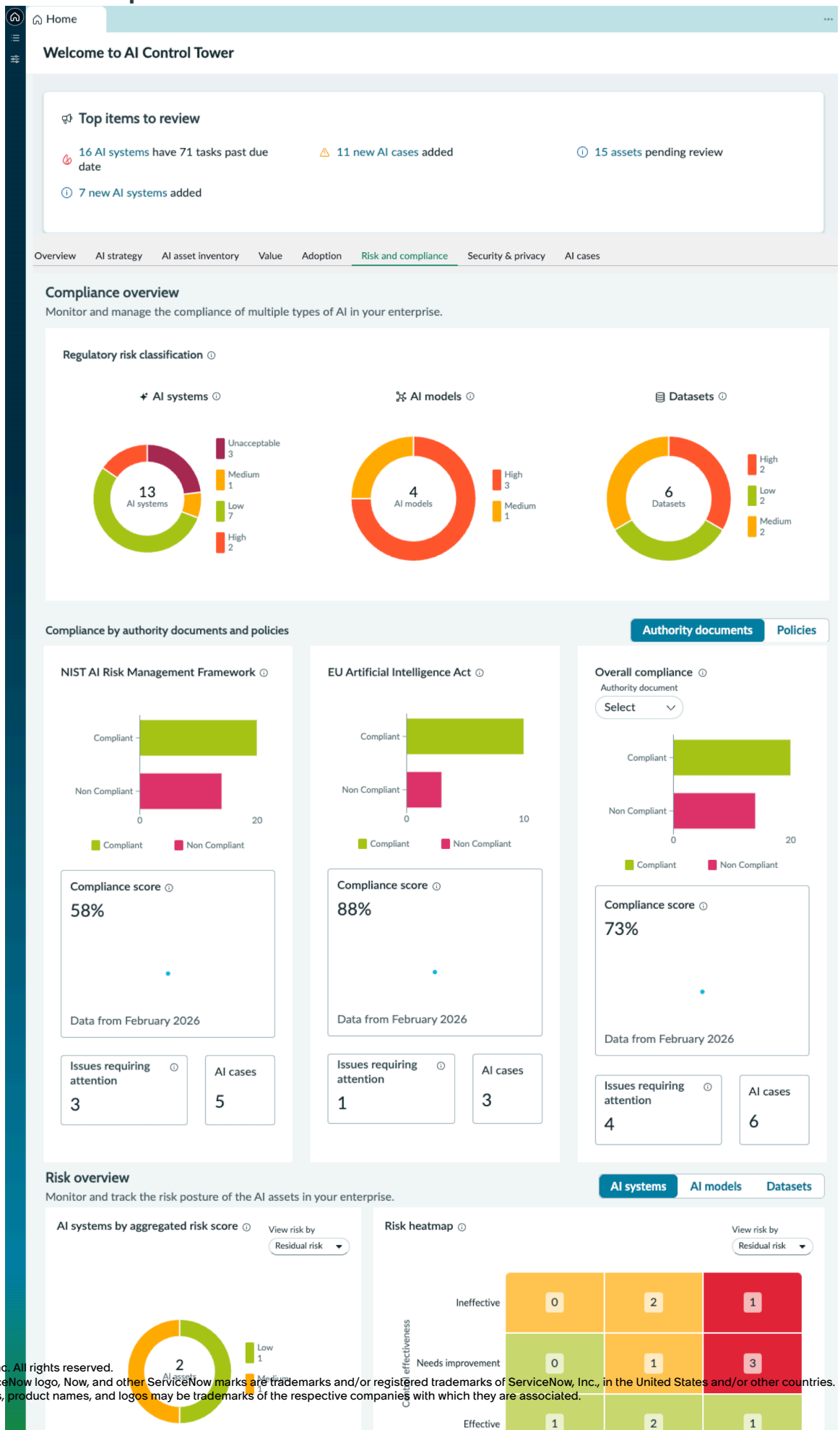
Risk and compliance dashboard



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For more information, see AI Risk and Compliance documentation.

AI cases tab in AI Control Tower

Track, monitor, and analyze your AI case workflows, identify your workflow bottlenecks, and check your accountability of your AI-related risks by using the AI risk and compliance dashboard. As an AI steward, you can also use the dashboard to track the status and trends of your AI-related inquiries.

AI cases

The **AI cases** tab on the AI risk and compliance dashboard provides the key metrics, trends, and actionable tasks that you can use to track your AI risks, case activities, compliance tracking, and governance enforcement. You can get case-level insights, task-level tracking, and accountability for your responsibilities and progress. As an AI steward, you can report a case when a violation is found. An AI analyst also follows the case and comes up with a resolution.

You can drill down into the data on each of the following widgets to learn more about an AI case.

AI cases status by state

Shows distribution of reported AI Cases by lifecycle state or workflow state.

AI cases status by priority

AI cases based on their priority: Critical, High, Moderate, Low, and Planning.

AI cases

Summarized list of AI cases reported:

- All: All the AI cases
- Overdue: AI cases that are past the due date.
- Due in 7 days: AI cases due in the next 7 days.
- Unassigned: AI cases that are not assigned to anyone.

Attributes of each case, such as Name, Sub-type, Case analyst, Priority, and State are available in a list view. Select each card to view that category of AI cases in a list view.

Trends

Visual patterns and historical data that are associated with the AI cases:

- AI cases by subtype widget: Trends by different categories of the AI case subtypes. You can group data by business unit, location, or primary cause to get contextual insight into the issues or AI cases patterns across the departments or systems. You can filter by AI assets.

- Open and closed cases widget: Historical trends of the case resolutions over a specified time frame. You can see the historical trends in the last 12 months. The historical trends help stakeholders to analyze the volume fluctuations and how efficiently the cases were closed.

  For example, in the last 12 months, consider that 4,200 cases were created and 3,960 cases were closed. The average time of case closure was 2.8 days, the peak case volume was in January 2025 (510 cases were created), and the fastest case resolution month was March 2025. You can see that over the past 12 months, the case closure efficiency has steadily improved, with a 12% decrease in the average resolution time compared to the previous year.

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Tracking

AI case progress at the task and issue level:

- Action tasks
  - Number of tasks in the Overdue, Due in 7 days, or Unassigned states.
  - Task distribution by the status, such as Draft or Work in Progress.
- Issues
  - Counts of issues that are linked to AI cases by their states like New, Review, or Responds.
  - Counts of issues that are linked to AI cases by additional details like Overdue, Due in 7 days, or Unassigned.

You can create AI cases and issues from the AI cases tab in both the AI Control Tower Workspace and the AI Risk and Compliance Workspace. The Create AI case button lets you initiate a new AI case record directly from the monitoring dashboard. Use this option to document, investigate, or track issues, risks, or compliance concerns related to AI models or datasets. Select the dropdown arrow next to Create AI case, and then select Create issue to create an issue related to an existing AI case.

For more information, see Create an AI case in the AI Risk and Compliance workspace and Create an AI issue in the AI Risk and Compliance workspace.

The following example shows the **AI cases** tab on the AI risk and compliance dashboard.

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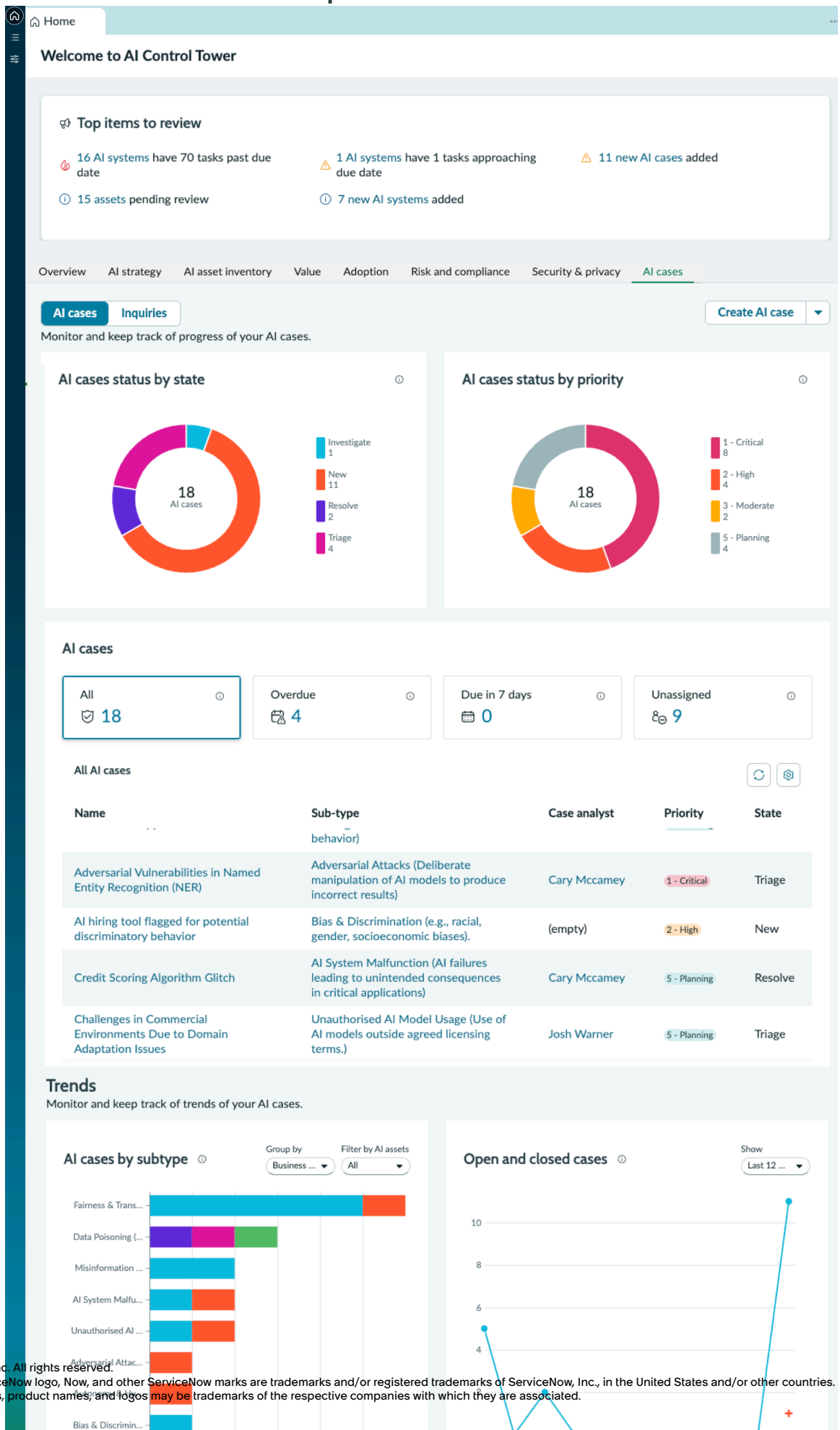
AI cases tab on the AI risk and compliance dashboard



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Inquiries

The **Inquiries** tab on the AI risk and compliance dashboard provides you with a structured view of the AI inquiry workflow. Use the following widgets on the dashboard to track the compliance and then to monitor the status and progress of an inquiry:

You can drill down into the data on each of the following widgets to learn more about an AI inquiry.

Inquiries status by state

Counts of inquiries by state. New, Triage, In progress, and Approved inquiries are represented in the donut chart.

Inquiries status by priority

Counts of inquiries by priority. An inquiry can have Critical, High, Moderate, Low, or Planning priorities.

Inquiries

Summarized list of all AI inquiries. It's filterable based on parameters such as status, priority, and assignment.

The essential attributes of inquiries are based on the operational relevance or urgency. Each inquiry entry includes metadata such as:

- Name
- Requested by
- Assigned to
- State
- Priority

Trends

Trend-based insights into your inquiry activity across the organization. These visualizations support longitudinal analysis to improve planning and compliance responsiveness.

Note: Longitudinal analysis refers to the process of analyzing data points across departments, teams, or systems over a period of time.

Filters, such as the AI assets and the time range, help you to refine the analytics.

- Inquiries by business unit: You can see the distribution of inquiries across the various departments or functional areas of your organization. This distribution helps you to identify where most AI-related concerns originate so that you can plan on more targeted risk mitigation or awareness training.
- Open and closed inquiries: You can track the volume of inquiries that are initiated and resolved within a selected time range. This tracking enables you to track how your workflow is performing and to plan for future capacity.

Use the **Create inquiry** button to initiate a new inquiry. You can make timely reports of AI-related concerns or clarification requests.

The following example shows the **Inquiries** tab on the AI risk and compliance dashboard.

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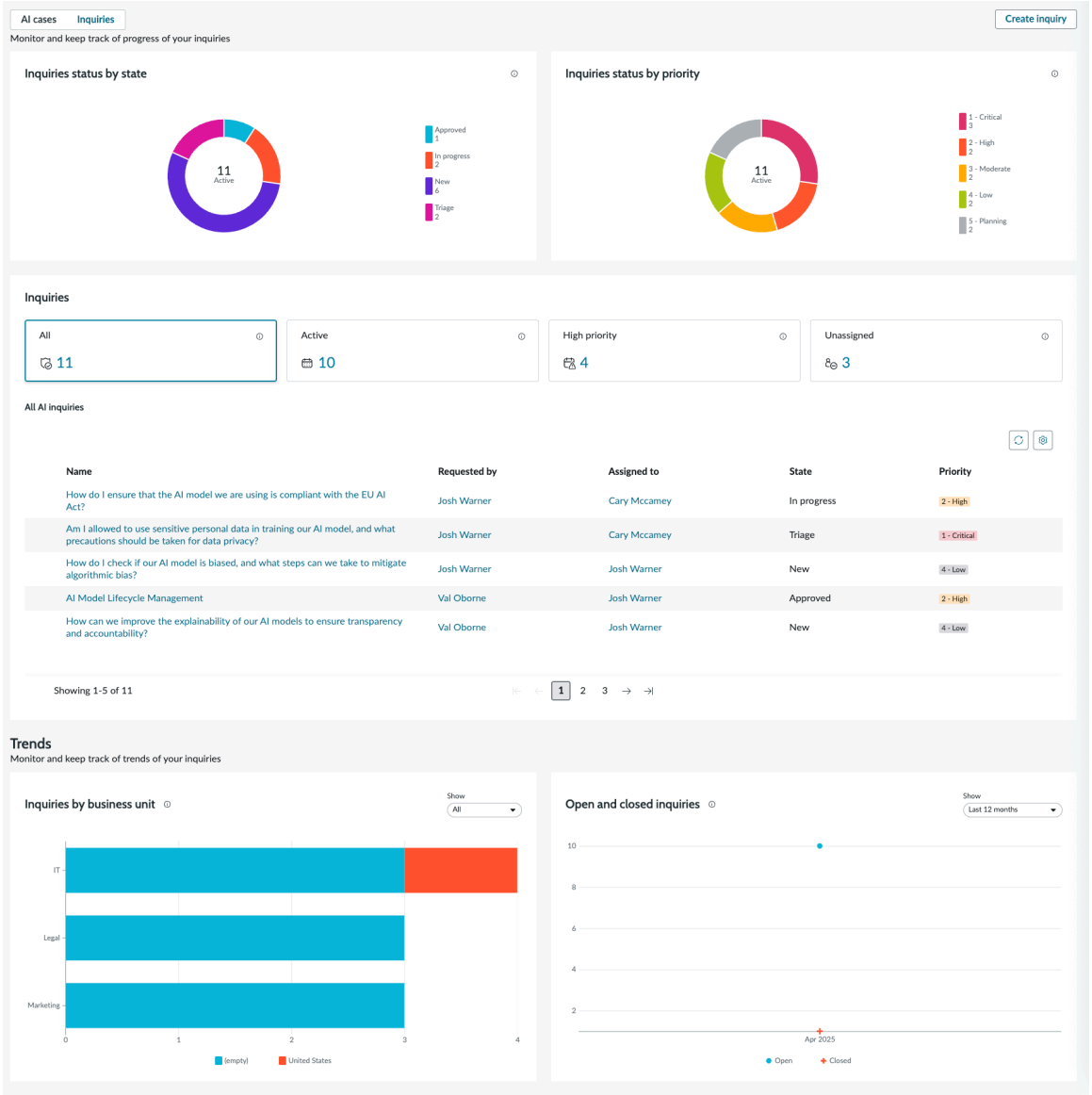
Inquiries tab on the AI risk and compliance dashboard



For more information, see AI Risk and Compliance documentation.

Evaluation tab in AI Control Tower

The **Evaluation** tab contains the Evaluation dashboard, which is designed to measure, automate, and improve the quality of interactions with Virtual Agent. This dashboard addresses several key challenges to enhance the end-user experience and overall virtual agent utility.

Evaluation dashboard

Prerequisites

Role required: sn_ai_governance.ai_steward

You must Enabling evaluations.

Conversations are excluded from auto-evaluation if any of the following conditions are met:

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- HR conversations: Conversations related to Human Resources are filtered out, which means that they aren't evaluated.
- Inaccessible or empty Knowledge Base (KB) articles: Conversation involving a Genius Result that points to a KB article that is either not accessible via script or is empty. For example, certain restricted HR Knowledge articles.
- Immediate live agent transfer: A conversation that begins immediately with transfer to a live agent, with no prior interaction with the virtual agent.
- Short conversations: Conversations having fewer than 180 words before a live agent is invoked. The word count is configurable via the *autoEvalConstants* script Include. The assumption is that conversations below this threshold didn't contain a meaningful interaction with the Virtual Agent.
- Custom triggers: Any custom-defined exclusion triggers.

Evaluation dashboard overview

The Evaluation dashboard helps in:

- Establishing a reliable measurement process by enabling the systematic tracking of the end-user experience with the Virtual Agent, providing deeper insights into interactions.
- Automation of conversation quality evaluation by automating the process of evaluating conversation quality across different user interactions. This automation helps lead to the creation of a trusted, scalable metric for performance tracking.
- Continuous improvement by supporting the iterative refinement of the virtual agent's performance, enhancing the overall user experience.
- Scalable monitoring by helping ensure that the process of evaluating and tracking virtual agent quality is both efficient and scalable, promoting quick identification of issues and improvements over time.
- User feedback integration through a set of optional questions enables you to provide direct feedback on their experience, which is used to improve the quality of future interactions.
- Service desk manager insights by enabling service desk managers to track and review auto-evaluation scores over time. Managers can also manually add feedback for benchmarking purposes, providing valuable insights into conversation quality and opportunities for improvement.
- Sustainable evaluation process by continuously improving virtual agent performance through a combined approach of automated evaluation and manual feedback enabling a scalable and sustainable system that evolves over time.

Important: Evaluation dashboard doesn't support domain separation.

Overview tab

The **Overview** tab of the Evaluation dashboard provides a comprehensive view of all metrics and evaluation data.

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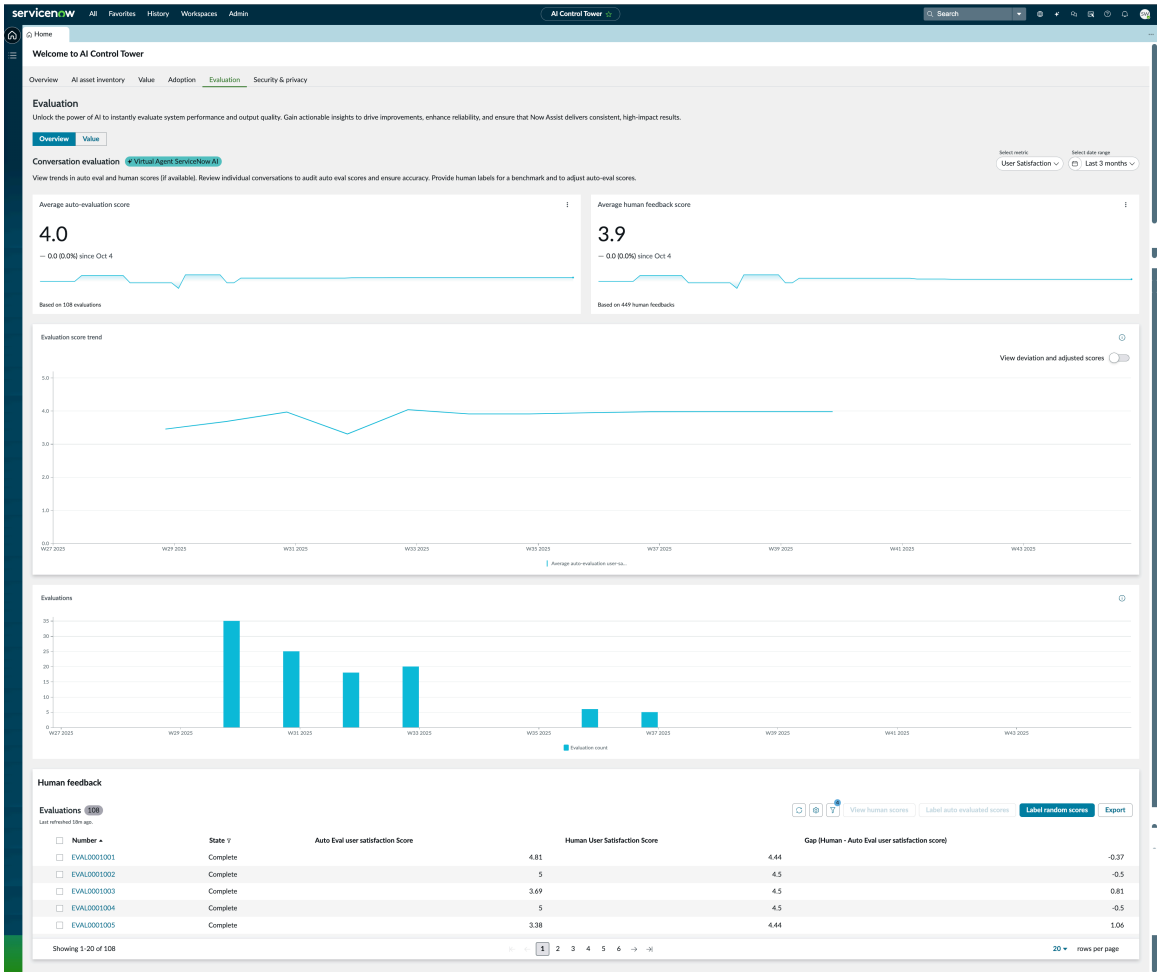

The following widgets are available, showing various metrics:

- Average Auto Eval score for the selected metric: Shows the average auto-evaluation score for the metric selected and its trend over time.

  For more information about each metric, see Evaluation metrics and calculations.

- Average Human Feedback score for the selected metric: Shows the average human-labeled score for the selected metric.

  Note: The score is available only if there are sufficient chat records that are manually evaluated. For more information about manually evaluating conversations, see Human feedback for evaluations.

- Evaluation score trend: Tracks the weekly score for the selected metric.

  If you turn on the **View Deviation and Adjusted Scores** toggle, it shows the comparison between the auto-evaluated and user-defined scores by overlaying the upper, lower deviations, and the final adjusted score on the trend chart.

  Note: The deviation and adjusted scores are calculated only if you have at least 50 human labels.

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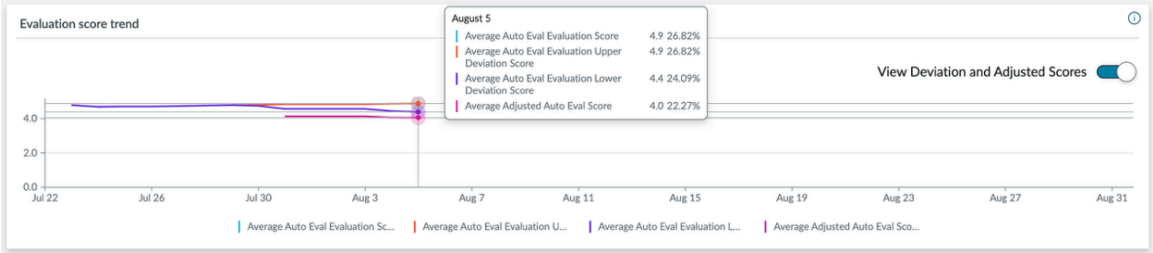


For more information about how the calculations are made, see Evaluation metrics and calculations.

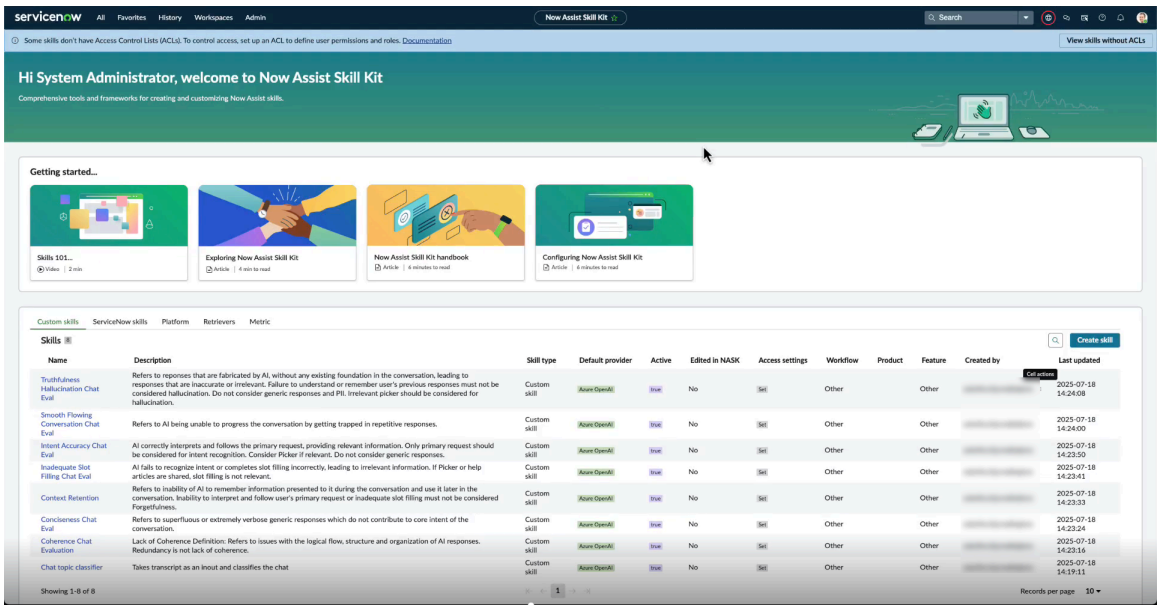
- Evaluations: Shows the total number of conversations that were evaluated each week.
- Human feedback section: Contains detailed information about each evaluation. From here, you can manually evaluate conversations. For more information, see Human feedback for evaluations.

Evaluations

Each conversation is evaluated on eight different metrics. For each of these metrics, there's a separate skill. You can view these skills in AI Skill Kit under **Custom skills**.

For more information about each metric, see Evaluation metrics and calculations.

Role required: sn_skill_builder.admin



The following Now Assist custom skills are used:

- Chat Topic Classifier
- Coherence Chat Evaluation
- Conciseness Chat Eval
- Context Retention
- Inadequate Slot Filling Chat Eval
- Intent Accuracy Chat Eval

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- Smooth Flowing Conversation Chat Eval
- Truthfulness Hallucination Chat Eval

The default provider for these skills is Now LLM. You can change the provider to Azure OpenAI, Google Gemini or AWS Claude. Azure OpenAI has been observed to improve results in certain scenarios.

For more information about AI Skill Kit, see AI Skill Kit.

Process of evaluation

Flow: Execute Evaluation.

1. 10% of the daily conversations are sampled, checking if the conversation is good enough to be evaluated or not. The evaluation is done by building the transcripts for these conversations and then sending it to the set large language model (LLM).
2. For the conversations that are good enough to be evaluated, the transcripts along with the prompts for different scales are sent to the LLM and the LLM then evaluates the conversations.
3. After evaluation, the conversation goes through post processing, where the scores and the reason for scores that the LLM has provided are parsed and stored in the Evaluation and Evaluation Metrics tables.

Note: Conversation evaluation estimates are considered as of evaluation date and not the conversation created date. For example, if a chat that happened at time t is evaluated at time t+10, the scores from evaluator is aggregated for the week of t+10 and not for the week of t.

For detailed information about the evaluation flow, see Evaluation flow.

Related topics

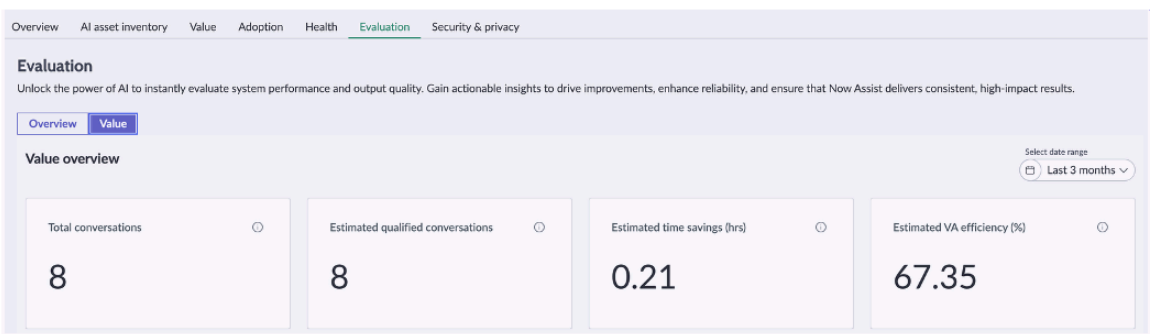
Value tab in the Evaluation dashboard

Evaluation dashboard reference

Value tab in the Evaluation dashboard

The **Value** tab in the Evaluation dashboard displays the value, efficiency, and time savings of the virtual agent. The information on this tab gives you a transparent and reliable estimation of the value delivered by the virtual agent, focusing on a quality-adjusted calculation of the time saved for users.

The **Value** tab shows a robust and realistic evaluation of the virtual agent's value. By incorporating sampling for scalability, rolling averages for stability, and a quality-weighting framework for business relevance, the resulting metrics gives the automation impact and time saved for the organization.



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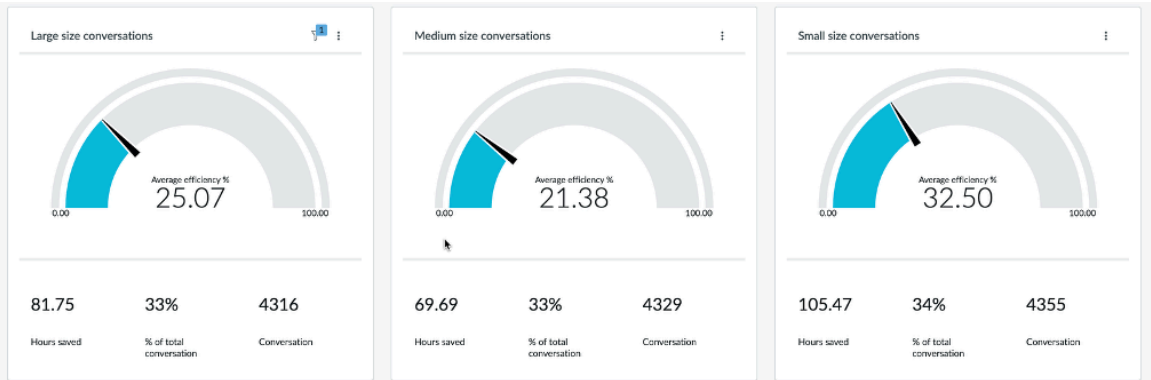
The following widgets are available:

- Total conversations: Shows the total volume of conversations initiated with the virtual agent for the selected date range. This metric is a direct indicator of user engagement and virtual agent usage.
- Estimated total hours: Shows the cumulative, quality-adjusted time saved by users interacting with the virtual agent.
- Estimated VA efficiency (%): Calculated as the ratio of the estimated total hours saved to the total duration of all conversations (Estimate Time Savings/Total Conversation Time). The estimate indicates how effectively conversation time is converted into value.
- Gauges by chat size: The gauges show a breakdown of the estimated total hours saved, segmented by the size of the conversation (long, medium, and short).

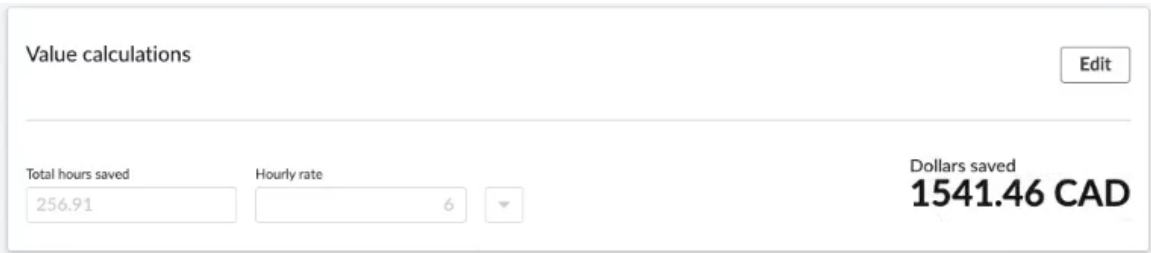
  Conversations are segmented based on their size to accurately correlate effort with value. The principle is that longer, more complex chats that successfully resolve issues save more time than shorter, simpler ones.

  - Large-size conversations: Conversations with more than 10 messages from the user.
  - Medium-size conversations: Conversations with more than 4 but fewer than 10 messages from the user.
  - Small-size conversations: Conversations with 4 or fewer messages from the user.

  Note: To change the definition of small, medium, and large conversations, update the property *sn_na_conv_eval.value_chat_classifier*. For more information, see Components installed with the Evaluation dashboard.



- Value calculations: Shows the amount saved based on the numbers of hours saved and the hourly rate.



- User acceptance score: The average satisfaction score derived from the conversation evaluator, scaled to 100 for easy interpretation. This score reflects the overall user perception of the virtual agent's quality of assistance.

Weekly user acceptance trend

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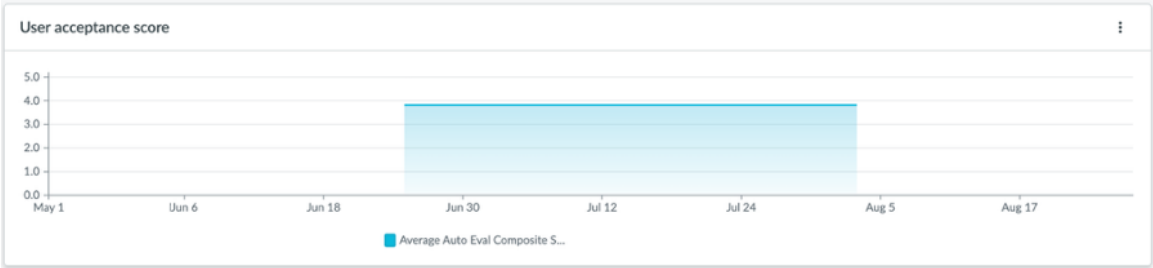
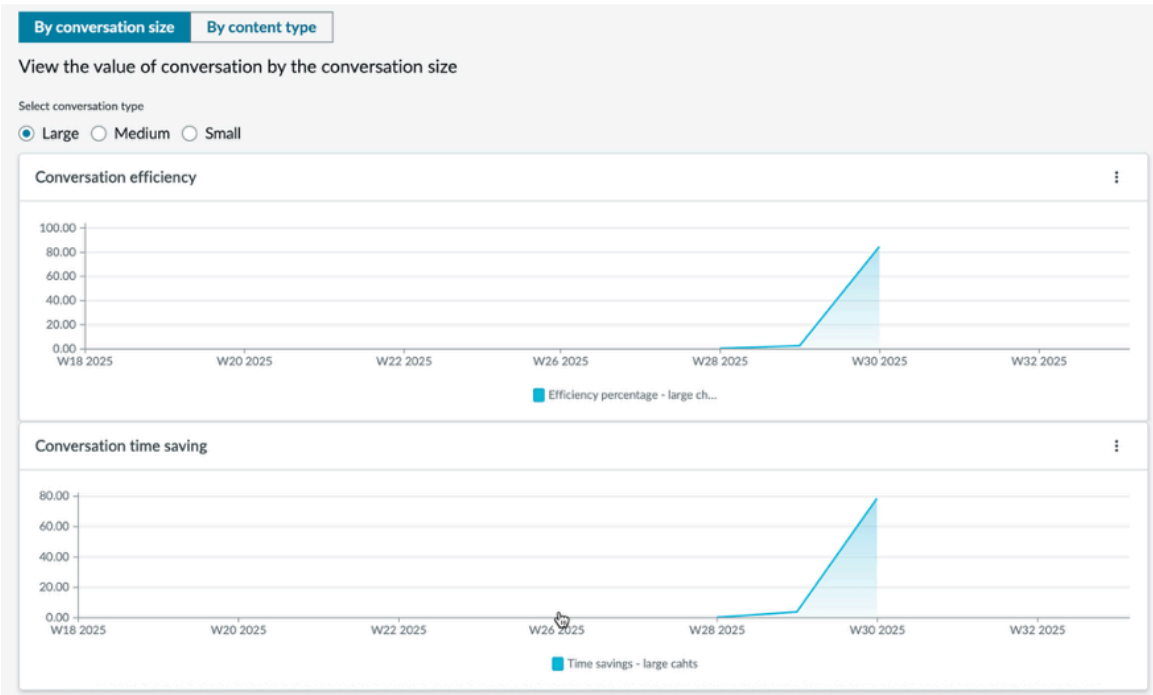
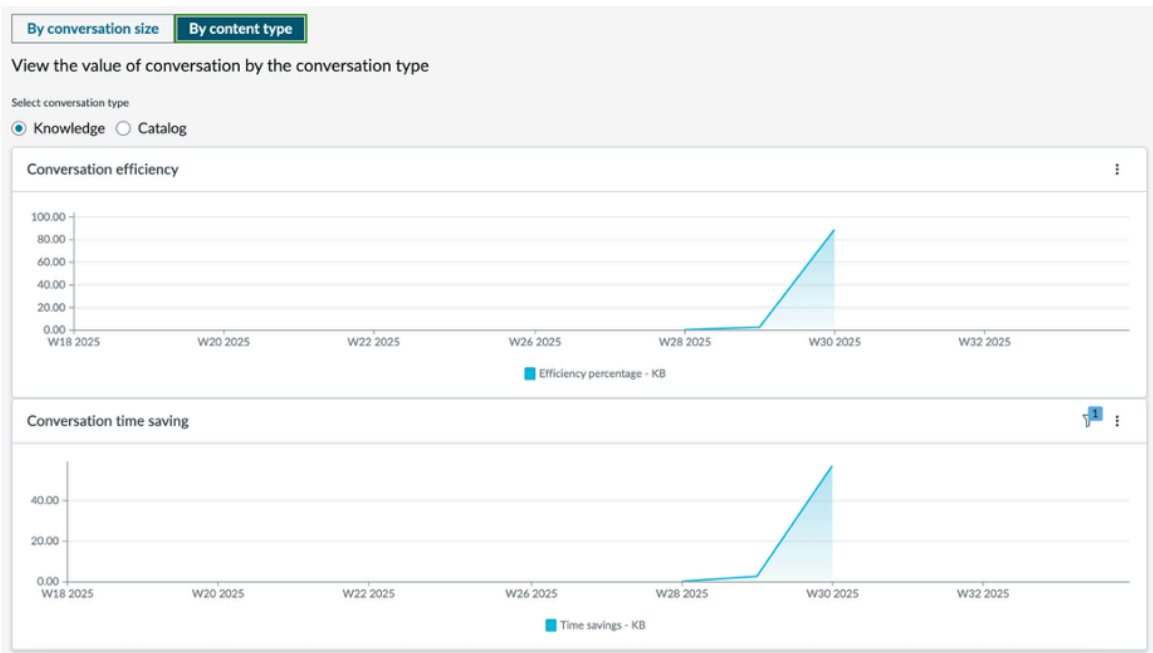


The line chart tracks the User acceptance score over time, providing insight into how user satisfaction is evolving on a weekly basis.

- Weekly efficiency trends:





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The weekly efficiency trend charts display the weekly trend of the Estimated Efficiency (%) metric, further broken down by both chat size and the type of content (Knowledge Base (KB) article or Service Catalog item) used during the conversation.

Note: Conversation evaluation scores are tagged as of evaluation date and not the actual conversation date. Hence older or historical chat scores are considered as of the day of evaluation for value calculation and not as of the conversation created date.

Calculating the estimated total hours

The estimated total hours calculated is the result of a multi-step, daily process designed to adjust raw time based on the quality of the interaction. It's calculated through the following steps:

1. Data sampling for quality evaluation.

   To limit number of assists, every conversation isn't evaluated. Instead, a daily sampling process is used.

   - Sample size: 10% of all conversations are selected for evaluation from the previous day.
   - Daily cap: The sample is capped at a maximum of 50 conversations daily.
   - Analytical dataset: To identify stable patterns in virtual agent quality, a rolling 30-day window is used for these evaluated chats, which creates a dataset of approximately 1,500 evaluated conversations (50 chats/day for 30 days) for analysis.

2. Categorizing conversation quality.

   Each of the ~1,500 conversations in the 30-day analytical dataset is assigned a quality score by the conversation evaluator. Based on the score, the conversation is categorized into one of five satisfaction levels:

Quality category	User satisfaction score range
Extremely satisfied	4.5–5.0
Satisfied	3.5–4.5
Average	2.5–3.5
Unsatisfied	1.5–2.5
Extremely unsatisfied	1.0–1.5

3. Projecting quality scores onto the daily conversations.

   There might not be a quality score for all virtual agent conversations, which limits the ability to accurately estimate the time saved by the virtual agent. To solve this issue, the quality distribution from the 30-day analytical dataset is projected onto the daily virtual agent conversations.

   a. Calculate rolling averages: From the ~1,500 evaluated chats, the percentage distribution of total chat time across the five quality categories for each segment is calculated.

      For example, for all short chats, or for all chats that invoked a KB article. Suppose that the 30-day analysis of short chats shows their total duration was 100 minutes. If 25 of those minutes came from chats rated as extremely satisfied, then the extremely satisfied category for short chats has a 25% time-based score.

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b. Apply averages to the daily conversations: The daily chats are grouped by their segment (for example, by chat size). The rolling average percentages are then applied to the total time of these groups.

For example, if the daily chats contain 400 short chats with a total duration of 4,000 minutes, the rolling average calculated is used to project that 25% of the time (1,000 minutes = 4000 minutes * 25%) was of extremely satisfied quality. The calculation is repeated for all quality levels and all segments.

4. Applying quality-adjustment weights.

To convert raw conversation time into a realistic measure of time saved, a weight is applied to the projected time in each quality category. Time from low-quality interactions contributes little to no savings, while time from high-quality interactions contributes 100% of its duration to savings.

Conversation quality category	Weight applied to time
Extremely satisfied	1.0 (100%)
Satisfied	0.5 (50%)
Average	0.25 (25%)
Unsatisfied	0.1 (1%)
Extremely unsatisfied	0.0 (0%)

Example continued, the 1,000 minutes of extremely satisfied time calculated in Step 4 is multiplied by a weight of 1.0, resulting in 1,000 minutes of estimated time saved. If another 500 minutes were projected to be satisfied, they would contribute 500 * 0.5 = 250 minutes of time saved.

5. Weekly aggregation:

The daily Final Daily Time Saved figures are aggregated at a weekly level for display on the dashboard's trend charts.

Important: Only the chat time before the first live agent invocation is considered for value calculation. That is, the time the user has spent interacting with the virtual agent. The chat time with the live agent isn't considered for value calculation.

Conversation evaluations scores are tagged as of evaluation date and not the actual conversation date. Hence older or historical chat scores are considered as of the day of evaluation for value calculation and not as of the conversation created date.

If data isn't updated on the dashboard, perform the following steps.

Role required: admin

1. Navigate to **All** > **System Definitions** > **Scheduled Jobs**.
2. Search for and select the *CE Populate Value Aggregates Chats - Daily* scheduled job.
3. Set it as **Active**.
4. Execute the scheduled job.

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5. Navigate to **All** > **Platform Analytics** > **Platform Analytics Administration** > **Data Collector** > **Jobs**.
6. Search for and select the **"[Conversation Evaluator] Evaluation Score Daily Data Collection** scheduled job.
7. Execute the job.
8. In the Related Lists section, check the **Job Logs** tab to see if the data was collected successfully.

Related topics

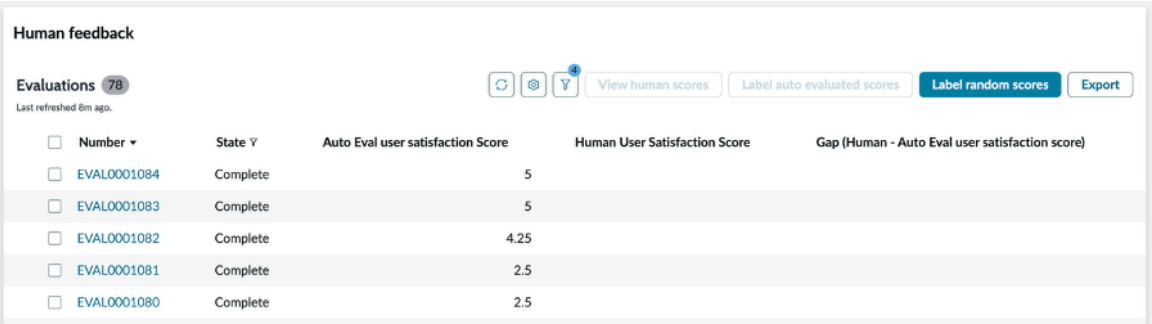
Evaluation dashboard reference

Human feedback for evaluations

Expand the Human feedback section to see details on evaluations and their satisfaction scores.

Role required: interaction_admin

Note: To label a record or label a conversation, you must have access to the transcript, and only users with the interaction_admin role have access to the transcript.



The Evaluations section shows all the chats that were auto-evaluated by the large language model (LLM). You have the option to manually evaluate conversations to compare the AI evaluations against your own interpretation of how the agent conversation was.

Field	Description
Number	Evaluation number assigned to each chat conversation. Select the evaluation number to see the respective chat and its evaluations.
State	State of the evaluation.
Auto Eval user satisfaction Score	Satisfaction score calculated automatically by the LLM.
Human User Satisfaction Score	Satisfaction score calculated based on the user evaluation of the chat.
Gap	Difference between the human and auto-evaluated satisfaction scores.

Manually evaluate a chat

You can manually evaluate each chat to compare it with the AI evaluation.

1. Select the evaluation that you want to score manually.
2. Toggle the **View Auto Eval Scores** switch on to see the AI evaluation for each category.

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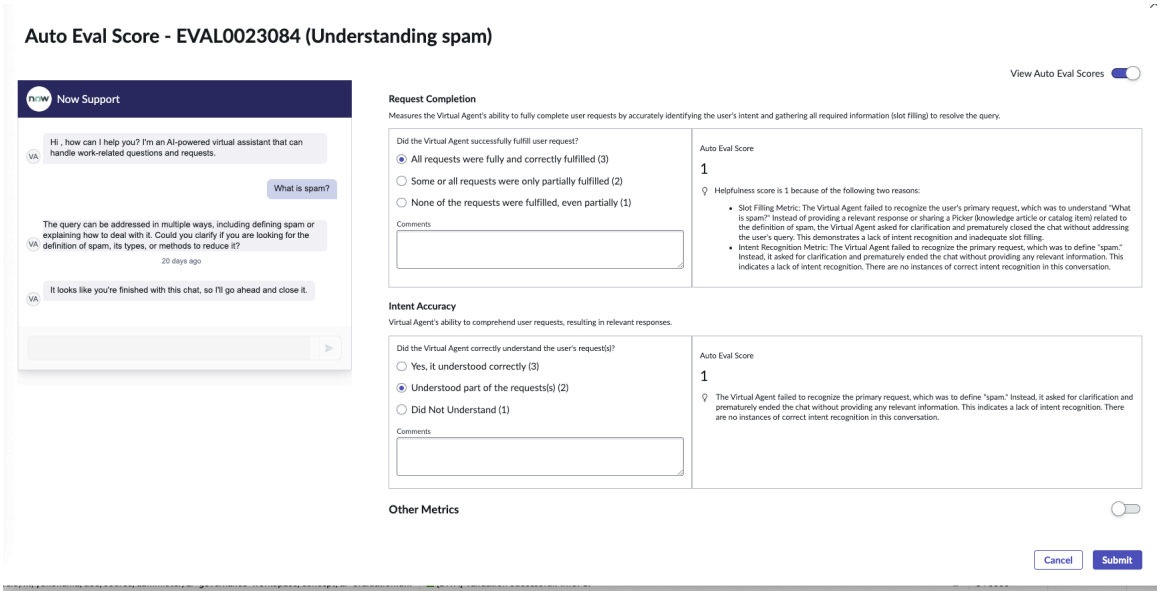
3. For each category, select your answer for how accurately you feel that the agent responded.



4. Toggle the **Other Metrics** switch on for a more detailed evaluation.
5. After completing, select **Submit**.

The **Human user Satisfaction Score** value gets calculated based on your response to the questions. You can see your responses for each evaluation by selecting it and then selecting **View Human Scores**. The **Export** option enables you to export the data in your preferred format.

You can also randomly label evaluations by selecting **Label random scores**. When selected, a list of 10 random, unevaluated conversations from the past 10 days are loaded for manual labeling.

Enabling evaluations

Evaluate random conversations by enabling continuous monitoring.

Role required: admin

Enable evaluations and set the number of evaluations to be performed daily.

Enable evaluations

1. Activate Skills:
   a. Navigate to **Admin** > **Now Assist Admin** > **Now Assist Skills** > **Platform**.
   b. Turn on the following skills:
      - Intent Accuracy Chat Eval
      - Inadequate Slot Filling Chat Eval
      - Smoothness (Deadlock avoidance)
      - Context Retention
      - Coherence Chat Evaluation
      - Truthfulness Hallucination Chat Eval

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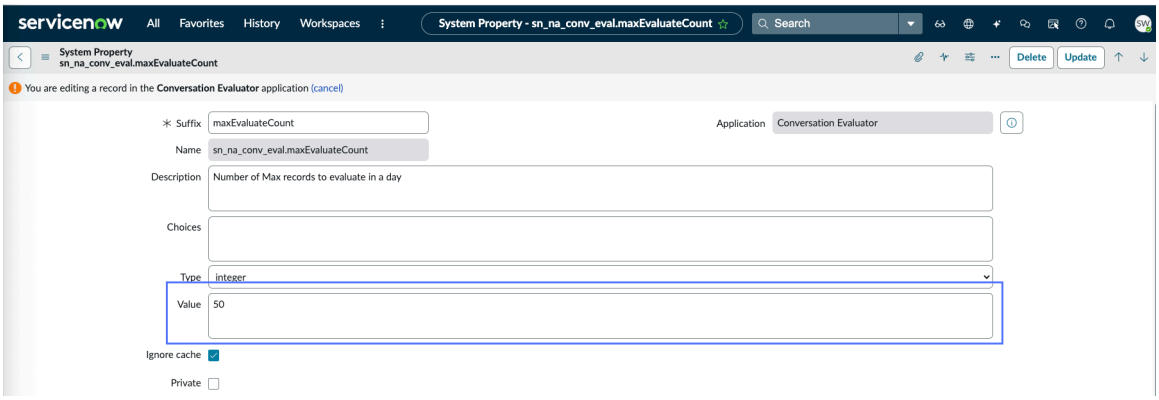
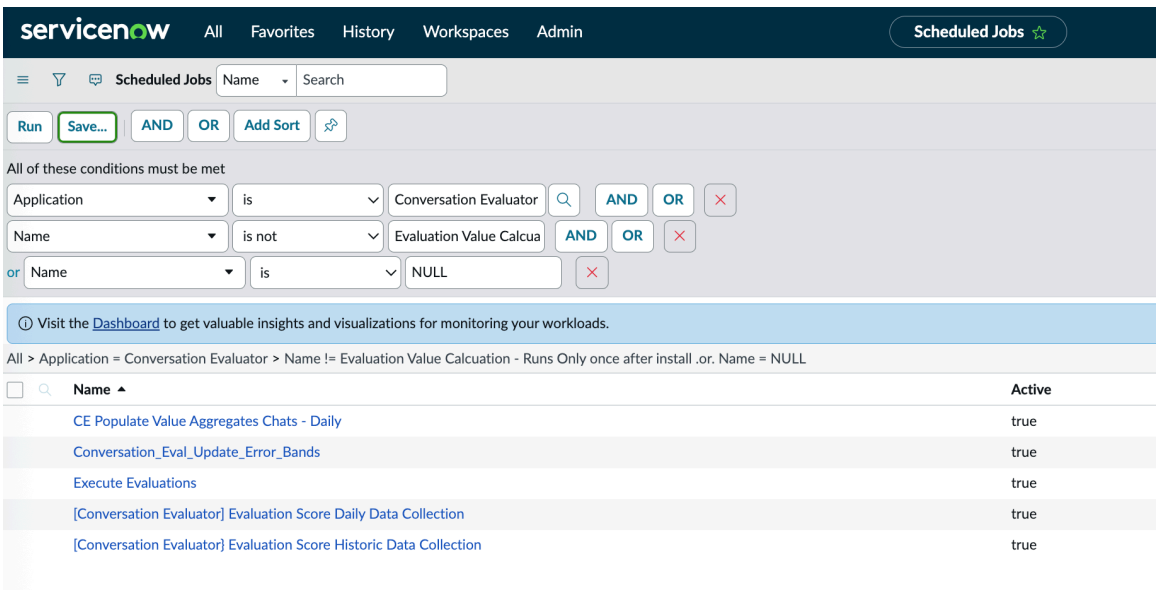
- Conciseness Chat Eval
- Chat topic classifier

Note: You can get the filtered list using the filter condition **Conversation Evaluator** under **Features**.

2. Set the value for the system property **sn_na_conv_eval.maxEvaluateCount**.
   a. Navigate to **All** > **System Properties** > **All Properties**.
   b. Search for and select the property **sn_na_conv_eval.maxEvaluateCount**.
   c. Update the **Value** field to set the maximum number of conversations to be evaluated daily.



   d. Select **Save**.
3. Activate the following associated scheduled jobs:
   a. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
   b. Apply the filter condition `Application is Conversation Evaluator` and filter out the job Evaluation Value Calcuation - Runs Only once after install.



   c. Activate all the scheduled jobs in the filtered list.
4. Activate the Execute Evaluation flow in Flow Designer.

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Note:

By default, the Execute Evaluation flow is deactivated. You can use the nightly scheduled job, Execute Evaluations, to evaluate the chats. The nightly job won't dominate over LLM calls from other services, whereas the real-time evaluation through the Execute Evaluation flow might conflict with LLM calls from other applications.

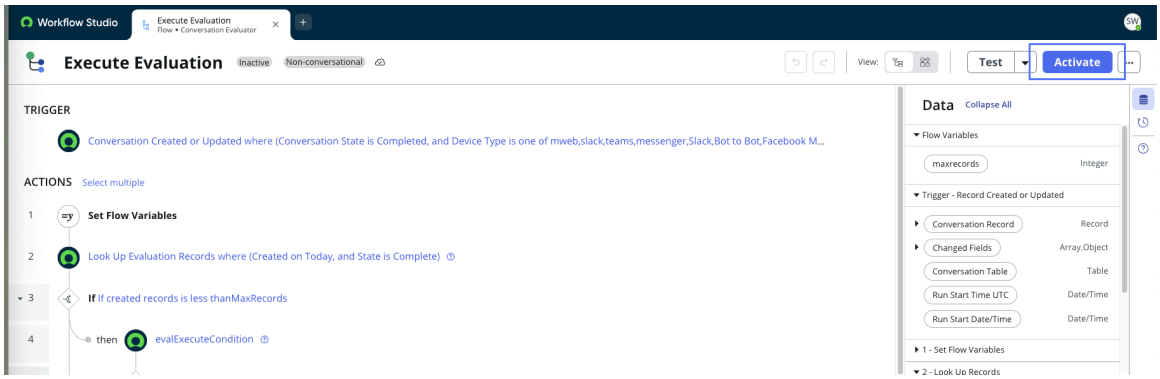
If you want to evaluate the chats real-time on chat completion, activate the Execute Evaluation flow. Domain separation is not supported.

a. Navigate to **All** > **Process Automation** > **Flow Designer** and select **Flows**.

b. Select the Execute Evaluation flow.

c. Select **Edit flow**.

d. Select **Activate**.



Note:

- If you want to configure some of the evaluation parameters based on your requirements, see Configuring evaluations.
- If you want to import historical data to be evaluated, you must run batch evaluations by activating the Execute Batch Evaluation flow. For more information on the batch evaluation workflow, see Evaluation flow for batch evaluations.

Evaluation dashboard vs. Conversation Insights

You can use the Evaluation dashboard and the Conversation Insights (CI) application together to gain a complete picture of virtual agent effectiveness, from system performance to end-user satisfaction.

For more information about Conversation Insights, see Conversation Insights.

Metrics captured by the Evaluation dashboard	Metrics captured by Conversation Insights
The Evaluation dashboard provides granular diagnostic explanations that help improve virtual agent design, dialog flows, and model accuracy. It evaluates performance along dimensions critical to task success and trustworthiness. For example, "Is the system working properly and performing the expected task?"	Conversation Insights focuses on measuring customer satisfaction and effort. It uses inferred customer satisfaction (CSAT) and supporting signals to show how end users perceive their interaction with the virtual agent. For example "Is the end user happy with the virtual agent's performance?"

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Metrics captured by the Evaluation dashboard	Metrics captured by Conversation Insights
• Intent Recognition: Whether the virtual agent correctly interprets the user's primary goal. • Slot Filling: Accuracy of extracting structured inputs required to complete tasks. • Conciseness: Avoidance of verbose or repetitive responses. • Coherence: Logical flow and organization of the virtual agent's responses. • Truthfulness: Ensures that responses are grounded in context or knowledge sources, not hallucinated. • Context Retention: Virtual agent's ability to remember earlier user inputs in the same session. • Deadlock Avoidance: Detects loops where the virtual agent gets stuck repeating questions or responses. • User Satisfaction (proxy): Correlates critical failures (like intent recognition or slot filling) with likely negative user perception.	• Inferred CSAT: Composite score (1–5) estimating overall satisfaction with the conversation. • Effort Score: Measures how much work the user had to do (low/medium/high), based on transfers, escalations, repeated data collection, or wait times. • Resolution: Tracks whether the user's issue was fully, partially, or not resolved. • Frustration: Detects explicit signs of user frustration such as rude language, sarcasm, or complaints about difficulty. • Confusion: Identifies misunderstandings between the user and virtual agent or the live agent. • Transfers and Escalations: Flags when a conversation is passed to another agent, team, or supervisor. • Empathy: Scores how polite, personable, and supportive the virtual agent or live agent was (low/medium/high). • Next Steps: Measures how clearly the virtual agent or live agent explained outcomes, instructions, or follow-up actions (low/medium/high).

Together, the Evaluation dashboard and Conversation Insights provide complementary value for virtual agent implementations.

- Conversation Insights offers a lightweight, cost-free view of the customer experience across all conversations.
- The Evaluation dashboard delivers granular, task-focused diagnostics that enable targeted improvements to virtual agent design and performance.
- Consolidated in AI Agent Analytics and AI Control Tower dashboards, these metrics give users complementary views into virtual agent system health and end-user satisfaction.

Configuring evaluations

Configure conversation evaluations by disabling evaluations, adjusting execution logic and thresholds, and tuning scoring weights.

Disable evaluations

Prerequisites

Update must be created.

Disable evaluations:

1. Navigate to **Process Automation** > **Flow Designer** and select **Flows**.
2. Select the Execute Evaluation flow.
3. Select **Deactivate**.

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Change the evaluation execution conditions

Change the evaluation execution conditions:

1. Navigate to **System Definition** > **Script Includes**.
2. Search for and select the script Include `evalExecuteCondition`.
3. In the **Script** field, modify the *`executeEvaluation`* method.
   - Input: The method receives the conversation reference record as a parameter.
   - To restrict by user profile, use the initiatedUser variable (contains the user's sys_id).
4. Use GlideRecord queries or other logic as needed to implement custom execution conditions.
5. Save and test in a non-production environment before promoting.

Set the daily limit on evaluations

Set a maximum daily limit on evaluations:

1. Navigate to **All** > **System Properties** > **All Properties** (sys_properties.list).
2. Search for and select the property **sn_na_conv_eval.maxEvaluateCount**.
3. Set the **Value** field to the desired integer value to limit the maximum number of evaluations created per day.

Configure the minimum records for error bands

Set the minimum number of records required to calculate the error band for upper and lower deviation:

1. Navigate to **All** > **System Properties** > **All Properties** (sys_properties.list).
2. Search for and select the property **sn_na_conv_eval.errorBandMinRecords**.
3. Set the **Value** field to the desired integer value to define the minimum number of records required before upper and lower error bands are calculated.

Adjust skill weights for the composite score

Set the weights for each evaluation metric for chat evaluation, which are used to compute total and composite scores on evaluation records:

1. Navigate to **All** > **System Properties** > **All Properties** (sys_properties.list).
2. Search for and select the property **sn_na_conv_eval.evalWeights**.
3. Update only the value components for each skill.

   The composite score is calculated as Sum(Skill Score × Skill Weight) / Sum(Skill Weights).

Security & Privacy tab in AI Control Tower

Review AI security metrics such as access issues, dormant and privileged AI agents, and map the relationships of your ServiceNow agents, agentic workflows, and tools.

The **Security & Privacy** tab of AI Control Tower offers a dashboard-based overview of your AI security metrics. The dashboard contains several visualizations detailing AI security metrics. In addition to tracking metrics the **Security & Privacy** tab contains the access map, a tool that gives an node-graph visualization of the relationships between your ServiceNow agents, agentic workflows, and tools. You can use the map to investigate the relationships between your AI agents and workflows further.

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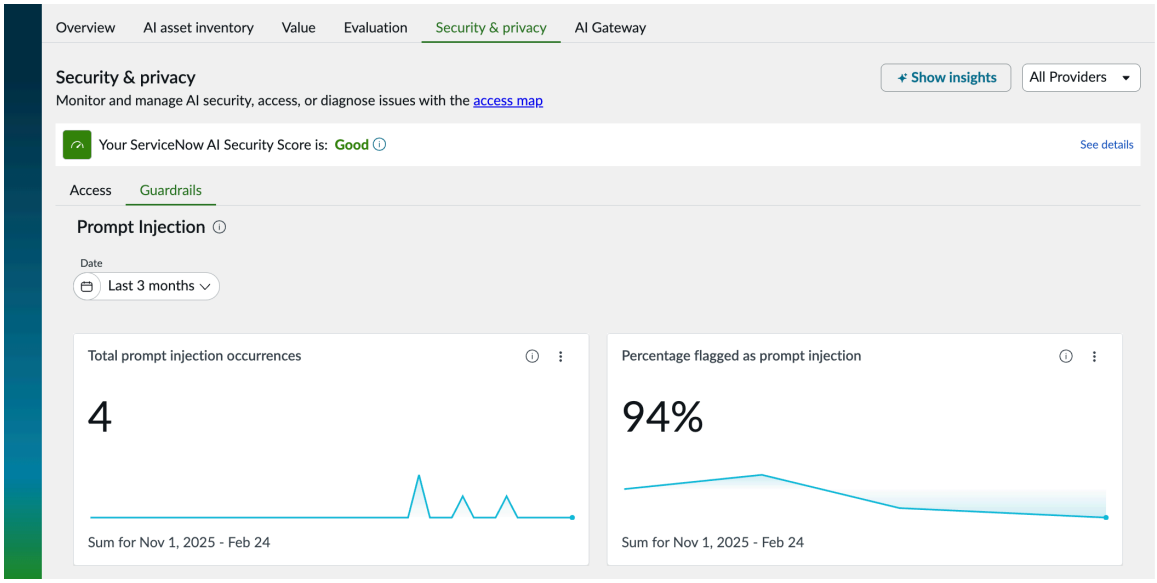
Note: You can drill down into the data on each widget by selecting the chart.



ServiceNow AI Insights

ServiceNow AI Insights require that the Now Assist AICT Security Posture Summarizer skill is enabled. For more details, see Activate a Now Assist skill.

AI Control Tower AI insights summarize positives and potential issues to remediate to improve the overall security posture of your instance.

- Positives: Enabled settings and features that improve your security posture.
- Areas for Attention: Low- to medium-risk items to resolve.
- High Impact Observations: High-risk items to resolve.
- Actions: Suggested action items to address Areas for Attention and High-Impact Observations.

Access map

The **Access map** displays a node map detailing the relationships of your ServiceNow® agents, agentic workflows, and tools. You can use the map to review these relationships, configure agent details, and resolve access issues. The map includes filters for both agents and agentic workflows. You can open the access map by either navigating to **All** > **AI Security and Privacy** > **Access Map**, or selecting the link in the dashboard. See Using the access map to learn how to use access map.

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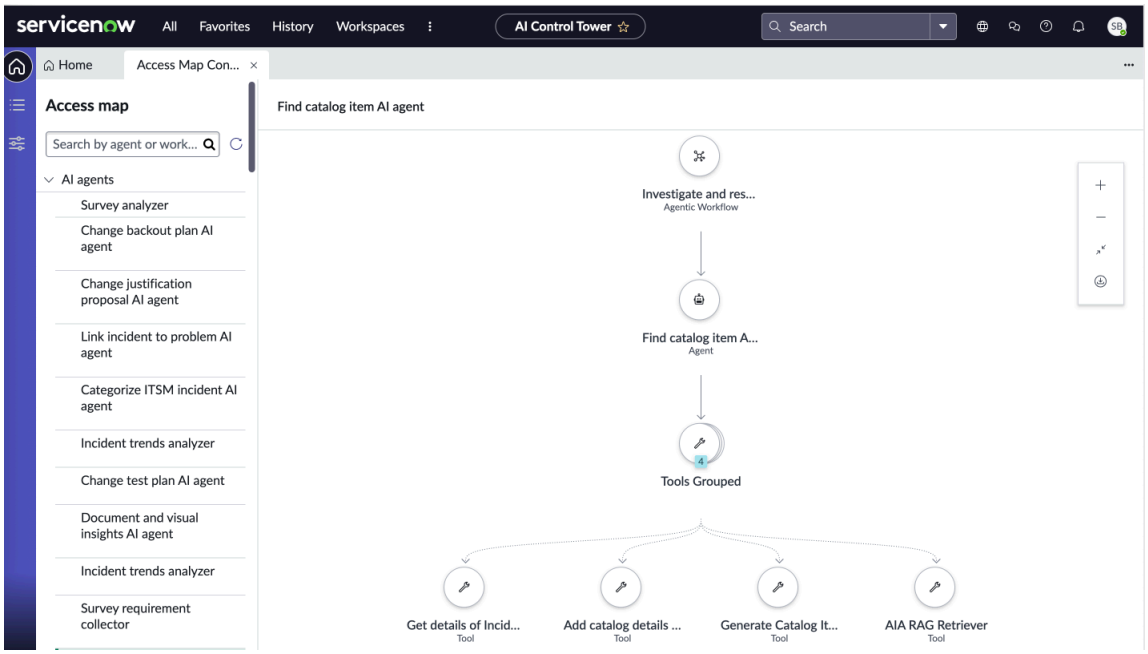

If a warning icon appears on any agent, that agent has access issues. Select the warning icon to see details such as the workflow, agent, and tool associated with the access issue.

In Access issues, the User ID is the ID of the user who ran the agent.

ServiceNow AI Asset Security Score

The ServiceNow AI asset security score is a measure of the health of your ServiceNow AI assets in terms of access issues, privileged AI agents, and dormant AI systems.

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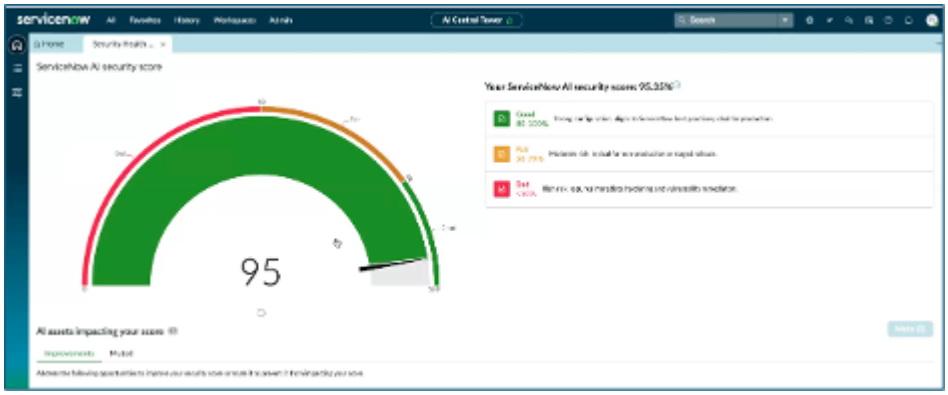

AI assets impacting your score

To see more information about your score, select **See details** in the **Security & Privacy** tab. A list view shows the ServiceNow AI assets that are included in your AI asset security score calculation. Your score is the average of all managed ServiceNow AI assets listed.

You can exclude an asset from your score by selecting a row and selecting **Mute**. For example, you can mute an AI asset if you determine that remediating the asset's issue would be a risky change. You can also configure the score to remove security categories from the score or change the weights of security categories. For more information, see Data sharing, Data overflow processing, and Security & privacy in AI Control Tower.

AI asset details

Column	Description
AI system	Name of the ServiceNow asset.
Category	Type of issue, such as dormant AI system, privileged AI agent, or access issue.
Provider	This value is always ServiceNow.
Score impact	The percentage impact to your AI asset security score.
Date	Date the issue occurred.
AI Task	The AI security task to remediate the issue, if applicable.

Access

Access issues

The Access issues chart displays the proportion of AI agents experiencing access-related issues and lists the top AI systems with access issues. AI agents with access issues may be unable to complete their workflows due to the access issue. Hover over a portion of the chart to see the exact proportion and count of agents.

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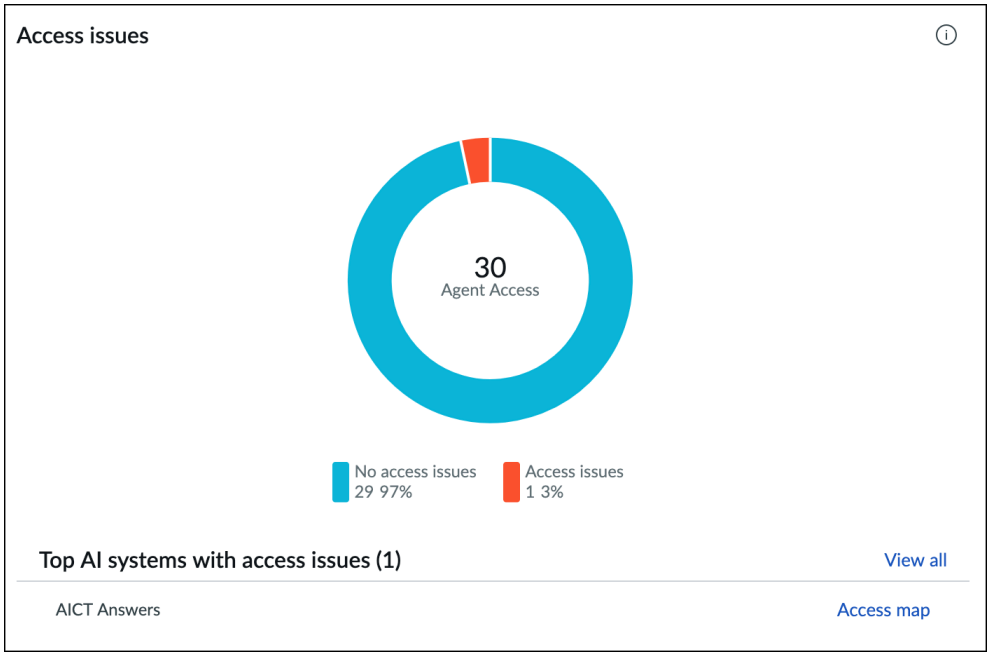


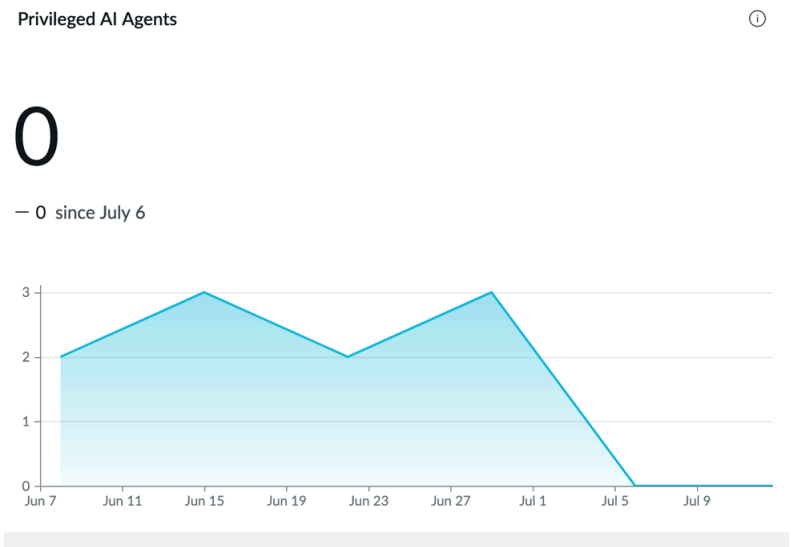
You can create AI security tasks directly from the list view by selecting **Create AI task**. See all active AI security tasks in **AI assets** in the AI Task section. Access to this section requires the sn_vsc.task_manager role.

Resolved AI security tasks that are over 180 days old are archived. Archival days can be configured in system properties.

Privileged AI Agents

The area chart shows AI agents with elevated permissions such as an agent with admin or security admin permissions that can perform critical actions. Some workflows require AI agents have elevated permissions to complete. Hover over a portion of the chart to see the exact number of privileged agents on that day.

To show AWS agent metrics, filter the metrics by selecting **AWS Bedrock** in the provider drop-down list. You must have an AWS account configured for your instance and the Now Assist AiSP AWS IAM Privileged Policy Checker skill enabled. For more details, see AI connections and Activate a Now Assist skill.



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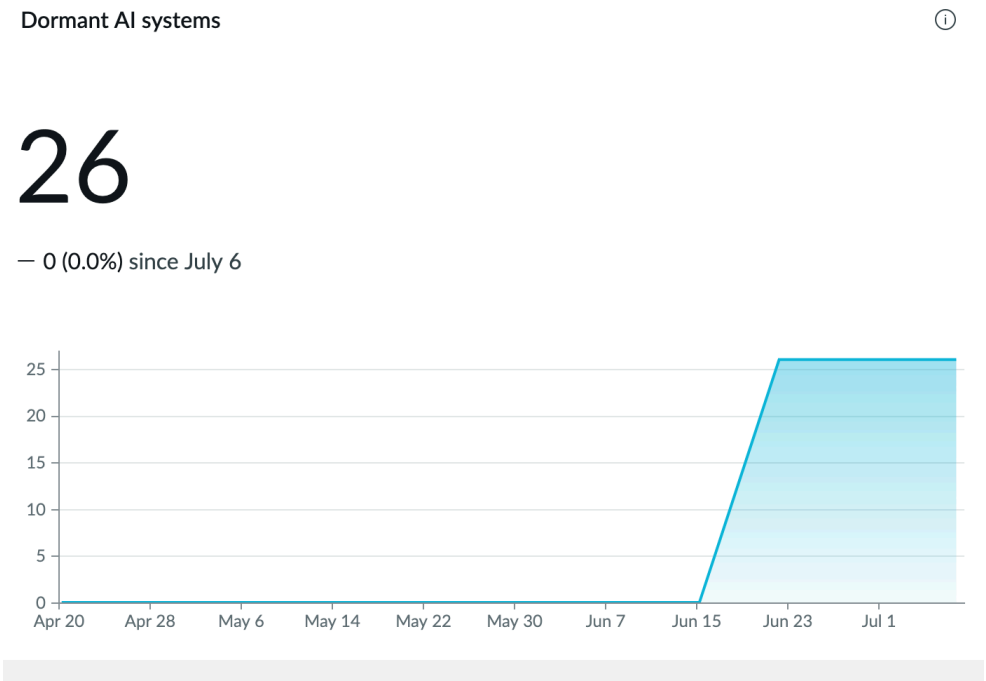
You can create AI security tasks directly from the list view by selecting **Create AI task**. See all active AI security tasks in **AI assets** in the AI Task section. (Role required: sn_vsc.task_manager.)

Resolved AI security tasks that are over 180 days old are archived. Archival days can be configured in system properties.

Dormant AI systems

The area chart shows AI agents that have not been active for over 90 days. Review dormant AI agent permissions to reduce security risk. Hover over a portion of the chart to see the exact number of dormant AI systems for that day.

To show AWS agent metrics, filter the metrics by selecting **AWS Bedrock** in the provider drop-down list. You must have an AWS account configured for your instance. For more details, see AI connections.



When an AI agent becomes dormant, an AI security task is created automatically to streamline your workflow, and quickly resolve issues. The AI security task is assigned to the agent's owner. See all active AI security tasks in **AI assets** in the AI Task section.

Resolved AI security tasks that are over 180 days old are archived. Archival days can be configured in system properties.

ServiceNow instance access to MCP servers

MCP server access metrics include all MCP client-server interactions routed through this instance's AI Gateway. Interactions that bypass the AI Gateway or are routed through another instance's AI Gateway aren't included.

Clients connecting to MCP servers

The Clients connecting to MCP servers chart shows the top 10 clients (ServiceNow AI agents or registered third-party MCP clients) connecting to MCP servers through this instance's AI Gateway. MCP server access metrics are captured for all client-server interactions routed through the AI Gateway. To see more clients, select the chart to drill down into the data.

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Authorized access attempts to MCP servers

The Authorized access attempts to MCP servers chart shows successful access attempts from MCP clients to MCP servers through this instance's AI Gateway. Clients include ServiceNow AI agents and registered third-party MCP clients. To see more attempts, select the chart to drill down into the data.

Failed access attempts to MCP servers

The Failed access attempts to MCP servers chart shows unsuccessful access attempts from MCP clients to MCP servers through this instance's AI Gateway. Clients include ServiceNow AI agents and registered third-party MCP clients. To see more data, select the chart to drill down into the data.

Guardrails

Prompt injection

These charts show prompt injection data provided by AI Guardian. To see data, enable AI Guardian for your instance. For more details, see AI Guardian analytics.

Offensive content

These charts show offensive content data provided by AI Guardian. To see data, enable AI Guardian for your instance. For more details, see AI Guardian analytics.

Sensitive data

The Sensitive data detected chart shows sensitive data that was identified in user responses to Now Assist prompts. Exposure of sensitive data is limited to the LLM in your instance.

The Sensitive data anonymized chart shows prompt data that met configured data patterns. This data was anonymized based on the configuration for the pattern in Configuration Data Patterns in Data Privacy.

Security policy violations

The Security policy violations chart shows violations of ServiceNow security policies detected in LLM output. The data is collected by scanning generative AI logs to detect policy violations in LLM responses. ServiceNow security policies are based on industry best practices and can't be modified. For example, one policy prohibits linking to executable files or malware, directing users to run unverified downloads or macros, or asking users to disable their antivirus protection. For more information about policies and how to configure data for this chart, see Data sharing, Data overflow processing, and Security & privacy in AI Control Tower.

Agent goal hijack

The Agent goal hijack chart shows when AI agents deviate from their intended role or objective. For example, unauthorized actions or prompt injection attempts. The data is collected by scanning and analyzing agent execution history. For information on how to configure data for this chart, see Data sharing, Data overflow processing, and Security & privacy in AI Control Tower.

AI agent output with PII detected

The AI agent output with PII detected chart shows when agents' LLM output contains personally identifiable information (PII). The data is collected by scanning LLM output for default PII sensitive data patterns specified in Data Privacy and additional PII patterns. For example, U.S. phone number, credit card number, or U.S. passport ID. For information on how to configure data for this chart, see Data sharing, Data overflow processing, and Security & privacy in AI Control Tower.

High-risk AI agent output

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The High-risk AI agent output chart shows when agents' LLM output contains security-vulnerable patterns. The data is collected by scanning LLM output for known vulnerable patterns and potential corresponding attack vectors. For example, HTML tags shouldn't have scripts associated with them for cross-site script attacks (XSS), or no stacked SQL queries that could result in SQL injection attacks. For information on how to configure data for this chart, see Data sharing, Data overflow processing, and Security & privacy in AI Control Tower.

AI Gateway tab in AI Control Tower

Explore the AI Gateway tab in the AI Control Tower.

AI Gateway overview

Prerequisites

Role required: AI steward [sn_ai_governance.ai_steward]

The AI Gateway tab shows the metrics at the MCP (Model Context Protocol) server level, listing all connected MCP servers along with the total number of transactions for each server and its success rate.

The AI Gateway displays a comprehensive view of all MCP servers categorized into:

- Name
- Total transactions
- Success rate

Total transactions are all tool calls, calculated by MCP method equal, which is ("tools/call").

The success rate is the number of such transactions that have an HTTP status from 200 through 299 divided by the total.

AI assets

An AI asset refers to a digital tool or resource that uses artificial intelligence to carry out particular tasks or address problems. Examples include machine learning models, chatbots, natural language processing systems, image recognition software, and similar technologies.

Details

For information on AI inventory, see AI asset inventory

For information on AI asset Lifecycle, see AI asset lifecycle

For information on approval playbook workflow, see Create an AI Control Tower Playbook workflow.

For information on creating Now Assist approvals task, see Create a Now Assist approval task.

For information on AI security tasks, see AI Task.

AI asset inventory

AI asset inventory includes all the AI assets such as AI models, AI systems, prompts, datasets, and MCP servers that an organization can use.

AI asset inventory view

AI systems

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An AI system can make predictions, recommendations, or decisions that impact physical or virtual environments, with outputs or behaviors that aren't always predetermined by the developer or user. These systems are often trained using large amounts of structured or unstructured data and may function with different levels of autonomy, or none at all, to fulfill objectives set by humans.

AI models

AI models consist of functions and algorithms that are trained and evaluated on datasets to generate predictions or take decisions.

Prompts

Any data, including text or images, that is used to guide, instruct, or influence an AI model's output. Prompts can also refer to an element in a process that requires user input in a field before moving to the output screen.

Datasets

A dataset usually consists of records and fields organized into rows and columns. These datasets are stored within a database table.

MCP Server

Provides external functionality by exposing tools for AI agents to use.

AI assets are presented in a list format and organized by display name, provider, vendor, managed by, lifecycle phase, state, status, and risk classification.

For information on AI asset record details, see View AI asset details

For information on creating AI assets, see Creating AI assets

For information on process flow of the MCP servers, see Process flow of MCP servers via AI Gateway

Assets list- managed and unmanaged assets

Learn about the AI assets list, managed and unmanaged assets.

Assets list

AI assets are presented in a list format and organized by display name, provider, vendor, managed by, lifecycle phase, state, status, and risk classification.

Managed & Unmanaged assets

Starting with the March (2026) release, you can designate assets as managed or unmanaged directly from the list. By default, all the assets in AI Control Tower are under unmanaged assets.

When an unmanaged asset is marked as managed, it gains access to AI Control Tower capabilities such as governance, lifecycle management, value assessment, risk classification, security, and privacy. If a managed asset is switched back to unmanaged, it loses all the before mentioned AI Control Tower capabilities.

The Automation rules define how AI assets are set to managed. For information on Automation rules page, see Automation rules

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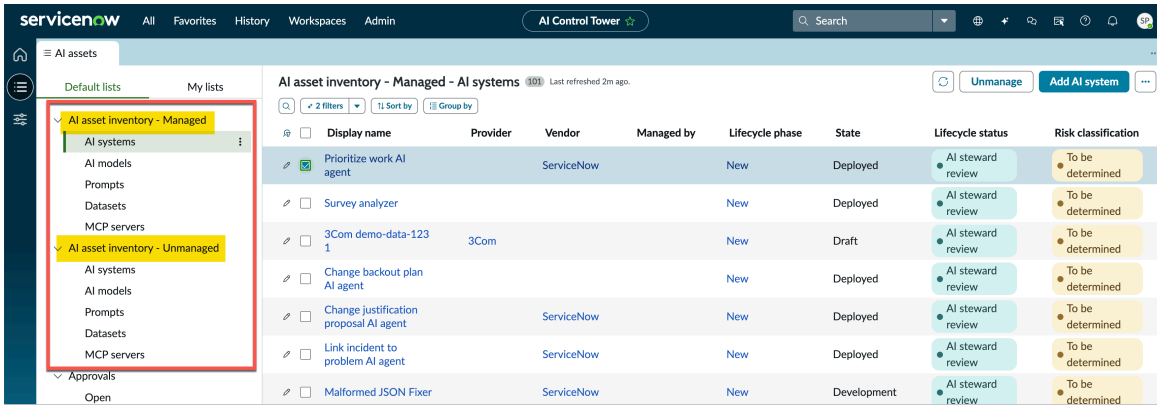

Note: Initiating a steward review for an unmanaged asset triggers the lifecycle process and automatically transitions the asset to a managed state.

View AI asset details

View the AI asset governance details to track the lifecycle's status, phase, and the install status.

Before you begin

Role required: AI steward

Procedure

1. Navigate to **Workspaces** > **AI Control Tower**.
2. From the AI Control Tower, open the AI assets view.
3. From the navigation menu of the AI assets view, under AI asset inventory, select an AI asset. AI asset details page is displayed.
4. On the page, review the AI asset details.

Field	Description
Version	Version number of the asset
Asset type	Type of assets: ○ Generative AI ○ Agentic AI ○ Classical AI ○ AI model ○ AI system ○ AI prompts ○ AI datasets
Provider	who has built the asset
Vendor	Who has sold the Asset
Department	Department where the asset is allocated
Managed by	Managed by the user who owns the asset
License details	License details of the asset

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Field	Description
Supported locations	Shows the locations supported for the AI as set.
Lifecycle phase	Shows the asset's lifecycle phase. ○ New ○ Assess ○ Build and test ○ Deploy ○ Offboarding
State	The state of the asset. ○ Deployed ○ Retired ○ Development ○ Unknown ○ N/A
Lifecycle status	The lifecycle status of the asset. ○ In review ○ Approved ○ Rejected ○ Deployed ○ AI steward review ○ Approved for development ○ Ready for deployment ○ Approved for deployment ○ Canceled
Risk classification	Risk classification of the asset
Created	Creation date
Updated	Updated date

AI asset lifecycle

The AI asset life cycle defines the series of stages that you must follow to manage an AI system, AI model, prompt, or dataset throughout its useful life.

AI asset lifecycle stages

The AI asset lifecycle consists of the following stages:

Onboard

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The onboard stage is the introduction of an AI asset into your organization. During this stage, you can define important details about the AI asset, including the asset version and documentation.

Assess

The Assess stage is the evaluation of an AI asset to determine its effectiveness, its efficiency, its reliability, and its alignment with your organizational goals. This evaluation includes assessments for the performance, business and risk impact, regulatory compliance, and overall value of each AI asset.

Build and test

The Build and test stage is the development and testing of an AI asset to prepare it for deployment. When you're developing an AI asset, you must create the asset, code any applicable algorithms, and integrate relevant data sources. After you develop the AI asset, you can run tests to verify that it functions correctly, meets your performance standards, and produces accurate results. You can also identify and resolve bugs.

Deploy

The Deploy stage is the integration of an AI asset into your existing workflows. During this stage, you can also set up monitoring to track the performance of the AI asset. You can choose to deploy each AI asset through either a gradual roll-out, in which the asset can be used only by a specific subset of users within your organization, or a full roll-out, in which the asset can be used by any user within your organization.

For more information on Completing AI lifecycle stages, see Complete AI asset lifecycle

For more information on view AI assets by lifecycle stage, see View AI assets by life-cycle stage

Approvals

The approvals are requests created to either approve or reject an asset. The Approvals menu displays a list of Now Assist approvals.

Approval record

The Now Assist approval record displays **Details** and **Playbook** tabs.

The **Details** section displays all the details of an approval and the asset in review. The Assigned to field is editable and the rest of the fields are auto-populated.

The Playbook section displays the workflow for the Now Assist approvals to approve or reject an asset.

The Playbook templates list has a record of playbooks to configure an approval record in three steps:

- Review asset
- Evaluate asset
- Approve or reject an asset

The AI steward can save an approval record by clicking **Save** option and select the more actions icon to **Cancel approval request** or **Delete approval request**.

You can post your work notes in the **Comment** section and track the approval task requests from the **Activity** section.

For enabling Now Assist governance, default Approval Playbook is available.

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The Approval Playbook feature is available for all Now Assist customers.

Note: If the onboarding playbook is present, then this feature isn't available.

For information about creating AI Control Tower Approval Playbook to enable Now Assist governance, see Create an AI Control Tower Playbook workflow.

For information about creating Now Assist approvals task, see .

Cases

You can view all the assigned and unassigned AI cases in a list view in the AI Control Tower.

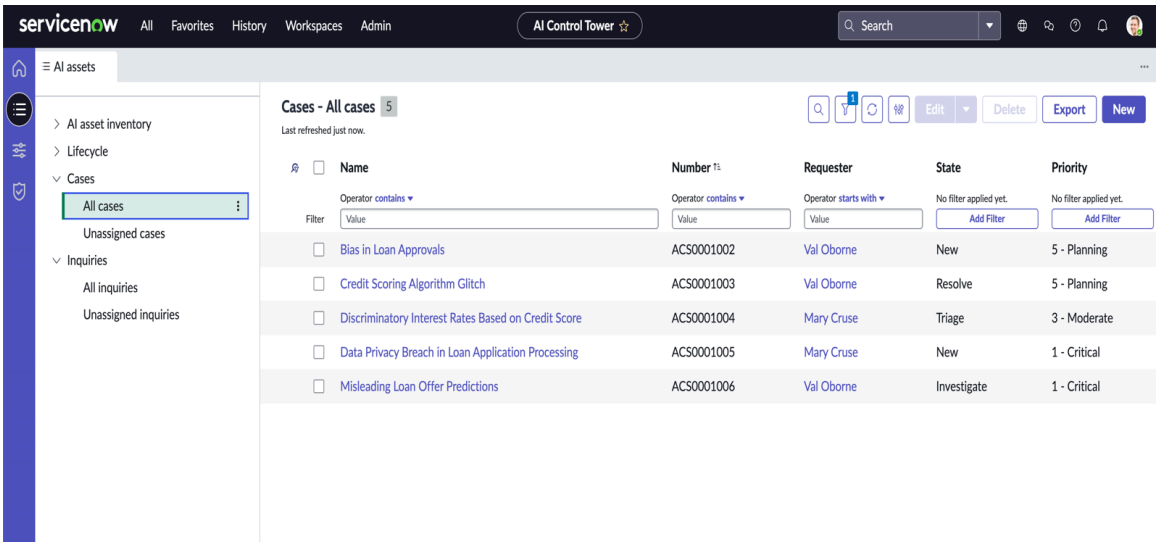
Cases list view

You can view all the cases in a list view. You can perform actions such as search, filter, refresh, and personalize list features on the list view.

Select any case from the list, select **Edit-More Actions** to assign the case to yourself, or **Delete** or **Export** the selected case. You can also select **New** to create a new AI case.

The following image displays all the AI cases in a list view.

Cases



For information about creating AI cases from the AI cases tab in the AI Control Tower workspace, see Create an AI case in the AI Control Tower

Inquiries

You can view all the assigned and unassigned inquiries in a list view in the AI Control Tower.

Inquiries list view

The inquiries section displays all the AI inquiries in a list view.

You can perform actions such as search, filter, refresh, and personalize list the inquiries on the list view.

Select any inquiry from the list, click **Assign to me** to assign the inquiry to yourself, or **Delete** or **Export** the selected inquiry. You can also click **New** to create a new AI inquiry.

The following image displays all the AI inquiries in a list view.

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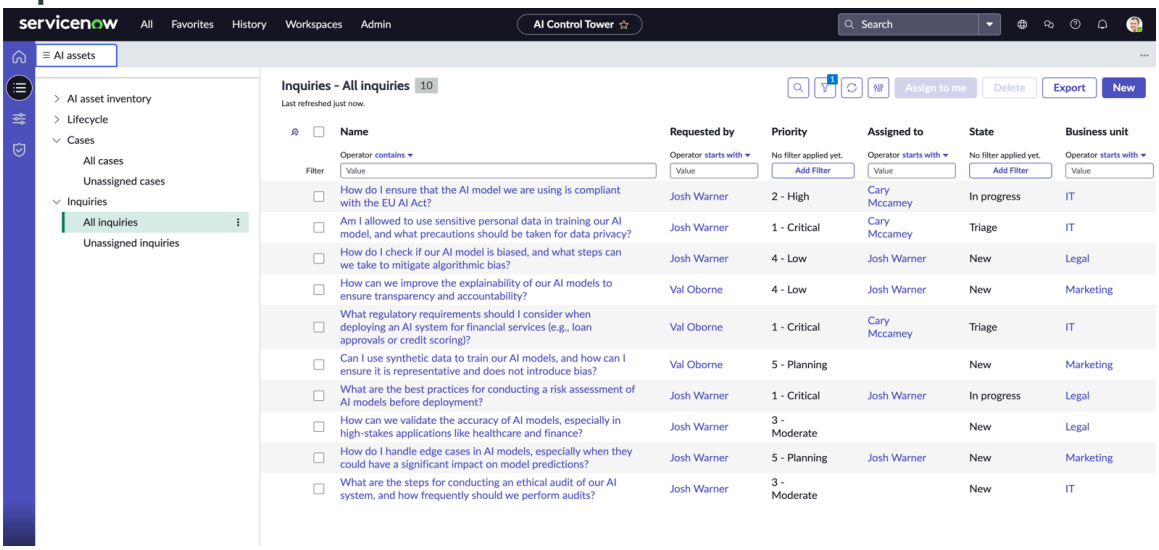
Inquiries



For information about creating AI inquiries from the AI cases tab in the AI Control Tower workspace, see Create an AI issue in the AI Control Tower

AI strategies and goals

You can track and monitor the progress of your strategic priorities, goals, planning items, and execution items—projects and demands classified as Artificial Intelligence in other ServiceNow applications.

Strategies

Actions of a strategic plan and its strategic priorities that help to orient your organizational strategic plan toward your goal. Strategic priorities are the objectives of your organizational plans. Strategic priorities help you to achieve your goals over a designated time period. The strategic priorities are also known as focus areas or long-term strategies.

Goals

Goals refer to objectives that an organization sets for itself to accomplish their organizational plans. Goals are typically qualitative in nature. Goals should be ambitious and are expected to motivate and challenge your teams.

Monitoring AI-related items

With Strategic Planning, you can track and monitor the progress of your strategic priorities, goals, planning items, and execution items—projects and demands classified as Artificial Intelligence in the Strategic Planning Workspace. For details, see Managing portfolio plan goals in Strategic Planning Workspace.

With Goal Framework, you can track and monitor the progress of your strategic priorities and goals classified as Artificial Intelligence in the Goal Framework application. For details, see Managing goals using Goal Framework or Goal Framework for SPM.

With PPM Standard, you can track and monitor the risks, issues, decisions, actions, and changes of your projects classified as Artificial Intelligence in Project Management or Project Workspace, or the primary goal or strategic priority associated with projects and categorized as Artificial Intelligence in Goal Framework or Strategic Planning Workspace. For details, see Create a project from Project Workspace and Add RIDAC records to projects from All RIDAC page.

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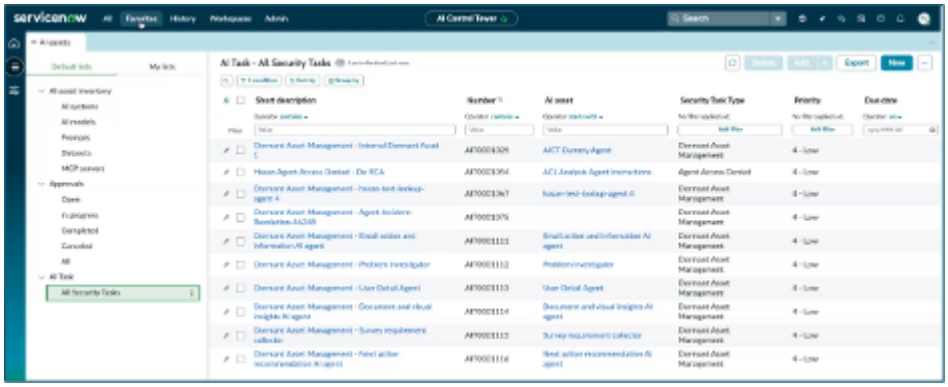
AI Task

Use the **All Security Tasks** tab to view all AI security tasks for your instance. You can also create an AI task on this page.



Configurations

Explore the AI Control Tower Configurations page to manage and govern ServiceNow® AI assets.

The **Configurations** page contains the following sections to manage the workflow of AI Control Tower

- Data sharing, Data overflow processing, and Security & privacy in AI Control Tower
- Controls
- Multi-instance Setup
- AI Gateway
- AI connections
- Playbooks

For information on configuring AI Control Tower, see Configure AI Control Tower.

For information on completing the AI asset lifecycle, see Complete AI asset lifecycle.

Data sharing, Data overflow processing, and Security & privacy in AI Control Tower

Explore the Data sharing, Data processing, and Security & privacy sections.

The section focuses on improving AI models, managing datacenter traffic, and enabling metrics to measure the integrity of your data model and monitor potential threats in large language model (LLM) input and output.

Data sharing

By default, Data sharing is active. You can opt out to deactivate AI Control Tower and share your data with ServiceNow to improve AI accuracy, enhance user experiences, and gain a better understanding of business needs.

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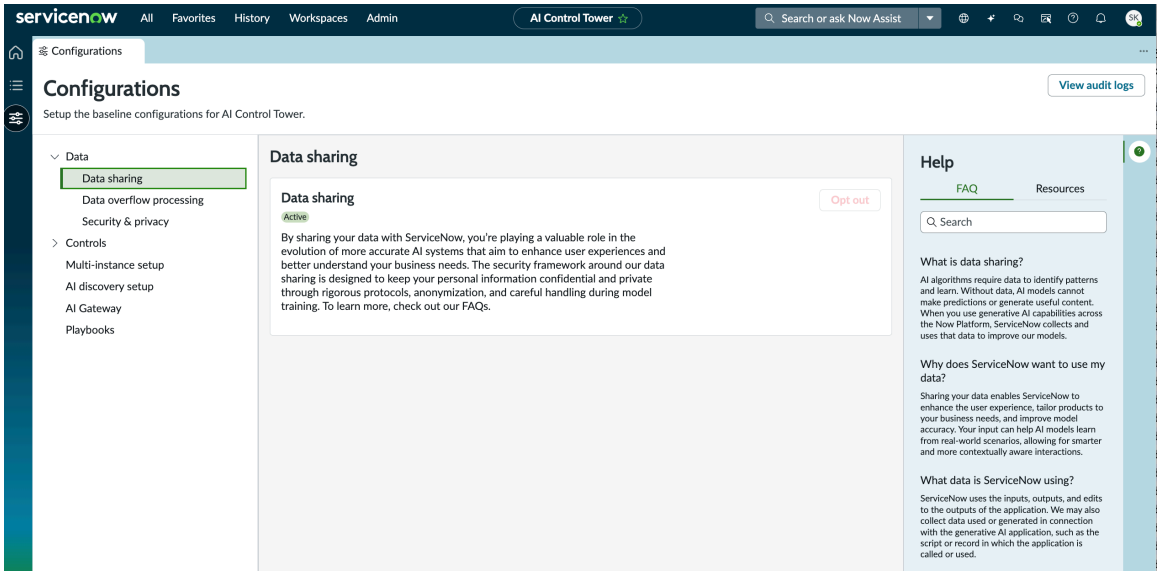

Data sharing helps enhance ServiceNow products, but if you choose to opt out of the ServiceNow data sharing program, you'll no longer be able to contribute data to improve ServiceNow AI products.

For information on data sharing opt-out, see Opt out of data sharing.

Data overflow processing

By default, all Now Assist traffic is managed within ServiceNow datacenters. If there are traffic spikes, the system automatically redirects to Microsoft Azure datacenters to maintain performance. You can opt out of this feature to keep all Now Assist traffic exclusively within ServiceNow datacenters. By default, data overflow processing is inactive.

Note: The Data sharing and Data overflow processing features are available for a sub-prod instance in read-only mode, when Multi-instance setup is configured and active.

Security & privacy

Secure policies violation

These configuration settings control the Security policy violations chart, which shows violations of policies detected in LLM responses. To show data for this chart on the dashboard, select **Configure**, and then select **Active**. If you want to discontinue collecting data for the chart, deselect **Active**.

Note: If you inactivate the chart, past data shows on the chart for 90 days.

You can configure these settings:

- **Security policies** – Predefined ServiceNow policies to track for violations. These policies are based on industry best practices and can't be modified.
  - **Physical Chemical Biological Harm** – Detect recipes, parts lists, or methods that could cause real-world harm. For example, explosives, toxins, or bio agents.
  - **Policy Circumvention** – Detect jailbreak techniques. For example, disabling safety instructions or acting as an unfiltered model.
  - **Untrusted Links Or Downloads** – Detect linking to executable files or malware, directing users to run unverified downloads or macros, or asking users to disable their antivirus protection. Heuristic red flags include EXE, BAT, PS1, and APK files, along with macro-enabled documents.

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- **Intellectual Property Proprietary** – Detect verbatim reproduction of paywalled or proprietary text or code beyond fair use.
- **Malware Exploits Hacking** – Detect exploited payloads, brute force attacks, evasion, persistence, keyloggers, or “ready-to-run” steps.
- **Refusal Appropriateness** – When a request conflicts with policy, refusal should be safe and brief. Detect under- and over-refusal. For example, refusing benign content.
- **Code And Command Safety** – Detect destructive and insecure commands. For example, don't allow “try this risky one-liner,” disabling security, or running unvetted code.
- **Social Engineering Deception** – Detect impersonation and phishing scripts, credential harvesting, and manipulative pretexts.
- **Fraud Misinformation Illegal Facilitation** – Detect how-to guides for illegal or deceptive practices. For example, for market manipulation, fraud templates, or evading audit. Benign corrections of misinformation are allowed, but not fabrication.
- **System Integrity Prompt Containment** – Detect output of system prompts, hidden policies, and internal configurations or tokens.
- **Legal Regulatory Compliance** – Detect guidance to evade regulations or practice without a license. For example, prescriptions, export control, or money laundering evasion.

- **Sampling rate** – The percentage of transactions that are evaluated. A lower sample rate will result in fewer LLM calls but may also result in fewer detected security events.
- **Max skill calls per execution** – The amount of AI usage per call, with a minimum of 10 calls and a maximum of 100 calls. The default is 10 calls. Entering a lower number results in fewer AI calls, but potentially less accurate data.
- **Single or multiple analysis** – Single analysis uses the default LLM to determine whether the model's output or behavior violates predefined security policies. Multiple analysis uses the results from three or more LLMs that ServiceNow supports to make a determination, using the majority result from the LLMs. Multiple analysis requires an odd number of LLMs.

Agent goal hijack

These configuration settings control the Agent output deviation chart, which shows when AI agents deviate from their intended role or objective. For example, unauthorized actions or prompt injection attempts. To show data for this chart on the dashboard, select **Configure**, and then select **Active**. If you want to discontinue collecting data for the chart, deselect **Active**.

Note: If you inactivate the chart, past data shows on the chart for 90 days.

You can configure these settings:

- **Sampling rate** – The percentage of transactions that are evaluated. A lower sample rate will result in fewer LLM calls but may also result in fewer detected security events.
- **Max skill calls per execution** – The amount of AI usage per call, with a minimum of 10 calls and a maximum of 100 calls. The default is 10 calls. Entering a lower number results in fewer AI calls, but potentially less accurate data.

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- **Single or multiple analysis** – Single analysis uses the default LLM to determine whether the AI agent's or skill's response diverges from the expected output. Multiple analysis uses the results from 3 or more LLMs to make a determination, using the majority result from the LLMs. Multiple analysis requires an odd number of LLMs.

Output screening

These configuration settings control the AI agent output with PII detected and High-risk AI agent output charts, which show when agents' LLM output contains PII or security-vulnerable patterns. To show data for these charts on the dashboard, select **Configure**, select **Active**, and then select a setting for the data to collect. If you want to discontinue collecting data for the charts, deselect **Active**.

Note: If you inactivate the charts, past data collected shows on the charts for 90 days.

You can configure these settings:

- **Output Security Vulnerability** – Collect and show data in the High-risk AI agent output chart. The data is collected by scanning LLM output for known vulnerable patterns and potential corresponding attack vectors. For example, HTML tags can have scripts associated with them to generate cross-site script attacks (XSS), or stacked SQL queries that can result in SQL injection attacks.
- **Output Extended PII** – Collect more PII data occurrences and show in the AI agent output with PII detected chart. The data is collected by scanning LLM output for additional PII data patterns beyond those specified in Data Privacy. These PII data patterns are U.S. CA drivers license, U.S. taxpayer ID, U.S. passport number, and vehicle ID number.
- **Output PII Violation** – Collect and show data in the AI agent output with PII detected chart. The data is collected by scanning LLM output for default PII sensitive data patterns specified in Data Privacy. For example, U.S. phone number or credit card number.

Sensitive data input and anonymization

This section shows the data patterns enabled in Data Privacy to detect and anonymize information in LLM prompts. Use this view as a quick reference when troubleshooting Sensitive data detected and Sensitive data anonymized charts. This feature requires the Data privacy plugin to be installed. For more information on how the data is sent and stored, see User data usage policy for Now Assist.

Score weight

This setting controls how the security categories that comprise the score are weighted. You can change the default weights or remove security categories from the score by deactivating them. The score formula is an average across all managed AI assets.

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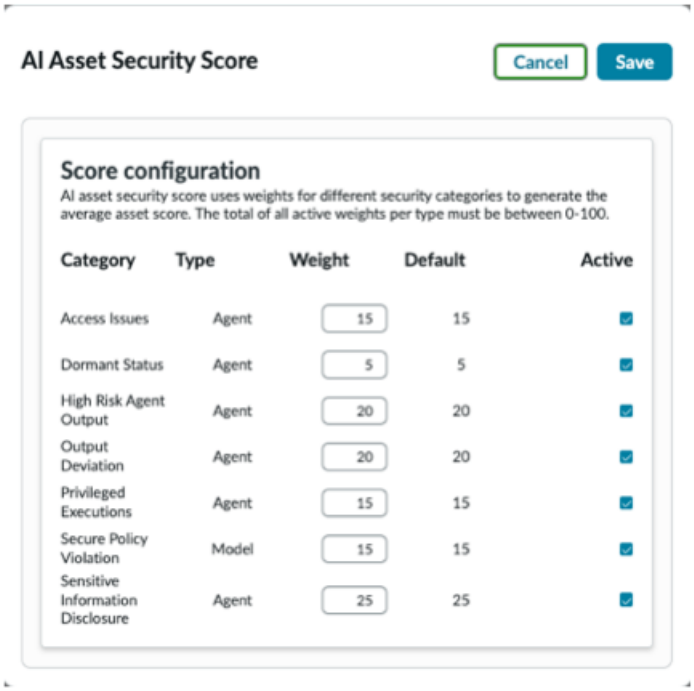

Controls

Explore the **Controls** section on the configurations page of the AI Control Tower.

Expand the **Controls** section to explore the sub sections:

- Explore Approvals
- AI model providers
- Automation rules

Explore Approvals

Explore the **Approvals** section on the Configurations page of AI Control Tower.

The approvals page has two features to set up governance of your approvals for AI assets and workflows.

- AI steward approval for AI assets- when the AI steward approval-required control is active, asset deployment is blocked until it receives an approval from the AI steward approves it. This control is inactive by default but can be activated for required approval before deploying an AI asset.
  1. AI systems- Activating AI systems, all the AI skills and agents need approval by an AI steward before being deployed.
  2. MCP servers- Activating MCP servers setting, AI Stewards can block unapproved MCP servers from being used in AI Agent Studio. The setting is deactivated by default and must be manually activated by the AI steward.

     When you attempt to add an unapproved server in Agent Studio, you'll see an error message: 'Approval is needed to display tools', helping prevent any interaction with that server.
  3. AI models- Activating this all AI models need approval by an AI steward before being deployed.
- Automatically trigger playbooks- enabling automatically trigger playbooks control triggers approval requests for AI assets. When inactive, only the AI steward can initiate requests manually. The recommendation is to have this control activated in the production environment.

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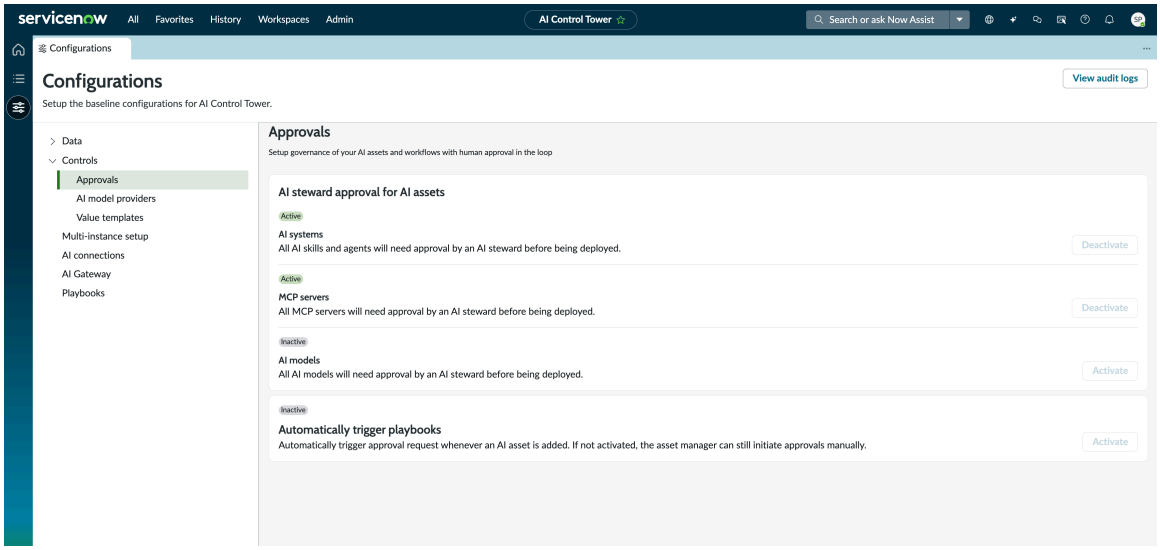

Explore AI model providers

Explore the AI model providers section in AI Control Tower.

AI model providers enable you to select data routing, manage third-party LLMs (Large Language Models) and SLMs (Small Language Models), and configure the third-party LLMs by selecting the allowed model providers.

Data routing and model providers

Data routing is a technology by which LLM and SLM requests are routed to the most suitable datacenter. This technology helps to optimize data traffic, which reduces latency and speeds up response time.

The Data routing and model providers section enables you to route AI model requests and select the Allowed model providers.

There are two types of data routing:

Regional data routing

Regional data routing routes LLM and SLM requests to datacenters within your region. For example, if you're in the APJC (Asia Pacific, Japan, and China) region, these requests could be routed to the most suitable datacenter in the APJC region. Regional data routing can sometimes be mandated by governments of specific regions.

Global data routing

When you opt for Global data routing, LLM and SLM requests are routed to the most suitable datacenter globally.

You can configure the third-party LLM providers using the edit option by choosing either Regional or Global data routing and select all the Allowed model providers.

There are two sections of AI model providers:

- AI model providers supported by ServiceNow
- AI model providers configured by your organization

The AI model providers supported by ServiceNow contain providers such as Now LLM Service, AWS Claude, Now LLM-LTS model and so on.

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The AI model providers configured by your organization such as Perplexity, IBM Watson and so on.

AI asset lifecycle

Note: You can select Now LLM Service- LTS (Long term stable) Model, which supports regulated industries, such as financial institutions, with stronger AI lifecycle management, governance, transparency, and compliance tools.

For more information on Now LLM Service- LTS model, see Long term stable models

For information on exploring the scenarios configuring third-party LLMs for all the regions, see Explore Third-party LLMs and regions

For information about configuring third-party LLMs through Data routing configuration for APJC region, see Configure third-party LLMs using AI Control Tower

Fallback and Spillover

Fallback

If you have active AI systems in ServiceNow® that aren't supported by your enabled model providers, the 'fallback mechanism' enables these systems to continue operating with their default providers. However, if you choose not to enable fallback, these AI systems must be deactivated. AI systems deployed on fallback providers conform with the list of approved providers.

Note: The Fallback is activated by default and can be modified.

Spillover

Regional deployments of AI models can experience limited capacity, which could lead to request rate limiting and impact performance. Enabling spillover can help prevent these performance issues. In ServiceNow®, only Azure OpenAI currently makes this switch.

Note: The Spillover feature gets active or enabled when Azure OpenAI gets selected.

Impact Summary

The Impact Summary is determined by the chosen Allowed model providers and the status of the fallback, which is either active or inactive. The Fallback significantly affects how the Impact Summary data appears in the Impact Summary table.

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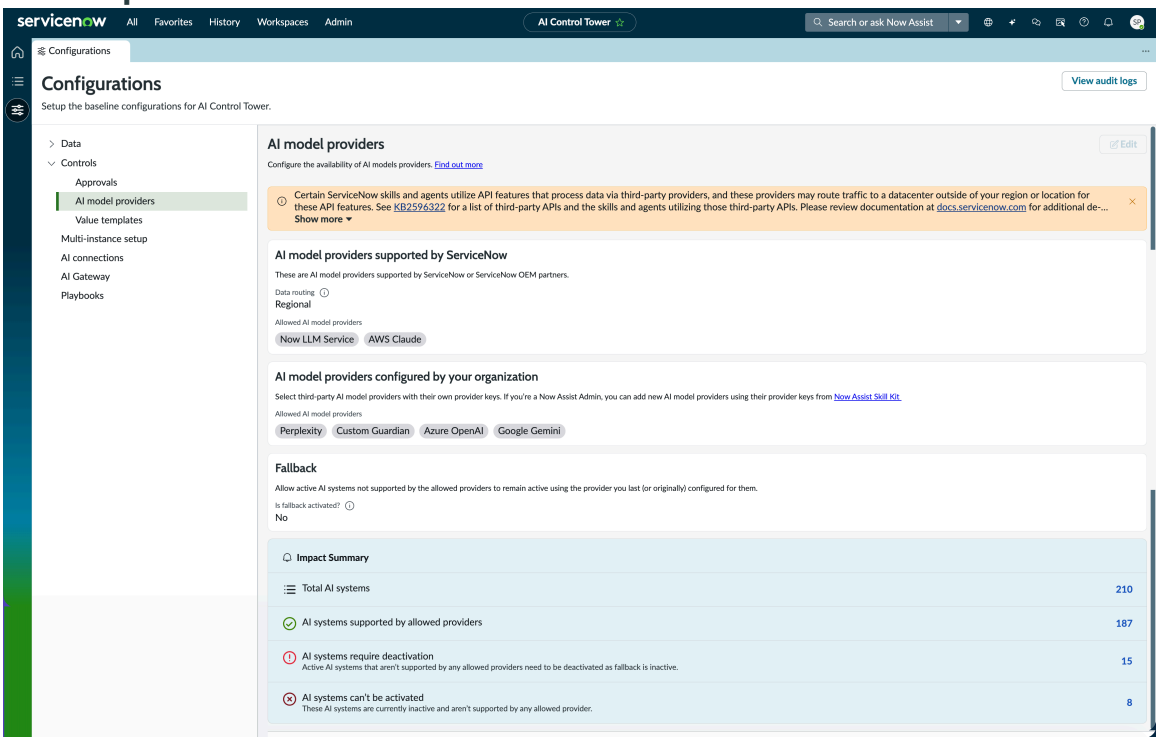
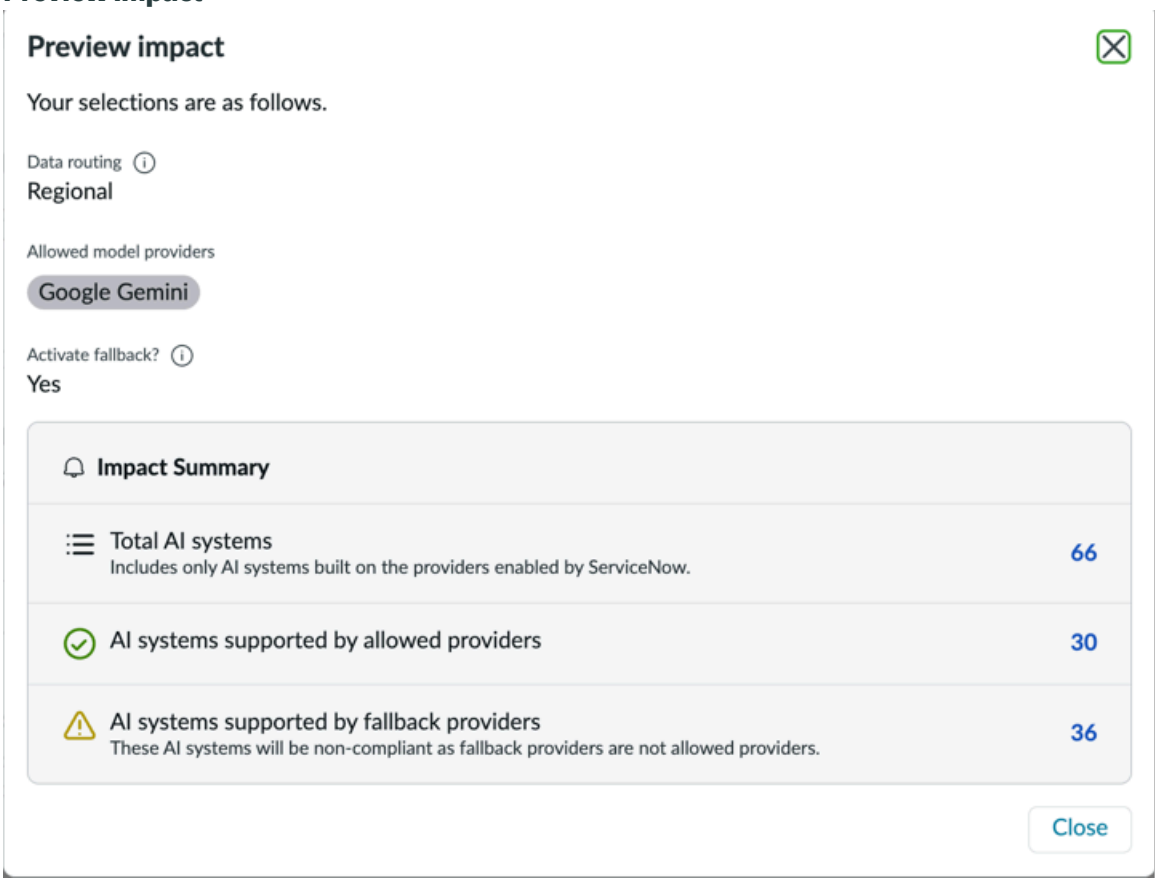
AI model providers



You can use the edit option to select Yes or No for activating the Fallback. Before saving, you can select Preview impact to review and confirm all your selections.

Preview impact



Let's review the Impact Summary table data for the following two scenarios.

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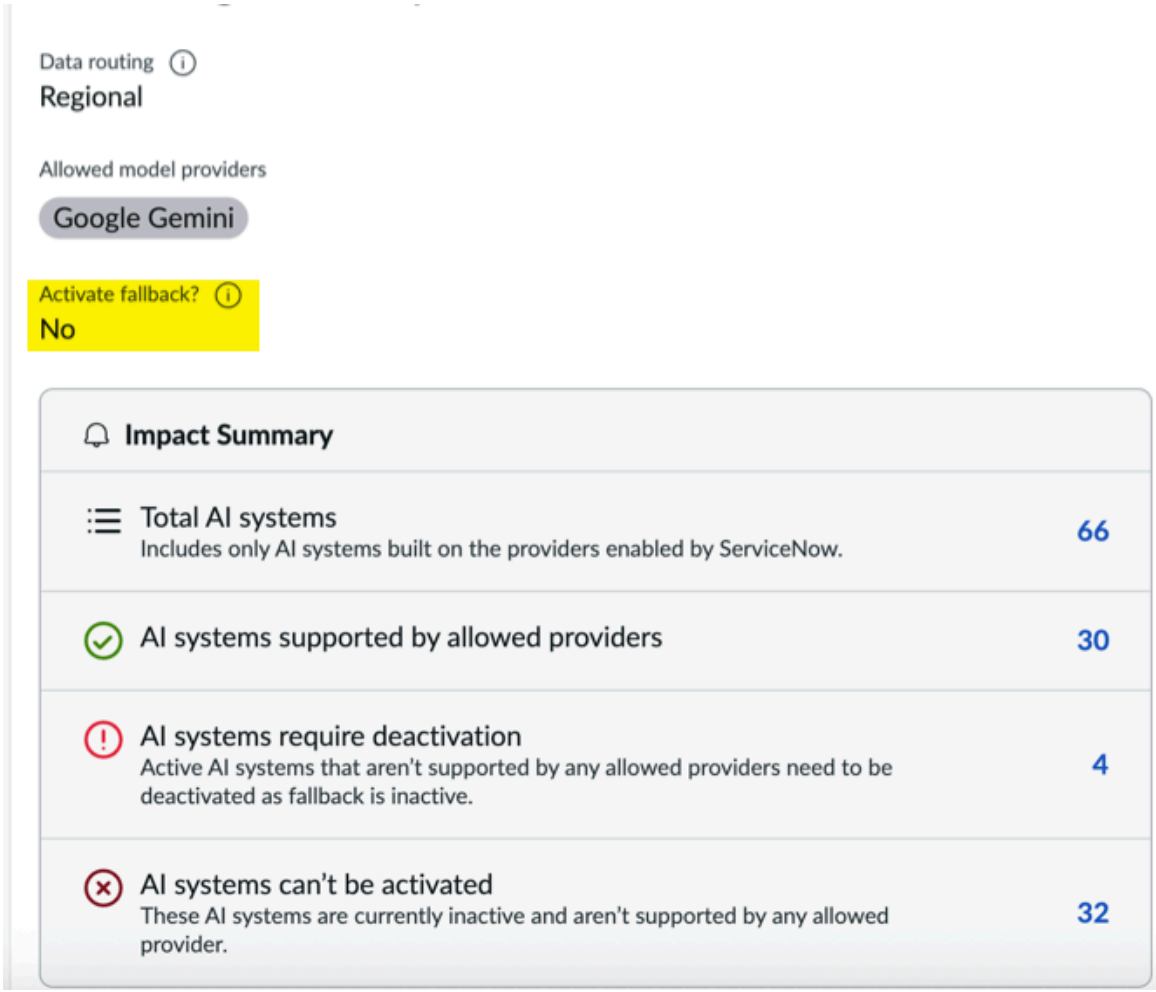
Activate fallback- No

- Total AI systems- Shows all AI systems that are supported by the allowed model providers.
- AI systems supported by allowed providers- Shows AI systems with skill sets that are supported by the providers.
- AI systems require deactivation- Lists all active AI systems that lack provider support and must be deactivated because the fallback option isn't enabled.
- AI systems can't be activated- Shows all those systems, which are currently inactive and aren't supported by any provider.

Activate fallback- No



Activate fallback- Yes

- Total AI systems- Shows all AI systems that are supported by the allowed model providers.
- AI systems supported by allowed providers- Shows all AI systems with skill sets that are supported by the providers.
- AI systems supported by fallback providers- Shows AI systems that are non-compliant as fallback providers aren't permitted providers.

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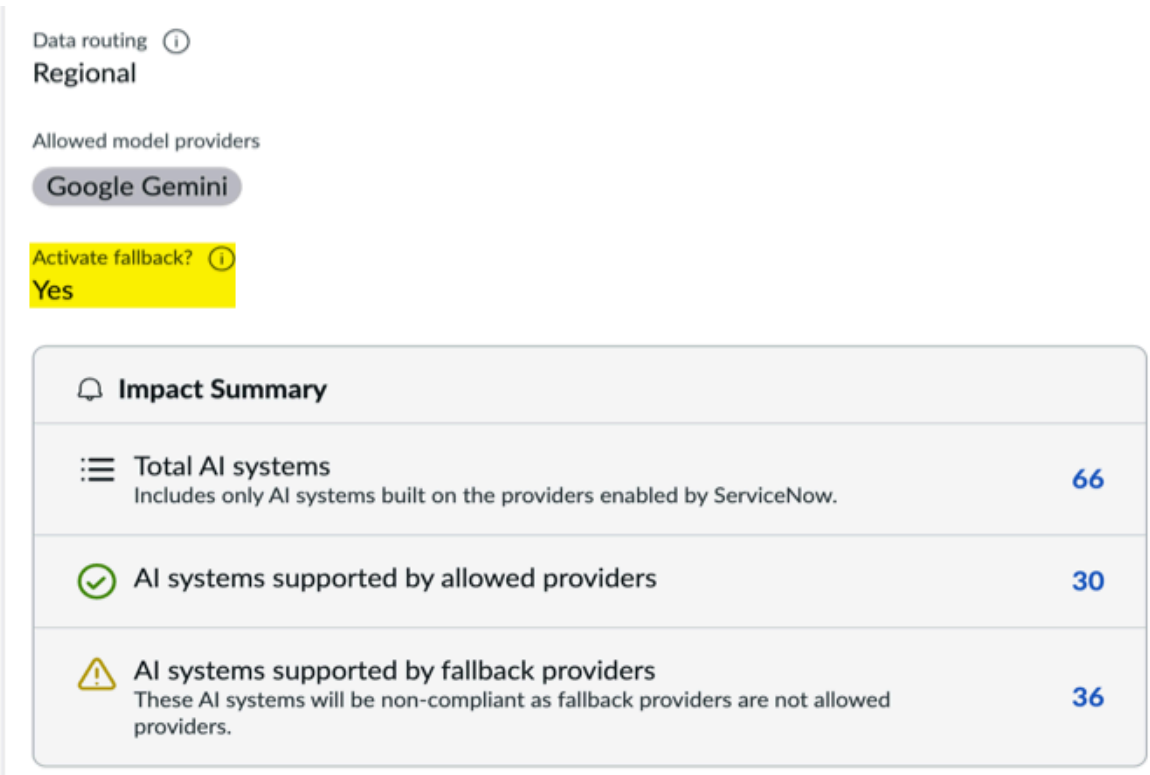
Activate fallback- Yes



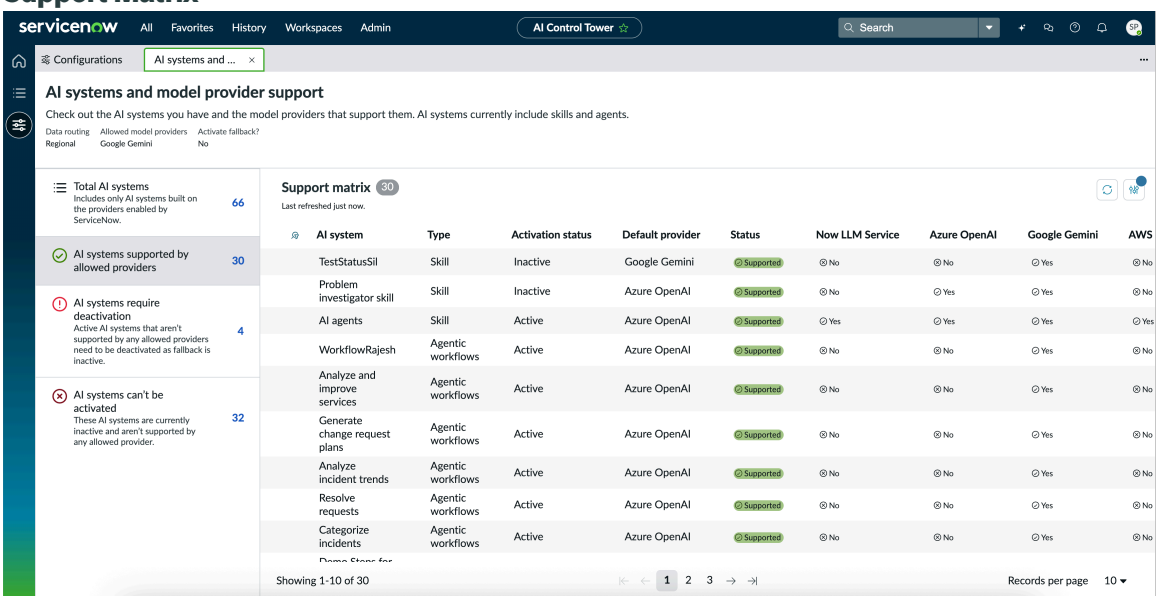
Note: The entries in the Impact summary table change based on the fallback status.

When you select an entry from the table, the support matrix page appears with those selected entries, allowing you to update your personalized list.

The support matrix presents all AI systems in a table format, along with their respective AI model providers. You are able to view the support matrix table and categories such as AI system, type, activation status and more, as well as the selected AI model provider.

If you have selected an AI provider, which is supported by your organization or a third party provider, the selected provider will show up in the AI systems and model provider support table.

Support Matrix



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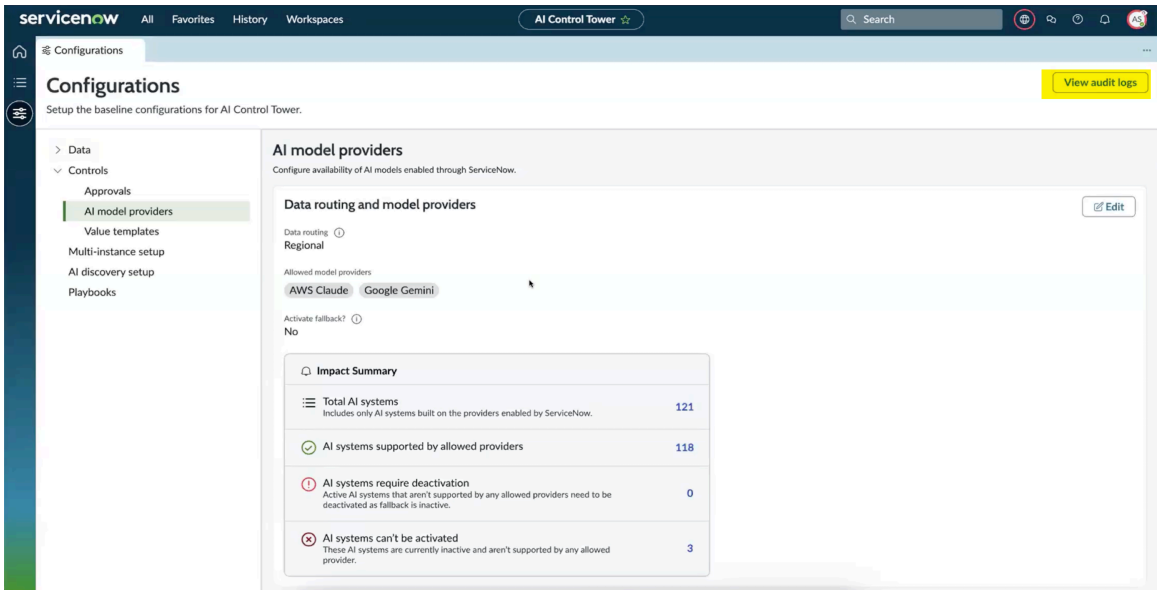
Audit logs

Audit logs show configuration changes made on Data, Approvals, and AI model providers categories in AI Control Tower. You can select the **View audit logs** option to view the Audit logs.



The Audit logs page displays all the configuration changes details organized in the following categories:

- Timestamp
- User
- Changed category
- Changed setting
- After change
- Before change

You can also filter the changes by selecting a date range, starting with the last 90 days.

Note:

In the Multi-instance setup, when a managed (sub-prod) instance is added or removed from the syncing instances in the AI inventory information to synchronize with a specific manager (prod) instance, the audit logs first display a record of all instances being removed, followed by a separate record indicating the instance being added or removed.

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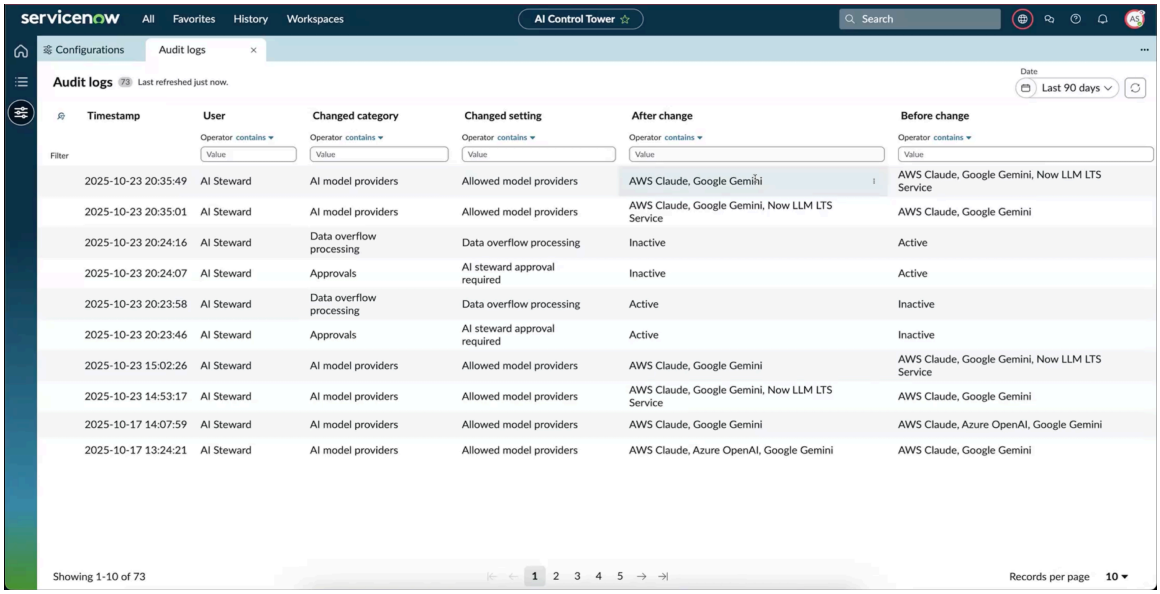

Automation rules

The Automation rules define how AI assets are set to managed.

Automation rules Overview

The Automation rules page displays all default rules available in AI Control Tower. AI Stewards can modify existing rules or create based on their organizational requirements.

Rule limits

- Maximum rules allowed: 10
- Maximum rules that can be active simultaneously: 5

How rules are applied

Once activated, rules are enforced according to the schedule defined in the Run AI Asset Management Rules Scheduled job.

Reference

For information on managed and unmanaged assets, see Assets list- managed and unmanaged assets.

Multi-instance Setup

The multi-instance setup enables a prod (manager) instance to control, manage, and communicate with multiple sub-prod (managed) instances for AI Control Tower.

AI asset Synchronization

Multi-instance setup uses the multi-instance framework, which helps the user to synchronize assets from sub-prod instances to prod instances for a faster review process.

Multi-instance setup synchronizes rules for the sub-prod instances from the prod instance.

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Note: Starting with the February 2026 release, ensure that both the prod and sub-prod instances are running the same AI Control Tower core version (5.1.1), which is the minimum supported version.

If there's any upgrade to version 5.1.1 in a sub-prod, then it's advisable to upgrade the prod instance to 5.1.1 to ensure Multi-instance framework functions correctly.

AI inventory information

You can include the sub-prod instances that you want to synchronize with the prod instance. This synchronizes AI inventory information between the instances.

When configured, the scheduled job starts syncing AI systems, AI models, prompts, and datasets. From the September (2025) release, the job has been enhanced to include syncing AI agents as well.

Note: State of the assets while configuring Multi-instance management.

The AI inventory in production reflects the true state of your assets like models, datasets, or skills from a production standpoint. Even if a model or dataset is active in a sub prod (lower) environment, it's still considered as under development from a prod perspective, since it's being tested and not yet live.

For this reason, you don't synchronize asset states across environments. An asset's state changes to **deployed** only when the asset and its related records are activated in the production system.

In summary, the state represents the overall lifecycle of the asset, not its local status in a specific environment.

Data sharing preference

You have the option to enable the data sharing preference, when it is enabled the preferences of the data sharing from the production will be applied to all sub-prod instances. By default, the data sharing preference is turned off.

Data overflow processing and bursting preference

You have the option to enable the data overflow processing and bursting preferences, when it is enabled the preferences of the data overflow and bursting from the production will be applied to all sub-prod instances. By default, data overflow processing and bursting is turned off.

Note: All the preferences mentioned earlier for a sub-prod instance are available in read-only mode, when Multi-instance is configured and enabled.

For information about configuring Multi-instance management for AI Control Tower, see Configure multi-instance management for AI Control Tower

For information about Data section, see Data sharing, Data overflow processing, and Security & privacy in AI Control Tower

AI Gateway

Explore the AI Gateway page and its tab in the AI Control Tower Configurations.

The AI Gateway page enables you to pause and resume AI Gateway transactions, as well as monitor AI connections. The AI Gateway page has the following tabs:

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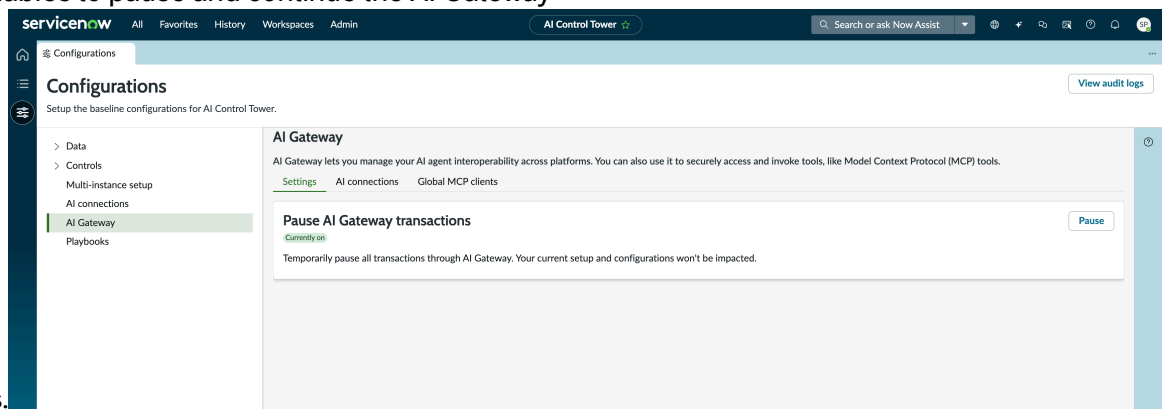
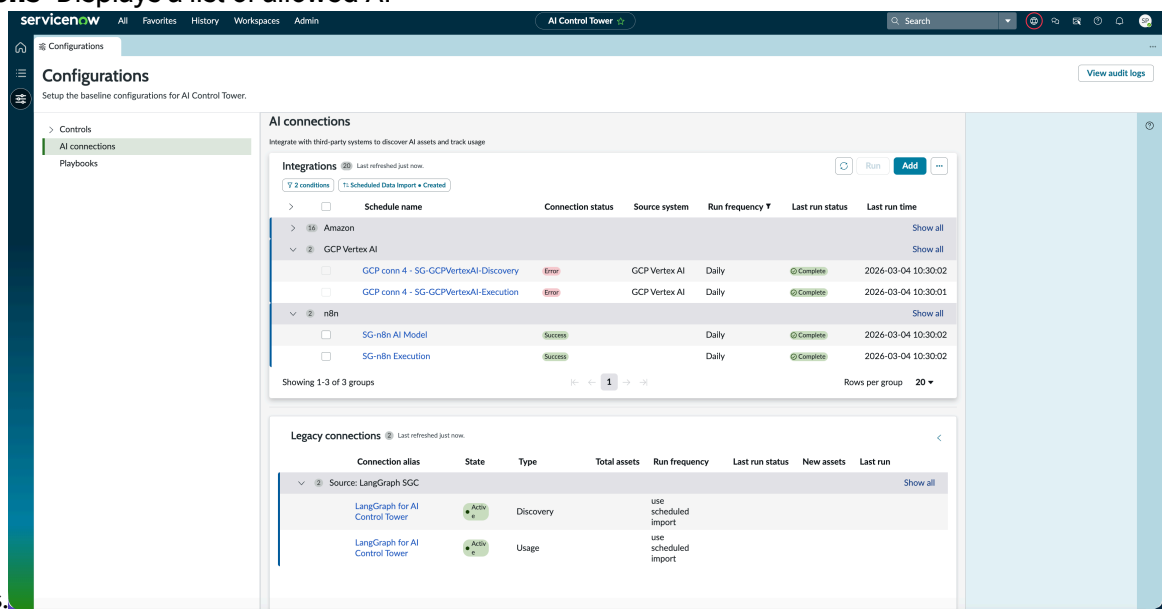
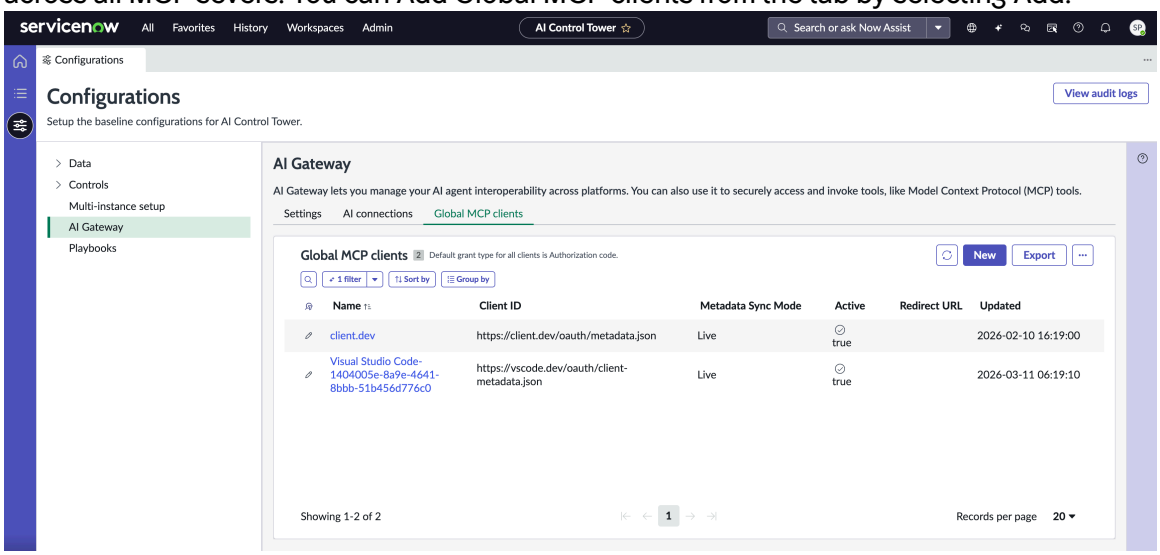
Settings- enables to pause and continue the AI Gateway transactions.



AI connections- Displays a list of allowed AI connections.



Global MCP clients- View the list of Global MCP clients (CIMD support), Where CIMD refers to Client ID Metadata document. These Global MCP clients once created can be used across all MCP severs. You can Add Global MCP clients from the tab by selecting Add.



For more information on adding a Global MCP client, see Add a Global MCP client.

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You can filter and export the list into PDF, JSON, Excel, and CSV format. The list of allowed AI connections is categorized into.

- Name
- Allowed on AI Gateway
- Last updated by
- Updated

For information on AI Gateway tab on the AI Control Tower Home, see AI Gateway tab in AI Control Tower

Playbooks

The Playbook templates list has a record of Approval Playbook for Now Assist approvals and Asset lifecycle playbook templates.

The Now Assist approval is a workflow that facilitates the AI asset approval process.

The AI asset lifecyle is completed by the following steps:

- Onboarding
- Assess
- Build and test
- Deploy

You can create your own playbook workflow by customizing the number of steps or rearranging them, as well as applying different security policies.

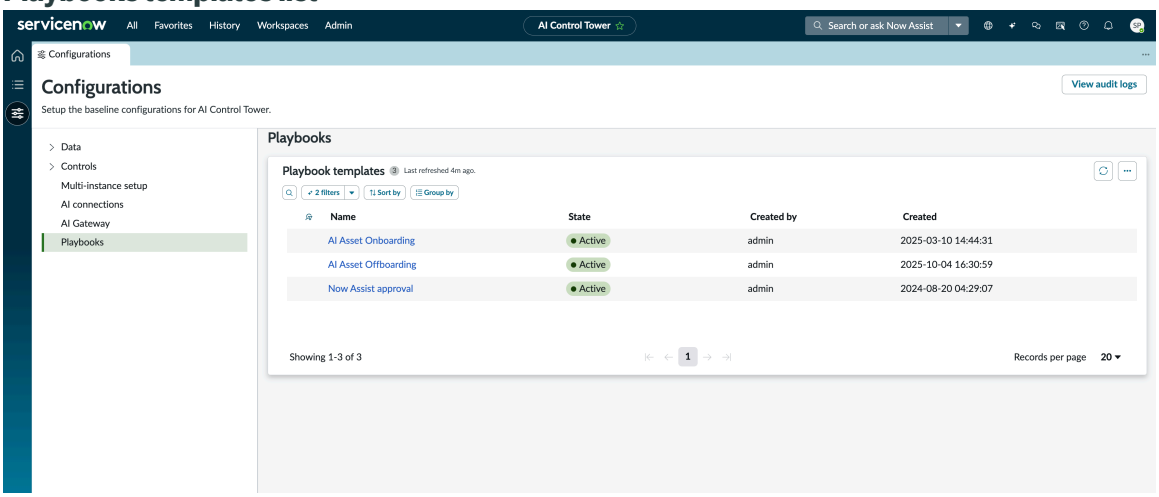
Note: To retire an asset, offboarding process is initiated.

For information about AI asset lifecycle process, see AI asset lifecycle

To view AI assets by lifecycle stages, see View AI assets by life-cycle stage

For information about Off-boarding and creating offboard requests for AI assets, see Create offboarding requests for AI assets

Playbooks templates list



For information on creating a AI Control Tower playbook workflow for Now Assist approvals, see Create an AI Control Tower Playbook workflow.

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To view the Asset lifecycle stage, see View AI assets by life-cycle stage and to view the completing of the Asset lifecycle stage, see Complete AI asset lifecycle

Product Owner portal

Explore the product owner view and navigate through the accessible tabs on AI Control Tower to ensure a comprehensive understanding of the features.

Product owner view

The AI Control Tower product owner view displays tabs for AI asset owner and workspace users. The AI asset owner can access **My overview**, **Value**, and **Adoption** tabs and the workspace user can access the **AI portfolio** tab.

For information about My overview tab, see My overview tab in AI Control Tower

For information about My portfolio tab, see AI portfolio tab in AI Control Tower

For information about Value tab, see Value tab in AI Control Tower

My overview tab in AI Control Tower

The **My overview** tab in the AI Control Tower home page displays all active assets to the asset owner and the AI stewards for assets that they manage or own.

Explore My overview tab

The **My overview** tab displays the following widgets. You can drill down into the data on each widget.

Assets

This area displays all the assets owned by the asset owner, organized into the following categories:

- Generative AI
- Agentic AI
- AI prompt
- AI dataset
- AI model

Assets by lifecycle status

This area displays the lifecycle status of the assets, organized into the following categories:

- Deployed
- In review
- AI steward review
- Ready for deployment
- Rejected
- Cancelled

AI cases by state

This area displays the active cases categorized into **New** and **Triage**.

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The **Create an AI asset** button is added to the home page to track and manage the life cycles of your AI systems, AI models, Prompts, and Datasets.

Tasks and cases list

The **My overview** tab displays a list of tasks and cases. You can view all the active tasks that are assigned by default under tasks.

The tasks list includes the following columns:

- Number
- Priority
- Short description
- Assigned to
- State
- Due date
- Asset in review

The cases list includes the following columns:

- Name
- Number
- Case analyst
- Assignment group
- State
- Priority

AI portfolio tab in AI Control Tower

The **AI portfolio** tab in the AI Control Tower home page displays all AI assets, which includes (active, inactive, and completed) to the workspace users.

Explore AI portfolio tab

The AI portfolio tab AI shows all the active AI assets organized into the following categories:

- AI systems
- AI model
- Datasets
- Prompts

The lifecycle status of AI assets is divided into the following categories:

- In review
- Approved
- Rejected
- Deployed
- Retired

The AI assets list includes the following columns:

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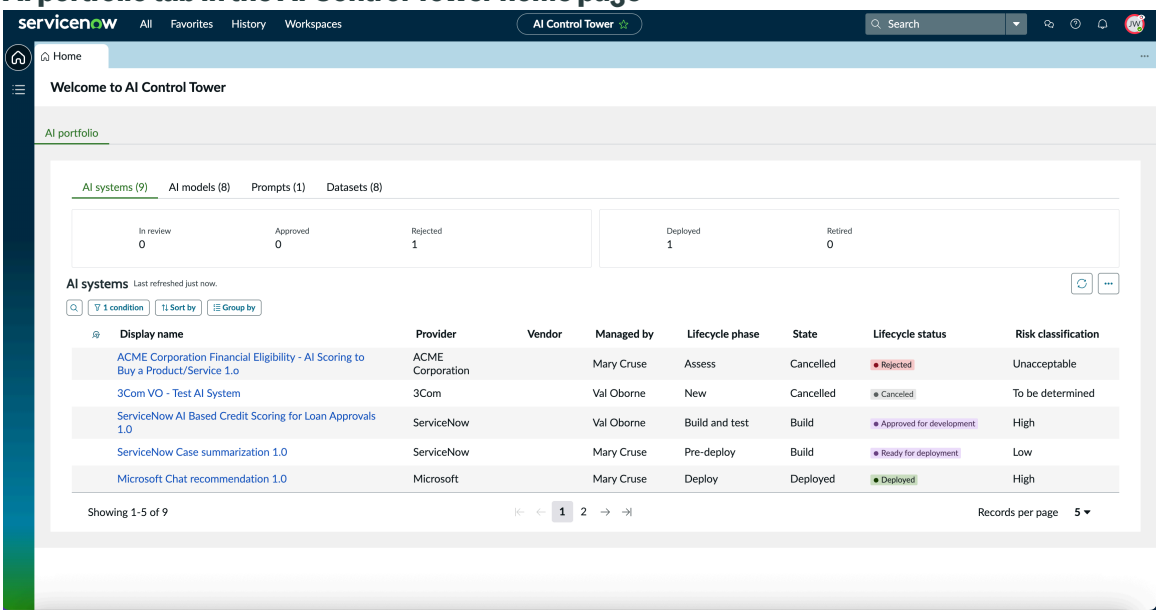
- Display name
- Provider
- Vendor
- Managed by
- Lifecycle phase
- Install status
- Lifcycle status
- Risk classification

The following image displays the AI portfolio tab as it appears to a workspace user.

AI portfolio tab in the AI Control Tower home page



Business portfolio tab in AI Control Tower

The Business portfolio tab on the AI Control Tower home page displays AI adoption trends across your business application portfolio.

The Business portfolio tab is accessible from the AI Control Tower workspace home page.

Business portfolio widgets

The Business portfolio tab displays the following widgets. You can drill down into the data on each widget.

- Business applications by AI system association: The total number of business applications, broken down into **Linked to AI systems** and **Not linked to AI systems**.
- AI systems by business application association: The total number of AI systems, broken down into **Linked to business applications** and **Not linked to business applications**.

You can filter the widgets by business application attributes, such as department, business unit, or application family.

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Viewing the underlying list

Select either segment of a donut chart to open the corresponding filtered list of business applications or AI systems.

Select a business application's **Number** in that list to open its record directly within the AI Control Tower, without navigating to the Enterprise Architecture Workspace.

Related topics

My overview tab in AI Control Tower

AI portfolio tab in AI Control Tower

AI Control Tower integration with Enterprise Architecture

Definitions of AI asset inventory

Explore AI asset inventory, and AI assets.

AI asset inventory overview

The AI asset Inventory provides a record of all components and their connections that contribute to an AI experience. In ServiceNow AI Control Tower, AI asset inventories can be organized in multiple ways. Organizations may opt to manage one or more of these AI assets as part of their overall AI governance strategy.

- AI systems
- AI models
- Datasets
- Prompts

For more information on, AI asset inventory tab, see AI asset inventory tab in AI Control Tower

For information on AI assets, see AI assets

AI systems

Explore AI systems in detail with examples.

AI system

An AI system is a type of computer program designed for performing tasks that typically require human intelligence, such as learning the language, deciding, or recognizing images. Unlike traditional software that operates based on set rules, AI systems learn from data, adapt their actions, and can decide on their own.

Hierarchical AI system

AI systems can be interconnected, with one system potentially depending on the outputs of another, referred to as a sub AI system." Recognizing these connections is important for monitoring AI usage and clarifying responsibilities.

Tools are considered attributes of an AI system or sub AI system. They aren't tracked as separate AI assets in the inventory and don't have a lifecycle managed by the AI Control Tower for governance or value assessment. The concept of Tools is relevant for agentic AI use cases, where they're linked to AI systems during discovery, often through cloud platforms like Azure Foundry, AWS, or internal discovery processes.

AI Control Tower helps identify and track all AI systems in an organization, including how they're connected. This supports AI risk assessments and audits.

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Examples:

- Spam filter in Gmail- Determines whether emails are spam or not
- Netflix recommendation engine- Suggests shows that you might like
- Self-driving car software- Makes driving decisions
- Chatbot like ChatGPT-Responds to questions
- AI Issue Resolution Agent- uses other smaller AI systems like Issue Summarization and Owner Mapping

Example of an AI system

The AI Control Tower application and the AI Risk and Compliance application play a critical role in managing and governing the responsible use of AI systems, especially in high-stakes domains such as banking and finance.

While AI risks extend beyond banking and finance, consider an AI system for credit scoring in loan approval as an example. This system interacts with other models, interfaces, monitoring tools, and decision rules. The AI Control Tower solution along with the AI Risk and Compliance application can help to ensure compliance and responsible usage when the AI system is created, built, and deployed.

For instance, an organization might use AI to generate credit scores for loan approvals and using those scores to make approval decisions. The AI system can be fed a variety of data from the following large language models (LLMs):

- Now LLM: Provides financial information, payment history, and so on.
- Open AI: Provides details such as bankruptcy filings, court judgments, and so on.
- Azure OpenAI: Provides spending and saving patterns.

The figure in the following example illustrates how an AI system is interrelated with datasets, models, and the broader ecosystem.

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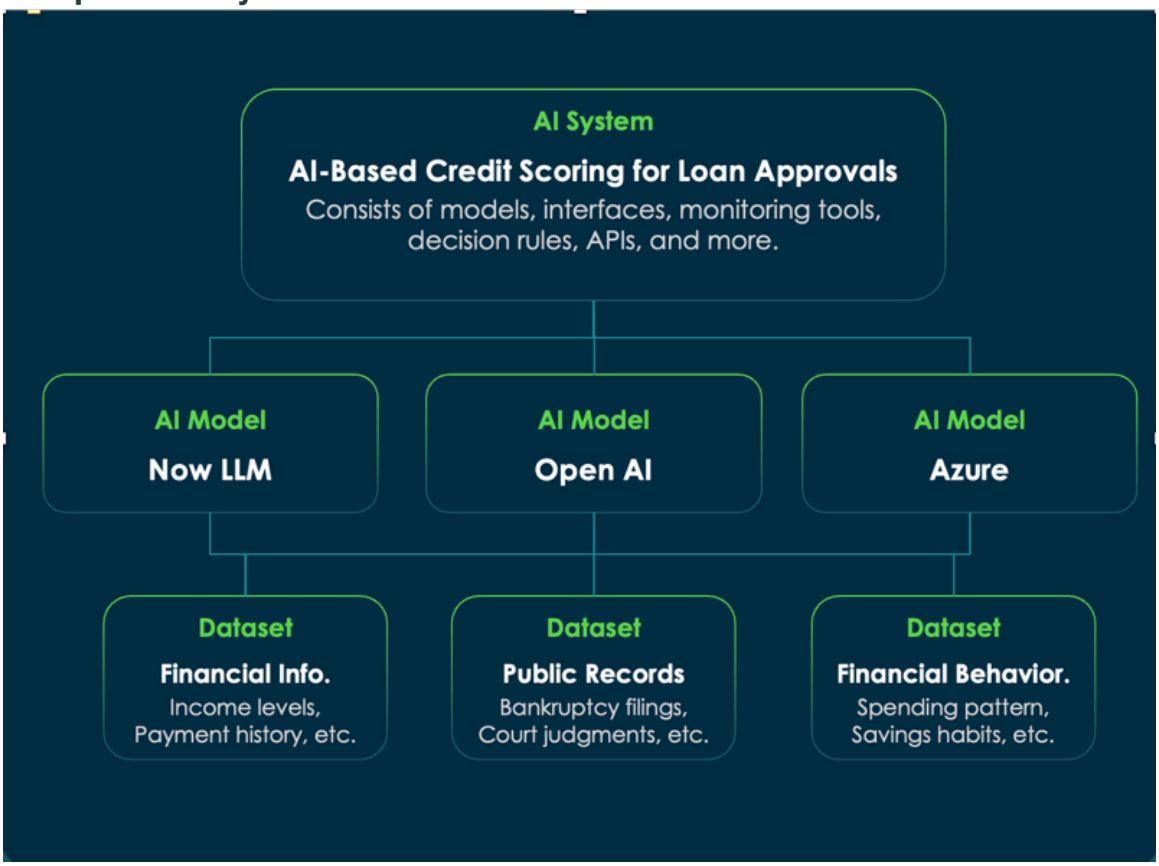
Example of an AI system



AI models

Explore AI models in detail with examples.

An AI model acts as the "brain" of an AI system. It learns from previous data and applies that knowledge to make predictions, respond to questions, or identify patterns. Models are developed using various training techniques, such as:

- Supervised learning
- Unsupervised learning
- Reinforcement learning

Learning which models power your AI systems is important for monitoring their accuracy, fairness, and potential risks.

Examples:

- Spam detection model- Flags emails as spam
- Language model (like ChatGPT)- Generates text
- Image model- Recognizes objects in photos
- Credit model- Predicts who might default on a loan

Prompts

Explore prompts in detail with examples.

A prompt is a question or instruction provided to an AI system, indicating what you want it to accomplish. Prompts are commonly used in tools like ChatGPT or image generators.

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Certain AI systems, such as GenAI systems, require user prompts to function. Monitoring prompts can help analyze user interactions with the AI and the types of outputs produced.

Examples:

- Write a poem about the moon- AI writes a poem
- Translate hello into Spanish- Hola
- Show red dresses under $50- Filters e-commerce results
- Summarize this email- Creates a short summary

Datasets

Explore datasets in detail with examples.

A dataset is a collection of data used to train or evaluate an AI model. You can think of it as a large spreadsheet with rows representing examples and columns for features or labels. Datasets can also come in other formats, such as images, audio, or video. They help models learn patterns and decide.

Mapping datasets within the AI Control Tower is important for tracking data sources, ownership, and other key details, making it a vital part of the organization's AI governance program.

Examples:

- A set of labeled images (dogs, cats) for training a model
- Articles and books for training a language model
- Customer purchase history for recommendations
- Medical records for diagnosis tools

Inter-dependencies

Explore the inter-dependencies of AI systems, AI models, and datasets.

An AI system operates as part of a larger framework, closely connected to the AI model powering its capabilities and the datasets that shape its behavior. While these elements are interrelated, each plays a unique role and should be clearly identified to confirm effective governance.

Overlooking any aspect, such as the training dataset or the model supporting an AI feature can result in incomplete risk assessments, audit challenges, or compliance issues.

Comprehensive responsible AI governance requires attention to all these components:

- Inventory for each AI system
- Identify the associated AI model
- Document the dataset

For a visual example of how these elements interact, see Example of an AI system

For information on Model asset classes, see Model asset classes

For information on AI assets API, see AI Assets API

Explore Third-party LLMs and regions

Explore all the scenarios for configuring third party LLMs and SLMs based on the regions.

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Configuration overview

These are the few scenarios to consider when configuring LLMs:

APJC, AMS & EMEA regions

LLMs follow regional data routing configurations, as there's no global routing option and you can view all the allowed providers.

Regulated markets

The Data routing configuration isn't available, and the list of allowed providers is limited. You can view the allowed provider, but only in a read-only format.

Activating Fallback enables AI systems supported by your approved providers to stay active by using their default providers. Manually deactivating Fallback ensures that these AI systems remain inactive.

For information about Data routing, Fallback, Spillover and Impact summary, see AI model providers

For information on configuring of third party LLMs for APJC region, see Configure third-party LLMs using AI Control Tower

Explore Now Assist AI asset discovery

Explore the syncing process of AI assets including models, datasets, prompts, skills, and agentic AI components into the AI Asset Inventory of AI Control Tower.

The AI systems are synchronized from source Now Assist skill config record (sn_nowassist_skill_config).

1. The out of the box skill meets the following conditions for an AI system:
   a. If active, insert.
   b. If not active, insert only if it belongs to the custom skill category and is published.
2. If the skill exists in AI Control Tower and the source Now Assist skill config record is updated, those changes are applied to the AI system record in AI Control Tower. The state for the AI system is mapped as follows based on source Now Assist skill config record state:
   a. Active: Mark as Deployed
   b. Published or Draft: Mark as In Development
   c. Retired: Mark as Retired
   d. Deleted: No update is made

AI Asset Sync Mapping Overview

Type	Source Table	Target Tables	Field Tracked	Records included
Models	sys_generative_ai_model_config	cmdb_ai_model_digital_asset, cmdb_ai_model_product_model	active, max_tokens, model, supported_languages, domain_id	Active = true
Datasets	sys_one_extend_test_dataset	cmdb_ai_dataset_digital_asset, cmdb_ai_dataset_product_model	status, name, description	Published = true eval_run datasets

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AI Asset Sync Mapping Overview (continued)

Type	Source Table	Target Tables	Field Tracked	Records included
Skills	sn_nowassist_skill_config	alm_ai_system_digital_asset, cmdb_ai_system_product_model	active, datasets, prompts, model, sys_created_by, domain_id, name, description	Active = true or state = published for custom skills; skill family not platform or any of its children(non platform skills)
Prompts	sys_generative_ai_config	alm_ai_prompt_digital_asset, cmdb_ai_prompt_product_model	active, prompt, model, name, version	Active prompts with active model and linked skill
Tools	sn_aia_tool	sn_ent_ai_tool	name, description, type, active, sys_created_by, domain_id	
AI Agents	sn_aia_agent	alm_ai_system_digital_asset, cmdb_ai_system_product_model	name, description, role, instructions, sys_created_by, domain_id	Active = true
Agent Tool Mapping	sn_aia_agent_tool_m2m	sn_ent_ai_system_agent_tool_component_m2m	agent, tool mapping	All agent-tool mappings
Agent Use cases	sn_aia_usecase	alm_ai_system_digital_asset, cmdb_ai_system_product_model	name, description, sys_created_by, domain_id	Active = true
Usecase to Agent mapping	sn_aia_team_member	sn_ent_ai_system_usecase_agent_m2m	usecase, agent mapping	All usecase-agent mappings

For more information on Model, dataset, prompt, and skill sync process, see KB2674041 article in the Now Support Knowledge Base.

Enterprise AI discovery: Unlock Visibility, Governance & Value

Explore Enterprise AI discovery, its key benefits, and capabilities.

AI discovery overview

Enterprise AI discovery is a fundamental feature of the AI Control Tower offering a unified and comprehensive view of all AI assets—including AI systems, agents, models, prompts, and tools—across various hyperscalars, AI apps, and Agentic AI frameworks via Service Graph Connectors (SGC).

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Key Benefits

- **Eliminate Blind Spots:** Aggregate fragmented AI assets for holistic visibility and control.
- **Accelerate Governance:** Centralize compliance, security, and operational efficiency.
- **Drive Innovation:** Enable responsible, scalable, and auditable AI ecosystems where governance and innovation coexist.

Why AI discovery

- Fragmented AI ecosystems create governance and compliance risks.
- Enterprises need real-time visibility into AI usage including shadow AI to ensure security, compliance, and operational efficiency.
- AI discovery empowers organizations to accelerate innovation while reducing risk.

Key Capabilities

- **Unified Registry:** Aggregate AI assets from hyperscalars, AI apps, and Agentic AI frameworks such as AWS Bedrock, Azure AI Foundry, Copilot Studio, Google Cloud Platform (GCP) Vertex AI, ServiceNow agents, and more.

  Note: We identify Assets and CIs (Configuration Item) using their unique source IDs, such as ARN (Amazon Resource Names) for AWS and Product Models are identified by the associated asset.

- **Automatic Discovery:** Seamlessly discover and incorporate agents, models, prompts, and tools into the AI Control Tower's AI asset inventory.
- **Comprehensive Meta data:** Capture detailed information for each asset, including relationships, versions, and operational status.
- **Visibility & Control:** Eliminates silos by aggregating AI assets from all major platforms, enabling holistic management and oversight, across cloud, on-premises, and hybrid environments. The AI steward has visibility into all the connections and integrations that the admin has set to be able to maintain oversight and get access to active connections. Enabling AI stewards to selectively synchronize assets and environments.

AI discovery challenges & solution

Enterprise AI adoption is growing rapidly, yet many organizations face challenges with fragmented visibility across internal developments, vendor offerings, and cloud deployments. The AI discovery feature in AI Control Tower automatically detects AI assets on the Now Platform, AWS Bedrock, Azure Machine Learning Services, Azure Cognitive Services, Copilot Studio, and GCP Vertex AI, then adds them to the ServiceNow's Configuration Management Database for unified governance.

This capability helps organizations achieve comprehensive visibility of their AI assets while supporting the expansion of initiatives across hybrid cloud environments.

Business Impact

AI discovery helps organizations reduce AI deployment risks by automatically finding AI assets and simplifying compliance. This feature improves governance by showing AI deployments across different environments, helping executives make informed decisions with full transparency. It also tracks AI usage and adoption, allowing organizations to measure productivity gains.

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For customers using both ServiceNow and cloud platforms, AI asset discovery is unified. This simplifies operations and ensures strong visibility.

AI discovery in the AI Control Tower enables enterprises to automatically find, catalog, and manage AI assets across cloud platforms through AI connections.

This setup can be accessed through the AI connections page in AI Control Tower using ServiceNow Graph Connectors to discover AI assets, and usage.

AI connections

Explore the AI connections page and its features.

AI connections overview

The AI connections page enables you to integrate the third-party systems to discover AI assets and track data usage from hyperscalars, AI apps, and agentic AI frameworks via Service Graph Connectors (SGC) to set AI connections. AI stewards can access the AI connections page and on this page, you can find a list of data sources displayed in columns.

Note: The AI connections page appears only when the plugins com.sn_ai_disc and sn_sgc_central are installed.

Agents are discovered according to the set run frequency, but you can also manually discover agents or collect usage data by selecting a connection and choosing the run option. AI stewards are able to perform this action, including activating or deactivating the AI connection by selecting the State column in the list. Admins are able to adjust the run frequency by accessing the connection alias.

Note: Uninstall the AWS AI Discovery plugin before installing the AI Discovery plugin (sn_ai_disc) to use the AI connections.

There are two types of scheduled jobs on AI connections.

Discovery

To discover AI assets from hyperscalars, AI apps, and agentic AI frameworks.

Execution

To process usage data and the data is visible on the Performance analytics page for every individual discovered agent.

Note: Confirm that the AI discovery daily data collection job is active, which is the key element in collecting the data.

AI connections are a combination of hyperscalars, AI apps, and agentic AI frameworks created using Service Graph Connectors. AI connections can discover AI agents and usage data from the hyperscalars, AI apps, and agentic AI frameworks.

Navigate to the AI connections page in the AI Control Tower, you're able to create AI connections as well as manage the existing ones. The existing connections appear under the section Legacy connections.

Starting March 2026, these AI Service Graph Connectors #are available.

- AWS
- GCP Vertex AI
- LangGraph
- Microsoft

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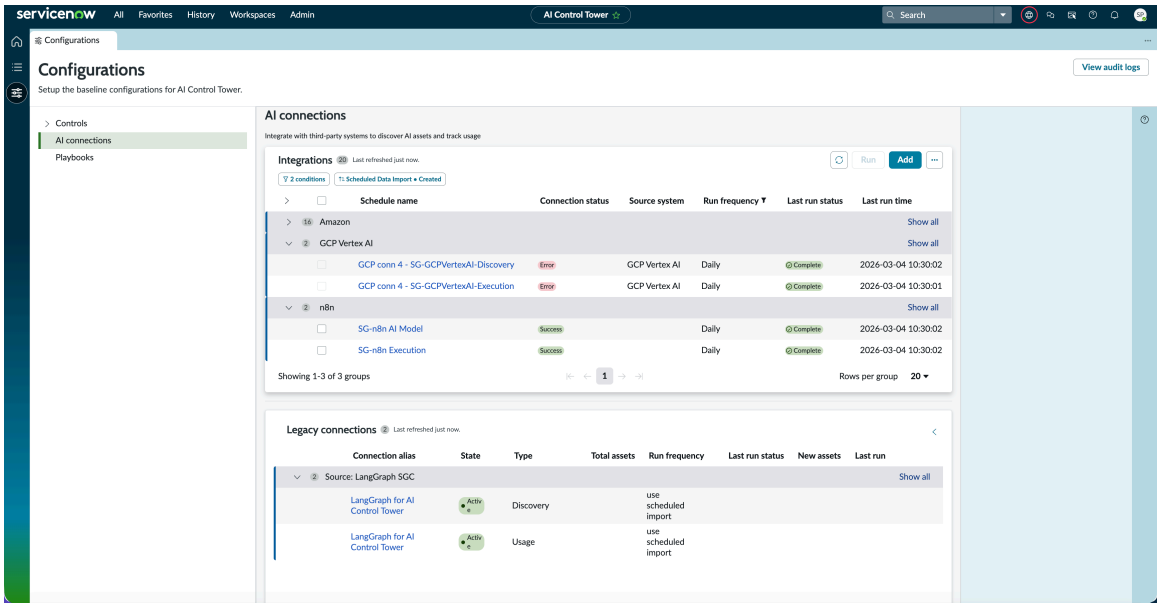
- n8n
- Salesforce



AI connection record

The AI connection record has the following tabs:

Details- displays the connection details of the AI connection.

Data sources- represent a running unit, which defines what data is fetched from a third-party system.

Import schedules- Run the parent data import and execute the job to discover AI Agents and track usage data.

Service Graph Connectors for AI Control Tower

You can use Service Graph Connectors (SGC)#to import and integrate third-party data into #CMDB#and non-CMDB#tables to create AI connections.

How SGC works

When you access third-party APIs, they return data. This data must be stored in ServiceNow tables. Before saving it, we should transform the data from its JSON format into our preferred format and then store it in ServiceNow tables.

Benefits of SGC

Lets explore some of the major benefits:

- Gain trust in your CMDB data.
- Minimize operational risk.
- Minimize custom integrations.
- Accelerate time to value.

To understand benefits and features of SGC in detail, see Service Graph Connectors

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AI Service Graph Connector for Amazon

Use the#AI Service Graph Connector for Amazon to discover AI assets such as AI systems, agents, models, tools, and prompts and well as usage data for these AI agents within your ServiceNow AI Control Tower. This usage information is consumed by the AI Control Tower value dashboard.

Download apps from the Store

Visit the#ServiceNow Store website to download the AI Service Graph Connector for Amazon app.

Supported ServiceNow versions

- Australia
- Zurich patch 7
- Yokohama patch 11

User roles

Roles required in the ServiceNow environment:

- sn_ai_disc.discovery_admin
- sn_cmdb_int_util.sgc_admin

Prerequisites from AWS

Role required: IAM user

AWS Prerequisites

Before proceeding, ensure you have:

- AWS Account- Active AWS account with access to the services you want to connect.
- IAM Credentials: AWS Access Key ID and Secret Access Key with read permissions for the services you plan to migrate.
- Service Access- API access enabled for Amazon Bedrock, Amazon SageMaker, Amazon CloudWatch, and/or Amazon Bedrock AgentCore.

Required IAM Permissions

Your IAM user role or role needs these permissions.

- Amazon Bedrock: bedrock:List*, bedrock:Get*
- Amazon SageMaker: sagemaker:List*, sagemaker:Describe*
- Amazon CloudWatch: logs:DescribeLogGroups, logs:DescribeLogStreams, cloudwatch:GetMetricData
- Amazon Bedrock AgentCore: bedrock:ListAgents, bedrock:GetAgent

AWS Setup documentation

Use these AWS resources to set up credentials and enable services:

- AWS IAM- Managing Access Keys
- Amazon Bedrock- Setting Up

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- Amazon Bedrock Agents- Setup Guide
- Amazon CloudWatch- Setup Guide
- Amazon SageMaker- Get Started

Data mapping

The following table lists the data sources, the staging tables, and the target tables #CMDB#CI classes and non-CMDB#classes where data is stored for a#AWS #project.

Data Source	Staging Table	Target Table
SGawsBedrockAIAssetDSUtilSNC	sn_ai_disc_aws_sgc_bedrock_ai_asset	sn_ai_disc_aws_sgc (routes to other stag
SGawsBedrockAISystemDSUtilSNC	sn_ai_disc_aws_sgc_bedrock_ai_system	alm_ai_system_digit
SGawsBedrockAIModelDSUtilSNC	sn_ai_disc_aws_sgc_bedrock_ai_model	alm_ai_model_digita
SGawsBedrockAIToolDSUtilSNC	sn_ai_disc_aws_sgc_bedrock_ai_tool	sn_ent_ai_tool
SGawsBedrockAIPromptDSUtilSNC	sn_ai_disc_aws_sgc_bedrock_ai_prompt	alm_ai_prompt_digi
SGawsBedrockAISbcompM2mDSUtilSNC	sn_ai_disc_aws_sgc_bedrock_sbcomp_m2m	sn_ent_ai_system_s
SGawsBedrockAIUsageDSUtilSNC	sn_ai_disc_aws_sgc_bedrock_ai_usage	sn_ai_disc_ai_usage
SGAgentCoreDataSourceUtil (importAgentRuntimesByID)	sn_ai_disc_aws_sgc_agentcore_ai_system	alm_ai_system_digit
SGAgentCoreDataSourceUtil (importCodeInterpretersByID, importBrowsersByID, importTargetsByID)	sn_ai_disc_aws_sgc_agentcore_ai_tool	sn_ent_ai_tool
SGAgentCoreDataSourceUtil (getAWSAgentCoreUsage)	sn_ai_disc_aws_sgc_agentcore_ai_usage	sn_ai_disc_ai_usage
SGSageMakerAIModelDSUtilSNC	sn_ai_disc_aws_sgc_sg_awssagemaker_model	alm_ai_model_digita
SGSageMakerModelCardDSUtilSNC	sn_ai_disc_aws_sgc_sg_awssagemaker_model	alm_ai_model_digita

Create AI connection for Amazon

Create an AI connection for Amazon in AI Control Tower using the AI Service Graph Connector for Amazon.

Before you begin

Role required: sn_ai_disc.discovery_admin and n_cmdb_int_util.sgc_admin

Procedure

1. Navigate to **AI Control Tower** > **Configurations** > **AI connections**.
2. Select **Add**.
3. Select **AWS** from all the available connectors.
4. Click **Create connection**.

   Note: The Review the setup instructions page appears and verifies to follow all the prerequisites.

5. Click **Continue**.

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Setup page appears.

6. Select Source systems.
7. Choose the AWS services that you want to integrate with ServiceNow.
   - Amazon Bedrock
   - Amazon Bedrock AgentCore
   - Amazon SageMaker
8. Click **Submit**.
9. **Configure Bedrock**

   a. Enter the **Connection Name**.

   b. Enter the **Access Key ID**.

   c. Enter the **Secret Access Key**.
   Access keys are long-term credentials for an IAM user or the AWS account root user. Access keys consist of two parts: an access key ID and a secret access key. For detailed information, see how to get access and secret key

   d. Enter the **AWS Region**.

   Note: The region information is available in the navigation bar of the AWS management console.

   e. Click **Update and test connection**.

   f. Click **Continue**.

10. **Configure Bedrock import schedule**

    a. Open a parent schedule import.

    b. Select the Active check box.

    c. Select Run according to your preference.

    Note: This is an optional step as the schedule imports run according to the schedule.

11. **Configure CloudWatch logs forBedrock**
    a. Enter the **Connection Name**.
    b. Enter the **Access Key**.
    c. Enter the **Secret Key**.
    d. Enter the **AWS Region**.
    e. Enter the **Log Group Names**.
    f. Click **Create and test connection**.
    g. Click **Continue**.
12. **Configure CloudWatch logs import schedule for Bedrock**

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a. Open a parent schedule import.

b. Select the Active check box.

c. Select **Execute Now**.

> **Note:** This is an optional step as the schedule imports run according to the schedule.

d. Click **Continue**.

13. **Configure SageMaker**
    a. Enter the **Connection Name**.
    b. Enter the **Access Key ID**.
    c. Enter the **Secret Access Key**.
    d. Enter the **AWS Region**.
    e. Click **Create and test connection**.
    f. Click **Continue**.
14. **Configure SageMaker import schedule**

a. Open a parent schedule import.

b. Select the Active check box.

c. Select Run according to your preference.

d. Select Execute Now.

> **Note:** This is an optional step as the schedule imports run according to the schedule.

e. Click **Continue**.

15. **Configure CloudWatch monitoring for SageMaker**
    a. Enter the **Connection Name**.
    b. Enter the **Access Key**.
    c. Enter the **Secret Key**.
    d. Enter the **AWS Region**.
    e. Click **Create and test connection**.
    f. Click **Continue**.
16. **Configure CloudWatch monitoring import schedules for SageMake**

a. Open a parent schedule import.

b. Select Active check box.

c. Select Run according to your preference.

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d. Select Execute Now.

Note: This is an optional step as the schedule imports run according to the schedule.

e. Click **Continue**.

Result
AI connection is created for AWS.

AI Service Graph Connector for Google Cloud Platform (GCP) Vertex AI

Use the AI Service Graph Connector for GCP Vertex AI plugin to create AI connections to discover AI assets such as AI systems, models, prompts, and tools as well as usage data for these AI agents within your ServiceNow AI Control Tower. This usage information is consumed by the AI Control Tower value dashboard.

Download apps from the Store

Visit the ServiceNow Store website to download the AI Service Graph Connector for GCP Vertex AI app.

Supported ServiceNow versions

- Australia
- Zurich patch 7
- Yokohama patch 11

User roles

Roles required in the ServiceNow environment:

- sn_ai_disc.discovery_admin
- sn_cmdb_int_util.sgc_admin

Prerequisites from GCP Vertex

Prerequisites:

Review the setup instructions to create a service account, assign roles, bind roles to the service account, enable APIs, create a JKS file, and register it in your ServiceNow instance. For setup instructions and used APIs, see the Service Graph connector for GCP Vertex AI- Setup Instructions [KB2731256]

Data Mapping

The following table lists the data sources, the staging tables, and the target tables CMDB CI classes and non-CMDB classes where data is stored for a GCP Vertex AI project.

Data source	Staging table	Target tables
SG-GCPVertexAI-Execution	sn_ai_disc_gcp_sgc_sg_gcp_execution	sn_ai_disc_ai_usage

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SG-GCPVertexAI-System	sn_ai_disc_gcp_sgc_sg_gcp_ai_system	cmdb_ai_system_component_ alm_ai_system_digital_asset cmdb_ci_function_ai cmdb_rel_asset_ci
SG-GCPVertexAI-Mode	sn_ai_disc_gcp_sgc_sg_gcp_ai_model	cmdb_ai_model_product_mod alm_ai_model_digital_asset
SG-GCPVertexAI-Tool	sn_ai_disc_gcp_sgc_sg_gcp_ai_tool	sn_ent_ai_tool
SG-GCPVertexAI-Prompt	sn_ai_disc_gcp_sgc_sg_gcp_ai_prompt	cmdb_ai_prompt_product_mod alm_ai_prompt_digital_asset
SG-GCPVertexAI-System Subcomponent M2M	sn_ai_disc_gcp_sgc_sg_gcp_ai_system_subcomponent_m2m	sn_ent_ai_system_subcompon

Create AI connections for GCP Vertex AI

Create an AI connection for GCP Vertex AI in AI Control Tower using the#AI Service Graph Connector for GCP Vertex AI.

Before you begin

Role required: sn_ai_disc.discovery_admin and sn_cmdb_int_util.sgc_admin

Procedure

1. Navigate to **AI Control Tower workspace** > **Configuration** > **AI connections**.
2. Select **Add**.
3. Select **GCP Vertex AI** from all the available connectors.
4. Click **Create connection**.
   Review setup instructions page displays
5. Verify to follow all the prerequisite steps.
6. Check the option **I have read the setup instructions**.
7. Click **Continue**.
8. Create **X.509** certificate.
9. Select **New**.
10. Enter the **Name**.
11. Enter the **Key store password**.
12. Click **+Add file**.

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13. Select the JKS file.
14. Select **Upload** to upload the JKS file.
15. Click **Save**.
    The JKS file is added.
16. Select **Continue**.
    Setup page appears
17. Create and test connections
    a. Enter the **Connection Name**.
    b. Enter the **Cloud region**.
    c. Enter the **Service Account Email**.
    d. Enter the **Keystore**.
    e. Enter the **Keystore Password**.
    f. Enter the **Organization Id**.

    Note: This field is needed only if you are looking to discover agents related to one organization. This is valid only if the service account email has organization level access.

    g. Click **Create and test connection**.
    h. Click **Continue**.
18. Configure import schedule
    a. Ensure that both the parent scheduled jobs, Discovery and Execution are active as they are shipped out of the box inactive.

    Note: Ensure to execute the Discovery scheduled job first.

    b. Set the run frequency.
    c. To run frequency by demand, select **Execute now**.

    Note: This is an optional step as the schedule imports run according to the schedule.

    d. Click **Continue**.
    e. Click **View all connections** to view the newly created connection.

Result
AI connection is created for GCP Vertex AI.

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AI Service Graph Connector for IBM

The AI Service Graph Connector for IBM enables you to discover and import AI assets from your IBM environment into ServiceNow AI Control Tower.

The AI Service Graph Connector for IBM integrates with your IBM account to catalog AI systems, agents, tools, models, and prompts. After discovery is run, usage data is automatically collected and populated into the AI Control Tower value dashboard, providing comprehensive visibility and governance of your AI operations.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Supported ServiceNow versions

- Zurich (Patch 8)
- Australia (Patch 1)

User roles

You must have one of the following roles:

- sn_ai_disc.discovery_admin
- sn_cmdb_int_util.sgc_admin

ServiceNow prerequisites

Complete the following setup steps when configuring the connector for the first time.

Note: Updating data source access and clearing cache are prerequisites that must be completed only once, when setting up a new instance for the first time.

Update data source access

The connector requires write permissions to the Data Source table to create data sources.

To enable data source creation:

1. Select **Global** from the application picker.
2. Navigate to **Application Access**.
3. Select the **Can create**, **Can update**, and **Can delete** check boxes.
4. Select **Update**.
5. Switch to the connector application scope.

Clear cache

Clear the cached data for the Data Source and Tables.

To clear the cache:

1. Navigate to **System Definition** > **Background Scripts**.
2. Enter the following script in the **Run Script** text box:

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```
GlideTableManager.invalidateTable('sys_data_source');
GlideCacheManager.flushTable('sys_data_source');
GlideTableManager.invalidateTable('sys_db_object');
GlideCacheManager.flushTable('sys_db_object');
```

3. Select **Run Script**.

> **Note:** The script might take several minutes to complete. After completion, switch to the connector application scope.

IBM prerequisites

Generate an IBM Cloud API Key and configure access for the connector before creating a connection. For setup instructions and API details, see the AI Service Graph Connector for IBM — Setup Instructions [KB2901071] article in the Now Support Knowledge Base.

After completing the IBM setup requirements, register the connector in your ServiceNow instance.

Create an AI connection for IBM

Create an AI connection for IBM in AI Control Tower using the#AI Service Graph Connector for IBM.

Before you begin

Role required: sn_ai_disc.discovery_admin and sn_cmdb_int_util.sgc_admin

Procedure

1. Navigate to **SGC Central** > **Create Connection**.
2. Select **IBM Watsonx AI** from the list of connectors, and then select **Create connection**.
3. On the#Review setup instructions#page, select **I have read the setup instructions**, and then select **Continue**.
4. Select the IBM watsonx AI services.

   a. Select the services that you want to discover.

   - **IBM WatsonX Runtime**: Discovers Runtime agents, prompts, and models.
   - **IBM WatsonX Orchestrate**: Discovers Orchestrate agents, tools, prompts, models, and usage traces.

   > **Note:** You can select both services, if required.

   b. Select **Submit**.

5. Configure the selected services.

   a. For Runtime: In the Regions and Deployment spaces activity, enter the region and deployment space ID, and then select **Submit**.

   Alternatively, select **Skip** to discover all accessible regions and spaces.

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b. For Orchestrate: In the Orchestrate Instances activity, enter a comma-separated list of instance GUIDs (tenant IDs) for which discovery should be run.

Alternatively, select **Skip** to discover all accessible Orchestrate instances.

6. Configure and test the connection.

a. Enter the **Connection name**.

b. Enter the **IBM Cloud API Key**.

c. Select **Create and test connection** to validate that the API key is working.

d. Select **Continue**.

7. Configure the import schedule.

a. Verify that the parent scheduled jobs are active.

These jobs are shipped as inactive and must be activated manually.

- *SG-IBMRuntime-Discovery* for Runtime#.
- *SG-IBMOrchestrate-Discovery* for Orchestrate#.

b. Set the run frequency for the scheduled import jobs.

Alternatively, select **Execute now** to execute the import schedule immediately.

c. Select **Continue**.

8. Select the **Confirm connection setup** activity to verify whether the connection was configured.

What to do next

Select **View all connections** to review the connection details. The created connection appears in the Installed connections list.

Note: The Discovery scheduled job must be executed before viewing discovered data in the CMDB.

APIs used by AI Service Graph Connector for IBM

Explore the IBM APIs used by the AI Service Graph Connector for IBM

The AI Service Graph Connector for IBM calls the following IBM APIs during discovery.

IBM API list and IAM permissions

Method	API	IAM permission	Purpose
IBM watsonx Orchestrate			
GET	https://resource-controller.cloud.ibm.com/v2/resource_instances	Resource Controller Viewer	Discover all watsonx Orchestrate instances in the account.
GET	https://api.region.watson-orchestrate.cloud.ibm.com/instances/instanceGuid/v1/orchestrate/agents	Orchestrate Reader	List all agents for an instance.

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IBM API list and IAM permissions (continued)

Method	API	IAM permission	Purpose
GET	https://api.region.watson-orchestrate.cloud.ibm.com/instances/instanceGuid/v1/orchestrate/tools/toolId	Orchestrate Reader	Get details of each tool referenced by an agent.
POST	https://api.region.watson-orchestrate.cloud.ibm.com/instances/instanceGuid/v1/traces/search	Orchestrate Reader	Search usage trace records (cursor-paginated, separate scheduled import).
POST	https://iam.cloud.ibm.com/identity/token	None	Exchange API Key for IAM Bearer token.
IBM watsonx Runtime			
GET	https://api.region.dataplatform.cloud.ibm.com/v2/spaces	Watson Studio Viewer	List all watsonx spaces per region. **Note:** For the us-south region, the API is `api.dataplatform.cloud.ibm.com v2/spaces`.
GET	https://region.ml.cloud.ibm.com/ml/v4/deployments	WML Viewer	List all AI model deployments in a space (paginated).
GET	https://api.region.dataplatform.cloud.ibm.com/wx/v1/prompts/promptId	Watson Studio Reader	Get prompt template details, including model_id and system prompt. **Note:** For the us-south region, the API is `api.dataplatform.cloud.ibm.com wx/v1/prompts/promptId`.
POST	https://iam.cloud.ibm.com/identity/token	None	Exchange API Key for IAM Bearer token.

For the full API list and required IAM permissions, see the AI Service Graph Connector for IBM — Setup Instructions [KB2901071] article in the Now Support Knowledge Base.

Data mapping for AI Service Graph Connector for IBM

The AI Service Graph Connector for IBM uses separate data sources and staging tables for each asset type, per service. The staged data is transformed and loaded into target CMDB tables.

The following table lists the data sources, the staging tables, and the target tables as CMDB CI classes for IBM.

Data mapping for IBM

Data source	Staging table	Target tables
IBM Watsonx Runtime		
SG-IBMRuntime-Agent	SG-IBMRuntime-Agent [sn_ai_ibm_disc_runtime_ai_agent]	alm_ai_system_di cmdb_ci_function cmdb_rel_asset_c

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Data mapping for IBM (continued)

Data source	Staging table	Target tables
		cmdb_ai_system_
SG-IBMRuntime-Prompt	SG-IBMRuntime-Prompt [sn_ai_ibm_disc_runtime_ai_prompt]	alm_ai_prompt_d cmdb_ai_prompt_
SG-IBMRuntime-Model	SG-IBMRuntime-Model [sn_ai_ibm_disc_runtime_ai_model]	alm_ai_model_dig cmdb_ai_model_ cmdb_ci_ai_mode cmdb_rel_asset_c
IBM Watson Orchestrate		
SG-IBMOrchestrate-System	SG-IBMOrchestrate-System [sn_ai_ibm_disc_orchestrate_ai_system]	alm_ai_system_di cmdb_ci_function cmdb_rel_asset_c cmdb_ai_system_
SG-IBMOrchestrate-Tool	SG-IBMOrchestrate-Tool [sn_ai_ibm_disc_orchestrate_ai_tool]	sn_ent_ai_tool
SG-IBMOrchestrate-Prompt	SG-IBMOrchestrate-Prompt [sn_ai_ibm_disc_orchestrate_ai_prompt]	alm_ai_prompt_d cmdb_ai_prompt_
SG-IBMOrchestrate-Model	SG-IBMOrchestrate-Model [sn_ai_ibm_disc_orchestrate_ai_model]	alm_ai_model_dig cmdb_ai_model_
SG-IBMOrchestrate-Usage	SG-IBMOrchestrate-Usage [sn_ai_ibm_disc_orchestrate_ai_usage]	sn_ai_disc_ai_usa
SG-IBMOrchestrate-SystemSubcomponentM2M	SG-IBMOrchestrate-SystemSubcomponentM2M [sn_ai_ibm_disc_orchestrate_ai_system_subcomponent_m2m]	sn_ent_ai_system

CMDB classes targeted in AI Service Graph Connector for IBM

When you complete setting up the connection, you can configure the integration to periodically pull data from IBM. The data is saved in tables that extend from the Configuration Item [cmdb_ci] table.

AI Function [cmdb_ci_function_ai]

The following attributes in the AI Function [cmdb_ci_function_ai] table are populated by collected data:

Attribute label	Attribute name
Name	name
Install Status	install_status

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Attribute label	Attribute name
Object ID	object_id
Model ID	model_id
Vendor	vendor
Discovery Source	discovery_source

AI Model Deployment [cmdb_ci_ai_model_deployment]

The following attributes in the AI Model Deployment [cmdb_ci_ai_model_deployment]#able are populated by collected data:

Attribute label	Attribute name
Name	name
Install Status	install_status
Object ID	object_id
Model ID	model_id
Vendor	vendor
Discovery Source	discovery_source

AI Service Graph Connector for IBM properties

AI Service Graph Connector for IBM properties control the behavior of the connector.

Connection properties

These connection properties are available for AI Service Graph Connector for IBM. These connection properties are automatically set when a new connection is configured and runtime or orchestrate services are selected.

Connection properties for AI Service Graph Connector for IBM

Property	Service	Description
IsRuntimeSelected	IBM watsonx Runtime	Enable IBM watsonx Runtime discovery for the connection.
Runtime_Spaces	IBM watsonx Runtime	Optional: Specify the JSON map of IBM Cloud regions to deployment space IDs. If no value is specified, all accessible spaces in all regions are discovered.
IsOrchestrateSelected	IBM watsonx Orchestrate	Enable IBM watsonx Orchestrate discovery for the connection.
Orchestrate_Instances	IBM watsonx Orchestrate	Optional: Specify the comma-separated list of IBM watsonx Orchestrate instance GUIDs (tenant IDs) to be discovered.

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Connection properties for AI Service Graph Connector for IBM (continued)

Property	Service	Description
		If no value is specified, all accessible instances are discovered.
SourceSystem	IBM watsonx Runtime IBM watsonx Orchestrate	Identifies the source system for the connection. The value is set automatically by the connector to#`IBM WatsonX AI`. **Note:** This property is system-managed and can't be modified manually.

AI Service Graph connector for LangGraph

Use the#AI Service Graph Connector for LangGraph to discover AI assets such as AI systems, agents, models, tools, and prompts and well as usage data for these AI agents. This usage information is consumed by the AI Control Tower value dashboard.

Download apps from the Store

Visit the ServiceNow Store #website to download the AI Service Graph Connector for LangGraph app.

Supported ServiceNow versions

- Australia
- Zurich patch 7
- Yokohama patch 11

User roles

Roles required in the ServiceNow environment:

- sn_ai_disc.discovery_admin
- sn_cmdb_int_util.sgc_admin

Prerequisites from LangGraph

Enter the connection details, API Key credentials and update the credential record.

Create an API key for the AI Connector to authenticate with LangGraph. For more information on creating API Key in LangGraph, see Create an API Key

Note: To access the latest and most comprehensive guidelines for managing API keys, see About LangGraph

Data Mapping

The following table lists the data sources, the staging tables, and the target tables #CMDB#CI classes and non-CMDB#classes where data is stored for LangGraph project.

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Data Source	Import Set Table	Target Table(s)
SG-LangGraph Agents	sn_langgraph_integ_agents	alm_ai_system_digital_asset alm_ai_prompt_digital_asset cmdb_ci_function_ai
SG-LangGraph Usage	sn_langgraph_integ_usage	alm_ai_model_digital_asset sn_ai_disc_ai_usage

Create an API Key for LangGraph

Create an API Key for the AI Connector to authenticate with LangGraph.

Before you begin

Role required: Workspace user (Organization user or Organization editor).

Procedure

1. Navigate to **Settings** > **API Keys in LangSmith**.
2. Click **+API Key**.
   API Key is created.
3. Save the API Key.

> **Note:** Ensure that the API Key grants access to the workspace where you intend to explore AI assets and usage details. Store the API key in a secure and private location.

Result

The API Key is created.

Create AI connection for LangGraph

Use the AI Service Graph Connector for LangGraph plugin to create AI connections to discover AI assets such as AI systems, models, prompts, and tools as well as usage data for these agents. This usage information is consumed by the AI Control Tower value dashboard.

Before you begin

Role required: sn_ai_disc.discovery_admin and n_cmdb_int_util.sgc_admin

Procedure

1. Navigate to **Service Graph connectors** > **LangGraph** > **Setup**.
2. Select **Add**.
3. Select **LangGraph** from all the available connectors.
4. Click **Create connection**.
   Setup instructions page displays.
5. Verify to follow all the prerequisite steps.
   Setup page appears
6. Create and test connection

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a. Enter the **Connection Name**.

b. Enter the **Connection URL for LangSmith API**.

c. Enter the **Connection URL for LangSmith Rest API**.

d. Enter the **API Key**.

> **Note:** Log in to LangGrapH instance and navigate to settings and select API Keys and create an API Key.

e. To use a MID server, select the MID server check box.

f. Click **Create and test connection**.

g. Click **Continue**.

7. Configure import schedule

a. Ensure that both the parent-scheduled jobs, Discovery and Execution are active as they're shipped out of the box inactive.

> **Note:** Ensure to execute the Discovery-scheduled job first.

b. Set the run frequency.

c. To run frequency by demand, select **Execute now**.

> **Note:** This is an optional step as the schedule imports run according to the schedule.

d. Click **Continue**.

e. Click **View all connections** to view the newly created connection.

Result
AI connection is created for LangGraph.

APIs used for LangGraph connector

Explore the AWS APIs used in AI service Graph Connector for LangGraph.The table lists all the LangSmith API endpoints used by the connector.

The following table lists all the LangSmith API endpoints used by the connector.

API	Endpoint (example)	What it does
List Workspaces	https://api.smith.langchain.com / api/v1/workspaces/	Lists all workspaces at the given endpoint for the current API key or user
List Deployments	https://api.host.langchain.com/ v2/deployments	Lists all agent deployments for a particular workspace

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List Tracer Sessions	https://api.smith.langchain.com/api/v1/sessions	Lists all tracer sessions for a given workspace
Get Run Stats	https://api.smith.langchain.com / api/v1/runs/stats	Gets stats on a particular run, including LLM invocations

This table lists all the LangGraph Agent Deployment APIs used by the connector. The “endpoint_url” below will be specific to each deployment and will be discovered at runtime by the app.

API	Endpoint (example)	What it does
Search Assistants	{{endpoint_url}}/assistants/search	Lists all assistants in each deployment
Search Threads	{{endpoint_url}}/threads/search	Lists all threads for each deployment

Target tables for LangGraph

Target tables for storing Service Graph Connector for LangGraph data.

The LangGraph connector uses following main target tables:

Digital asset tables

- alm_ai_system_digital_asset - AI System digital assets
- alm_ai_prompt_digital_asset - AI Prompt digital assets
- alm_ai_model_digital_asset - AI Model digital assets

Usage table

sn_ai_disc_ai_usage - AI Usage/Execution data.

CMDB table

cmdb_ci_function_ai – AI Function (Agent) CI table.

AI Service Graph Connector for Microsoft

Use the #AI Service Graph Connector for Microsoft#plugin to create AI connections for Azure Foundry and Copilot to discover AI assets such as AI systems, models, prompts, and tools as well as usage data for these AI agents within your ServiceNow AI Control Tower. This usage information is consumed by the AI Control Tower value dashboard.

Download apps from the store

Visit the#ServiceNow Store #website to download the AI Service Graph Connector for Microsoft app.

Supported ServiceNow versions

- Australia
- Zurich patch 7
- Yokohama patch 11

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User roles

Roles required in the ServiceNow environment:

- sn_ai_disc.discovery_admin
- sn_cmdb_int_util.sgc_admin

Prerequisites from Azure Foundry environment

Setting up Azure Foundry:

- To get the OAuth credentials, refer to the Azure documentation.
- The Azure client application needs at least 'User. Contributor' role on AI Hub (ML services) API. Refer documentation for Azure Hub roles. It also requires a workspace to be created.
- The Azure client application needs at least an 'Azure AI User' role on the Azure Foundry (Cognitive Services) API. Refer documentation for Azure Foundry roles. It also requires an account (resource name) to be created.
- Enable both Discovery and Execution import schedules to discover agents and retrieve execution data.

Prerequisites from Copilot environment

Setting up Copilot

- Register an application in Microsoft Entra ID and Register to obtain the Client ID and Client secret.
- Open the Power Platform Admin Center, select your Copilot environment, then go to Settings > Users+permissions > Application users, add a new app user using the Client ID and assign Basic user and System administrator roles.
- Find the Organization ID, Tenant ID under Settings > Session details.
- Usage is tracked only in non-developer environments.
- Enable both Discovery and Executions to discover agents and retrieve execution data.

Note: For Microsoft, OAuth authentication is supported.

Create AI connection for Azure Foundry

Create an AI connection for Azure Foundry in AI Control Tower using the#AI Service Graph Connector for Microsoft.

Before you begin

Role required: sn_ai_disc.discovery_admin and n_cmdb_int_util.sgc_admin

Procedure

1. Navigate to **AI Control Tower workspace** > **Configurations** > **AI connections**.
2. Select **Add**.
3. Select **AI connector for Microsoft** from all the available connectors.
4. Click **Create connection**.
5. Select Azure Foundry check box.
6. Review setup instructions page displays.

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Note: Verify to follow all the prerequisite steps.

7. Click **Continue**.
8. Setup page appears
9. **Configure and test ML services connection**
   a. Enter the **Connection Name**.
   b. Enter the **Connection URL** (https://<region>api.azureml.ms).
      Note: The region is available under project details.
   c. Enter the **OAuth client ID**OAuth client ID.
   d. Enter the **OAuth client secret**.
   e. Enter the **OAuth token URL** (https://login.microsoftonline.com/<tenantid>/oauth2/v2.0/token).
      The tenant id can be found in the URL of every page. It's abbreviated as tid.
   f. Click **Update and test connection**
   g. Click **Continue**.
10. **Configure and test AI services connection**
    a. Enter the **Connection Name**.
    b. Enter the **Connection URL** (https://<resource-name>services.ai.azure.com)
       Note: To obtain the resource name, make sure that you are on New Foundry (Enable the New Foundry toggle) and select the project. Once you're on the home page, look for the Project endpoint to view the resource name.
       Starting from March 2026 onwards, ServiceNow provides support to the New Foundry along with the old Foundry.
    c. Enter the **OAuth client ID**.
    d. Enter the **OAuth client secret**.
    e. Enter the **OAuth token URL**.
11. **Configure import schedule**
    a. Ensure that both the parent-scheduled jobs, Discovery and Execution are active as they're shipped out of the box inactive.
       Ensure to execute the Discovery-scheduled job first.

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b. Select **Execute now** to run.

Note: This is an optional step as the schedule imports run according to the schedule.

c. Click **Continue**.

d. Click **View all connections** to view the newly created connection.

Result
AI connection is created for Azure Foundry.

Properties of Azure Foundry

System properties for AI Service Graph Connector for Microsoft (Azure Foundry specific).

System properties

Property	Description
sn_ai_msft_integ.usage_data_lookback	Number of days to look back for fetching threads before the run collection window start time. Type: Integer Default value: 3 Location: System Property [sys_properties] table
sn_ai_msft_integ.usage_first_run_lookback_days	Number of days to look back for usage data on first run (when no last_success_import_time exists). Type: integer Default value:30 Location: System Property [sys_properties] table

Create AI connection for Copilot

Create an AI connection for Copilot in AI Control Tower using the#AI Service Graph Connector for Microsoft.

Before you begin
Role required: sn_ai_disc.discovery_admin and n_cmdb_int_util.sgc_admin

Procedure

1. Navigate to **AI Control Tower workspace** > **Configurations** > **AI connections**.
2. Select **Add**.
3. Select **AI connector for Microsoft** from all the available connectors.
4. Click **Create connection**.

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5. Select the Microsoft Copilot check box.
6. Review setup instructions page displays.

   Note: Verify to follow all the prerequisite steps.

7. Expand Create Copilot connection section.
8. Click **Continue**.
9. Setup page appears
10. **Configure and test Copilot connection**
    a. Enter the **Connection name**.
    b. Enter the **Connection URL** (https://<provider-domain-name>.com).
    c. Enter the **OAuth client ID**.
    d. Enter the OAuth client secret.
    e. Enter the OAuth token URL (Tenant id).
    f. Click **Create and test connection**
    g. Click **Continue**.
11. **Configure import schedule**

    a. Ensure that both the parent-scheduled jobs, Discovery and Execution are active as they're shipped out of the box inactive.

       Ensure to execute the Discovery-scheduled job first.

    b. Set the run frequency.

    c. To run frequency by demand, select Execute now to run.

       Note: This is an optional step as the schedule imports run according to the schedule.

    d. Click **Continue**.

    e. Click **View all connections** to view the newly created connection.

Result
AI connection is created for Copilot.

APIs used by Microsoft- Azure & Copilot

Explore the AWS APIs used in AI service Graph Connector for Amazon.

The table lists all the Amazon API endpoints used by the connector.

New Azure Foundry — Discovery & Usage

API	Endpoint	What it does
List Projects	https://management.azure.com/subscriptions/{subscription_id}/resourceGroups/{resource_group}/	Lists all Azure AI Foundry projects in a resource group

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	providers/Microsoft.CognitiveServices/accounts?api-version=2025-06-01&kind=Project	
List Deployments	https://resource_name.services.ai.azure.com/api/projects/project_name/deployments?api-version=v1	Lists all model deployments within a Foundry project
List Agents	https://resource_name.services.ai.azure.com/api/projects/project_name/agents?api-version=2025-11-15-preview	Lists all agents in a Foundry project
List Agent Versions	https://resource_name.services.ai.azure.com/api/projects/project_name/agents/agent_name/versions?api-version=2025-11-15-preview	Lists all versions of a specific agent
List conversations	https://resource_name.services.ai.azure.com/api/projects/project_name/openai/conversations?api-version=2025-11-15-preview	Lists all conversation threads in a Foundry project
List Conv Items	https://resource_name.services.ai.azure.com/api/projects/project_name/openai/conversations/conv_id/items?api-version=2025-11-15-preview	Lists all messages/items within a specific conversation

AI Services (Classic)

API	Endpoint	What it does
List Projects	https://management.azure.com/subscriptions/{subscription_id}/resourceGroups/{resource_group}/providers/Microsoft.CognitiveServices/accounts?api-version=2025-06-01&kind=Project	Lists all AI Services projects in a resource group
List Deployments	https://resource_name.services.ai.azure.com/api/projects/project_name/deployments?api-version=2025-11-15-preview	Lists all model deployments within a project
List Assistants	https://resource_name.services.ai.azure.com/api/projects/project_name/assistants?api-version=v1	Lists all assistants (agents) in a project List
List Threads	https://resource_name.services.ai.azure.com/api/projects/project_name/threads?limit=limit&api-version=v1	Lists all execution threads in a project

ML Services (AI Hub)

API	Endpoint	**What it does**

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List Subscriptions	https://management.azure.com/subscriptions?api-version=management_api_version	Lists all Azure subscriptions available to the authenticated principal
List Resource Group	https://management.azure.com/subscriptions/subscription_id/resourceGroups?api-version=management_api_version	Lists all resource groups within a subscription
List MLWorkspaces	https://management.azure.com/subscriptions/%7Bsubscription_id%7D/resourceGroups/%7Bresource_group%7D/providers/Microsoft.MachineLearningServices/workspaces?api-version=2023-04-01	Lists all Azure ML workspaces in a resource group
List Deployments	https://resource_name.services.ai.azure.com/api/projects/project_name/deployments?api-version=2025-11-15-preview	Lists all model deployments within an ML project
List Assistants from ML Services	https://region.api.azureml.ms/agents/v1.0/subscriptions/subscription_id/resourceGroups/resource_group/providers/Microsoft.MachineLearningServices/workspaces/workspace_name/assistants?api-version=v1	Lists all agents/assistants from an AzureML workspace
List Threads from ML Service	https://region.api.azureml.ms/agents/v1.0/subscriptions/subscription_id/resourceGroups/resource_group/providers/Microsoft.MachineLearningServices/workspaces/workspace_name/threads?api-version=v1	Lists all threads from an AzureML workspace
List Thread Runs from ML Service	https://region.api.azureml.ms/agents/v1.0/subscriptions/subscription_id/resourceGroups/resource_group/providers/Microsoft.MachineLearningServices/workspaces/workspace_name/threads/thread_id/runs?api-version=v1	Lists all thread runs within a specific thread in an AzureML workspace

AWS APIs used for Copilot

API	Endpoint	Description
List of all the agents in the Copilot environment	<org-url>/api/data/v9.2/bots	Returns metadata about all Copilot Studio bots (agents) registered in a Dataverse environment, including their name, status, authentication config, and ownership details. This is the primary endpoint to discover and inventory deployed copilots.
List of all the components per agent	<org-url>/api/data/v9.2/botcomponents	Exposes the internal authoring components of a Copilot, such as topics, entities, variables, and trigger phrases, stored in the botcomponent table. Essential for inspecting or programmatically analyzing a bot's conversational logic and structure.
List Conversations	<org url>/api/data/v9.2/conversationtranscripts	Retrieves the full chat/conversation transcripts between users and Copilot Studio bots, stored in the Dataverse conversationtranscript table.

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Target tables for Microsoft

Target tables for storing Service Graph Connector for Azure and copilot data.

Both Azure Foundry and Copilot data sources use the following main target tables:

Digital Asset Tables

- alm_ai_system_digital_asset- AI System digital assets
- alm_ai_prompt_digital_asset- AI Prompt digital assets

Entity Tables

- sn_ent_ai_tool- AI Tools
- sn_ent_ai_system_subcomponent_m2m- AI System Subcomponent many-to-many relationships

Usage Table

sn_ai_disc_ai_usage- AI Usage/Execution data.

Additional information

- Staging tables are import set tables where data is initially loaded from external sources.
- Target tables are the destination where transformed data is stored.
- Data flows from Data Source → Staging Table → Transform Map → Target Table
- For the tools attached to AI Agents which are discovered, the tool names are suffixed to ensure uniqueness. This is the format for tool name- tool-name:tenantid:resource-name:project-name.

AI Service Graph Connector for n8n

Use the#AI Service Graph Connector for n8n to create AI connections to discover AI assets such as AI systems, models, prompts, and tools as well as usage data for these AI agents.

Download apps from the Store

Visit the#ServiceNow Store website to download the AI Service Graph Connector for n8n app.

Supported ServiceNow versions

- Australia
- Zurich patch 7
- Yokohama patch 11

User roles

Roles required in the ServiceNow environment:

- sn_ai_disc.discovery_admin
- sn_cmdb_int_util.sgc_admin

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Prerequisites from n8n

Create a n8n API key using your n8n instance.

For more information on creating a n8n API Key, see Create an API Key in n8n environment

Create an API Key in n8n environment

Creating a API key in n8n environment using your n8n instance.

Before you begin
Role required: admin (authenticated user with the appropriate administrative permissions#in the n8n instance)

Procedure

1. Log in to your n8n instance.
2. Navigate to **Settings** > **n8n API**.
3. Select **Create an API Key**.
4. Choose a label and set an Expiration time for the key.
5. Copy the API Key and use this key to authenticate your calls.

Result
The n8n API Key is created.

What to do next
Create an AI connection for n8n

Create an AI connection for n8n

Use the#AI Service Graph Connector for n8n#to discover AI assets such as AI systems, models, prompts, and tools well as usage data for these AI agents. This usage information is consumed by the AI Control Tower value dashboard.

Before you begin
Role required: sn_ai_disc.discovery_admin and sn_cmdb_int_util.sgc_admin

Procedure

1. Navigate to **Service Graph connectors** > **n8n** > **Setup**.
2. Select **SGC Central** tab.
3. Select **Add**.
4. Select **n8n** from all the available connectors.
5. Click **Create connection**.
   Setup page appears
6. Configure and test connection.

   a. Enter the **Connection Name**.

   b. Enter the **Connection URL**(https://<n8n-instance>)

   c. Enter the **API Key**.

   d. Click **Create and test connection**.

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e. Click **Continue**.
Setup page appears

7. Configure import schedule

a. Select a parent import schedule job.

b. Select the Active check box.

c. Select run and time to schedule the job.

d. Select all the additional settings if necessary.

e. Ensure that both the parent-scheduled jobs, Discovery and Execution are active as they're shipped out of the box inactive.

Note: Ensure to execute the Discovery-scheduled job first.

f. To run frequency by demand, select **Execute now**

Note: This is an optional step as the schedule imports run according to the schedule.

g. Select **Save**.

h. Click **Continue**.

8. Select **View all connections** to view the newly created connection.

Result
AI connection is created for n8n.

Properties for n8n

Service Graph Connector for n8n#properties control the behavior of the connector.

System properties

Note: To open the System Properties [sys_properties] table, enter#sys_properties.list#n the navigation filter.

System properties

Property	Description
sn_n8n_integ.list_execution_page_size	The maximum number of items to return in each page of sn_n8n_integ.sgn8n_list_execution datastream. This is passed as a query parameter to n8n REST API via the datastream. **Note:** The maximum permitted size is 250 by n8n.

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System properties (continued)

Property	Description
sn_n8n_integ.list_workflow_page_size	The maximum number of items to return in each page of sn_n8n_integ.sgn8n_list_workflow datastream. This is passed as query parameter to n8n REST API via the datastream. **Note:** The maximum permitted size is 250 by n8n.

Target tables for n8n

When you complete setting up the connection, you can configure the integration to periodically pull data from a n8n project. The data is saved in tables that extend from the CMDB CI classes and other non-CMDB classes.

Target tables for AI systems

[cmdb_ai_system_component_product_model]

The following attributes in the n8n Datacenter [cmdb_ai_system_component_product_model] table are populated by collected data.

Attribute label	Attribute name	n8n attribute
Name	name	name
Version	version	Type version

[alm_ai_system_digital_asset]

The following attributes in the n8n Datacenter [alm_ai_system_digital_asset] table are populated by collected data.

Attribute label	Attribute name	n8n attribute
External Ref id	external_ref_id	Connection Url
Display Name	display_name	Name
Install Status	Install_status	Data is Archived
AI Models	ai_models	AI Language model

[cmdb_ci_function_ai]

The following attributes in the n8n Datacenter [cmdb_ci_function_ai] table are populated by collected data.

Attribute label	Attribute name	n8n attribute
Name	name	display name

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Object ID	object_id	external reference id
Install status	install_status	Install status
Model ID	model_id	model
Vendor	vendor	vendor

Target tables for AI model

cmdb_ai_model_product_model.

The following attributes in the n8n Datacenter [cmdb_ai_model_product_model] table are populated by collected data.

Attribute label	Attribute name	n8n attribute
Name	name	Model name
Version	version	Type version

alm_ai_model_digital_asset.

The following attributes in the n8n Datacenter [alm_ai_model_digital_asset] table are populated by collected data.

Attribute label	Attribute name	n8n attribute
External Ref ID	external_ref_id	Connection URL, model name, type version

Target tables for AI prompts

cdmb_ai_prompt_product_model.

The following attributes in the n8n Datacenter [cdmb_ai_prompt_product_model] table are populated by collected data.

Attribute label	Attribute name	n8n attribute
Name	name	Name
Prompt Info	prompt_info	Parameters system message

alm_ai_prompt_digital_asset.

The following attributes in the n8n Datacenter [alm_ai_prompt_digital_asset] table are populated by collected data.

Attribute label	Attribute name	n8n attribute
External Ref ID	external_ref_id	Asset type, asset id

Target tables for AI Subcomponents

sn_ent_ai_system_subcomponent_m2m.

The following attributes in the n8n Datacenter [sn_ent_ai_system_subcomponent_m2m] table are populated by collected data.

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Attribute label	Attribute name	n8n attribute
AI System	ai_system	connectionUrl + workflowId + +nodeId or n8n
AI Subcomponent	ai_subcomponent	connectionUrl + workflowId + nodeId or n8n
AI subcomponent reference table	ai_subcomponent_reference_table	agents or tools

Target tables for AI Usage

sn_ai_disc_ai_usage.

The following attributes in the n8n Datacenter [sn_ai_disc_ai_usage] table are populated by collected data.

Attribute label	Attribute name	n8n attribute
AI System	ai_system	connectionUrl+ workflowId + nodeId
Session ID	session_id	data.id
Time	time	runData.executions
Count	count	runData.executions.length

AI Service Graph Connector for OCI

The AI Service Graph Connector for OCI enables you to discover and import AI assets from your OCI environment into ServiceNow AI Control Tower.

The AI Service Graph Connector for OCI integrates with your OCI account to catalog AI systems, agents, models, and prompts. Usage data is automatically collected and populated into the AI Control Tower value dashboard, providing comprehensive visibility and governance of your AI operations.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Supported ServiceNow versions

- Zurich (Patch 8)
- Australia (Patch 1)

User roles

You must have one of the following roles:

- sn_ai_disc.discovery_admin
- sn_cmdb_int_util.sgc_admin

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ServiceNow prerequisites

Complete the following setup steps when configuring the connector for the first time.

Note: Updating data source access and clearing cache are prerequisites that must be completed only once, when setting up a new instance for the first time.

Update data source access

The connector requires write permissions to the Data Source table to create data sources.

To enable data source creation:

1. Select **Global** from the application picker.
2. Navigate to **Application Access**.
3. Select the **Can create**, **Can update**, and **Can delete** check boxes.
4. Select **Update**.
5. Switch to the connector application scope.

Clear cache

Clear the cached data for the Data Source and Tables.

To clear the cache:

1. Navigate to **System Definition** > **Background Scripts**.
2. Enter the following script in the **Run Script** text box:

```
GlideTableManager.invalidateTable('sys_data_source');
GlideCacheManager.flushTable('sys_data_source');
GlideTableManager.invalidateTable('sys_db_object');
GlideCacheManager.flushTable('sys_db_object');
```

3. Select **Run Script**.

Note: The script might take several minutes to complete. After completion, switch to the connector application scope.

OCI prerequisites

Create a Java KeyStore (JKS) certificate, configure OCI IAM policies, bind the policies to the OCI user, and configure the connection in your ServiceNow instance. For setup instructions and API details, see the Service Graph Connector for OCI - Setup Instructions [KB2898105] article in the Now Support Knowledge Base.

After completing the OCI setup requirements, register the connector in your ServiceNow instance.

Create an AI connection for AI Service Graph Connector for OCI

Create an AI connection for OCI in AI Control Tower using the#AI Service Graph Connector for OCI.

Before you begin
Role required: sn_ai_disc.discovery_admin and sn_cmdb_int_util.sgc_admin

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Procedure

1. Navigate to **SGC Central** > **Create Connection**.
2. Select **OCI GenAI** from the list of connectors, and then select **Create connection**.
3. On the Grant attachment update permissions page, enable edit permissions for the Attachment [sys_attachment] table, and then select **Continue**.
4. On the#Review setup instructions#page, select **I have read the setup instructions**, and then select **Continue**.
5. Create an X.509 certificate.
   a. Select **New**.
   b. Enter the **Name** for the certificate.
   c. Enter the **Key store password**.
   d. Select **Add file** to attach the Java KeyStore (JKS) file.
   e. Select **Upload** to upload the JKS file.
   f. Select **Save**, and then select **Continue**.
6. Select the source system.
   a. Select the services that you want to discover.
      - **#Generative AI**: Discovers base models, custom (fine-tuned) models, and imported models.
      - **Generative AI Agents**: Discovers AI agents, agent-referenced models, AI tools, AI prompts, and agent usage metrics.

      Note: You can select both services, if required.

   b. Select **Continue**.
7. Configure and test the connection.
   a. Enter the following details for the connection.

Field	Description
Connection name	Name to identify the OCI connection.
Tenancy ID	The OCID of your OCI tenancy. For example, `ocid1.tenancy.oc1..aaaaaa....`
User ID	The OCID of the OCI user whose API key is configured.
Key Fingerprint	The fingerprint generated when uploading the public key. See OCI prerequisites and the Service Graph Connector for OCI - Setup Instructions [KB2898105] article in the Now Support Knowledge Base.
Region	The OCI region identifier. For example, `us-chicago-1`.
Certificate	The JKS certificate. See OCI prerequisites and the Service Graph Connector for OCI - Setup Instructions [KB2898105] article in the Now Support Knowledge Base.

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Field	Description
Certificate Alias	The alias used during JKS certificate creation. See OCI prerequisites and the Service Graph Connector for OCI - Setup Instructions [KB2898105] article in the Now Support Knowledge Base.
Certificate Alias Password	The alias password used during JKS certificate creation. See OCI prerequisites and the Service Graph Connector for OCI - Setup Instructions [KB2898105] article in the Now Support Knowledge Base.
Compartment ID (optional)	The OCID of a specific compartment to scope discovery to that compartment and its sub-tree. If no value is specified, the entire tenancy is discovered.

b. **Optional:** Select a MID Server.

c. Select **Create and test connection**, and then select **Continue**.

8. Configure the import schedule.

a. Verify that the parent scheduled jobs are active.

These jobs are shipped as inactive and must be activated manually.

- *SG-OCIGenAI-Discovery* for Model Track#.
- *SG-OCIGenAIAgents-Discovery* for Agent Track.
- *SG-OCIGenAIAgents-Usage* for Usage metrics.

b. Set the run frequency for the scheduled import jobs.

Alternatively, select **Execute now** to execute the import schedule immediately.

c. Select **Continue**.

9. Select the **Confirm connection setup** activity to verify whether the connection was configured.

What to do next

Select **View all connections** to review the connection details. The created connection appears in the Installed connections list.

Note: The Discovery scheduled job must be executed before viewing discovered data in the CMDB.

APIs used by AI Service Graph Connector for OCI

Explore the OCI APIs used by the AI Service Graph Connector for OCI

The AI Service Graph Connector for OCI calls the following OCI APIs during discovery.

OCI API list and IAM permissions

Method	API	IAM permission	Purpose
OCI Generative AI			

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OCI API list and IAM permissions (continued)

Method	API	IAM permission	Purpose
GET	https://identity.*region*.oraclecloud.com/20160918/compartments?compartmentId=*compartmentId*&compartmentIdInSubtree=true&lifecycleState=ACTIVE	inspect compartments	List active compartments within discovery scope.
GET	https://identity.*region*.oraclecloud.com/20160918/compartments/*compartmentId*	inspect compartments	Test connection.
GET	https://generativeai.*region*.oci.oraclecloud.com/20231130/models?compartmentId=*compartmentId*	read generative-ai-family	List base and custom models.
GET	https://generativeai.*region*.oci.oraclecloud.com/20231130/importedModels?compartmentId=*compartmentId*	read generative-ai-family	List imported models.
GET	https://generativeai.*region*.oci.oraclecloud.com/20231130/endpoints?compartmentId=*compartmentId*	read generative-ai-family	List endpoints.
OCI Generative AI Agents			
GET	https://identity.*region*.oraclecloud.com/20160918/compartments?compartmentId=*compartmentId*&compartmentIdInSubtree=true&lifecycleState=ACTIVE	inspect compartments	List active compartments within discovery scope.
GET	https://identity.*region*.oraclecloud.com/20160918/compartments/*compartmentId*	inspect compartments	Test connection.
GET	https://agent.generativeai.*region*.oci.oraclecloud.com/20240531/agents?compartmentId=*compartmentId*	read genai-agent-family	List AI agents.
GET	https://agent.generativeai.*region*.oci.oraclecloud.com/20240531/tools?compartmentId=*compartmentId*&agentId=*agentId*	read genai-agent-family	List tools for a specific agent.
GET	https://agent.generativeai.*region*.oci.oraclecloud.com/20240531/agentEndpoints?compartmentId=*compartmentId*	read genai-agent-family	List agent endpoints (used for usage metrics collection).
GET	https://agent.generativeai.*region*.oci.oraclecloud.com/20240531/agentEndpoints/*agentEndpointId*	read genai-agent-family	Get agent endpoint details (agent-as-tool resolution).
GET	https://generativeai.*region*.oci.oraclecloud.com/20231130/models/*modelId*	read generative-ai-family	Get model details (resolve agent-

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OCI API list and IAM permissions (continued)

Method	API	IAM permission	Purpose
			referenced models).
GET	https://generativeai.*region*.oci.oraclecloud.com/20231130/endpoints/*endpointId*	read generative-ai-family	Get model endpoint details (resolve agent-referenced endpoints to backing models).
POST	https://telemetry.*region*.oraclecloud.com/20180401/metrics/actions/summarizeMetricsData	read metrics	Retrieve agent usage metrics.
GET	https://generativeai.*region*.oci.oraclecloud.com/20231130/importedModels/*modelId*	read generative-ai-family	Get imported model details (resolve agent-referenced imported models).
GET	https://generativeai.*region*.oci.oraclecloud.com/20231130/endpoints?compartmentId=*compartmentId*	read generative-ai-family	List endpoints.

For the full API list and required IAM permissions, see the Service Graph Connector for OCI - Setup Instructions [KB2898105] article in the Now Support Knowledge Base.

Data mapping for AI Service Graph Connector for OCI

The AI Service Graph Connector for OCI uses separate data sources and staging tables for each asset type, per service. The staged data is transformed and loaded into target CMDB tables.

The following table lists the data sources, the staging tables, and the target tables as CMDB CI classes for OCI.

Data mapping for OCI

Data source	Staging table	Target tables
Generative AI Service (Model Track)		
SG-OCIGenAI-Model	sn_ai_oci_disc_ai_model	cmdb_ai_model_product_mode alm_ai_model_digital_asset cmdb_ci_ai_model_deployment cmdb_rel_asset_ci
Generative AI Agents Service (Agent Track)		

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Data mapping for OCI (continued)

Data source	Staging table	Target tables
SG-OCIGenAIAgents-Model	sn_ai_oci_disc_ai_agent_model	cmdb_ai_model_product_mode alm_ai_model_digital_asset cmdb_ci_ai_model_deployment cmdb_rel_asset_ci
SG-OCIGenAIAgents-System	sn_ai_oci_disc_ai_system	cmdb_ai_system_component_p alm_ai_system_digital_asset cmdb_ci_function_ai cmdb_rel_asset_ci
SG-OCIGenAIAgents-Prompt	sn_ai_oci_disc_ai_prompt	cmdb_ai_prompt_product_mod alm_ai_prompt_digital_asset
SG-OCIGenAIAgents-Tool	sn_ai_oci_disc_ai_tool	sn_ent_ai_tool
SG-OCIGenAIAgents-SystemSubcomponentM2M	sn_ai_oci_disc_ai_system_subcomponent_m2m	sn_ent_ai_system_subcompone
SG-OCIGenAIAgents-Usage	sn_ai_oci_disc_ai_usage	sn_ai_disc_ai_usage

CMDB classes targeted in AI Service Graph Connector for OCI

When you complete setting up the connection, you can configure the integration to periodically pull data from OCI. The data is saved in tables that extend from the Configuration Item [cmdb_ci] table.

AI Function [cmdb_ci_function_ai]

The following attributes in the AI Function [cmdb_ci_function_ai] table are populated by collected data:

Attribute label	Attribute name
Name	name
Description	short_description
Object ID	object_id
Model ID	model_id
Vendor	vendor
Asset	asset
Discovery Source	discovery_source

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Relationship created for AI Function

Parent class	Relationship type	Child class
AI Function [cmdb_ci_function_ai]	Depends on::Used by	AI Model Deployment [cmdb_ci_ai_model_deployment]

AI Model Deployment [cmdb_ci_ai_model_deployment]

The following attributes in the AI Model Deployment [cmdb_ci_ai_model_deployment] table are populated by collected data:

Attribute label	Attribute name
Name	name
Description	short_description
Object ID	object_id
Install Status	install_status
Model ID	model_id
Vendor	vendor
Asset	asset
Discovery Source	discovery_source

AI Service Graph connector for Salesforce

Use the#AI Service Graph Connector for Salesforce to discover AI assets such as AI systems, agents, models, tools, and prompts and well as usage data for these AI agents. This usage information is consumed by the AI Control Tower value dashboard.

Download apps from the Store

Visit the ServiceNow Store website to download the AI Service Graph Connector for Salesforce app.

Supported ServiceNow versions

- Australia
- Zurich patch 7
- Yokohama patch 11

User role

- sn_ai_disc.discovery_admin
- sn_cmdb_int_util.sgc_admin

Salesforce AI Metadata mapping in ServiceNow tables

AI Agents

alm_ai_system_digital_asset -> Model table (cmdb_ai_system_component_product_model)

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Required Fields	ServiceNow (Target)	Salesforce (Staging)
Model ID	Model	model_id
Agent ID	Product instance identifier	agent_id
Version	External record reference	version_id
Status	State (install_status)	u_status
Quantity	Quantity	quantity
Vendor	Vendor	u_vendor
Company	Company	cleansed_manufacturer_ref
Source System	Source System	vendor
Asset Type	Model Category	asset_type

AI Models

alm_ai_model_digital_asset -> Model table (cmdb_ai_model_product_model)

Required Fields	ServiceNow (Target)	Salesforce (Staging)
Asset Type	Model category	asset_type
Foundation Model ID	Base model	foundation_model_identifier
Model	Model	base_model
Status	State (install_status)	u_status
External Reference ID	External record reference	id
Vendor	Vendor	cleansed_vendor_ref
Quantity	Quantity	quantity

AI Tools

AI subcomponent reference table (sn_ent_ai_tool) -> sn_ent_ai_system_subcomponent_m2m -> AI system/Model table (alm_ai_system_digital_asset)

Required Fields	ServiceNow (Target)	Salesforce (Staging)
Description	Description	description
Type	Type	type
Source Information	Source information	source
Name	Name	developername
Table Name	Target document table	tablename

AI Prompts

alm_ai_prompt_digital_asset -> Model table (cmdb_ai_prompt_product_model)

Required Fields	ServiceNow (Target)	Salesforce (Staging)

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Model Name	Model	model
Description	Prompt information	description
Table Name	Servicenow table	table_name
ID	External record reference	id

AI Agents Usage

sn_ai_disc_ai_usage -> AI system/Model table (alm_ai_system_digital_asset)

Required Fields	ServiceNow (Target)	Salesforce (Staging)
User	User	user
Time	Time	timestamp
Parent ID	Session ID	parentid
Total Invocations	Count	totalinvocations
Conversion Definition ID	AI system	conversationdefinitionid

Create AI connection for Salesforce

Use the AI Service Graph Connector for Salesforce plugin to create AI connections to discover AI assets such as AI systems, models, prompts, and tools as well as usage data for these AI agents within your ServiceNow AI Control Tower. This usage information is consumed by the AI Control Tower value dashboard.

Before you begin

Role required: sn_ai_disc.discovery_admin and n_cmdb_int_util.sgc_admin

Procedure

1. Navigate to **AI Control Tower** > **Configuration** > **AI connection**.
2. Select **Add**.
3. Select **Salesforce** from all the available connectors.
4. Click **Create connection**.
   Review setup instructions page displays
5. Verify to follow all the prerequisite steps.
   Setup page appears.
6. Create and test connection
   a. Enter the **Connection Name**.
   b. Enter the **Connection URL**.
   c. Enter the **OAuth Client ID**.
   d. Enter the **OAuth Token URL**.
   e. Click **Create and test connection**.
   f. Click **Continue**.
7. Configure import schedule

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a. Ensure that both the parent-scheduled jobs, Discovery and Execution are active as they're shipped out of the box inactive.

Note: Ensure to execute the Discovery-scheduled job first.

b. Select Run according to your preference.

c. To run frequency by demand, select **Execute now**.

Note: This is an optional step as the schedule imports run according to the schedule.

d. Click **Continue**.

e. Click **View all connections** to view the newly created connection.

Result
AI Connection is created for Salesforce.

APIs used by Salesforce

Explore the Salesforce APIs used in AI service Graph Connector for Salesforce. The table lists all the Salesforce API endpoints used by the connector.

The following table lists all the Salesforce API endpoints used by the connector.

API	Endpoint
Bot Definition, BotVersion	https://<domain_name>.salesforce.com/services/data/v65.0/query?q=SELEC BotVersions) FROM BotDefinition WHERE Type != 'Bot' LIMIT 100 OFFSET 100
Configured Einstein Models	https://<domain_name>.salesforce.com/services/data/v65.0/ssot/machine-le
GenAiFunctionDefinition	https://<domain_name>.salesforce.com/services/data/v65.0/query?q=SELEC Plugin.Planner.Id, Plugin.Planner.DeveloperName, Plugin.DeveloperName, Plug GenAiFunctionDefinition WHERE PluginId != null LIMIT 100 OFFSET 100
GenAiPluginDefinition, GenAiPluginInstructionDef	https://<domain_name>.salesforce.com//services/data/v65.0/query?q=SELE Description,id,GenAiPluginDefinition.DeveloperName,GenAiPluginDefinition.Id GenAiPluginDefinition.MasterLabel, GenAiPluginDefinition.Planner.Developer
ConversationDefinitionId, ConversationDefinitionEventLog	https://<domain_name>.salesforce.com/services/data/v65.0/query?q=SELEC ConversationDefinitionId, COUNT(Id) TotalInvocations FROM ConversationDe ParentId, CreatedById, ConversationDefinitionId, User ORDER BY MIN(EventD

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AI Gateway

Explore the AI Gateway, its value and learn how to use and configure it for your MCP (Model context protocol) transactions.

Model Context Protocol

The Model Context Protocol (MCP) is a standardized client-server protocol that enables AI applications to discover and interact seamlessly with external tools, data sources, and systems. MCP facilitates communication between an AI host application (AI Agent Studio), an MCP Client embedded in the host, and one or more MCP servers that expose specific capabilities such as tools.

For more information on MCP, see Model Context Protocol Client

AI Gateway overview

AI Gateway enables governance, observability, and security for your MCP transactions. AI Gateway is designed to be platform agnostic, delivering the above-mentioned benefits both within ServiceNow (AI Agent studio) and in external agentic studios and hosts.

Why Gateway

Enterprises are building unified AI across vendor boundaries. Their agentic workflows operate across platforms requiring governance.

AI Gateway offers:

- Lifecycle management
- Asset registry
- Identity and access management
- Secure authentication method (OAuth 2.1)
- Observability

Value of AI Gateway

With the increasing need of interoperability across different AI solutions across enterprises. AI Gateway provides a way for interoperability governance, observability & security.

Features and benefits

- Enable tight governance and control of cross-platform resources such as MCP servers.
- Enable enterprises to securely connect their agents to remote MCP servers, which work for any agent and MCP server.
- Provide visibility into production metrics such as usage and latency.

Installation and prerequisites

Applications

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- Now Assist subscription (required)
- AI Control Tower for Now Assist – Pro Plus license (auto-installs sn_awh_config)
- AI Agent Studio (required for MCP server intake in AI Gateway for AI Control Tower (1.0.5))

Plugins

- sn_ai_governance (version 5.0.6 or higher)
- sn_telemetry_data (version 1.1.10 or higher)

Roles

- AI steward [sn_ai_governance.ai_steward] - for approval workflows and policy management
- AI Agent admin [sn_aia.admin] – for configuring MCP servers as tools in AI Agent Studio

The AI Gateway application is automatically installed for customers who use AI Control Tower for Now Assist.

If you're using any generative AI features, you already have access to AI Gateway. The AI Gateway is included with all types of pro plus licenses. To use the features in AI Gateway, ensure that both AI Agent Studio and AI Control Tower are available in your instance.

What to explore next

- For information on the process flow of MCP servers, see Process flow of MCP servers via AI Gateway
- For information on AI Gateway setup tab, see MCP server record
- For information on AI Gateway in the configuration page, see AI Gateway
- For information on the roles in AI Control Tower and their role with AI Gateway, see AI Control Tower roles

Process flow of MCP servers via AI Gateway

Explore the process flow of configuring and introducing MCP servers via AI Gateway in AI Control Tower.

The following steps are performed in the following order to complete the process flow of MCP servers.

Role required: sn_ai_governance.ai_steward

1. Adding an MCP server (The MCP server can be added in three different ways)
   - ServiceNow AI Agent studio
   - AI Control Tower
   - MCP Catalog
2. MCP server approval workflow
3. AI Gateway setup and Client Registration

Add an MCP server from ServiceNow AI Agent studio

Add an external MCP server from ServiceNow AI Agent studio.

Before you begin

Role required: sn_ai_governance.ai_steward

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Note: The AI Steward (sn_ai_governance.ai_steward) role gets inherited with the following roles:

- (AI admin) sn_aia.admin
- (AIG admin) aig_admin
- (MCP Client admin) sn_mcp_client.admin

For more information on the AI Steward role and its responsibilities, see AI Control Tower roles

Procedure

1. Navigate to **Workspaces** > **AI Agent Studio** > **Settings** > **Manage MCP servers**.
2. Select **New**.

   Note: In the Create and manage tab of the AI Agent studio, you can add only those MCP servers that have been approved in the AI Control Tower. To view these approvals, go to the Approvals tab on the MCP server record. For more information on Approvals tab and MCP server record, see MCP server record

3. Enter the Name.
4. Select the Authentication type: OAuth 2.1

   Note: AI Gateway supports OAuth 2.1.

5. Select **Next**.
6. Select the Client registration type: Dynamic Client Registration.

   AI Gateway registration in AI Agent Studio supports Dynamic Client Registration.

   If the server allows dynamic client registration, it will automatically retrieve the necessary details. Otherwise, you will need to enter the details manually.

7. Select the **Grant type**.
8. Select **Add**.

   The server gets added and displays the details of the server.

9. Select **Authenticate** to authenticate the server with your credentials.

   Note: To view the approval request record for every MCP server in the AI Agent studio, select **View Approval record**. This action will direct you to the Related Variants tab of the respective MCP server

   To know more about Related Variants tab in the MCP server record, see MCP server record

10. Select **Save** to create an MCP server record.

    Note: A scheduled job named **AI Agent Studio to AICT-MCP server sync** runs every 15 minutes to synchronize the MCP servers from AI Agent Studio to AI Control Tower.

Result

After synchronizing, the MCP server shows up in the AI asset inventory with its Status listed as In review, and the lifecycle phase listed as New.

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Note: After the MCP server is added to the AI Control Tower, it can't be added again. Additionally, AI Agent Studio will not discover a server that has already been added.

What to do next

The MCP server approval request must be approved. See MCP server approval workflow

Add an MCP server from MCP Catalog

Add an MCP server from the MCP Catalog in the AI Control Tower

Before you begin

Role required: sn_ai_governance.ai_steward

Note: The AI Steward (sn_ai_governance.ai_steward) role gets inherited with the following roles:

- (AI admin) sn_aia.admin
- (AIG admin) aig_admin
- (MCP Client admin) sn_mcp_client.admin

Procedure

1. Navigate to **AI assets** > **AI asset inventory** > **MCP servers**.
2. Select **Add**.
3. Select **Choose from MCP Catalog**
4. Search for a server using the search box, or browse available MCP servers displayed as cards with icons, descriptions, and versions.
5. Select a server to view details including:
   - MCP server URL
   - Transport type
   - Available tools and capabilities
6. Click **Select** to import the server.

   Note: The system auto-fills Name, MCP server URL, Authentication type, and Transport type.

7. Select **OK** to confirm your server and endpoint selections.

   Note: Add any additional details.

8. Select **Submit**.

   The MCP server is submitted to AI Steward review.

   Note: You can only add one MCP server at a time.

Result

The MCP server is added to AI Control Tower with status In review and synced to AI Agent Studio within 15 minutes.

Add an MCP server from AI Control Tower

Add an MCP server from the AI Control Tower.

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Before you begin
Role required: sn_ai_governance.ai_steward

Note: The AI Steward (sn_ai_governance.ai_steward) role gets inherited with the following roles:

- (AI admin) sn_aia.admin
- (AIG admin) aig_admin
- (MCP Client admin) sn_mcp_client.admin

For more information on the AI Steward role and its responsibilities, see AI Control Tower roles

Procedure

1. Navigate to **AI assets** > **AI asset inventory** > **MCP servers**.
2. Select **Add**.
3. Enter the Name (Server name).
4. Enter the MCP server URL.
5. Select **Next**.
6. Select the Client registration type.

   Note: Selecting Dynamic client Registration, AI Control Tower automatically receives the Client ID and Client Secret. Selecting Manual registration, the client must be created externally on the MCP provider side while the client ID and secret must be entered manually.

7. Review all the other details such as Grant type, and Token authentication method.

   Note: There are three sections for the URL:

   - Authorization URL: Where the user authenticates and grants access token\
   - Token URL: Where the system exchanges and authorization code for an access token
   - Token revocation URL: Used to invalidate issued tokens if supported.

8. Select **Submit**.

Result
The newly added MCP server is registered in the AI asset inventory MCP servers list and available for approval workflow.

MCP server approval workflow

Explore the MCP server approval workflow.

Before you begin
Role required: sn_ai_governance.ai_steward

Procedure

1. Navigate to **AI Control Tower** > **AI assets** > **Approvals**.
2. Select the MCP server from the asset type filter or navigate to Lifecycle and filter by the current state: **New**.

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3. Select the MCP Server record with its Status: **New**.
4. Select **Start Review**.

   Note: Within AI Agent Studio, the MCP Server shows a status of AI Steward review during this phase. Product Owners can select View approval record in AI Agent Studio to go straight to the MCP Server record in AI Control Tower.

   A playbook is triggered to guide the approval process through three phases: Assess, Build and Test, and Deploy.
5. Select **Mark as Complete** for the Assess phase.

   Note: The Asses phase includes Architecture review, Risk Assessment, and Stakeholder review.

6. Complete the Build and Test phase activities.

   Note: The Build and Test phase involves out-of-application testing and validation activities such as running a test AI agent using the MCP Server as a tool and validating output received.

7. Select **Mark as Complete** for the Build and test phase.
8. Select **Mark as Complete** for the Deploy phase.

   Note: The Deploy phase is the final step to deploy and allow the MCP Server for usage.

9. Select **Save**.

   Note:

   The AI Gateway setup tab appears only after an MCP server request is approved. The AI steward can pause transactions whenever needed through this tab. For information on the tabs appearing in the MCP server record, see MCP server record

AI Gateway setup and Client Registration

Setting up AI Gateway tab and creating MCP Client Registration.

Before you begin

Role required: sn_ai_governance.ai_steward

Procedure

1. Navigate to **AI assets** > **AI asset inventory** > **MCP servers**.
2. Select and open an approved MCP server.
3. Navigate to the **AI Gateway setup** tab.

   If an AI steward wants to enable ServiceNow Agent Studio for the approved MCP server, they can create a new MCP Client integration.

4. Select **New** under **MCP Client integration**.
5. Enter the **Name**.

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Note: A redirect URL will be available after an agent is created and configured. The redirect URL is a callback point endpoint used during OAuth.

The redirect URL for the MCP clients is unique to each:

- AI Agent Studio: https://<instance_name>.service-now.com/oauth_redirect.do
- Copilot studio: Unique to the tool or connection that you can create inside their Copilot agent.
- Postman: https://oauth.pstmn.io/v1/browser-callback
- Other platforms: Consult the platform's OAuth documentation

6. Select **Save**.

Result
A connection to the MCP server is set up via AI Gateway.

Note: The Client ID and Client secret are automatically generated and available in the MCP server record. These credentials are used to authenticate the client when connecting to the Gateway.

To connect with Copilot Studio via AI Gateway, see Connecting with Microsoft Copilot Studio Via AI Gateway

MCP server record

Explore the MCP server record and its associated tabs.

The MCP server record has the following tabs:

1. **Details**: Displays all the asset details along with the MCP server URL at the bottom of the page.
2. **Approvals**: Displays all the approval requests for the MCP server.

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Note:

When MCP servers are synced to the AI Gateway with the AI Control Tower Core (with Now Assist), an option appears in AI Control Tower to start the approval process. However, with AI Control Tower Pro license version, the button doesn't appear after the synchronization job runs, and the Lifecycle Status is shown as 'None'.

This is a known behavior. As a workaround, set the lifecycle phase to "New" and the lifecycle status to "AI Steward review" for the relevant sn_ai_governance_asset_governance_details record.

This can be achieved by running a script manually:

```
var assetGovernanceRecord = new
 GlideRecord('sn_ai_governance_asset_governance_details');

if (assetGovernanceRecord.get('<sys_id of asset governance
 record>')) {

    assetGovernanceRecord.setValue('status', 5);


 assetGovernanceRecord.setDisplayValue('lifecycle_phase','N
ew');

    assetGovernanceRecord.update();

}
```

For more information on workflow of MCP server approval request, see MCP server approval workflow

3. **KPIs & Metrics**: Displays the MCP tools observability metrics for each server, which is approved and running. In the KPIs & Metrics tab, the AI steward can view different tools, which have been invoked across gateway usage from different hosts. The tab shows the total number of requests sent, the success rate, and any latency observed.

   Note: Similarly, at the AI Gateway tab in AI Control Tower tab on the landing page of AI Control Tower, you can view the various servers that have been used, along with the total number of requests or transactions and the corresponding success rate.

4. **AI Gateway setup**: The AI Gateway setup tab appears only after an MCP server request is approved. From the AI Gateway setup tab, you can pause the AI Gateway transaction of the MCP server and add an MCP Client integration. The AI Gateway tab is accessible for all AI Control Tower workspace users.

   The AI Gateway setup tab has three sections:

   - **AI Gateway MCP server details** - Displays the following URLs:
     - **AI Gateway MCP server URL**- The Gateway endpoint that clients connect to
     - **Authorization endpoint URL**- OAuth authorization endpoint.
     - **Token endpoint URL**- OAuth token exchange endpoint.

     Note: All the three URLs are generated automatically and can't be modified.

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If an MCP server is identified as malicious for a certain period, the AI stewards can pause all transactions directed to that server through the AI Gateway. Once the risk is resolved, transactions can be resumed. Similarly, at the AI Gateway level, it's possible to pause all transactions across all servers from the AI Gateway page on the Configurations section of AI Control Tower.

- **MCP Client Integration**- Displays Registered clients for the server. Each agent builder requires its own client registration and MCP client Integration generates a client ID and client secret. If you want to enable ServiceNow Agent Studio for a linear MCP server, then you can create an MCP client integration by selecting **Add**.

  Note: For more information Gateway setup and MCP Client Integration, see AI Gateway setup and Client Registration

- **Global MCP Clients**- Global MCP clients are set up separately from server records. You can configure them on the Configurations page of AI Control Tower in the AI Gateway section. Once they're created, they're automatically available across all MCP servers, so there's no need to set up individual client integrations for each server.

5. **Related Variants**: The Related Variants tab provides a one-to-one mapping of all the MCP server entries from AI Agent Studio, so each entry is visible and trackable in AI Control Tower. In the Related Variants tab, you can have multiple MCP servers of the same variant.

Note: The AI steward can activate sensitive data protection for any transaction across servers by selecting **Activate PII check**. By activating, the AI gateway blocks those transactions, which involve sharing sensitive information to the MCP server.

Add a Global MCP client

Adding a Global MCP client from the AI gateway configuration page.

Before you begin

Role required: AI steward

Procedure

1. Navigate to **AI Control Tower** > **Configurations** > **AI Gateway** > **Global MCP clients**.
2. Select **Add**.
3. Enter then Client ID.
4. Select **Next**.
5. Select Metadata sync mode.

   It is preferable to select Live.

6. Change the Security controls according to the requirements of the agent builder.
7. Click **Submit**.
   A Global MCP client is created.

Result

The MCP client is created and appears in the Global MCP client tab.

Configuring AI Control Tower (legacy)

Configure the AI Control Tower workflow.

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Configuration overview

1. Activation and installation of AI Control Tower
2. Configure AI Control Tower
3. Configure multi-instance management for AI Control Tower

Activation and installation of AI Control Tower

The following section provides an order of installing the applications and their dependent plug-ins.

Installation overview

Installing **AI Control Tower (sn_aict)**, the dependent plug-ins are installed in the following order:

1. AI Control Tower Core- This combines AI assets and controls in a central hub, ensuring comprehensive governance and management.
2. AI Asset management- The ability to collect information, track changes and manage lifecycle of AI artifacts like AI systems, models, datasets, prompts etc.
3. AI Risk and Compliance management- It is a comprehensive framework that facilitates end-to-end lifecycle management of AI risks. It supports activities such as risk classification of AI assets, mapping to regulatory authority documents, continuous monitoring, and policy compliance to ensure responsible and accountable AI usage.
4. AI Case management- This module enables tracking, triaging, and resolution of incidents or inquiries related to AI systems. It provides a structured case handling mechanism for AI stewards, compliance officers, and stakeholders to manage AI-related exceptions, investigations, and operational events efficiently.
5. AI Risk and Compliance integration with Control Tower- It establishes a seamless connection between AI Risk and Compliance and the AI Control Tower workspace. This integration ensures unified visibility into AI governance activities, allowing users to monitor risk postures, compliance statuses, and case workflows directly within the Control Tower interface for a centralized oversight experience.
6. AI Risk and Compliance content (optional)- Provides customers to ensure compliance with the applicable laws, regulations, directives and/ or standards and that any content provided in the product is accurate and up to date. Customer acknowledges that the content provided with the product is for ease of use and it is Customer's responsibility to replace the content with the applicable laws, regulations, directives and/ or standards at its own discretion.
7. AI Control Tower- Provides a single, consolidated view of all enterprise AI assets and their relationships, empowering organizations with enhanced integration, governance, and operational efficiency.

Application list

Application	Dependent plug-in
AI Control Tower Core	Data Foundation Model (sn_cmdb_foundation:1.1.0)
AI Risk and Compliance management	• AI Control Tower Core (sn_ai_governance:4.0.2) • GRC Feature roles (sn_grc_ftr_role:21.0.1) • GRC: Common workspace elements (sn_grc_workspace:21.0.4)

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Application list (continued)

Application	Dependent plug-in
	• GRC: Policy and Compliance management (sn_compliance:21.0.2) • Post assessment actions for Smart assessments (sn_smart_imp_auto:20.1.0) • GRC: Risk management (sn_risk:21.0.2) • Regulatory agency library (sn_reg_body_mgmt:21.0.0) • Smart assessment core (sn_smart_asmt:21.0.1) • Smart assessment connected (sn_smart_asmt_conn:21.0.1) • Smart assessment designer (sn_smart_asmt_desg:21.0.3)
AI Risk and Compliance integration with Control Tower	• AI Case Management (sn_ai_case_mgmt:21.0.1) • AI Risk and Compliance management (sn_grc_ai_gov:21.0.1) • GRC: Advanced Risk (sn_risk_advanced:21.0.2)
AI Control Tower	• AI Asset Management (sn_ai_asset_mgmt: 2.0.0) • AI Control Tower Core (sn_ai_governance:4.0.2) • AI Risk and Compliance integration with Control Tower (sn_grc_ai_irm_intg:21.0.1) • Engagement dashboard for AI Control Tower (sn_ai_engagement:2.1.6) • Value dashboard for AI Control Tower (sn_ai_value:2.1.6) • AI Discovery (sn_ai_disc:1.0.4)
AI Control Tower for Now Assist 1.01	Gen AI Controller (sn_generative.ai 11.0.9)

When the dependent plug-ins are active, you can look for AI Control Tower application in the ServiceNow store, and download the application when available.

For more information about downloading any application from ServiceNow store, see Download any application from ServiceNow

Configure AI Control Tower

Configuring the AI Control Tower for Now Assist from the **Configurations** page.

Before you begin

Role required: AI steward [sn_ai_governance.ai_steward]

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Procedure

1. Navigate to the **Configurations** view in the AI Control Tower.
2. Expand **Data** and select **Opt in** under **Data sharing**.
   To view the **Data** section, confirm that the generative AI Controller plugin is installed.
   The **Opt in** option is enabled by default.

   Note: Opting out of data sharing can only be reversed by your Account Executive or the Now Support team.

   For more information about Data sharing, see the FAQs (common questions) section on the Data Sharing page.
3. Select **Controls** and activate the **Automatically trigger playbooks** option.
   The **Automatically trigger playbooks** option is inactive by default.
   Enabling the **Automatically trigger playbooks** and adding an AI asset to this environment automatically triggers approval requests.

   Note: When the Automatically trigger playbooks isn't enabled, the approval requests aren't generated automatically, however, the asset manager can initiate them manually.

   Verify to have the **Automatically trigger playbooks** option enabled in your production environment.

Result
The AI Control Tower is configured.

Configure multi-instance management for AI Control Tower

Configuring Multi-Instance management for AI Control Tower.

Before you begin
Note: The feature is available on Yokohama release onwards.

This feature isn’t supported on Government Community Cloud (GCC) and on-premises instances.

Role required: AI Steward [sn_ai_governance.ai_steward]

About this task
Note: Make sure the plugin com.glide.mif.mtls is active. If it is not installed, contact Now Support to activate the plugin com.glide.mif.mtls for MIF features.

Procedure
1. Log in to the managed instance and navigate to **All** > **Multi-Instance Management** > **Manager Instances**.
   The Manager Instances list view page appears.
2. Select **New**.
3. Select the **Application**: AI Control Tower Core.
4. Select the **Manager Instance**.

   Note: The **Approval** field will show Awaiting Manager Confirmation.
5. Select **Submit**.
6. Log in to the valid prod instance (selected in the step 4) and navigate to Managed Instances.

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A record will appear with the request status in auto-approved state. It gets auto-approved in 5 to 10 minutes.

7. Navigate to the Managed Instances tab on the Multi-instance Setup page to view all registered managed instances.

Result

Multi-instance management is configured for the AI Control Tower.

For more information about Trust configuration and Trust configuration management, see Cross-instance application trust configuration.

For more information about AI asset synchronization process, see Multi-instance Setup section under Exploring the AI Control Tower configurations.

Configure third-party LLMs using AI Control Tower

Use the AI Control Tower to configure third-party LLMs based on the data routing configuration for the APJC region.

Before you begin

Role required: AI steward [sn_ai_governance_ai_steward]

Procedure

1. Navigate to **All** > **AI Control Tower** > **Configurations** > **Controls** > **AI model providers**.
2. Select **Edit**.

   You can configure AI model requests through these types of data routing configuration:

   a. Regional

   b. Global

3. Configure LLMs through Regional data routing.

   a. Select **Regional**.
   All allowed model providers are displayed:

   - Now LLM Service
   - AWS Claude
   - Azure OpenAI
   - Google Gemini

   b. Select the model providers according to your organizational policies.
   When Azure OpenAI is selected, you're asked to Allow Spillover, which redirects the traffic to Global data routing.

   c. Enable spillover by selecting **Yes**.

   d. Select **Save**.
   The Data routing confirmation consent request appears informing you to provide the consent.

   e. Select **Agree and proceed**.

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f. Select **Save**.
The third-party LLMs are configured with Regional data routing configuration for the APJC region.

4. Configure LLMs through Global data routing.

a. Select **Global**.
All allowed model providers are displayed:

- AWS Claude
- Azure OpenAI
- Google Gemini
- Now LLM Service

Note: Selecting global data routing redirects your data processing location to a global datacenter.

b. Select all the model providers.

c. Select **Save**.

Result

The third-party LLMs are configured with the Global data routing configuration for the APJC region.

For information about Data routing, Fallback, and Spillover, see AI model providers

For information about scenarios for configuring third-party LLMs for regulated markets and AMS & EMEA regions, see Explore Third-party LLMs and regions

Using AI Control Tower (legacy)

Use AI Control Tower for creating governance workflows.

Create an AI Control Tower Playbook workflow

Create a AI Control Tower Playbook workflow for Now Assist approvals to approve or reject an asset.

Before you begin

Important: The AI Control Tower Approval Playbook for the Now Assist approval isn't created manually. They're automatically triggered when an approval request is created while the approval mandate is enabled. To automatically trigger, activate the Automatically trigger playbooks feature under configuration.

Role required: AI steward [sn_ai_governance_ai_steward]

Procedure

1. Navigate to **Workspaces** > **AI Control Tower**.
2. From the AI Control Tower, open the **AI assets** view.
3. From the navigation menu of the AI assets view, navigate to Now Assist **Approvals** and open an Approval record.

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4. Under the **Playbook** section of the approval record, you can see the Now Assist **Approvals** workflow.

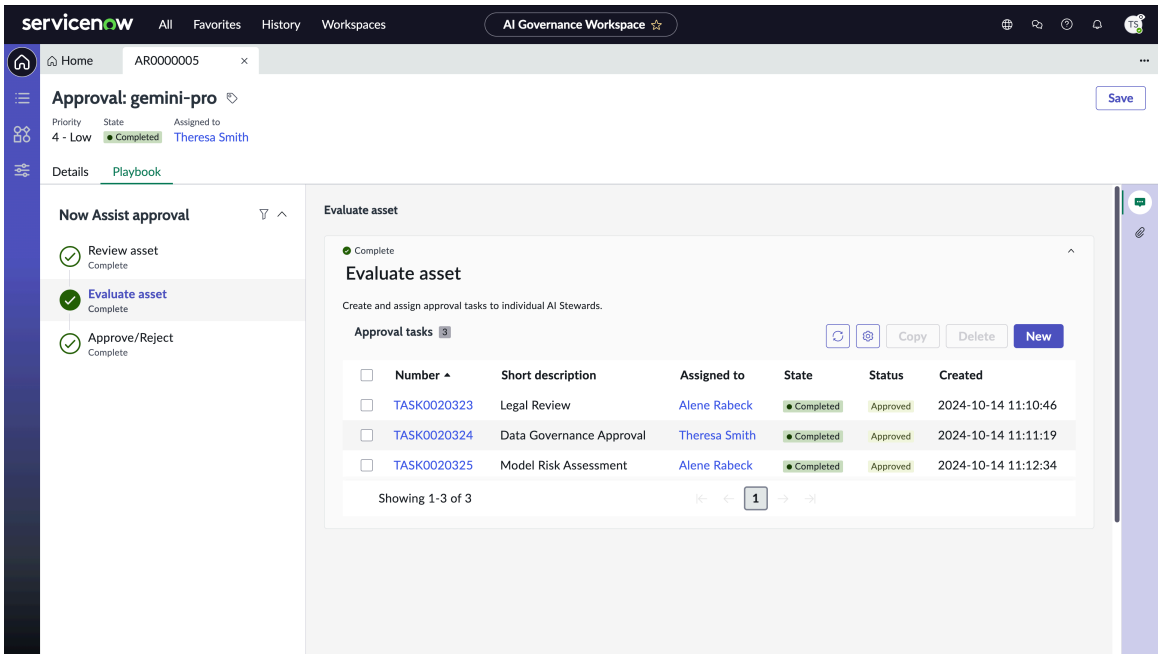
   You can save the **Playbook** record using the **Save** option or select **Cancel approval request** to cancel the workflow during any step.

5. **Review asset**- You can view all the details of an asset in review.
6. Select **Next**.
   The approval status changes when the Review asset step is marked as complete.
7. **Evaluate asset**- AI Stewards can create and assign the approval tasks to other individual AI Stewards to evaluate the assets.
   For information on creating a Now Assist approval task for evaluating assets, see Create a Now Assist approval task.

   Note: You can **Copy** or **Delete** the tasks and create a task using the **New** option in the Approval tasks list.

8. **Approval/Reject**- AI Stewards can select the Risk score from the drop-down menu and enter the Close notes, while approving or rejecting an asset based on the evaluation of the tasks.
9. Select **Reject** or **Approve asset** to complete the workflow.

   The **Risk score** and **Close notes** can't be modified after the **Approve/Reject** step is marked as complete.



What to do next

If you need to activate any skill from Now Assist Admin, an approval request is now required. The AI Control Tower approvals are integrated with both the builder team on the Skill Kit and Now Assist Admin. You may only use models, skills, or AI systems that have been approved. Approval is granted when the "AI steward approval required" option is enabled.

Create a Now Assist approval task

Create an Now Assist approval task to evaluate the assets. The Now Assist approval task is a sub task of an approval request where you will need approvals from other organizations or entities like Legal review, Security review, Data review, Piracy review etc.

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Before you begin
Role required: admin

Procedure
1. Navigate to Now Assist **Approvals** and open an Approval record.
2. Under the **Playbook** section, confirm that the **Review asset** step is marked as complete.
3. Select **Create new task** under **Evaluate asset**.
   A new approval task is created. The task number and task type fields are auto-populated.
4. Enter the **Short description**, **Description**, **Due date**, and **Close notes**.
5. Select the **Priority**, **State**, and **Status** of the task from the drop-down menu.
6. Enter and search for **Assigned to** and **Parent approval record**.
   The **Parent approval record** gets auto-populated and appears in a read-only mode.
7. Select **Save**.
   A Now Assist Approval task of an approval request is created.

Creating AI assets

You can create AI assets to track and manage the life cycles of your AI systems, AI models, prompts, and datasets.

Create AI system assets

Create AI assets to track and manage the life cycles of your AI systems.

Before you begin
Role required: sn_ai_governance_ai_steward or sn_ai_asset_mgmt.ai_asset_owner

About this task
An AI system is a software artifact that provides AI and machine learning (ML) capabilities to generate outputs, such as predictions, content, recommendations, and decisions, with varying levels of autonomy. Each AI system can be associated with one or more AI models, which may also be associated with one or more prompts and datasets. These AI models, prompts, and datasets enable the AI system to process data and solve complex problems with little to no human intervention.

Procedure
1. Navigate to **Workspaces** > **AI Control Tower**.
2. From the AI Control Tower, open the AI assets view.
3. From the navigation menu of the AI assets view, navigate to either **AI asset inventory - Managed** > **AI Systems** or **AI asset inventory - Unmanaged** > **AI Systems**.
4. Select **Add AI system**.
5. In the Details section of the Add AI system form, fill in the fields.

Details fields in the Add AI system form

Field	Description
Name	Name of the AI system.
Provider	People or organization that developed the AI system.
Version	Version of the AI system.

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Field	Description
Description	Brief description of the AI system.
Documentation	Additional information about the AI system, such as the method used to evaluate the efficacy of the AI system.
Managed by	User who is assigned to manage the AI system. This field is automatically set to the user who creates the AI system asset. **Note:** This field is editable only if you have the AI steward (sn_ai_governance_ai_steward) role. If you have the AI asset owner (sn_ai_asset_mgmt.ai_asset_owner) role, this field is read-only.
State	State of the AI system. The options are **Draft** and **Deployed**.
License details	License that you are using for the AI system.
Asset type	Type of AI that your AI system is. Select one of the following options: ○ **Agentic AI** ○ **Classic AI** ○ **Generative AI**
Department	Department that the AI system belongs to.
Supported locations	Locations in which the AI system is supported.

6. Select **Next**.
7. In the Related assets section of the Add AI system form, associate the AI system with other AI assets that are related to it.

   a. Depending on the type of related AI asset that you want associate the AI system with, select one of the following options from the asset type menu:

   - To associate the AI system with any of its supported components or subsystems, select **Sub AI systems**.

     Note: This option is available only if you set the **Asset type** field to either **Agentic AI** or **Generative AI** in the Details section of the Add AI system form.

   - To associate the AI system with any of its integrated AI models, select **AI models**.
   - To associate the AI system with a dataset that is used to test an integrated AI model, select **Evaluation datasets**.
   - To associate the AI system with a prompt that you are providing to an integrated AI model, select **Prompts**.
   - To associate the AI system with any of its integrated AI tools, select **Tools**.

     Note: This option is available only if you set the **Asset type** field to **Agentic AI** in the Details section of the Add AI system form.

   The corresponding asset list opens.

   b. Associate the AI system with the related AI asset.

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Depending on if the related AI asset is currently available in your asset inventory, proceed with one of the following options:

- To associate the AI system with a related AI asset that is currently available, use the following steps:
  i. Select the Add from inventory drop-down menu on the header of the corresponding asset list.
  ii. Select **Add from inventory**.
  iii. In the Add from inventory dialog box, select the check box for the related AI asset that you want to associate the AI system with.

  > **Note:** If you want to associate the AI system with multiple related AI assets, select the check box for each asset.

  iv. Select **Add**.
  The dialog box closes and the selected AI asset appears in the corresponding asset list.
- To associate the AI system with a related AI asset that is not currently available, use the following steps:

  > **Note:** This option is not available for AI tools.

  i. Select the Add from inventory drop-down menu on the header of the corresponding asset list.
  ii. Select **Create**.
  iii. Create the AI asset.
    - If you are creating an AI system asset, return to step 5.
    - If you are creating an AI model asset, follow the proceeding steps in Create AI model assets.
    - If you are creating a prompt asset, follow the proceeding steps in Create prompt assets.
    - If you are creating a dataset asset, follow the proceeding steps in Create dataset assets.

  The new AI asset appears in the corresponding asset list.

8. Select **Next**.
9. In the Use & purpose section of the Add AI system form, fill in the fields.
   This section of the Add AI system form enables you to specify the intended use and purpose of the AI system.

Use & purpose fields in the Add AI system form

Field	Description
Intended outcome of the AI system	Primary business outcome that the AI system is expected to achieve. Select one of the following options: ○ **Not Applicable** ○ **Efficiency Boost** ○ **Quality Enhancement** ○ **Decision Guidance** ○ **Automation of Tasks**

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Field	Description
	○ **Customer Experience Upgrade** ○ **Insight Generation**
Interaction type with end users	Type of interaction between end users and the AI system, including whether outputs are visible, actionable, or interactive. Select one of the following options: ○ **Not Applicable** ○ **No Direct Interaction** ○ **Background Support** ○ **Notifications & Prompts** ○ **User-Facing Recommendations** ○ **Chat-Based Interaction** ○ **Interactive Experience**
Level of human involvement	Capacity at which users can guide, review, and accept AI system activities during operation. Select one of the following options: ○ **Not Applicable** ○ **Full User Control** ○ **User-Guided with AI Support** ○ **Shared Control** ○ **AI-Initiated with User Approval** ○ **Full Automated Workflow**
System autonomy level	Extent to which the AI system can initiate actions or decisions without human intervention. Select one of the following options: ○ **None** ○ **Assistive (AI suggests)** ○ **Semi-Automated (acts with confirmation)** ○ **Condition-Based Automation** ○ **Event-Triggered Automation** ○ **Fully Automated Execution**
Type of output produced	Type of output that the AI system produces for users, systems, or downstream processes. Select any of the following options: ○ **Automated Decisions** ○ **Generated Content** ○ **Insight & Summaries** ○ **Ranking & Scores** ○ **Recommendations** ○ **Simple Alerts** ○ **System Actions**

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Field	Description
Area where the AI system is used	Business or operational areas where the AI system is used or provides value. Select any of the following options: ○ **Customer services** ○ **External Partner Ecosystem** ○ **Finance & Accounting** ○ **HR & Workforce** ○ **Internal Operations** ○ **IT & Security** ○ **Sales & Marketing** ○ **Supply Chain**
People affected by the AI system	Users who may be directly or indirectly affected by the AI system outputs or decisions. Select any of the following options: ○ **External Partners** ○ **General Customer Base** ○ **Internal Team** ○ **Public or Large Audiences** ○ **Specific Customer Groups**
Data used by the system	Types of data that the AI system uses to process inputs and generate outputs. Select any of the following options: ○ **Behavioral or Usage Data** ○ **Business Operational Data** ○ **Customer Interaction Data** ○ **Profile or Account Data** ○ **Public or General Info** ○ **Sensitive Business Data**
Additional use and purpose details	Additional information or context that helps clarify the specific use and purpose of the AI system.

10. Select **Submit for review**.

> **Note:** If you aren't ready to submit the AI system for review, select **Save** instead. You can then edit it and submit it for review later by navigating to **AI assets** > **Lifecycle** > **Onboard** and then selecting the AI system from the list. When the AI asset record opens, continue editing the AI system details.

Result

The AI system is added to your AI asset inventory. It automatically enters the onboard stage of the AI asset life cycle and is updated with a Lifecycle status of AI steward review.

What to do next

Users who are assigned the AI steward (sn_ai_governance.ai_steward) role can start the review process to begin tracking and managing the life cycle of the AI system. For detailed instructions, see Complete AI asset lifecycle.

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Create AI model assets

Create AI assets to track and manage the life cycles of your AI models.

Before you begin

Role required: sn_ai_governance_ai_steward or sn_ai_asset_mgmt.ai_asset_owner

About this task

An AI model is a program that is trained to process data and generate outputs, such as predictions, content, recommendations, and decisions, without human intervention. You can use an AI model to perform a specific task, such as image recognition, data classification, or price prediction.

Procedure

1. Navigate to **Workspaces** > **AI Control Tower**.
2. From the AI Control Tower, open the AI assets view.
3. From the navigation menu of the AI assets view, navigate to either **AI asset inventory - Managed** > **AI Models** or **AI asset inventory - Unmanaged** > **AI Models**.
4. Select **Add AI model**.
5. In the Details section of the Add AI model form, fill in the fields.

Details fields in the Add AI model form

Field	Description
Name	Name of the AI model.
Provider	People or organization that developed the AI model.
Version	Version of the AI model.
Supported languages	Languages that are supported by the AI model.
Deployment guidelines	Guidelines or instructions on how to deploy the AI model.
Training procedure	Method that you're using to train the AI model.
Context window	Maximum number of tokens that the AI model can process and recall when generating outputs.
Model size in MB	Size of the AI model in megabytes (MB).
Model parameters info	Internal variables that the AI model learns during training to process data and generate outputs.
Description	Brief description of the AI model.
Managed by	User who is assigned to manage the AI model. This field is automatically set to the user who creates the AI model asset. **Note:** This field is editable only if you have the AI steward (sn_ai_governance_ai_steward) role. If you have the AI asset owner (sn_ai_asset_mgmt.ai_asset_owner) role, this field is read-only.

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Field	Description
State	State of the AI model. The options are **Draft** and **Deployed**.
License details	License that you are using for the AI model.
Base model	Base model, also known as a foundation model or pre-trained model, that the AI model was built from.
Department	Department that the AI model belongs to.
Supported locations	Locations in which the AI model is supported.
Model card	Brief document that describes important information about the AI model, including the context, intended use, training data, and limitations of the model.
Model weights info	Numerical parameters that define how the AI model learns during training so that it can generate more desired outputs.
Required infrastructure	Integrated software and hardware components that are required for developing, deploying, and managing the AI model.
Evaluation metrics report	Report that provides data for the metrics that you're using to evaluate the effectiveness of the AI model.

6. Select **Next**.
7. In the Related assets section of the Add AI model form, associate the AI model with related datasets.
   Related datasets include any collections of data that can help test or train the AI model.

   a. Depending on the type of related dataset that you want associate the AI model with, select one of the following options from the asset type menu:
      - To associate the AI model with a dataset that can help test it, select **Evaluation datasets**.
      - To associate the AI model with a dataset that can help train it, select **Training datasets**.

      The corresponding asset list opens.

   b. Associate the AI model with the related dataset.
      Depending on if the related dataset is currently available in your asset inventory, proceed with one of the following options:
      - To associate the AI model with a related dataset that is currently available, use the following steps:
        i. Select the Add from inventory drop-down menu on the header of the corresponding asset list.
        ii. Select **Add from inventory**.
        iii. In the Add from inventory dialog box, select the check box for the related dataset that you want to associate the AI model with.

        > **Note:** If you want to associate the AI model with multiple related datasets, select the check box for each dataset.

        iv. Select **Add**.
        The dialog box closes and the selected dataset appears in the corresponding asset list.

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- To associate the AI model with a related dataset that is not currently available, use the following steps:
  i. Select the Add from inventory drop-down menu on the header of the corresponding asset list.
  ii. Select **Create**.
  iii. Create the dataset by following the proceeding steps in Create dataset assets. The new dataset appears in the corresponding asset list.

8. Select **Submit for review**.

> **Note:** If you aren't ready to submit the AI model for review, select **Save** instead. You can then edit it and submit it for review later by navigating to **AI assets** > **Lifecycle** > **Onboard** and then selecting the AI model from the list. When the AI asset record opens, continue editing the AI model details.

Result
The AI model is added to your AI asset inventory. It automatically enters the onboard stage of the AI asset life cycle and is updated with a Lifecycle status of AI steward review.

What to do next
Users who are assigned the AI steward (sn_ai_governance.ai_steward) role can start the review process to begin tracking and managing the life cycle of the AI model. For detailed instructions, see Complete AI asset lifecycle.

Create prompt assets

Create AI assets to track and manage the life cycles of your prompts.

Before you begin
Role required: sn_ai_governance_ai_steward or sn_ai_asset_mgmt.ai_asset_owner

About this task
A prompt is the instructive input that you provide to AI models to elicit specific responses or outputs. The more detailed and descriptive a prompt is, the higher the quality of the response or output. Examples of prompts include instructions, questions, and commands.

Procedure
1. Navigate to **Workspaces** > **AI Control Tower**.
2. From the AI Control Tower, open the AI assets view.
3. From the navigation menu of the AI assets view, navigate to either **AI asset inventory - Managed** > **Prompts** or **AI asset inventory - Unmanaged** > **Prompts**.
4. Select **Add prompt**.
5. In the Details section of the Add prompt form, fill in the fields.

Details fields in the Add prompt form

Field	Description
Name	Name of the prompt.
Provider	People or organization that developed the prompt.
Version	Version of the prompt.

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Field	Description
Description	Brief description of the prompt.
Documentation	Additional information about the prompt, such as the method used to evaluate the accuracy and quality of AI model responses based on the given input.
Managed by	User who is assigned to manage the prompt. This field is automatically set to the user who creates the prompt asset. **Note:** This field is editable only if you have the AI steward (sn_ai_governance_ai_steward) role. If you have the AI asset owner (sn_ai_asset_mgmt.ai_asset_owner) role, this field is read-only.
State	State of the prompt. The options are **Draft** and **Deployed**.
Prompt information	Input that you want to provide to AI models.

6. Select **Next**.
7. In the Related assets section of the Add prompt form, associate the prompt with related AI models.

   Related AI models include any AI models that you can provide the prompt to. These AI models can process inputs from the prompt and help generate appropriate outputs.

   Depending on if the related AI model is currently available in your asset inventory, proceed with one of the following options:

   - To associate the prompt with a related AI model that is currently available, use the following steps:

     a. Select the Add from inventory drop-down menu on the header of the AI models list.

     b. Select **Add from inventory**.

     c. In the Add from inventory dialog box, select the check box for the related AI model that you want to associate the prompt with.

     Note: If you want to associate the prompt with multiple related AI models, select the check box for each model.

     d. Select **Add**.
     The dialog box closes and the selected AI model appears in the AI models list.

   - To associate the prompt with a related AI model that is not currently available, use the following steps:

     a. Select the Add from inventory drop-down menu on the header of the AI models list.

     b. Select **Create**.

     c. Create the AI model by following the proceeding steps in Create AI model assets.
     The new AI model appears in the AI models list.

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8. Select **Submit for review**.

> **Note:** If you aren't ready to submit the prompt for review, select **Save** instead. You can then edit it and submit it for review later by navigating to **AI assets** > **Lifecycle** > **Onboard** and then selecting the prompt from the list. When the AI asset record opens, continue editing the prompt details.

Result
The prompt is added to your AI asset inventory. It automatically enters the onboard stage of the AI asset life cycle and is updated with a Lifecycle status of AI steward review.

What to do next
Users who are assigned the AI steward (sn_ai_governance.ai_steward) role can start the review process to begin tracking and managing the life cycle of the prompt. For detailed instructions, see Complete AI asset lifecycle.

Create dataset assets

Create AI assets to track and manage the life cycles of your datasets.

Before you begin
Role required: sn_ai_governance_ai_steward or sn_ai_asset_mgmt.ai_asset_owner

About this task
A dataset is a collection of structured or unstructured data that you can use to train and test AI models. Datasets can help you improve the performance and efficacy of your AI models.

Procedure
1. Navigate to **Workspaces** > **AI Control Tower**.
2. From the AI Control Tower, open the AI assets view.
3. From the navigation menu of the AI assets view, navigate to either **AI asset inventory - Managed** > **Datasets** or **AI asset inventory - Unmanaged** > **Datasets**.
4. Select **Add dataset**.
5. On the form, fill in the fields.

Add dataset form

Field	Description
Name	Name of the dataset.
Provider	People or organization that developed the dataset.
Acceptable usage	Acceptable use for the dataset. You can specify more than one use.
Version	Version of the dataset.
Data type	Type of data that the dataset contains. You can specify more than one data type.
Source	Source of the dataset, such as internal customer data within an organization or publicly available data from a government agency.
Description	Brief description of the dataset.
Managed by	User who is assigned to manage the dataset. This field is automatically set to the user who creates the dataset asset.

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Field	Description
	Note: This field is editable only if you have the AI steward (sn_ai_governance_ai_steward) role. If you have the AI asset owner (sn_ai_asset_mgmt.ai_asset_owner) role, this field is read-only.
State	State of the dataset. The options are **Draft** and **Deployed**.
Creation type	Method by which the dataset was created. Select one of the following options: ○ **Curated**: The dataset was created through careful selection, organization, and refinement of data. ○ **Derived**: The dataset was created by processing, transforming, or combining data from existing datasets. ○ **Synthetic**: The dataset was created by using artificial data that mimics real-word data.
Base datasets	Base dataset that the dataset was built from.
Department	Department that the dataset belongs to.
Dataset creation date	Date and time that the dataset was created.
Dataset card	Brief document that describes important information about the dataset, including the context, intended use, limitations, and potential biases of the dataset.

6. Select **Submit for review**.

Note: If you aren't ready to submit the dataset for review, select **Save** instead. You can then edit it and submit it for review later by navigating to **AI assets** > **Lifecycle** > **Onboard** and then selecting the dataset from the list. When the AI asset record opens, continue editing the dataset details.

Result
The dataset is added to your AI asset inventory. It automatically enters the onboard stage of the AI asset life cycle and is updated with a Lifecycle status of AI steward review.

What to do next
Users who are assigned the AI steward (sn_ai_governance.ai_steward) role can start the review process to begin tracking and managing the life cycle of the dataset. For detailed instructions, see Complete AI asset lifecycle.

Creating requests for AI assets

You can manage deployed AI assets effectively by creating change requests for updates to existing assets or by creating offboarding requests for retiring assets.

Create change requests for AI assets

Create a change request to modify the relationships between a deployed AI asset and its related assets.

Before you begin
Role required:

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- AI steward (sn_ai_governance_ai_steward)
- AI asset owner (sn_ai_asset_mgmt.ai_asset_owner)

About this task

To modify the relationships between related AI assets, a user with the AI asset owner (sn_ai_asset_mgmt.ai_asset_owner) role can initiate the change process by creating and submitting a change request. After the request is submitted, a user with the AI steward (sn_ai_governance_ai_steward) role can review and approve the request. This approval triggers the AI Control Tower application to create a new AI asset record for the asset that the change request was created for. The asset then automatically enters the onboarding stage of the asset life cycle.

You can create change requests for the following AI asset types:

- AI systems (classic, generative, and agentic)
- AI models
- Datasets

Procedure

1. Navigate to **Workspaces** > **AI Control Tower**.
2. If you have the AI asset owner (sn_ai_asset_mgmt.ai_asset_owner) role, create a change request.

   a. Initiate the request by using one of the following navigation options.

Navigation option	Procedure
AI Control Tower Home view	**i.** From the Home view of the AI Control Tower workspace, select the **Create request** drop-down menu. **ii.** Select **Create a change request**.
Change requests list	**i.** From the AI Control Tower workspace, open the AI assets view. **ii.** From the navigation menu of the AI assets view, navigate to **Requests** > **Change requests**. **iii.** Select **Create change request**.
AI asset record	**i.** From the AI Control Tower workspace, open the AI assets view. **ii.** From the navigation menu of the AI assets view, locate the **AI asset inventory - Managed** section and then select the subsection for the type of AI asset that you want to create a change request for. Alternatively, navigate to **Lifecycle** > **Deploy**. **iii.** Select an AI asset that meets the following criteria: ▪ The State is set to Deployed. ▪ The Lifecycle phase is set to Deploy. ▪ The Lifecycle status is set to Deployed.

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Navigation option	Procedure
	iv. Select the **Create a request** drop-down menu. **v.** Select **Create a change request**.

b. On the form, fill in the fields.

New change request form

Field	Description
Change details	
Asset in review	The AI Asset that you want to modify related asset relationships for. **Note:** If you initiated the change request from an AI asset record, this field populates automatically.
Version	Updated version number of the AI asset.
Due date	Date and time at which the request must be completed.
Justification	Justification for creating the request.
Sub AI systems **Note:** This form section appears only if you are creating a change request for an AI system with an Asset type of either Generative AI or Agentic AI.	
Updated Sub AI systems	Related AI components or subsystems that you want to associate the AI asset with.
AI models **Note:** This form section appears only if you are creating a change request for an AI system.	
Updated models	Related AI models that you want to associate the AI asset with.
AI prompts **Note:** This form section appears only if you are creating a change request for an AI system.	
Updated prompts	Related prompts that you want to associate the AI asset with.
Evaluation dataset **Note:** This form section appears only if you are creating a change request for an AI system or AI model.	
Updated evaluation datasets	Related evaluation datasets that you want to associate the AI asset with.
Tools	

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Field	Description
Note: This form section appears only if you are creating a change request for an agentic AI system.	
Updated tools	Related tools that you want to associate the AI asset with.
Training datasets **Note:** This form section appears only if you are creating a change request for an AI model.	
Updated training datasets	Related training datasets that you want to associate the AI asset with.
Source **Note:** This form section appears only if you are creating a change request for a dataset.	
Updated source	Related data source that you want to associate the AI asset with.
Base datasets **Note:** This form section appears only if you are creating a change request for a dataset.	
Updated base datasets	Related base dataset that you want to associate the AI asset with.
Dataset card **Note:** This form section appears only if you are creating a change request for a dataset.	
Updated dataset card	Related dataset card that you want to associate the AI asset with.

c. Select **Submit for review**.

d. In the Submit change request dialog box, select **Submit request**.
After the dialog box closes, you are automatically redirected to the new change request record.

3. If you have the AI steward (sn_ai_governance_ai_steward) role, approve or reject the request.

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a. Open the change request record by using one of the following navigation options.

Navigation option	Procedure
Change requests list	**i.** From the AI Control Tower workspace, open the AI assets view. **ii.** From the navigation menu of the AI assets view, navigate to **Requests** > **Change requests**. **iii.** From the list of available change requests, select the record number for the request that you want to approve.
AI asset record	**i.** From the AI Control Tower workspace, open the AI assets view. **ii.** From the navigation menu of the AI assets view, locate the **AI asset inventory - Managed** section and then select the subsection for the type of AI asset that the change request was created for. Alternatively, navigate to **Lifecycle** > **Deploy**. **iii.** Select the AI asset that the change request was created for. **iv.** On the AI asset record, select the **Requests** tab. **v.** Select **Change requests** from the request types menu. **vi.** From the list of available change requests, select the record number for the request that you want to approve.

The change request record opens.

b. On the **Details** tab, set the **Assigned to** field to the user who you want to assign the change request to.
You can assign the request to yourself or to any other user with the AI steward (sn_ai_governance_ai_steward) role.

c. If you are the assigned user, approve or reject the request.

- To approve the request, select **Approve**.
- To reject the request, select **Reject**.

○ If you approved the request, the Status changes to Approved and the State changes to In progress.

The AI Control Tower application then generates a change task for each asset that is impacted by the request. These change tasks appear on the **Change tasks** tab and specify the actions that must be taken on the impacted assets. Each change task is assigned to a user with the AI asset owner (sn_ai_asset_mgmt.ai_asset_owner) role. If you have any concerns or need further clarification on the request, you can create additional change tasks manually. After the assigned users complete all change tasks, the AI Control Tower application automatically creates a new AI asset record for the asset that the change request was created for. The State of the request then changes to Completed.

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Note: The **Change tasks** tab is not available if the change request was created for a dataset.

- If you rejected the request, the Status changes to Rejected and the State changes to Completed.

Create offboarding requests for AI assets

Create an offboarding request to retire AI assets that are no longer needed.

Before you begin

Role required:

- AI asset owner (sn_ai_asset_mgmt.ai_asset_owner)
- AI steward (sn_ai_governance_ai_steward)

About this task

To retire a deployed AI asset, a user with the AI asset owner (sn_ai_asset_mgmt.ai_asset_owner) role can initiate the offboarding process by creating and submitting an offboarding request. After the request is submitted, a user with the AI steward (sn_ai_governance_ai_steward) role can review and approves the request. This approval triggers the offboarding workflow that assigns tasks to impacted asset owners and updates the Status of the AI asset record to Retired upon completion.

Note: We have automated the ServiceNow AI model to initiate the offboarding workflows when a deprecation date is present.

You can create offboarding requests for the following AI asset types:

- AI systems (classic, generative, and agentic)
- AI models
- Datasets
- MCP servers

Procedure

1. Navigate to **Workspaces** > **AI Control Tower**.
2. If you have the AI asset owner (sn_ai_asset_mgmt.ai_asset_owner) role, create an offboarding request.

   a. Initiate the request by using one of the following navigation options.

Navigation option	Procedure
AI Control Tower Home view	**i.** From the Home view of the AI Control Tower workspace, select the **Create request** drop-down menu. **ii.** Select **Create an offboarding request**.

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Navigation option	Procedure
Offboarding requests list	i. From the AI Control Tower workspace, open the AI assets view. ii. From the navigation menu of the AI assets view, navigate to **Requests** > **Offboarding requests**. iii. Select **Create offboarding request**.
AI asset record	i. From the AI Control Tower workspace, open the AI assets view. ii. From the navigation menu of the AI assets view, locate the **AI asset inventory - Managed** section and then select the subsection for the type of AI asset that you want to retire. Alternatively, navigate to **Lifecycle** > **Deploy**. iii. Select an AI asset that meets the following criteria: ▪ The State is set to Deployed. ▪ The Lifecycle phase is set to Deploy. ▪ The Lifecycle status is set to Deployed. iv. Select the **Create a request** drop-down menu. v. Select **Create an offboarding request**.

b. On the form, fill in the fields.

New offboarding request form

Field	Description
Asset in review	**Note:** If you initiated the offboarding request from an AI asset record, this field populates automatically.
Due date	Date and time at which the request must be completed.
Justification	Justification for creating the request.

c. Select **Submit for review**.

d. In the Submit offboarding request dialog box, select **Submit request**.
After the dialog box closes, you are automatically redirected to the new offboarding request record.

3. If you have the AI steward (sn_ai_governance_ai_steward) role, review the request.

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a. Open the offboarding request record by using one of the following navigation options.

Navigation option	Procedure
Offboarding requests list	**i.** From the AI Control Tower workspace, open the AI assets view. **ii.** From the navigation menu of the AI assets view, navigate to **Requests** > **Offboarding requests**. **iii.** From the list of available offboarding requests, select the record number for the request that you want to review.
AI asset record	**i.** From the AI Control Tower workspace, open the AI assets view. **ii.** From the navigation menu of the AI assets view, locate the **AI asset inventory - Managed** section and then select the subsection for the type of AI asset that the offboarding request was created for. Alternatively, navigate to **Lifecycle** > **Deploy**. **iii.** Select the AI asset that the offboarding request was created for. **iv.** On the AI asset record, select the **Requests** tab. **v.** Select **Offboarding requests** from the request types menu. **vi.** From the list of available offboarding requests, select the record number for the request that you want to review.

The offboarding request record opens.

b. On the **Details** tab, set the **Assigned to** field to the user who you want to assign the offboarding request to.
You can assign the request to yourself or to any other user with the AI steward (sn_ai_governance_ai_steward) or AI asset owner (sn_ai_asset_mgmt.ai_asset_owner) role.

c. If you are the assigned user, select **Start review**.

The **Offboarding workflow** tab appears and then the offboarding workflow initiates. In addition, the **Impacted assets** tab automatically updates with the list of assets that are impacted by the request.

The offboarding workflow contains the Assess, Pre-offboarding tasks, and Offboard stages. You can create and delete relevant tasks in all three stages. Any tasks that are generated for impacted assets also appear in the corresponding workflow stages.

Note: Each user who is assigned to an impacted asset must complete the corresponding task by either accepting or rejecting it.

- If the user accepts the task, the Status task changes to Accepted and the State changes to Completed.
- If the user rejects the task, the Status of the task changes to Rejected and the State changes to Completed.

d. Complete all tasks in the Assess stage.

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e. Select **Mark as complete** to move to the Pre-offboarding tasks stage.

f. Complete all tasks in the Pre-offboarding tasks stage.

g. Select **Mark as complete** to move to the Offboard stage.

h. Complete all tasks in the Offboard stage.

i. Select **Mark as complete**.

After all three stages are marked as complete, the Status of the request changes to Approved and the State changes to Completed. The State of the asset then changes to Retired.

View AI assets by life-cycle stage

View AI assets based on the AI asset life-cycle stage that they are currently in. Use this information to determine which AI assets require your attention.

Before you begin

Role required: sn_ai_governance.ai_steward or sn_ai_asset_mgmt.ai_asset_owner

Procedure

1. Navigate to **Workspaces** > **AI Control Tower**.
2. From the AI Control Tower, open the AI assets view.
3. From the navigation menu of the AI assets view, locate the **Lifecycle** section.
   You can select **Cancel** to cancel AI asset.
4. Depending on the life-cycle stage that you want to view AI assets for, select one of the following Lifecycle subsections:
   - To view the list of AI assets that are currently in the New stage, select **New**.
   - To view the list of AI assets that are currently in the assess stage, select **Assess**.
   - To view the list of AI assets that are currently in the build and test stage, select **Build and test**.
   - To view the list of AI assets that are currently in the deploy stage, select **Deploy**.
5. Select an AI asset to launch the life-cycle review process or to view and modify additional details about the asset.
   - To initiate the life-cycle review process for the asset, select **Start review** and then follow the proceeding steps in Complete AI asset lifecycle.
   - To continue a life-cycle review that is already in progress, select the **Lifecycle** tab and then follow the proceeding steps in Complete AI asset lifecycle.
   - To view or modify general details about the asset, select the **Details** tab and then navigate to **Details** > **Details**.
   - To view or modify the use and purpose of the asset, select the **Details** tab and then navigate to **Details** > **Use & purpose**.

     Note: This option is available only for AI systems.

   - To view, modify, or add associations to other AI assets that are related to this asset, select the **Details** tab and then locate the **Related assets** section of the navigation menu.

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Select the subsection for the type of related AI asset that you want to view, modify, or add associations for.

For example, if you want to view all datasets that can help train an AI model, select the **Training datasets** subsection.

Note:

If you want to associate the asset with additional related AI assets, select one of the following options from the Add from inventory drop-down menu:

- To associate the asset with a related AI asset that is already available in your asset inventory, select **Add from inventory**.
- To associate the asset with a related AI asset that is not already available in your asset inventory, select **Create**. This option is not available for related AI tools.

You can then follow the proceeding steps in the corresponding AI asset creation topic:

- Create AI system assets
- Create AI model assets
- Create prompt assets
- Create dataset assets

- To view evaluation metrics for the asset, select the **KPIs & metrics** tab.

  Note: This tab is available only for AI systems and AI models.

- To view, modify, or create value templates that are mapped to the asset, select the **Value template** tab.

  Note: This tab is available only for AI systems.

  For more information on value templates, see Using value templates.

- To view associated onboarding, change, and off-boarding requests for the asset, select the **Requests** tab.

  For more information on change and off-boarding requests, see Creating requests for AI assets.

- To view the evaluations that are enabled for the asset, select the **Evaluation template** tab.

  Note: This tab is available only for AI systems.

Enable or disable the management of an AI asset

Enable or disable the management of an AI asset by designating it as either managed or unmanaged.

Before you begin

Role required: sn_ai_governance.ai_steward

About this task

If you designate an AI asset as managed, you can perform all life-cycle management and request creation processes on that asset. In addition, you can determine the risk classification, value, quality, and safety of the asset. If you designate an AI asset as unmanaged, you cannot perform any processes on it. By using these designations, you can streamline the asset management

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process and reduce operational risks. For more information on managed and unmanaged AI assets, see Assets list- managed and unmanaged assets.

Note: By default, all AI assets that you create through the AI Control Tower application are automatically designated as managed.

Procedure

1. Navigate to **Workspaces** > **AI Control Tower**.
2. From the AI Control Tower, open the AI assets view.
3. Depending on whether you want to enable or disable the management of an AI asset, proceed with one of the following options:
   - If you want to enable the management of an AI asset, use the following steps:
     a. From the navigation menu of the AI assets view, locate the **AI asset inventory - Unmanaged** section.
     b. Select the subsection for the type of AI asset that you want to enable the management of.

        For example, if you want to enable the management of an AI system, select the **AI systems** subsection.
     c. From the list of available AI assets, select the check box for the asset that you want to enable the management of.

        Note: If you want to enable the management of multiple assets, select the check box for each asset.
     d. Select **Move to Managed**.
     e. In the dialog box, select **Move to Managed**.

     The asset is designated as managed and automatically moves to the corresponding **AI asset inventory - Managed** subsection. The life-cycle review process, risk classification, value template calculations, and evaluations for the asset automatically initiate.
   - If you want to disable the management of an AI asset, use the following steps:
     a. From the navigation menu of the AI assets view, locate the **AI asset inventory - Managed** section.
     b. Select the subsection for the type of AI asset that you want to disable the management of.

        For example, if you want to disable the management of an AI model, select the **AI models** subsection.
     c. From the list of available AI assets, select the check box for the asset that you want to disable the management of.

        Note: If you want to disable the management of multiple assets, select the check box for each asset.

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d. Select **Unmanage**.

e. In the dialog box, select **Unmanage**.

The asset is designated as unmanaged and automatically moves to the corresponding **AI asset inventory - Unmanaged** subsection. The life-cycle review process, risk classification, value template calculations, and evaluations for the asset are automatically canceled.

Complete AI asset lifecycle

Complete the AI asset lifecycle process starting from assessment through deployment.

Before you begin

Role required: AI steward [sn_ai_governance.ai_steward] or Asset owner [sn_ai_asset_mgtm.ai_asset_ownerAI]

Procedure

1. Navigate to **Workspaces** > **AI Control Tower**.
2. From the AI Control Tower, open the AI assets view.
3. From the AI assets view, locate and open an asset which has its **Lifecycle status** as steward review.
4. In the asset record view, initiate the lifecycle process by selecting **Start review**.
5. On the **Lifecycle** tab, select **Assess** to create tasks.

   Note: The AI steward can manually create tasks under **Lifecycle**>**Assess** and assign them to an asset owner. The asset owner or the AI steward can mark this task as complete and move on to the next stage.

6. Select **Build and test** and create tasks under the **Development plan** and **Pre-deployment assessments** phases.

   Note: An AI steward can create tasks in the **Development plan** and **Pre-deployment assessments** phases, marking the tasks as complete in both the phases using the **Complete** button.

7. To create tasks and complete the AI asset Lifecycle, select **Deploy**.
   The asset owner can mark the task as complete.

Result

The life cycle status of an AI asset is deployed and completed.

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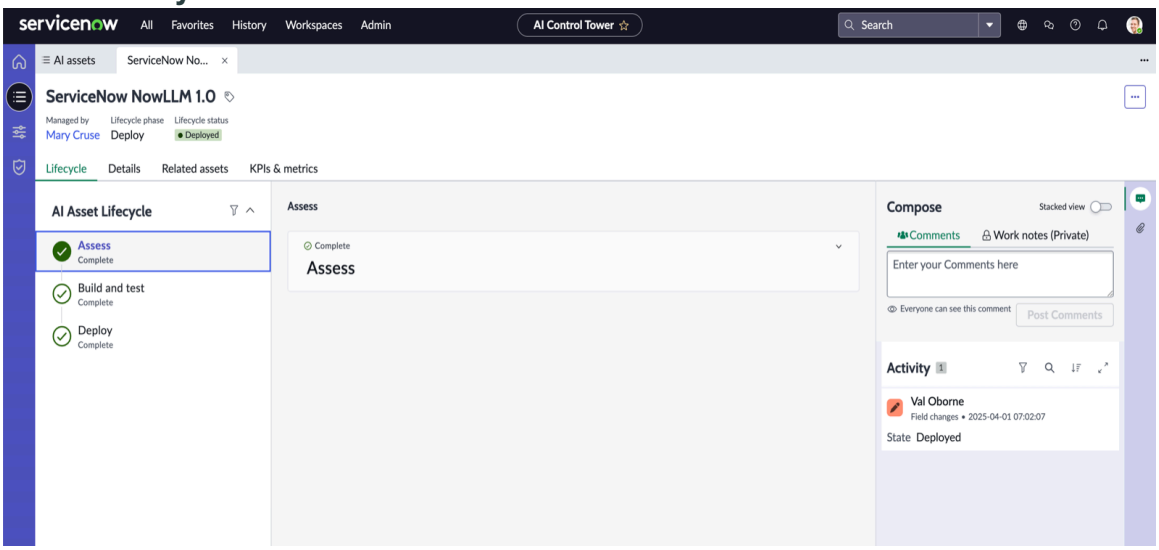
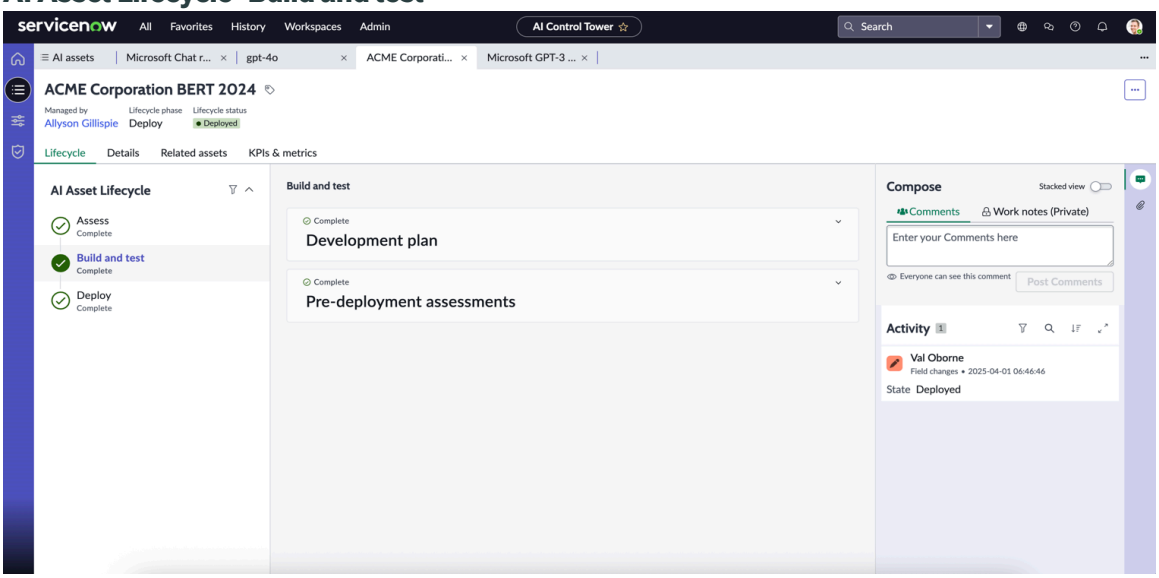
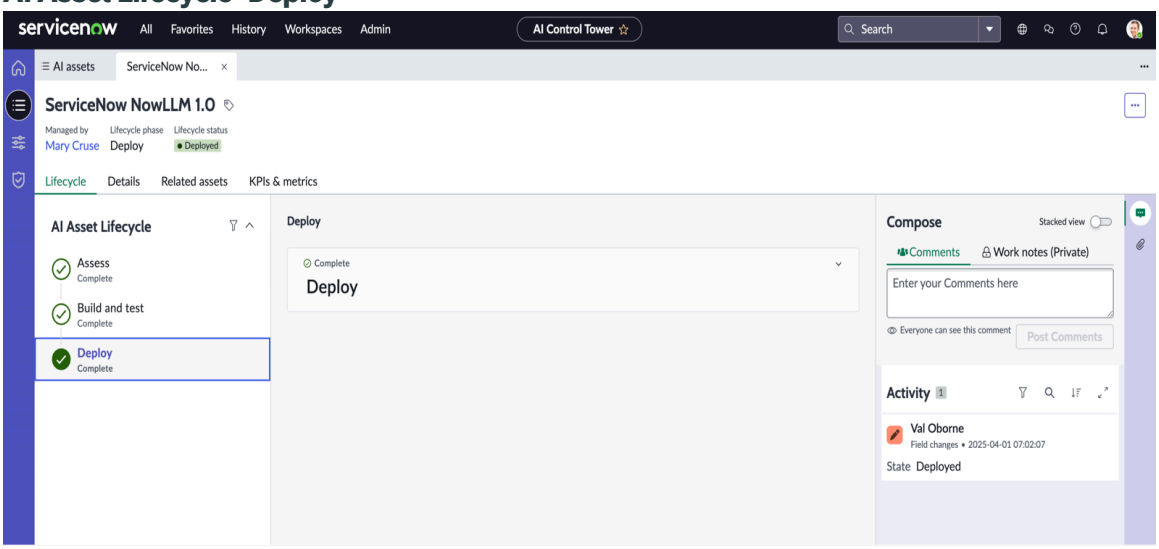
AI asset Lifecycle- Assess



AI Asset Lifecycle- Build and test



AI Asset Lifecycle- Deploy



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To manage the approval workflow for ServiceNow® AI, see Create an AI Control Tower Playbook workflow.

Using AI Control Tower to create hyperscaler connections

Use AI discovery setup on AI Control Tower to create hyperscaler connections.

AI discovery setup page allows to connect third-party applications for discovering assets and usage data.

- Hyperscaler connection with Azure
- Hyperscaler connection with AWS

Hyperscaler connection with Azure

Explore the hyperscaler connections with Azure.

To set up a Hyperscaler connections for asset discovery and usage from Azure, perform the following steps:

1. Configure Azure portal.
2. Connect to Azure from ServiceNow.

Configure Azure portal

Configuring the Azure portal.

Before you begin

Role required: Azure admin

Procedure

1. Log in to the Azure portal as Azure admin.
2. Navigate to **Azure AI Foundry**.
3. Open the **AI HUB resource** containing your agents.
4. Select **Access Control (IAM)**.
5. Select + Add icon to **Add role assignment**.
6. Add roles **Cognitive Services Open AI Contributor** and **Contributor** to Service principal (Integration user).

   The credentials used on ServiceNow to connect to Azure are the credentials of the Service principal (Integration user).

What to do next

Connect to Azure from ServiceNow

Connect to Azure from ServiceNow®

Connecting to Azure from ServiceNow for an hypserscaler connection.

Perform the following actions from ServiceNow for asset discovery and usage from Azure:

- Create a hyperscaler connection for asset discovery for Azure Foundry
- Create a hyperscaler connection for usage data for Azure Foundry
- Create a connection alias for Azure Foundry

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- Create a HTTP(s) connection for Azure Foundry
- Create a Credential alias (user specific)

Create a hyperscaler connection for asset discovery for Azure Foundry

Use the AI Control Tower workspace to create a hyperscaler connection for asset discovery from Azure Foundry.

Before you begin

Role required: admin

Ensure the plugin AI discovery (sn_ai_disc) is installed.

- With Generative AI Controller application for Now Assist.
- With AI Control Tower application.

Procedure

1. Login to Azure portal and ensure to activate your roles.
2. Navigate to **All** > **AI Control Tower** > **Configuration** > **AI discovery setup**.
3. Select **Set up now** to create a new connection or if there are existing connection aliases, select **New**.
   AI data source new record page appears.
4. Enter the Connection alias.

   For more information on creating a connection alias for Azure, see Create a connection alias for Azure Foundry
5. Select the Source configuration: Azure
6. Select the type as **Discovery** to discover AI assets.
7. Select the Run frequency as **Daily**, **Weekly**, or**Monthly**.
8. Select the Run hour of day.
   The Run hour of day depends on the Run Frequency.
9. Save the record.

   To add the information about the AWS to the connection alias, you must create a HTTP(s) connection under the connection alias record. For more information about creating a new HTTP(s) connection for Azure see, Create a HTTP(s) connection for Azure Foundry

   The connection alias has been added to the AI discovery setup page.
10. Enter the HTTP(s) connection and ensure the newly created HTTP(s) connection appears active under Connections section on the connection and credential alias page.

    The hyperscaler connection is created, and you can view the connection on AI discovery setup. If a connection is active, it will run based on the given schedule. To manually run, select the connection alias and select **Run** to discover all the agents from Azure Foundry to AI Control Tower.

    To view all the assets discovered from Azure Foundry, see the AI asset inventory view on the AI assets page.

Create a hyperscaler connection for usage data for Azure Foundry

Use the AI Control Tower workspace to create a hyperscaler connection for usage data from Azure Foundry.

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Before you begin
Role required: admin

Ensure the plugin AI discovery (sn_ai_disc) is installed.

- With Generative AI Controller application for Now Assist.
- With AI Control Tower application.

Procedure

1. Log in to Azure portal and ensure to activate your roles.
2. Navigate to **All** > **AI Control Tower** > **Configuration** > **AI discovery setup**.
3. Select **Set up now** to create a new connection or if there are existing connection aliases, select **New**.
   AI data source new record page appears.
4. Enter the Connection alias.

   For more information on creating a connection alias for Azure, see Create a connection alias for Azure Foundry
5. Select the Source configuration: Azure
6. Select the type as **usage** to load usage data of the assets.
7. Select the Run frequency as **Daily**, **Weekly**, or **Monthly**.
8. Select the Run hour of day.
   The Run hour of day depends on the Run Frequency.
9. Save the record.

   To add the information about the Azure to the connection alias, you must create a HTTP(s) connection under the connection alias record. For more information about creating a new HTTP(s) connection for Azure see, Create a HTTP(s) connection for Azure Foundry

   The connection alias has been added to the AI discovery setup page.
10. Enter the HTTP(s) connection and ensure the newly created HTTP(s) connection appears active under Connections on the connection and credential alias page.

    The hyperscaler connection is created, and you can view the connection on AI discovery setup. If a connection is active, it will run based on the given schedule. To manually run, select the connection alias and select run to load the usage data of the assets from Azure Foundry to AI Control Tower.

    To view the usage data of the assets, see the AI discovery setup page and the connection alias type and the number of assets.

Create a connection alias for Azure Foundry

Use the AI Control Tower workspace to create a connection alias for asset discovery for Azure Foundry.

Before you begin
Role required: admin

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Procedure

1. Enter the look-up list of connection alias field.
   When opened, the look-up list shows a list of existing connection aliases; you can select an appropriate alias or select New to navigate to the new record page.

   A new connection & credential aliases record page appears.
2. Enter the Name.
3. Enter the Parent Alias: sn_ai_disc_Azure_Foundry_for_AICT
4. Click **Submit**.
   The connection alias is configured

What to do next

Return to step 4 Create a hyperscaler connection for asset discovery for Azure Foundry

Create a HTTP(s) connection for Azure Foundry

Use the AI Control Tower workspace to create a HTTP(s) connection for Azure Foundry.

Before you begin

Role required: admin

Procedure

1. Open the Connection and credential alias record page.
2. Under the **Connections** section, select **New** to create a HTTP(s) connection.
   A new HTTP(s) connection new record page is created.
3. Enter the Name.
4. Enter the Credential.

   This credential is user/customer specific. You can create **OAuth credential** or any other credential as per your specifications.
5. Enter the Connection url.
6. Enter the Connection Alias.
7. Enter the Attributes such as **Subscription ID**, **Project Name**, **Resource Name**, and **Resource Group Name**, and **Workspace Name**.
8. Click **Submit**.

Result

A new HTTP(s) connection has been created.

What to do next

Return to step 10 Create a hyperscaler connection for asset discovery from AWS

Hyperscaler connection with AWS

Explore the hyperscaler connection procedure with AWS.

To set up a Hyperscaler connections for asset discovery and usage from AWS, perform the following steps:

1. Configure AWS console.
2. Connect to AWS from ServiceNow.

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Configure AWS console

Configuring AWS for a hyperscaler connection.

Perform the following actions in an order in the AWS console:

1. Configure IAM user
2. Configure an IAM for Agent discovery
3. Configure an IAM policy for execution monitoring
4. Configure CloudTrail and CloudWatch in the AWS Console

Configure IAM user

Configuring the IAM user in the AWS console.

Before you begin

Role required: AWS Admin

Procedure

1. Log in to https://console.aws.amazon.com
2. Navigate to **IAM**>**Access management**>**Users**.
3. Select **Create user** and configure the user with the policies mentioned in the following section. The IAM user is created.
4. Open the user and create an access key for a third party service.
5. Copy the **Access key ID** (AWS Specific) and the **Secret access key** (AWS Specific) to a text file. You can only show the secret access key once, but you can delete and create keys when necessary.

What to do next

The IAM user must configure policies for Agent discovery and Execution monitoring.

1. Configure an IAM for Agent discovery
2. Configure an IAM policy for execution monitoring

Configure an IAM for Agent discovery

Configuring IAM policy action permissions necessary for Agent discovery and integration user access on AWS to read bedrock agentic data.

Before you begin

Role required: Admin

AWS provides the minimum given policies by default:

- AmazonBedrockReadOnly
- CloudWatchReadOnlyAccess

The minimum policy action permissions needed for the integration user on AWS to read bedrock agentic data:

- ListAgents
- GetAgent
- ListAgentActionsGroups
- ListAgentVersions

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- GetInferenceProfile
- GetFoundationModel
- ListAgentCollaborators
- GetAgentAlias

Note:

To exclude specific resources from AI Control Tower, you can restrict them from the resources region. Select 'all' to include all AWS bedrock agentic resources data into AI Control Tower.

```
{
    "Version": "2012-10-17",
    "Statement": [
        {
            "Sid": "VisualEditor0",
            "Effect": "Allow",
            "Action": [
                "bedrock:ListAgents",
                "bedrock:ListAgentVersions",
                "bedrock:ListAgentCollaborators",
                "bedrock:ListAgentActionGroups",
                "bedrock:GetInferenceProfile",
                "bedrock:GetFoundationModel",
                "bedrock:GetAgent"
            ],
            "Resource": "*"
        }
    ]
}
```

What to do next

Configure an IAM policy for Execution monitoring.

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Configure an IAM policy for execution monitoring

Configuring IAM policy action permissions necessary for execution monitoring and integration user access on AWS to read Cloudwatch logs usage data.

Before you begin

Role required: Admin

Cloud watch logs:

- StartQuery
- GetQueryResults

Note: To exclude specific resources from AI Control Tower, you can restrict them from the resources region. Select 'all' to include all CloudWatch logs data in AI Control Tower.

```
{
    "Version": "2012-10-17",
    "Statement": [
        {
            "Sid": "VisualEditor0",
            "Effect": "Allow",
            "Action": [
                "logs:GetQueryResults",
                "logs:StartQuery"
            ],
            "Resource": "*"
        }
    ]
}
```

For more information about creating an user in IAM and providing the required access, see Understanding and Getting Your Security Credentials page on the AWS Documentation site.

What to do next

Configure CloudTrail and CloudWatch in the AWS Console.

Configure CloudTrail and CloudWatch in the AWS Console

Configure CloudTrail to store execution logs of your bedrock agents activities and configure CloudWatch to monitor your trail logs and notify you when specific activity occurs.

Before you begin

Role required: AWS Admin

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Procedure

1. Log in to https://console.aws.amazon.com
2. Select **CloudTrail** from the AWS Console home.
3. Select **Trails** under section **Lake** on the left pane the AWS Console.
   The Choose trail attributes page is displayed to create a trail.
4. Enter a display name for your trail in the **Trail name** field.
5. To store the logs of the trail, you can select **Create new S3 bucket** or **Use existing S3 bucket**.
6. Select **New** check box under customer managed by AWS KMS (Key management system) key and enter the AWS KMS alias.

   Verify the KMS key and newly created S3 bucket must be in the same region.
7. To configure CloudWatch, ensure to select **Enabled** check box under the **CloudWatch Logs** section.
8. Select the **New** check box and enter the **Log group name**.
9. Select **Next**.
   The Choose log events page is displayed.
10. Select the **Data events** check box and clear the **Management events** check box under **Event type**.
11. Select **Add data event type**.
12. Select the **Resource type** and keep the **log selector template** as **log all events** for all the resource types.
    List of Resource types
    - Bedrock session
    - Bedrock async invoke
    - Bedrock Invoke Inline-Agent
    - Bedrock knowledge base
    - Bedrock model
    - Bedrock flow alias
    - Bedrock agent alias
13. Select **Next**.
    The Review and create page get displayed. You can verify all the data event types.
14. Select **Create trail**.

Result

The CloudTrail and CloudWatch are configured in the AWS Console. The CloudTrail is accessible from CloudWatch.

Connect to AWS from ServiceNow®

Connecting to AWS from ServiceNow for a hyperscaler connection.

There are two procedures for connecting AWS to ServiceNow, which include connecting for AI asset discovery and usage. To complete these procedures, you will must follow the necessary sub steps in the order for both AI asset discovery and usage.

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- Create a hyperscaler connection for asset discovery from AWS
  1. Create a connection alias for asset discovery for AWS
  2. Create a HTTP(s) connection for asset discovery for AWS
  3. Create an AWS credential for asset discovery
- Create a hyperscaler connection for usage from AWS
  1. Create a connection alias for usage for AWS
  2. Create a HTTP(s) connection for usage for AWS
  3. Create an AWS credential for usage

Create a hyperscaler connection for asset discovery from AWS

Use the AI Control Tower workspace to create a hyperscaler connection for asset discovery from AWS.

Before you begin

Role required: admin

Ensure the plugin AI discovery (sn_ai_disc) is installed.

- With Generative AI Controller application for Now Assist.
- With AI Control Tower application.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Configurations** > **AI discovery setup**.
2. Select **Set up now** to create a new connection or if there are existing connection aliases, select **New**.
   AI data source record page is created.
3. Enter the Connection alias.
   For more information on creating and configuring connection alias, see Create a connection alias for asset discovery for AWS
4. Select the Source configuration: AWS
5. Select the type as **Discovery** to discover AI assets.
6. Select the Run frequency as **Daily**, **Weekly**, or **Monthly**.
7. Select the **Run hour of day**.

   The Run hour of day depends on the Run frequency.
8. Save the record.

   To add the information about the AWS to the connection alias, you must create a HTTP(s) connection under the connection alias record. For more information about creating a new HTTP(s) connection see, Create a HTTP(s) connection for asset discovery for AWS

   The connection alias has been added to the AI discovery setup page.
9. Enter the HTTP(s) connection and ensure the newly created HTTP(s) connection appears active under Connections on the connection and credential alias page.

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The hyperscaler connection is created, and you can view the connection on AI discovery setup.If a connection is active, it will run based on the given schedule. To manually run, select the connection alias and select run to discover all the agents from AWS to AI Control Tower.

To view all the assets discovered from AWS, see the AI asset inventory view on the AI assets page.

Create a connection alias for asset discovery for AWS

Use the AI Control Tower workspace to create a connection alias for asset discovery for AWS.

Before you begin
Role required: admin

Procedure

1. Enter the look-up list of Connection alias field.
   When opened, the look-up list shows a list of existing connection aliases; you can select an appropriate alias or select New to navigate to the new record page.

   A new connection & credential aliases record page appears.
2. Enter the Name.
3. Enter the Parent Alias: **sn_ai_disc_Amazon_Bedrock_for_AICT**
4. Click **Submit**.

Result
The connection alias is configured.

What to do next
Return to step 3 Create a hyperscaler connection for asset discovery from AWS

Create a HTTP(s) connection for asset discovery for AWS

Use AI Control Tower workspace to create a HTTP(s) connection for asset discovery for AWS.

Before you begin
Role required: admin

Procedure

1. Open the Connection and credential alias record page.
2. Under the Connections section, select **New** to create a HTTP(s) connection.
   A new HTTP(s) connection new record page is created.
3. Enter the Name.
4. Enter the Credential.

   For more information on creating AWS credential, see Create an AWS credential for asset discovery
5. Enter the Connection url.
6. Enter the Connection alias.
7. Enter the Attributes.
8. Select **Submit**.
   A new HTTP(s) connection has been created.

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What to do next
Return to step 9 Create a hyperscaler connection for asset discovery from AWS

Create an AWS credential for asset discovery

Use the AI Control Tower workspace to create an AWS credential for asset discovery.

Before you begin
Role required: admin

Procedure

1. Select the look-up list of the **Credential** field.
   The AWS credentials new record page is displayed
2. Enter the Name.
3. Enter the Access Key ID.
4. Enter the Secret Access Key.
5. Enter the authentication algorithm: **Amazon Bedrock Algorithm for AICT**.
6. Select **Submit**.
   The AWS credential is created

What to do next
Return to step 3 Create a HTTP(s) connection for asset discovery for AWS

Create a hyperscaler connection for usage from AWS

Use the AI Control Tower workspace to create a hyperscaler connection for usage from AWS.

Before you begin
Role required: admin

Ensure the plugin AI discovery (sn_ai_disc) is installed.

- With Generative AI Controller application for Now Assist.
- With AI Control Tower application.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Configurations** > **AI discovery setup**.
2. Select **Set up now** to create a new connection or if there are existing connection aliases, select **New**.
   AI data source record page is created.
3. Enter the Connection alias.
   For more information on creating and configuring connection alias, see Create a connection alias for asset discovery for AWS
4. Select the Source configuration: AWS
5. Select the type as **Usage** to load usage data of the AI assets.
6. Select the Run frequency as Daily, Weekly, or Monthly.
7. Select the **Run hour of day**.

   The Run hour of day depends on the Run frequency.

8. Save the record.

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To add the information about the AWS to the connection alias, you must create a HTTP(s) connection under the connection alias record. For more information about creating a new HTTP(s) connection see, Create a HTTP(s) connection for asset discovery for AWS

The connection alias has been added to the AI discovery setup page.

9. Enter the HTTP(s) connection and ensure the newly created HTTP(s) connection appears active under Connections on the connection and credential alias page.

   The hyperscaler connection is created, and you can view the connection on AI discovery setup.If a connection is active, it will run based on the given schedule. To manually run, select the connection alias and select run to load all the usage data of the assets from AWS to AI Control Tower.

   To view the usage data of the assets, see the AI discovery setup page and the connection alias type and the number of assets.

Create a connection alias for usage for AWS

Use the AI Control Tower workspace to create a connection alias for usage for AWS

Before you begin
Role required: admin

Procedure

1. Enter the look-up list of Connection alias field.
   When opened, the look-up list shows a list of existing connection aliases; you can select an appropriate alias or select New to navigate to the new record page.

   A new connection & credential aliases record page appears.

2. Enter the Name.
3. Enter the Parent alias: sn_ai_disc_Amazon_Cloudwatch_for_AICT
4. Click **Submit**.

Result
Connection alias is configured.

What to do next
Return to step 3 Create a hyperscaler connection for asset discovery from AWS

Create a HTTP(s) connection for usage for AWS

Use the AI Control Tower workspace to create a HTTP(s) connection for usage for AWS.

Before you begin
Role required: admin

Procedure

1. Open the Connection and credential alias record page.
2. Under the Connections section, select **New** to create a HTTP(s) connection.
   A new HTTP(s) connection new record page is created.
3. Enter the Name.
4. Enter the Credential.

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For more information on creating AWS credential for usage, see Create an AWS credential for usage

5. Enter the Connection url.
6. Enter the Connection alias.
7. Enter the Attributes: CloudWatch log Group Names.
8. Select **Submit**.

Result
A new HTTP(s) connection has been created.

What to do next
Return to step 9 Create a hyperscaler connection for usage from AWS

Create an AWS credential for usage

Use the AI Control Tower workspace to create an AWS credential for usage.

Before you begin
Role required: admin

Procedure
1. Select the look-up list of the **Credential** field.
   The AWS credentials new record page is displayed
2. Enter the Name.
3. Enter the Access Key ID.
4. Enter the Secret Access Key.
5. Enter the authentication algorithm: **Amazon CloudWatch Algorithm for AICT**.
6. Select **Submit**.
   The AWS credential is created.

What to do next
Return to step 3 Create a HTTP(s) connection for usage for AWS

Using value templates

Use value templates to define, calculate, and track the value delivered by your AI systems and models.

Value templates introduces a unified and structured framework for defining, calculating, and tracking the value delivered by your AI assets. You can define value based on personas and formulas using customizable templates.

Value templates offer the following benefits.

- Transparency: Provides visibility into how value is determined for an AI asset.
- Customization: Supports various persona-driven and formula-based definitions.

Currently, value templates are supported for skills and agents. A value template is assigned to an asset when a skill or agent is activated and deployed as an asset in the system. The following table lists the default value templates.

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Default value templates

AI asset	Default value template
ServiceNow skill	Daily skill executions (Usage) x average time per execution (Time) x 50% (Acceptance rate) For example, for Incident Summarization skill, if the daily executions are 1500, average time per execution is 0.2 minutes, acceptance rate is 90%, the value as per the default value template is 1500x0.2x90/100, which is 270 minutes.
ServiceNow AI agent	Daily AI agent executions (Usage) x average time per execution (Time) x 50% (Acceptance rate) For example, for Problem investigator agent, if the daily executions are 1000, average time per execution is 1.5 minutes, acceptance rate is 50%, the value as per the default value template is 1000x1.5x50/100, which is 750 minutes.
AWS and Microsoft AI agents	Daily AI agent invocations (Usage) x 15 mins (Time) x 50% (Acceptance rate)

Add a value template

Add a value template to define, calculate, and track the value delivered by an AI asset.

Before you begin

Role required: [sn_ai_governance_ai_steward]

Procedure

1. Navigate to **Workspaces** > **AI Control Tower**.
2. Select the **AI asset inventory** tab and navigate to the asset that you want to assign a value template to.
3. In the **Value template** tab, select **Add template**.

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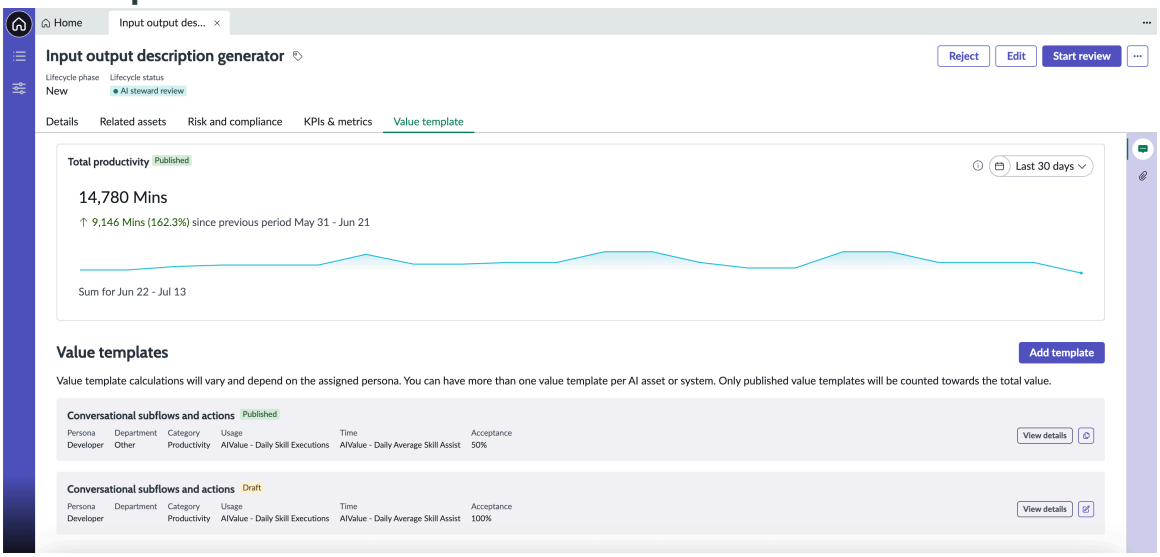
Value template tab



4. On the Add value template form, fill in the fields.

   For a description of the field values, see Add value template form.

5. Select **Save as draft**.
6. Validate and test the formula against the available dataset by selecting **Validate and calculate output**.
   You can change the values and validate the formula until you're satisfied with the output.
7. If you're satisfied with the output, publish the template by selecting **Publish**.
   When a value template is published, it's modified across all instances and subsequent calculations are based on the new template.

Edit a value template

Edit a value template to update how value is calculated for AI assets.

Before you begin

Role required: [sn_ai_governance_ai_steward]

Procedure

1. Navigate to **Workspaces** > **AI Control Tower**.
2. Select the **AI asset inventory** tab and navigate to the asset that you want to edit the value template for.
3. In the **Value template** tab, select **Duplicate**.
   A new tab with the same details as the original template opens for you to edit.
4. Edit the value template according to your requirements.
5. Select **Save as draft**.
6. Validate and test the formula against the available dataset by selecting **Validate and calculate output**.
   You can preview calculations from the past 30 days using the new template before publishing. This functionality enables you to evaluate the impact of the new template while preserving the historical data associated with the previous version.

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7. If you're satisfied with the output, publish the template by selecting **Publish**.
   When a value template is published, it's modified across all instances and subsequent calculations are based on the new template.

Create an AI case in the AI Control Tower

Create an AI case in the AI Control Tower by providing a detailed description, such as system behavior, affected users, and any relevant data. Ensure all necessary information, such as supporting attachments, is included for prompt resolution.

Before you begin

Role required: sn_ai_case_mgmt.ai_case_analyst or sn_ai_case_mgmt.ai_case_manager

Procedure

1. Navigate to **All** > **AI Control Tower**.
2. Go to the **AI cases** dashboard.
3. On the AI cases dashboard, on the **AI cases** tab, select **Create AI case**.
4. On the form, fill in the fields.
   For a description of the field values on the Create New AI case form, see Create new AI case form.
5. Select **Save**.
   After you submit this form, the AI case team will provide the insights and support you need.

Create new AI case form

Use the Create New AI case form in the AI Control Tower to report an AI case with the necessary details.

See the following table for a description of the field values.

Create new AI case form

Field	Description
Number	Number of the request. This field is automatically set to a request number.
Name	Name of the AI case. For example, `Incorrect AI recommendation`.
Description	Description about the AI case in detail. For example, include information such as the expected recommendation, actual suggestion, context, impact, and steps to reproduce the issue, especially for cases such as Incorrect AI Recommendation.
Type	Type of the AI case. This field is automatically set to **AI case**.
Sub-type	Subtype of the case. For example, Adversarial attacks (Deliberate manipulation of AI models to produce incorrect results).
State	Workflow state of the request. This field is automatically set to **New**.

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Create new AI case form (continued)

Field	Description
Priority	Urgency of the AI case. It enables the AI case team to triage requests effectively and responds based on how critical the request is. The options are as follows: • **Critical** • **High** • **Moderate** • **Low** • **Planning**
Requester	Name of the person who raised the request.
Requested on behalf of	Name of the person that you created the request for.
Primary entity	Entity impacted by the AI case. Only the entities identified in the impacted areas are available for selection as the primary entity.
Entity owner	User who is the owner of the entity. This field is automatically set based on the entity selected in the Impacted areas related list.
Assignment	
Assignment group	Group that is assigned to the request. **Note:** The assignment group is preconfigured to the request type during the configuration setup.
Case analyst	Analyst who will analyze and work on the AI case. The AI case analyst is a part of the Assignment group.
Watch list	Person who must be informed about the AI case.
Accountable executive	Person who is accountable for the AI case.
Primary origin	
Location	Location where the AI case occurred. For example, Japan.
Sub-location	Sub location of the AI case occurrence. For example, the sub location is Tokyo.
Impacted business unit	Business unit that is affected by the reported AI case. For example, Finance.
Impacted department	Department that is affected by the AI case. For example, Customer support.

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Create new AI case form (continued)

Field	Description
Source	Source of the AI case creation. This field is automatically set to Manual when the case is manually created. If the case is reported from the Employee Center, the field displays the source as Employee Center.
Additional source	Mode of how the AI case is reported when the case is created manually. This field is available only when **Manual** is selected from the **Source** field and the record is saved. The choices are as follows: • Email • Phone
Schedule	
Date of occurrence	Date when the AI case occurred. For example, the case may have occurred on 18-02-2025.
Date of discovery	Date when the case was discovered. For example, the case may have occurred on 18-02-2025, but was discovered on 12-03-2025.
Reported date	Date the case is reported.
Case closure SLA	Expected date of case closure.
Investigation planned start	Planned start date to investigate the case.
Investigation actual start	Actual start date of case investigation.
Remediation planned start	Planned start date to remediate the case.
Remediation actual start	Actual start date of case remediation.
Investigation planned end	Planned end date to investigate the case.
Investigation actual end	Actual end date of case investigation.
Remediation planned end	Planned end date of case remediation.
Remediation actual end	Actual end date of case remediation.
Breach analysis	
Breach status	Status to indicate if a breach has occurred or not. The choices are as follows: • **To be determined**: This value is the default value. • **Breach detected**: If the breach is confirmed.

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Create new AI case form (continued)

Field	Description
	• **Future potential**: If the breach hasn't occurred but may occur in the future. • **Not a breach**: When there's no breach detected.
Breach start	Date the breach started. This field only appears when **Breach detected** or **Future potential** is selected from the **Breach status** field.
Reporting status	Status of the AI case being reported to the regulators. This field is automatically set based on the reporting status of the regulations associated with the case. If an AI case has many regulations and even if one regulation is identified as reportable, then the reporting status of the case is set to **Reportable**. The default value of this field is **To be determined**.
Breach end	Date the breach ended. This field only appears when **Breach detected** or **Future potential** is selected from the **Breach status** field.
Breach significance identified	Date when the user identifies that the breach is significant. This field only appears when **Breach detected** or **Future potential** is selected from the **Breach status** field.
Root cause analysis	
Primary cause	Primary cause of the AI case occurrence. This field is automatically set to the primary cause that is selected in the Cause and consequences related list.
Primary consequence	Consequences of the primary cause for the AI case.
Overall observations	Observations made regarding the AI case.
Remediation taken	Field to indicate if remediation measures have been taken to address the AI case. The choices are as follows: • **Yes** • **No**
Overall preventive measures	Preventive measures taken toward the case.
Activity	
Work notes (Private)	Notes or information about the request.
Additional comments (Customer visible)	Additional information about the request that you want to share with your customers.

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Create an AI issue in the AI Control Tower

Identify and manage issues related to the impacted areas for the reported AI case in the AI Control Tower.

Before you begin

Role required: sn_grc_ai_gov.ai_risk_and_compliance_analyst or sn_grc_ai_gov.ai_risk_and_compliance_manager

Procedure

1. Navigate to **All** > **AI Control Tower**.
2. Go to the **AI cases** dashboard.
3. On the AI cases dashboard, on the **AI cases** tab, select **Create issue**.
4. On the form, fill in the fields.
   For a description of the field values on the Create New AI case, see Create new AI issue form.
5. Select **Save**.

Create new AI issue form

Use the Create New Issue form to identify and manage issues related to the impacted areas for the reported AI case.

See the following table for a description of the field values.

Create New Issue form

Field	Description
Number	Number of the issue. This field is automatically set to a request number.
Name	Name of the issue. For example, `Cyber Attack on Acme`.
Issue source	Source from where the issue was created. This field is automatically set to **AI case**.
Issue type	Type of the issue. The options are as follows: • **Control design effectiveness failure**: The control was poorly designed and cannot effectively prevent or detect the intended risk. • **Control operative effectiveness failure**: The control was well-designed but failed during execution or wasn't followed correctly. • **Control doesn’t meet requirement**: The control is in place but doesn't satisfy regulatory, policy, or business requirements. • **Control doesn’t exist**: There is no control present to address a known risk or requirement. • **Non-compliance to a regulation**: A law or regulation was not followed, potentially exposing the organization to penalties. • **Non-compliance to a policy**: An internal policy was not adhered to, which could lead to risks or inefficiencies. • **Improvement or suggestion to an existing policy**: A recommendation to enhance an existing policy for better clarity, coverage, or effectiveness. • **Recommendation for a new policy**: A proposal to create a new policy to address a gap or need that currently isn’t covered.

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Create New Issue form (continued)

Field	Description
	• **Process optimization or improvement**: Opportunities identified to improve efficiency, accuracy, or effectiveness of a business process. • **Observation**: A general note or finding that may not be an issue now but could warrant attention. • **Data breach**: Unauthorized access, disclosure, or loss of sensitive or personal data. • **Fraud**: Intentional deception for personal or organizational gain, such as misappropriation of assets. • **Misstatement**: Errors or omissions in financial or operational reporting that misrepresent facts. • **Training**: Gaps or needs identified in knowledge or skills that require attention. • **Documentation**: Issues related to missing, outdated, or inaccurate documentation. • **Risk issue**: A broad risk-related concern that may not fall under other specific categories. • **Other**: Any issue that doesn't fit into the above types but is still worth tracking and resolving.
Classification	Classification of the issue. The options are as follows: • **Compliance** • **Risk** • **Audit** • **Vendor Risk**
Location	Location where the issue occurred. For example, Japan.
State	Workflow state of the issue. This field is automatically set to **Review**. The options are as follows: • **New** • **Analyze** • **Respond** • **Review** • **Closed Complete** • **Closed Incomplete** For more information on Issue management workflow and life cycle, see View AI assets by life-cycle stage.
Substate	Substate of the issue. This field is auto-filled.
Priority	Urgency of the issue. It enables the team to triage requests effectively and respond based on how critical the request is. This field is automatically set to **Review**. The options are as follows:

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Create New Issue form (continued)

Field	Description
	• **Critical** • **High** • **Moderate** • **Low** • **Planning**
Issue rating	Rating of the issue. The options are as follows: • **Very High** • **High** • **Moderate** • **Low** • **Very Low**
Description	Description about the issue in detail. For example, ACME experienced a cyber attack that resulted in unauthorized access to internal systems.
Assignment	
Assignment group	Group to whom the issue is assigned. For example, Risk Managers.
Assigned to	User to whom the issue is assigned.
Issue manager group	Manager group that the issue is assigned to. The options are as follows: • **Compliance Managers** • **IT Risk Managers** • **Risk Managers**
Issue manager	Manager to whom the issue is assigned.
Watch list	Person who must be informed about the issue.
Schedule	
Due date	Date when the issue is due.
Confirmed date	Confirmation date for the issue. This field is auto-filled.
Created	Date on which the issue is created. This field is automatically set to the current date and time.
Closed	Date on which the issue is closed.
Planned start date	Planned start date for the issue.
Planned end date	Planned end date for the issue.
Duration	Duration for the issue in days, hours, minutes, and seconds.
Actual start date	Actual start date for the issue.

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Create New Issue form (continued)

Field	Description
Actual end date	Actual end date for the issue.
Actual duration	Actual duration for the issue in days, hours, minutes, and seconds.
Issue grouping	
Issue group rule	Group rule for the issue. This field is auto-filled.
Parent issue	Parent issue that is associated with the issue.
Action plan	
Recommendation	Recommendation for the issue. For example, `Enhance cybersecurity measures and provide regular security training`.
Action plan	Action plan for the issue. For example, `Upgrade the firewall to the latest version and implement multi-factor authentication for all administrative accounts.`
Activity	
Work notes (Private)	Notes or information about the issue.
Additional comments (Customer visible)	Additional information about the issue that you want to share with your customers.
Settings	
Functional domain	Functional domain that the issue belongs to. For example, an issue may belong to the AI Risk and Compliance domain.

Using the access map

Learn how to use the **Access map** in AI Control Tower.

Before you begin

Role required: AI Steward

Procedure

1. Select **access map** in the header of the **Security and privacy** tab.
   You can also access the map by navigating to **All** > **AI Security and Privacy** > **Access Map**.
2. Select an AI agent/agentic workflow using the **Access map**.
   You can also use the **Search by agent or workflow** field, and the **AI agents** and **Agentic workflows** to refine your search. Additionally, agents with access issues will have a ⚠ icon.
3. In the node map, select a node to view the connections of your AI agent/agentic workflow.
   Agents with access issues with be highlighted with a ⚠ icon in the map.
4. Select a node to get further details and configure settings.

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Access map node details

Icon	Label	Details
	Agentic workflow	**Description** A brief description of the workflow **Domain** The domain scope of the workflow **Execution mode** How the workflow is executed (Autonomous or manual) **Created by** The creator of the workflow
	Agent	**Description** A brief description of the agent **Domain** The domain scope of the agent **Created by** The creator of the workflow **Tables accessed** Review the table accesses of the agent over the last month. Select **Operation** to filter specific access operations. **Note:** Only agents with access issues will display the **Access issues** details. **Access issues**

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Icon	Label	Details
		Details the resources and operations causing the access issues. **Resource** The resource the agent is having issues accessing **Operation** The operation the agent attempted **Count** The number of times of the agent encounter the issue
	Tool	**Description** The description of the tool. **Domain** The domain scope of the tool. **Execution mode** The execution mode of the tool (Supervised or Autonomous) **Type** The type of tool **Target record** The record the tool modifies. **Created by** The creator of the tool **Note:** Select **Open tool record** to view additional tool details.

AI Control Tower reference (legacy)

Reference topics for AI Control Tower.

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Add value template form

Add value template form fields and descriptions.

Add value template form

Field	Description
Calculation builder	
Persona	The user role for whom the value is being calculated, for example, Agent, Requester.
Usage	The usage indicator that you want to associate the value template with.
Time value type	The type of time-based metric used in the calculation, for example, Constant or Indicator. Choose a value that aligns with your performance goals.
Time constant	A fixed time value (in hours, minutes, or days) used as a baseline or threshold in the calculation. Useful for comparisons or normalization.
Time indicator	The time indicator that you want to associate the value template with.
Acceptance rate type	The type of acceptance metric to include, such as Indicator or Constant.
Acceptance rate constant	A fixed percentage or ratio used to represent an expected or target acceptance rate in the value calculation.
Attributes	
Template name	A unique and descriptive name for the value template. This name appears in the list of templates and should clearly indicate its purpose.
Value template category	The categorization of the template based on its use case, for example, Productivity, Efficiency, Accuracy. Helps in organizing and filtering templates.
Department	The business unit or department associated with the value template. This helps in aligning the template with organizational goals.
Description	A brief explanation of what the value template does, including its purpose and how it contributes to measuring value.
Calculation output	
Instance	The instance where the value template is applied. This field is useful for managing value templates across instances.

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Add value template form (continued)

Field	Description
	Note: You can validate a formula in a non-production instance before publishing it to a production instance.

AI Control Tower roles

Certain roles are installed along with the installation of the AI Control Tower.

Roles and their descriptions

Role title [name]	Description	Contains roles
AI steward [sn_ai_governance_ai_	**Note:** The organization decides on assigning the AI steward role. By adding the users to the AI stewards group, allows user to have additional permissions related to playbook. The AI steward is responsible for: • Configuring AI Control Tower • Adoption of AI governance practices. • Adoption of managing AI Control Tower and linking the AI asset Inventory. • Execution of AI Control Tower initiatives. • Understand the AI assets and AI Control Tower policies. • Creating AI assets. • Completing the AI asset lifecycle. • Collaboration of cross-functional teams within the organization to confirm that the organization policies are adhered. • Creating AI Control Tower Approval Playbook for Now Assist approvals. • Configure third-party LLMs and SLMs. • Configure Multi-instance management. • Add and edit a value template. • Learning to use the access map • Approve or reject an approval request. For AI discovery:	• sn_nowassist_admin.user • sn_ai_governance.workspace_admin • sn_aia.admin • aig_admin • sn_mcp_client.admin

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Roles and their descriptions (continued)

Role title [name]	Description	Contains roles
	• Activate or deactivate hyperscaler connections. • Select the hyperscaler connections to discover agents and usage on-demand. For AI Gateway: • Add an MCP server via AI Agent Studio. • Set up MCP client connections.	
AI Control Tower Workspace user [sn_ai_governance_workspace_user]	The AI Control Tower Workspace user is responsible for: • Own and manage the AI assets. • Access the AI Control Tower home page. • Exclusive access to the AI portfolio tab.	None
AI asset owner/ Product owner [sn_ai_asset_mgmt.ai_asset_owner]	The AI asset owner/Product owner is responsible for: • Ensure that AI assets are represented accurately and kept up to date. • Manage AI assets like AI systems, AI models, datasets, and prompts through their asset lifecycle from intake to retirement. • Access My overview, Value, and Adoption tabs. • Creating an AI asset from the AI Control Tower home page using **Create AI Asset icon**. • Marking the deploy phase of the AI asset lifecycle task complete. If the AI asset gets deployed, then the state of the task doesn't change anything automatically in the asset table or the asset governance details record.	None

AI Risk and Compliance roles

The AI Risk and Compliance application installs the essential role to perform respective day-to-day operational tasks for managing AI systems across the enterprise.

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Roles and their descriptions

Role title [name]	Description	Contains roles
AI Risk and Compliance Admin [sn_grc_ai_gov.ai_risk_and_compliance_admin]	The AI Risk and Compliance Admin can perform the following tasks: • Set up risk and impact assessment frameworks. Configure risk assessment methodologies, risk contribution factors, and impact assessment templates. • Define automation rules for impact assessments to determine applicable risks and controls based on the assessment responses. • Set up and profile AI case types. • Delete AI systems.	• sn_risk.admin • sn_smart_asmt.template_manager • sn_grc_ai_gov.ai_risk_and_compliance_mana • sn_smart_asmt.assessment_admin • sn_grc_workspace.state_model_admin • sn_smart_asmt.template_contributor • sn_compliance.admin • sn_compliance.control_framework_admin* • sn_compliance.library_admin* • sn_compliance.policy_admin*
AI Risk and Compliance Manager [sn_grc_ai_gov.ai_risk_and_compliance_manager]	The AI Risk and Compliance Manager can access all AI systems on the system and perform the following tasks: • Initiate impact assessments. • Manage the lifecycle of an AI system. • Initiate risk assessments. • Initiate control attestations.	• sn_grc_ai_gov.ai_risk_and_compliance_analy • sn_smart_asmt.template_contributor • sn_smart_asmt.template_manager • sn_risk.manager • sn_compliance.control_framework_manager* • sn_compliance.library_manager* • sn_compliance.policy_manager*
AI Risk and Compliance Analyst [sn_grc_ai_gov.ai_risk_and_compliance_analyst]	The AI Risk and Compliance Analyst can access all AI systems assigned to them in the system and perform the following tasks only on the assigned records: • Initiate impact assessments. • Manage the lifecycle of an AI system. • Initiate risk assessments. • Initiate control attestations.	• sn_smart_asmt.assessment_reader • sn_grc_ai_gov.ai_risk_and_compliance_busi • sn_smart_asmt.template_reader • sn_risk_advanced.ara_approver • sn_grc_ai_gov.ai_risk_and_compliance_reader • sn_grc_workspace.user • sn_risk.user • sn_risk_advanced.ara_assessor • sn_compliance.library_user* • sn_compliance.control_framework_user* • sn_compliance.policy_user*

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Roles and their descriptions (continued)

Role title [name]	Description	Contains roles
AI Risk and Compliance User [sn_grc_ai_gov.ai_risk_and_compliance_business_user]	The AI Risk and Compliance User can perform the following tasks: • Create AI case on the Employee Center. • Work on the assigned tasks. • Perform control attestations.	• sn_grc_workspace.assessment_template_co • sn_smart_asmt.actor • sn_grc.business_user • sn_grc_workspace.user • sn_smart_asmt.assessment_reader • sn_compliance.control_framework_business • sn_compliance.library_business_user* • sn_compliance.policy_business_user*
AI Risk and Compliance Reader [sn_grc_ai_gov.ai_risk_and_compliance_reader]	The AI Risk and Compliance Reader can have read access to the AI systems and AI impact assessments.	• sn_risk.reader • sn_grc_workspace.user • sn_compliance.library_reader* • sn_compliance.control_framework_reader* • sn_compliance.policy_reader*
AI System Reader [sn_grc_ai_gov.ai_risk_and_compliance_ai_system_reader]	The AI System Reader can have read access to the AI systems on AI Control Tower workspace and AI Risk and Compliance workspace.	NA
AI Case Business User [sn_ai_case_mgmt.ai_case_business_user]	The AI Case Business User can create AI case and AI inquiry on the Employee Center.	sn_grc_case_mgmt.grc_case_business_user
AI Case Analyst [sn_ai_case_mgmt.ai_case_analyst]	The AI Case Analyst can review the AI cases and AI inquiries assigned to them in the system and perform the following tasks only on the assigned records: • Identify and manage impacted and related areas such as policies, regulations, and enterprise wide compliance risks. • Identify and manage issues related to impacted areas to eliminate the root causes.	• sn_grc_case_mgmt.grc_case_analyst • sn_ai_case_mgmt.ai_case_business_user
AI Case Manager	The AI Case Manager can review all the AI cases, AI	• sn_ai_case_mgmt.ai_case_analyst • sn_grc_case_mgmt.grc_case_manager

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Roles and their descriptions (continued)

Role title [name]	Description	Contains roles
[sn_ai_case_mgmt.ai_case_manager]	inquiries, and its associated information.	
AI Case Admin [sn_ai_case_mgmt.ai_case_admin]	The AI Case Admin can manage type profiles to segregate AI cases. They can set up assignment rules and delete AI cases.	• sn_grc_case_mgmt.grc_case_admin • sn_ai_case_mgmt.ai_case_manager

Important: Roles indicated with an asterisk (*) indicate feature roles.

Note: Feature Roles provide granular access to individual risk and compliance capabilities, enabling teams to share only the functionality they need. This capability replaces broad Integrated Risk Management (IRM) roles with feature-specific roles for better control. Non-Integrated Risk Management families like Privacy Management, Operational Sustainability Management, and AI Risk and Compliance are restricted from accessing IRM-specific data or core plugin features. This model ensures secure, domain-specific access and simplifies governance across GRC applications.

For more information, see https://www.servicenow.com/products/employee-center.html.

Tables installed with AI Control Tower

Certain Tables or fields are installed along with the activation of the AI Control Tower core plugin.

The following table is provided to understand the AI assessment and AI task fields.

AI Control Tower details

Asset	ai_asset	Reference
Risk classification	risk_score	choice
Status	approval_status	choice

AI asset assessment request

Sys ID	sys_id	SYS_ID
AI asset	asset	Reference
Parent Task	parent_task	Reference (ai_gov_review_task)
State	state	
Type	type	Choice
Close Notes	close_note	

AI asset governance task

Sys ID	sys_id	SYS_ID

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AI asset governance task (continued)

Parent Task	parent_task	Reference
Approval	approval	Reference (sysapproval)
State	state	
Type	type	Choice

Related topics

Enterprise Architecture for AICT plugin installation and upgrade considerations

AI asset data model attributes

Additional attributes for the AI asset data model.

Attributes

AI model product model: Product Information for the AI model that is used by the AI system to generate responses without human intervention (cmdb_ai_model_product_model).

AI model product model

Attribute	Description
Model parameters info	Number of parameters for the model.
Supported languages	Languages supported.
Model size	Size of the model in MB. Mostly applicable for models developed and deployed within the organization.
Deployment guidelines	Instructions applicable for models developed and deployed within the organization.
Source	Links or details of source of the model sources example: Hugging face, Microsoft, and so on.
Training procedure	Types of training • Decision Trees • Deep Neural Networks • Linear Regression • Logistic Regression • Random Forest • Supervised Learning • Unsupervised Learning • Reinforcement Learning • Transfer Learning • Semi-Supervised Learning • Instruction Finetuning • Supervised Finetuning

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AI model product model (continued)

Attribute	Description
Context window	Size of input sequences that the model can handle (number of tokens).

AI dataset product model: Product Information for the collection of data that is used to train and test AI models (cmdb_ai_dataset_product_model).

AI dataset product model

Attribute	Description
Data type	Describes data, example: Text, Image, Video, and Table
Source	Links or details of source of the dataset sources, example: Customer, Wikipedia, Hugging face, Crowd sourced, and so on.
Acceptable usage	Acceptable usage of the data according to license / contract example: Training, and Evaluation.

AI prompt product model: Product Information for instructions given to AI models to get a response for AI system (cmdb_ai_dataset_product_model).

AI prompt product model

Attribute	Description
Documentation	Links and information about requirements, design, and related information.

AI system product model: Product Information for software that provides ML / AI capability to generate outputs, such as decisions, recommendations, content, or predictions (cmdb_ai_system_product_model).

AI system product model

Attribute	Description
Documentation	Links and information about requirements, design, and related information.

Information asset

Attribute	Description
Data classification	Classification according to organization's data classification model, example: Public, confidential, and customer confidential.

AI digital asset

Attribute	Description
ServiceNow® record reference	Reference to Now Assist record.

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AI digital asset (continued)

Attribute	Description
ServiceNow® table	Now Assist table.

AI system digital asset

Attribute	Description
AI models	Reference to more than one associated models.
Evaluation Dataset	Reference to more than one associated datasets used for evaluation.
Evaluation Metrics Report	Details of evaluation results.

AI model digital asset

Attribute	Description
Base model	This AI model version was derived from an internal model developed within the organization.
Model weights info	Additional model information if available. Mostly applicable for models developed within the organization.
Required infrastructure	Documentation of infrastructure requirements for model deployment, primarily for models deployed within an organization. Example: Infrastructure stack and processing requirements.
Training dataset	Reference to one or more associated datasets used for training the model. These datasets are mostly applicable for models developed within the organization.
Evaluation dataset	Reference to one or more associated datasets used for evaluating the model. These datatsets are mostly applicable for models developed within the organization.
Evaluation metrics report	Links or details of evaluation results
License details	Link or detail to applicable licenses applied to the model.
Model card	Links to shareable model card (Internal and external model card).

AI dataset digital asset

Attribute	Description
Base datasets	This version of the AI dataset was derived from the previous version.

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AI dataset digital asset (continued)

Attribute	Description
Dataset card	Information on number of records, distribution, and so on. Documentation for data quality and known risks and limitations.
License details	Link or detail to applicable licenses applied to the dataset, example: CommonCore, Apache 2.0,etc.

AI prompt digital asset

Attribute	Description
Prompt information	Details of the prompt.
AI model	Reference to the AI model for which the prompt is created.

Evaluation dashboard reference

Reference topics for the Evaluation dashboard.

Components installed with the Evaluation dashboard

Several types of components are part of the Evaluation tab, including scheduled jobs, tables, system properties, and flows.

Scheduled jobs installed

Scheduled job	Description
CE Populate Value Aggregates Chats – Daily	This scheduled script runs daily and randomly selects 1000 conversations from yesterday's conversations. After that, for each conversation, this job extracts the chat duration and classifies them as small, medium, or large. It also classifies the chats in which a Knowledge article or catalog item was invoked. For the evaluated chat, it also classifies the conversations based on the chat performance and populates that data into the Evaluation Value Aggregates table.
Evaluation Value Calcuation - Runs Only once after install	Deletes all the records on the Evaluation Value Aggregates tables, runs the calculations again and stores the aggregated value in the Evaluation Value Aggregates table. The data is from the first evaluation date.

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Tables installed

Label	Name
Evaluation	[sn_na_conv_eval_evaluation]
Evaluation configurations	[sn_na_conv_eval_evaluation_configurations]
Evaluation Metrics	[sn_na_conv_eval_evaluation_metrics]
Evaluation Set	[sn_na_conv_eval_evaluation_set]
Evaluation Value Aggregates	[sn_na_conv_eval_evaluation_value_aggregates]

Remote tables installed

Table	Description
Conversation Evaluator Value Calculations [sn_na_conv_eval_st_value_calcs]	For the given query, the definition for this remote table calculates the time savings and efficiency percentage for small, medium, and large chats. Also, it returns the time savings and efficiency when a Knowledge article or catalog item was invoked.
Conversation weekly calculations [sn_na_conv_eval_weekly_cals]	For the given query, the definition for this remote table calculates the time savings and efficiency percentage for small, medium, and large chats for different weeks of the selected date range. Also, it returns the time savings and efficiency when aKnowledge article or catalog item was invoked for all the different weeks of the selected date range.

System properties installed

Property	Description
sn_na_conv_eval.errorBandMinRecords	Minimum number of records required to calculate the error band for upper and lower deviation. By default, the value is 30.
sn_na_conv_eval.evalWeights	Contains weights to each evaluation metric for chat evaluation. This property is used to compute total or composite scores for evaluation records.
sn_na_conv_eval.maxEvaluateCount	Maximum number of records to evaluate in a day. By default, the value is 200.

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Property	Description
sn_na_conv_eval.total_sampled_conversations	Edit this property to control the total number of conversations that can be sampled for value calculations. By default, the value is 1000.
sn_na_conv_eval.value_chat_classifier	Edit this property to change the definition of small, medium, and large conversations. By default, the value it stores is 4, 10. Here, 4 and 10 signify the total number of inbound messages. Fewer than or equal to 4 inbound messages in the sys_cs_message table for a conversation means that it's a small conversation. More than 4 inbound messages and fewer than or equal to 10 inbound messages means that it's a medium conversation, and more than 10 inbound messages means that it's a large conversation.
sn_na_conv_eval.ce_value_calculation_weights	Value calculation weight values for each type of evaluated chat.
sn_na_conv_eval.eval_value_rerun_status	Recalculate value calculations once after the installation. This property will check the status of the Conversation Evaluator Value Rerun status. If it has run, then the script will change the value of this system property to false.

Business rules installed

Name	When	Insert	Update	Filter Conditions
Add info message for Evaluation set	after	TRUE	TRUE	stateCHANGESTOIn Progress^evaluation_type=conversation^
Scale Up labeling metric	before	TRUE	TRUE	metric_type=Labeling^metric_nameINhel
updateLabelingScoresOnEvaluation	after	TRUE	TRUE	metric_type=Labeling^raw_scoreVALCHA
Update deviation scores	before	TRUE	TRUE	metric_type=LLM Generated^scoreVALCHANGES^EQ
getAutoEvalCompositeScore	after	FALSE	TRUE	stateCHANGESTOComplete^total_scoreI

Flows installed

Flow	Description
Execute Evaluation	Performs evaluations when conversations are completed. By default, the Execute Evaluation flow is deactivated. You can use the nightly scheduled job Execute Evaluations to evaluate the chats. If you want to evaluate the chats on chat completion, activate the Execute Evaluation flow.

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Flow	Description
Execute Batch Evaluation	Performs batch evaluations, evaluating up to 100 completed virtual agent conversations. Flow is triggered when the Evaluation set is created or updated and the Evaluation Type is Conversation.

Flow actions installed

Flow action	Description
Randomize conversations	Performs randomization of conversations and returns 100 conversations randomly from a given query.
invokeApiDefinition	Invokes OneExtend Capability in the large language model (LLM).
Chat Classifier Eval	Gives the title, category, and whether the evaluation should be executed.
buildTranscript	Builds the transcript from a conversation.
evalExecuteCondition	Checks if the transcript is good enough to be evaluated.

Script includes installed

Script includes	Description
evalExecuteCondition	Use this script include to update the evaluation condition.
evalUtils	Primary Utility function for the Evaluator.

Related topics

Remote tables

Evaluation metrics and calculations

Metrics against which conversations are evaluated and calculation of adjusted scores.

Metrics

The Select metric list shows all the metrics against which each conversation is evaluated for the selected date range. You can filter the evaluation trend based on each metric. The following metrics are available:

Metric	Description
Request Completion	Measures the virtual agent's ability to complete user requests by accurately identifying the user's intent and gathering all required information (slot filling).
Intent Accuracy	Shows the virtual agent's ability to comprehend user requests, resulting in relevant responses.

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Metric	Description
Slot Filling	Shows the virtual agent's capability to interpret user responses and extract structured answers to the required questions.
Smooth Flowing Conversation (Deadlock avoidance)	Checks if the virtual agent responds dynamically, successfully moving the conversation forward without repetition.
Context Retention	Shows if the virtual agent succeeds in retaining and using information provided during the conversation, including request interpretation and slot filling.
Truthfulness (Hallucination Prevention)	Shows if the virtual agent generated genuine responses grounded in conversation, excluding fabrication or memory and comprehension failures.
Conciseness (Redundancy Avoidance)	Checks the virtual agent's ability to avoid superfluous or verbose and generic responses, which doesn't contribute to the core intent of the conversation.
Coherence	Checks for clear logical flow, structure, and organization of the virtual agent's responses.
User Satisfaction	Weighted average of all the other metrics on which the conversation was evaluated.

Note: All the metrics are rated on a scale of 3 or 5, and are finally scaled up to 5.

Calculations

Calculation of deviations and Adjusted Score:

To align the auto-evaluation scores with human judgment over time, a deviation is calculated and used to produce an adjusted score on metric level.

- Upper Deviation

  Condition: If the number of human-labeled scores that are higher than the auto-evaluated scores in the last 6 months is more than 30.

  Calculation: The top 90% of these cases are taken and the difference (delta) between the human score and the auto-evaluated score is averaged. This delta is the Upper Deviation.

- Lower Deviation

  Condition: If the number of human-labeled scores that are lower than the auto-evaluated scores in the last 6 months is more than 30.

  Calculation: The top 90% of these cases are taken and the difference (delta) between the human score and the auto-evaluated score is averaged. This delta is the Lower Deviation.

- Adjusted Score

  The final Adjusted Score is calculated based on the availability of the deviations.

  - If at least 30 distinct evaluations of both upper and lower deviations are labeled for a given metric, Error band is calculated as SUM(Avg labeling score – LLM score)/Distinct evaluations. This error band is added to Auto-Eval score to get Adjusted Score.
  - If neither deviation is available, then Adjusted Score = Auto-Eval Score

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Calculation of Auto eval user satisfaction score, Human user satisfaction score, and Upper and Lower deviation on Evaluation level:

- Auto eval user satisfaction score: For a given evaluation, get all the scores for each metric that are LLM generated and calculate SUM(metric score * metric weight)/SUM(metric weights).
- Human user satisfaction score: For a given evaluation, if at least one metric is labeled, it's considered to calculate the human user satisfaction score. If labeled, the labeling score is used, or else LLM score is used. Calculated as SUM(metric score * metric weight)/SUM(metric weights).
- Gap: Gap is calculated as (Human user satisfaction score – Auto eval satisfaction score).
- Upper Deviation: If the Gap is positive and there are more than 30 records, the error band is calculated at top 90% by SUM(Positive Gap) / Distinct evaluations. This error band is added to the Auto eval user satisfaction score.
- Lower Deviation: If the Gap is negative and there are more than 30 records, the error band is calculated at top 90% by SUM(Negative Gap) / Distinct evaluations. This error band is added to the Auto eval user satisfaction score.
- Adjusted user satisfaction score is calculated as SUM(Gap) / Distinct evaluations.

Note:

- The evaluator provides aggregated score per chat, even if there are multiple different requests made by user.
- Performance Analytics indicators are used to calculate the average score over time. If you run batch jobs on historical data, then by the definition of Performance Analytics indicators, these evaluations are counted on the evaluation date in aggregated scores and not counted for scores on the actual chat date.

Evaluation flow

The workflow for evaluation execution, which performs evaluations when conversations are completed.

Conversations are evaluated using the following logic:

1. Conversation capture:

   All end-user interactions with the virtual agent are logged in the Conversation table [sys_cs_conversation]. When a user ends the conversation, the record's state is updated to Complete.

2. Automated flow evaluation trigger:

   Flow name: Execute Evaluation.

   Trigger condition:

   - Table: Conversation table [sys_cs_conversation]
   - State: Complete
   - Device type: Web Client, Slack, Teams, Bot to Bot, Messenger

Sequence of execution:

Action 0: Check evaluations count for today

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- Perform a query on evaluation table and to get record count.
- If record count is less than Max Number of evaluations per day, continue to Action 1, else end flow.

Action 1: evalExecuteCondition

- Invokes the `evalExecuteCondition.executeEvaluation` script Include with conversation reference.
- Generates a random number (1–100). Proceeds only if ≤10 (10% random sampling).
- Outcome: Returns true or false for further processing.

Action 2: Conditional Branch

- If true: Proceed to the next action.
- If false: Evaluation stops.

Action 3: Lookup Interaction Table:

Matches the conversation's channel metadata with the interaction table to fetch related records.

Action 4: Application Scope Filter:

If the interaction's application scope doesn't include `hr`, continue.

Action 5: buildTranscript:

Detailed Transcript Construction:

- Tags: [User]: For user messages, [Virtual Agent]: For virtual agent messages.
- For any referenced Knowledge article:
  - Pulls the complete article body to replace genius result, tagged with `[Virtual Agent]: Help articles for user query:` and delimited by Article_Start/Article_End.
  - If the Knowledge article is in HR scope/inaccessible, skip evaluation.
  - If the Knowledge article content is >10,000 words: Truncate at 10,000.
  - Attached files (PDF/Word/Txt): Use genius result instead.
- For referenced Catalog Items:

  Extracts name, short description, description, annotated as `[Virtual Agent]: Please choose one of the below options:` with citation number.

- If the first message is to the live agent, or the live agent is invoked within the first 120 words: skip evaluation.

Outputs:

- ExecuteEvaluation (true/false)
- Chat Transcript
- Knowledge articles or catalog items referred
- Sys_id of first live agent invocation (if any)
- List of skills to invoke (all evaluation skills for Evaluation dashboard)
- Additional evaluation logs

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Action 6: Conditional Branch:

If ExecuteEvaluation is true: Continue to Action 7.

Action 7: Chat Classifier Eval

- Builds the initial transcript from *sys_cs_message*.
- Uses Chat topic classifier to determine:
  - Should the conversation be evaluated? (ExecuteEvaluation: true/false)
  - Topic Name
  - Category (IT/HR)
- If ExecuteEvaluation is true: Proceed to Action 6.

Action 8: Create or Update Evaluation Record:

Create a record on Evaluation [sn_na_conv_eval_evaluation] table with:

- Document Conversation: Conversation reference
- State: Processing
- Topic, Category, Knowledge article or catalog references, first live agent sys_id, type, user who initiated, message log

Action 9: For each skill:

Repeats for each skill flagged in Action 6.

Action 10: invokeApiDefinition

- Inputs: Skill name, conversation, transcript, evaluation id
- Calls Now Assist Skill API asynchronously.
- Post processing available in sys_generative_ai_response_validator, performs the following parsing:
  - Score
  - Reason for Score
  - Examples for the reasoning
- Parsed data is created on the Evaluation Metrics [sn_na_conv_eval_evaluation_metrics] table (Score, Reasons, Examples, and the entire reasoning for scoring [Scratchpad]).

Action 11: Waits 7 seconds before continuing to the next skill.

Special behavior and edge case handling:

- Sampling: Only 10% of conversations (randomly chosen) are evaluated.
- Channel Filter: Only Web, Slack, Teams, Bot to Bot, Messenger.
- Application Scope: Excludes records with `_hr_` in the scope.
- Knowledge article controls: No evaluation for HR or inaccessible. Knowledge articles, limits on Knowledge article size, and file handling.
- First live agent invocation: Excludes conversations routed to the live agent at the start or within 120 words.
- The Request Completion skill is added as part of a business rule where the score is tagged as the lowest between Slot filling and Intent.

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- The reason on the record is added as follows:

```
if (Slot filling score > Intent score) {
Intent reason is used
} else if (Slot filling score < Intent score) {
Slot filling reason is used
} else {
Both are used
}
```

Evaluation flow for batch evaluations

Batch evaluation enables Eval admins to evaluate up to 100 completed virtual agent conversations at once, based on a saved query.

Flow name: Execute Batch Evaluation.

The flow creates evaluation records and invokes Now Assist skills for each eligible conversation, mirroring the single-conversation evaluation logic, but at scale. It enforces HR scope exclusions, topic/category validation, transcript construction rules, early live-agent exclusions, and asynchronous scoring through skills.

Batch evaluations are performed using the following logic:

Trigger

- Table: Evaluation set [sn_na_conv_eval_evaluation_set]
- Condition: State changes to In Progress and Evaluation type = Conversation

Inputs

- Evaluation Set record with:
  - Query filter: A query that targets conversations to be evaluated (for example, sys_cs_conversation filters).
  - Evaluation type: Conversation
  - State: In Progress (to start)
- LLM/Skills: Chat Topic Classifier, plus the evaluation skills listed after this.

High-level behavior

- Reads the query filter and randomly samples up to 100 conversations.
- Skips already-evaluated conversations.
- Excludes HR-scoped interactions.
- Uses Chat Topic Classifier to validate evaluation eligibility and extracts Topic and Category.
- Builds a transcript with controlled inclusion of Knowledge articles and catalog sources, and applies early live agent exclusions.
- Creates an Evaluation record and asynchronously invokes all selected evaluation skills, writing scores and rationale to metrics.

Sequence of execution:

Action 1: If the query filter isn't empty

- Purpose: Guard clause.
- Logic: Look up the Evaluation Set record and check the query filter field.

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- If the query filter is present: Proceed to Action 2.
- If empty: Stop and optionally log `No query provided`.

Action 2: Randomize conversations

- Purpose: Select a bounded, random sample of conversations from the provided query.
- Logic:
  - Execute the query to get matching conversation records.
  - Randomly select up to 100 conversations.
    - If >100 matches, cap at 100.
    - If <100, select all.
  - Validate the query; if invalid, return false and an empty or partial array.
- Outputs:
  - success: true/false
  - conversation_ids: array of sys_ids (max 100)
- If success = true: Proceed to Action 3; otherwise, stop and log the validation error.

Action 3: Look up the evaluation table to check prior evaluation

- Purpose: Avoid duplicate evaluations.
- Logic: For each conversation sys_id, check sn_na_conv_eval_evaluation for existing records indicating that it's already evaluated or is in progress (implementation choice: state not in canceled/failed).
- If not previously evaluated: Proceed to Action 4 for that conversation.
- If already evaluated: Skip this conversation, optionally log `Already evaluated`.

Action 4: Look up the interaction record

- Purpose: Enforce HR scope exclusion.
- Logic: Resolve the interaction related to the conversation. If its application scope contains `hr`, skip the conversation.
- If the scope doesn't contain `hr`: Proceed to Action 5.

Action 5: buildTranscript

- Purpose: Construct the final, minute-level transcript and determine downstream skill set and guardrails.
- Steps:
  - Aggregate all conversation messages.
  - Tag user messages as `[User]:` and virtual agent messages as `[Virtual Agent]:`.
  - Knowledge articles:
    - If genius results reference Knowledge articles, query the Knowledge article and replace the genius snippet with the entire article body.
    - Annotate with `[Virtual Agent]: Help articles for user query:` and wrap content within Article_Start and Article_End.
    - Constraints:

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        - If the KB is HR-scoped or inaccessible, don't evaluate (skip conversation).
        - Truncate the article body to a maximum of 10,000 words.
        - If the KB content source is attached files (PDF/Word/Txt), fall back to the genius result instead of full file content.
    - Catalog Items:
        - If genius results reference catalog items, query sc_cat_item and build a string: catalog name, short description, description.
        - Annotate with `[Virtual Agent]: Please choose one of the below options :` and include citation order.
    - Live Agent Exclusions:
        - If the first user message requests a live agent, skip evaluation.
        - If a live agent is invoked within the first 120 words, skip evaluation.
- Outputs:
    - ExecuteEvaluation: true/false (post-guardrail outcome)
    - Chat transcript
    - Knowledge articles referred
    - Catalog items referred
    - First live agent occurrence: Sys_id of the conversation message (if present)
    - Skills to invoke:
        - Coherence Chat Evaluation
        - Conciseness Chat Eval
        - Context Retention
        - Inadequate Slot Filling Chat Eval
        - Intent Accuracy Chat Eval
        - Smooth Flowing Conversation Chat Eval
        - Truthfulness Hallucination Chat Eval
    - Additional logs
- If ExecuteEvaluation = true: Proceed to Action 7; otherwise, skip the conversation.

Action 6: If Block

- Purpose: Branch to record creation.
- Logic: If ExecuteEvaluation from Action 6 is true, go to Action 8.

Action 7: Chat Classifier Eval

- Purpose: Validate whether the conversation should be evaluated and extract high-level labels.
- Logic:
    - Build a lightweight transcript from sys_cs_message for classification input.
    - Invoke Chat topic classifier skill with the transcript.
    - Receive:

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        - Execute evaluation: true/false
        - Topic Name
        - Category: IT or HR
- If Execute evaluation = true: Proceed to Action 6.
- If false: Skip conversation and log the classifier decision.

Action 8: Create or Update evaluation record

- Purpose: Persist an evaluation entry for this conversation.
- Table: sn_na_conv_eval_evaluation
- Field population:
    - Document conversation: Conversation reference
    - State: processing
    - Topic: from Action 5
    - Category: from Action 5
    - KB Referred: from Action 6
    - Catalog Referred: from Action 6
    - First live agent occurrence: from Action 6
    - Type: chat summarization
    - User: initiating user for the conversation
    - Message log: Additional logs from Action 6
- On success: Proceed to Action 9.

Action 9: For Loop over skills

- Purpose: Execute each selected evaluation skill.
- For each skill in the list from Action 6:
    - Action 10: invokeApiDefinition
        - Inputs: Skill Name, Conversation, Transcript, Evaluation Id
        - Behavior:
            - Invoke the Now Assist skill asynchronously.
            - The post-processor writes results into sys_generative_ai_response_validator.
            - Extract JSON response fields:
                - Score
                - Reason for Score
                - Examples supporting the reasoning
            - Create child metric records in sn_na_conv_eval_evaluation_metrics linked to the parent evaluation.
    - Action 11: Wait

      Pause seven seconds before proceeding to the next skill to manage rate limits or throttling.

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AI Risk and Compliance

The AI Risk and Compliance (AIRC) application gives your risk and compliance team a dedicated workspace to assess AI-specific risks, attest to controls, demonstrate regulatory compliance, and manage AI-related cases for the AI capabilities and other AI assets your organization deploys.

Why AI Risk and Compliance matters

Generative AI introduces a class of risks that traditional risk and control frameworks weren't built to address. AI systems can produce biased outputs, expose sensitive data, or fall under emerging regulations such as the EU AI Act, NIST AI RMF, Colorado's SB 205, or California's SB 53. Without a coordinated way to assess and document those risks, organizations either slow AI adoption or accept exposure they can't measure.

The AI Risk and Compliance application gives your risk and compliance team the structure needed to govern AI responsibly while keeping AI deployments moving. Impact and risk assessments quantify exposure for each AI system, model, and dataset. A regulatory content pack maps requirements from major AI frameworks to your internal controls. AI case management captures investigations, exceptions, and incidents without disrupting development.

How AI Risk and Compliance works with AI Control Tower

AI Risk and Compliance and AI Control Tower work as a coordinated governance framework. AI Control Tower serves as the system of record for AI assets, managing inventory, life cycle state, and progression across phases. AI Risk and Compliance performs the independent risk, regulatory, and control governance activities that determine whether an AI system can advance through those phases.

A typical interaction follows this pattern: an AI use case is submitted through the Employee Center. AI Control Tower creates the inventory record and manages the asset through its life cycle. AI Risk and Compliance evaluates impact and risk during assessment, validates that required controls are implemented during build, and approves or blocks deployment based on residual risk. After deployment, AIRC monitors for new risks and manages the cases and inquiries that arise.

Neither application replaces the other; together they provide consistent oversight from demand through life cycle closure.

Key capabilities

Intake and risk-based classification

Intake requests provide a structured entry point for new AI use cases, models, and datasets. Responses to screening questions in the Use and Purpose section drive an initial risk classification (High, Medium, Low, or Unacceptable), so the appropriate level of governance attention is applied from the start of the life cycle.

Impact and risk assessments

Risk Assessment Methodologies (RAMs) define the scoring frameworks used to classify AI systems and evaluate the individual risks tied to each asset. Default RAMs cover regulatory classification and quantitative risk scoring across AI systems, models, and datasets. Administrators can configure custom RAMs to match organizational requirements.

Regulatory content pack

The AI Risk and Compliance Content Pack ships with authority documents and citations for the EU AI Act, NIST AI RMF, California's SB 53, and Colorado's SB 205.

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Citations are mapped to control objectives across frameworks, so a single attested control can satisfy requirements from multiple regulations.

Control attestation and issue management

Controls associated with AI assets can be attested as part of the build and validation phase. Issues that surface during attestation are tracked and remediated, and policy exceptions can be raised and documented when controls can't be implemented as designed.

AI case management

AI cases and inquiries support investigation, exception handling, and regulatory response after AI systems are deployed. Cases capture governance events, document decisions, and trigger reassessment when changes in risk warrant it, without breaking life cycle continuity.

AI Risk and Compliance workspace

The workspace is the central hub for AI risk and compliance managers. The Risk and Compliance dashboard shows risk posture and assessment status. The Operations dashboard tracks controls, issues, and exceptions. The AI Cases dashboard surfaces active investigations and inquiries.

Explore further

For details on configuring and using AI Risk and Compliance, see AI Risk and Compliance.

AI Guardian

AI Guardian provides the runtime protection layer for your generative AI deployments, evaluating requests and responses in real time to detect offensive content, prompt injection attacks, and sensitive topics that aren't suited for an AI response.

Why AI Guardian matters

Generative AI behavior is probabilistic. The same input sent to a large language model (LLM) can produce different outputs from one request to the next, and even well-tested skills can return content that's harmful, off-topic, or manipulated by a bad actor. Lifecycle governance can establish policies and controls before a generative AI skill goes live, but it can't catch what happens in the moment a user submits a prompt.

AI Guardian closes that gap by evaluating every request and response in real time. Offensive content is detected before it reaches a user. Prompt injection attempts that try to override LLM instructions are flagged or blocked. Conversations that drift into topics not suited for AI responses are redirected to a fallback flow. Together, these protections give your governance team the runtime evidence and enforcement they need to deploy AI with confidence.

How AI Guardian fits into AI governance

AI governance operates at two levels, and a complete program needs both. Lifecycle governance, supported by AI Control Tower and AI Risk and Compliance, evaluates AI assets before deployment and across their full life cycle: intake, impact assessment, risk classification, control attestation, and ongoing monitoring. Runtime governance, supported by AI Guardian, evaluates each individual AI interaction as it happens.

The two layers reinforce each other. Lifecycle reviews establish which AI systems are approved to operate and what controls must be in place. AI Guardian enforces parts of those controls at runtime and produces the logs that feed back into ongoing risk monitoring. When a guardrail

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surfaces a pattern of incidents, that signal can drive reassessment in AI Risk and Compliance without disrupting service.

The three guardrails

AI Guardian provides three guardrails, each with a different scope of applicability.

Offensiveness detection

Identifies toxic, defamatory, fraudulent, or otherwise harmful content in both the input sent to an LLM and the output returned. By default, detections are logged. You can configure the guardrail to block detected content and return a standard error message instead of the generated response. Offensiveness detection applies to specific generative AI skills and agentic workflows.

Prompt injection detection

Identifies attempts to override LLM instructions or expose restricted information through techniques such as role playing, paraphrasing, repetition, or instructions to ignore previous prompts. Prompt injection protection applies across all generative AI applications and features on your instance, and you can configure it at the instance level or for individual skills. When both are set, the more protective setting applies.

Sensitive topic filters

Identifies subjects not suited for an AI response, such as workplace safety, employee compensation, or personal well-being. When a filter triggers, the user is redirected to a Sensitivity Detection: Fallback Virtual Agent topic that can route them to a live agent or help them open a case. Sensitive topic filters apply to Virtual Agent conversational skills and are available with HR Service Delivery and Customer Service Management.

Logging and blocking

Offensiveness and prompt injection detections are logged by default. Logs capture the request, the conversation context, and any user feedback, and are accessible from **AI Admin Hub** > **Settings** > **AI Guardian**. Reviewing logs over a representative period of time gives your team a baseline for how often issues occur in your environment before you enable blocking.

When blocking is enabled and a guardrail triggers, the user sees a standard error message and the generated content isn't returned. Personally identifiable information (PII) is anonymized from requests before they reach the LLM, and the type of data anonymized is configurable.

Explore further

For details about configuring guardrails, exporting logs, and setting up a Guardrail Service Provider, see AI Guardian.

Large language models and providers

Large language models (LLMs) power every Now Assist generative AI capability. Understand how LLMs work on the ServiceNow AI Platform, choose model providers, and write effective instructions.

Large language models (LLMs) are the engine behind generative AI capabilities. Every skill, AI agent, and agentic workflow on the ServiceNow AI Platform relies on an LLM to interpret context, reason through tasks, and generate responses from your enterprise data.

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Large language models on the ServiceNow AI Platform

An LLM is a machine learning model trained on large datasets to generate text-based responses. Because LLMs are probabilistic rather than deterministic, the same prompt may produce slightly different outputs each time. Learning this characteristic helps you set appropriate expectations and design effective interactions with AI capabilities. To understand how LLMs generate responses and why their probabilistic nature shapes the way you design AI interactions, see Large language models on the ServiceNow AI Platform.

Now LLM Service

The ServiceNow AI Platform manages LLM interactions through Now LLM Service, which provides access to optimized models hosted by ServiceNow. Now LLM Service handles model selection, routing, and updates so that AI capabilities on your instance stay current without manual model management. Long-term stable (LTS) model options are available for organizations that require predictable behavior over extended periods, such as those in regulated industries. To use hosted models that handle selection, routing, and updates for you, including long-term stable models for regulated environments, see Model provider updates.

Writing effective instructions

How you write instructions and prompts for an LLM directly affects the quality of its output. General guidelines for writing effective instructions help you craft clear, specific prompts that produce consistent, useful results. These guidelines apply whether you're configuring base system skills, building custom skills with AI Skill Kit, or defining instructions for AI agents. To write clear, specific instructions that produce consistent results across skills, AI Skill Kit, and AI agents, see General guidelines for writing instructions for generative AI large language models (LLMs).

Providers and models

The ServiceNow AI Platform supports third-party model providers and the Now LLM Service. Configure provider connections, create model records, and understand the capabilities and constraints, such as context windows and token limits, that affect how AI features perform on your instance.

Note: If you notice inconsistencies in AI-generated results when using different search tools on your instance, refer to the topic on discrepancies when using different AI search tools.

To connect third-party model providers, create model records, and work within context-window and token limits, see Providers and Models.

Large language models on the ServiceNow AI Platform

ServiceNow AI Platform® utilises large language models (LLM) for generative AI and agentic AI functionality. You can choose the ServiceNow® LLM or supported third-party models. LLMs bring about the Generative AI application capabilities by understanding and generating human language, and processing vast amount of data.

Third-party model strategy

ServiceNow® supports third-party AI model providers, which signifies that the admin persona can select a third-party large language or an AI model provider for Now Assist skills that are available out of box. Find the supported model providers, the LLM services and the version.

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Third party AI model providers

Model provider	Large language model	Version	Deployment policy
ServiceNow®	Now LLM Service	Latest update for your instance	
Microsoft Azure	Azure OpenAI	OpenAI GPT-4.1 and GPT-4.1-mini	https://learn.microsoft.com/en-us/azure/ai-services/openai/how-to/deployment-types#global-standard
Google	Google Gemini	Gemini 2.5 Flash and 2.5 Pro	https://cloud.google.com/vertex-ai/generative-ai/docs/learn/locations
AWS	AWS Claude	Claude 3.7 Sonnet	https://docs.aws.amazon.com/bedrock/latest/userguide/models-regions.html **Note:** Some out of box skills, Agents, and Agentic Workflows do not support Now LLM Service or third party model providers. To learn more about the exceptions to LLM service and third party model providers support, see https://support.servicenow.com/kb?id=kb_article_view&sysparm_articl

Note: Some out of box skills, Agents, and Agentic Workflows do not support Now LLM Service or third party model providers. To learn more about the exceptions to LLM service and third party model providers support, see https://support.servicenow.com/kb?id=kb_article_view&sysparm_article=KB2222333

Large language model selection

This selection is supported at various levels such as, skill, skill group and instance levels. However, the controls that define LLMs mapping to different skills, allowed at various global locations, are configured and approved in AI Control Tower by the AI steward. The model

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provider options for custom skills created in Now Assist skill kit and AI Agent Studio are also configured in AI Control Tower. See Configure third-party LLMs using AI Control Tower to learn more.

The **Manage large language models** feature enables the admin persona to perform additional actions like:

- Edit the model provider at the instance, skill group and skill levels
- Deactivate active skills which are non-compliant with fallback as **No**. See AI model providers to learn more.
- View audit history on policy updates by AI steward in AI Control Tower
- Select allowed model providers across domain separated instances.

See Manage AI models to learn about managing.

For more information on selecting and updating model providers, see Manage model providers.

Model provider updates

Review these updates to learn which model providers and models are available for your skills and agents. Review the model cards for information about how each model is intended to be used.

Model cards

Large language models (LLMs) are complex machine-learning models that are trained on large datasets like websites and documentation to perform language-related tasks. Examples include text generation for case summaries and resolution notes.

Model cards explain the specific model's context, intended use, training data, limitations, and other important information.

These model cards reflect the AI models that power various features within the ServiceNow platform. These include skills, agents, and agentic workflows within ServiceNow Otto as well as AI powered features outside of ServiceNow Otto. To see which model a ServiceNow Otto skill, agent, or agentic workflow is using, you can check the skill list in the AI Admin Hub console and review the LLM service column.

Model card for Gemma 4 26B A4B

Selectable ServiceNow Otto model for enterprise AI that enhances text-based automation and content generation in ServiceNow workflows, including requester OOTB skills, custom skills, and agentic use cases.

Model card for ServiceNow large language model (V2)

ServiceNow Otto model for enterprise AI that enhances text-based automation and content generation in ServiceNow workflows, including requester OOTB skills, custom skills, and agentic use cases.

This model is available for Generative AI Controller application 15.1.0 or higher.

Model card for ServiceNow small language model (V2)

ServiceNow Otto model for enterprise AI that enhances text-based automation and content generation in ServiceNow workflows, including creator and fulfiller OOTB skills as well as custom skills.

This model is available for Generative AI Controller application 11.2 or higher.

Model card for ServiceNow third party large language model

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ServiceNow Otto models used for AI-driven solutions for text generation, summarization, and conversational AI.

Model card for ServiceNow Voice AI Speech-to-Text and Text-to-Speech models

Models used within ServiceNow AI Voice Agents for converting spoken user input to text and generating natural-sounding speech from AI responses.

Model card for ServiceNow AI Guardian model

This model provides content moderation and helps identify different kinds of prompt injection attacks and offensive content.

Model card for ServiceNow Inferred CSAT and Factors large language model

This model is designed to ingest a conversation and predict a CSAT score as well as factors that explain the predicted score.

October 2026

The October release adds models to the Now LLM Service and to Google Gemini. It also retires the Gemini 2.5 models and Claude Sonnet 4.5, and begins the deprecation of the Now LLM Service V2 models.

- New model in the Now LLM Service: Gemma 4 26B-A4B is available for both large and small language model use cases. Third-party models remain the default. You can select the Now LLM Service for your skills and agents instead of the default.
- New restricted model: Gemini 3.7 Flash supports the Build Agent. You can't select it for your skills and agents.
- Gemini 2.5 models retired: Gemini 2.5 Pro, Gemini 2.5 Flash, and Gemini 2.5 Flash Lite are retired on October 8, 2026. These models are no longer available, and requests to them fail. Gemini 3.5 Flash replaces all three models. Review your skills, agents, and generative AI configurations for references to the retired models, and select Gemini 3.5 Flash instead.
- Claude Sonnet 4.5 retired: Claude Sonnet 4.5 is retired on October 8, 2026. Claude Sonnet 4.6 replaces it. Select Claude Sonnet 4.6 for your skills and agents.
- V2 models deprecated for new development: The ServiceNow large language model (V2) and small language model (V2) are deprecated for new development. Your existing skills and agents continue to work. Retirement is planned for the December release, when these models are replaced by Gemma.

September 2026

September release adds restricted models from AWS Anthropic. Restricted models support specific features only. You can't select them for your skills and agents.

This release doesn't add any general purpose models. The models that you can select in the AI Admin Hub console are unchanged.

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- Claude Sonnet 5 and Claude Fable 5 support the Build Agent.

- Restricted replaces limited: The card now uses **Restricted** instead of **Limited** to identify models that you can't configure. Claude Opus 4.6 and Gemini 2.5 Flash Lite use the new term. Their supported features haven't changed. Gemini 2.5 Flash Lite is retired on October 8, 2026, and is replaced by Gemini 3.5 Flash.

July 2026

The Now LLM Service model strategy has moved toward integrated model provider flexibility. Store application updates have started shipping, and the default model for base system skills and agents is changing from the Now LLM Service to an integrated third-party model provider. If you haven't changed the default model for a skill, that skill uptakes the new default.

- Integrated third-party model providers: The integrated third-party model providers are Google Gemini, AWS Claude, and Azure OpenAI.

- New general purpose models: You can select these models for your skills and agents in the AI Admin Hub console. Model availability varies by your instance, your configuration, and your geographic region.
  - Azure OpenAI: GPT-5.1, GPT-5.4 Mini, and GPT-5.1 Mini
  - Google Gemini: Gemini 3.5 Flash

- GPT-5.2 deprecated: GPT-5.2 is no longer available as a model option. GPT-5.4 replaces it. If you selected GPT-5.2, update your model configuration records to select GPT-5.4. References to GPT-5.2 aren't redirected automatically.

- The Now LLM Service is still supported: The change to the default model provider doesn't remove access to the Now LLM Service. You can still select it for your skills and agents if you require a ServiceNow hosted model.

- Existing selections preserved: If you have already selected a model provider, that configuration is preserved. The update doesn't overwrite an explicit selection.

- Changing your model provider: To select a model provider other than the default, review the providers that are allowed for your instance in AI Control Tower. Navigate to **Configurations** > **Controls** > **AI model providers**, and then make your changes in the AI Admin Hub Center by navigating to **Settings** > **Manage AI Models** > **Manage Model Providers**.

- Explicit model names required: Update prompt and generative AI configuration records that use generic large or small model references. Reference a specific supported model by name instead.

June 2026

June release includes updates to third-party model defaults. It also contains a change to the default reasoning effort setting for GPT-5 Mini, and the retirement of the Now LLM long-term support (LTS) SKU.

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- Third-party default model version update: Teams that did not update their third-party default model versions to the latest available versions in the May release must do so in the June release. GAIC 13.1.2 is the required version for this update.

- GPT-5 Mini: `reasoning_effort` default change: The default `reasoning_effort` setting for GPT-5 Mini has changed from `none` to `minimal`. This change is included in GAIC Snapshot 14.0.0, which is compatible with Now Assist for Platform 12.0.0.

  Teams using GPT-5 Mini should run regression and functional testing to confirm that the new default works as expected. If you explicitly set `reasoning_effort` in your generative AI config additional properties, smoke test to verify there are no unexpected effects. If you have `reasoning_effort: none` set in additional properties, update the value to `minimal` and run regression and functional testing.

- Claude Sonnet 4.0 retirement: Claude Sonnet 4.0 references are being redirected on the backend. No team action is required.
  - `claude_large` / Claude 4.0 Sonnet redirects to Claude 4.5 Sonnet
  - `claude_small` / Claude 4.0 Sonnet redirects to Claude 4.5 Sonnet

- Now LLM LTS SKU retired: ServiceNow no longer offers the LTS model SKU. There are no testing requirements or expectations for teams related to this retirement.

May 2025

An advanced 12B general-purpose small language model (SLM) with a singular, high-performance architecture that supports a wide range of tasks in ServiceNow's context was released. Fine-tuned on Mistral-Nemo-12B-Instruct, this model is designed and optimized for tasks like Agent Assist, Text-to-Flow, Text-to-Cypher, Safety & Content Moderation and Text-to-Code.

Key Enhancements:

- Enhanced instruction adherence: Improved the model's capability to accurately interpret and follow user instructions, ensuring that the model can better understand and execute complex commands. Leading to more precise and reliable outcomes than previous releases.
- Increased context window: Increased context window from 16K to 32K, enabling the model to better understand long-form inputs. This increase maintains coherence over extended interactions, and supports more complex tasks with richer contextual awareness.
- Improved multilingual proficiency: Boosted performance across languages compared to previous releases, with notable enhancements in Japanese processing.
- Optimized for ServiceNow workflow related capabilities: Extended support coverage for Text-to-Flow, and improved the performance of Text-to-Code, Text-to-Cypher etc.
- Continuously enhanced model deployment consolidation: Integrates ServiceNow-related tasks into a single model, reducing system complexity at the same time while elevating overall performance.

March 2025

A powerful 12B general-purpose small language model (SLM) designed to enhance a wide range of applications, including text-to-code and agent use cases was released. Fine-tuned on Mistral-

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Nemo-12B, it streamlines deployment and consolidates multiple functionalities into a singular, architecture.

Key Enhancements:

- Optimized to fulfill use cases: Enhances case summarization, chat summarization, resolution notes, and knowledge base generation across supported languages, including improvements in Japanese quality.
- Superior text-to-code and text-to-cypher performance: Delivers major advancements in Glide JavaScript and generic JavaScript editing and generation, along with improved accuracy in query generation and execution for structured databases.
- Robust content moderation and safety: Provides stronger protection against adversarial prompts, jail-breaking attempts, and harmful content generation, ensuring safer deployment with built-in content filtering.
- Unified model deployment:integrates ServiceNow-related tasks into a single model, thereby reducing system complexity while elevating overall performance.
- Improved instruction adherence: Delivers better instruction following and consistency across varying levels of prompt and instruction strictness than the current text-to-text NowLLM.

November 2024

Several key improvements were added to the Now LLM Service that are aimed at enhancing performance and quality.

- Multilingual support: Now LLM Service supports 8 additional languages, enabling global teams to use the model in their native languages.

  The supported languages are: English, German, French, Japanese, Dutch, French Canadian, Spanish, Brazilian Portuguese, and Italian.

- JSON format support: The model now provides output in JSON format, making it easier for developers to integrate with various applications and automate workflows seamlessly.
  - Deterministic responses: JSON mode ensures structured, consistent output, which improves predictability and reliability when integrating with applications.
  - Error reduction: Unlike free-form text mode, JSON responses are less prone to format errors or stray characters, minimizing integration issues.
  - Lower token consumption: The fixed structure of JSON can reduce token usage, making it more efficient and cost-effective for applications with high response frequency.
- Improvements in instruction following: The model has been fine-tuned to understand and follow instructions more precisely. This enables the model to deliver more to-the-point and actionable responses, helping users get the information they need faster and more efficiently.

General guidelines for writing instructions for generative AI large language models (LLMs)

When using Now Assist products and skills, you may have the option to give specific instructions or other guidance to the LLM. Writing generative AI instructions is different from conducting a keyword search. Use the following general guidelines when crafting your instructions.

Writing instructions for generative AI is very different from using search keywords. Keywords are the words that you might expect to appear in your results. For example, if you search for "gray bobtail cats," then you can reasonably expect your search results to return with topics or media that is about gray cats, bobtail cats, or even just cats in general. But with generative AI, you are

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asking the LLM to perform a task for you. The phrase "gray bobtail cats" does not include a verb to tell the LLM what to do. What about these gray cats? Should it locate all there is to know about them? Should it find gray bobtail cats to adopt? Should it create a picture of a gray bobtail cat? Should it be a realistic picture, or more of a line drawing? Generative AI needs more than just keywords.

General LLM instructions

Use instructions or questions to tell the LLM what you want. They can include four parts:

Goal

What kind of result do you want from the LLM?

Example: `I want a list of 3-5 bullet points to prepare me...`

Context

Why do you need it, and who is involved?

Example: `...for an upcoming meeting with [client], focusing on their current state and what they're looking to achieve with their "Phase 3+" brand campaign.`

Expectations

How should the LLM best fulfill your request?

Example: `Please use simple language so I can get up to speed quickly.`

Source

What information or other resources would you like the LLM to use?

Example: `Focus on email and Teams chats with [people] since June.`

Sample LLM instructions

Continually test and refine your instructions. Creating good LLM instructions is an iterative process, and as the LLM model learns, you may want to modify your instructions over time.

Stating your goal

When constructing an LLM description or instruction, consider these basic guidelines.

- Lead with action verbs. Use the imperative form or direct commands.
- Be direct and use simple sentences rather than complex ones.
- Be specific.

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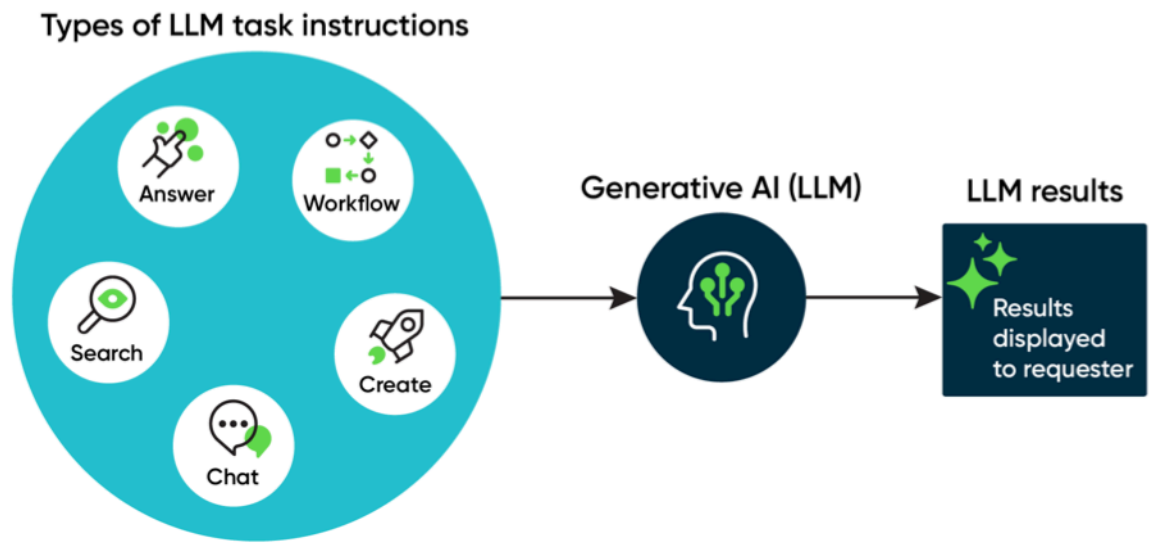
- Don't use jargon or slang terms.
- Avoid references to third parties or pronouns. Removing the subject or any identifiers generally prevents the LLM from personifying or otherwise misidentifying the end user.
- Your words instruct the logic that generative AI will use. Detailed, chain-of-thought instructions work well for this.

Instructions should also be tailored to the type of task. The following table describes the different kinds of tasks and the sort of instructions you might write for each circumstance.

Types of generative AI tasks and example instructions

Task type	Description	Example instruction
Simple search	Simple search for an answer.	When is the next company holiday?
Answer	Gather information from multiple sources and provide a summarized answer.	What were the major customer support issues in the past 30 days?
Chat	A back-and-forth conversation in which the LLM is getting additional information from the requester.	I have a new phone and now I can't access Okta.
Create	Create a new ServiceNow component.	Write a new KB on common reasons for slow query execution and how to fix it, based on problems created in the last 12 months.
Workflow	Leverage existing workflows and create conversations from them.	Reset my Okta password.

LLM instruction workflow



Providing context in your instructions

Providing context to the LLM may feel like you are stating the obvious. For example, you may need to explain why your user would want to perform the task, or explain more about what the task is about. If you're using language that could have alternative meanings, you may want to define your terms. For example, if your instructions are about Microsoft Teams, you may need

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to say something like, "Teams refers to Microsoft Teams, an application that employees in a company can use to communicate with one another individually or in groups."

When providing context, think about the target audience for the task. This will help you to write better instructions. Mentioning whom the task is for also helps the LLM carry out the task.

Types of users to consider:

Admins

Admins configure skills in the AI Admin Hub console. They work with platform owners and product owners for tasks and requirements. Subject-matter experts check the accuracy of generative AI results. Governance boards or committees may oversee final sign-off on the skill.

Builders

Builders create assets such as applications and workflows. Their skill level may vary from no-code, low-code, mid-skill, or high-skill. They mostly interact with each other and admins.

Agents

Agents provide technical assistance, customer support, or other problem-solving help for users of a product, service, or organization. Agents work with their peers and support many kinds of requesters.

Requesters

Requesters may include your organization's employees, partners, or customers. Requesters encounter generative AI mostly in a self-service context. Generative AI provides the opportunity to requesters to solve the problem themselves before they resort to asking an agent for help.

In addition, you may need to "instruct" the LLM how to arrive at the kind of answer you want. Detailed chain-of-thought instructions are more likely to produce the results you're looking for. If you make assumptions in your instructions, your results may vary wildly.

Example of chain-of-thought instructions

Standard instructions	Chain-of-thought instructions
Q: Start with 5 tennis balls. Buy 2 more cans of tennis balls. Each can has 3 tennis balls. How many tennis balls are there now? A: The answer is 11. Q: The cafeteria had 23 apples. If the cafeteria used 20 to make lunch and bought 6 more, how many apples does the cafeteria have?	Q: Start with 5 tennis balls. Buy 2 more cans of tennis balls. Each can has 3 tennis balls. How many tennis balls are there now? A: There are 5 balls. 2 cans of 3 tennis balls each is 6 tennis balls. 5+6=11. The answer is 11. Q: The cafeteria had 23 apples. If the cafeteria used 20 to make lunch and bought 6 more, how many apples does the cafeteria have?
LLM results (incorrect!)	LLM results (correct!)
A: The answer is 27.	A: The cafeteria had 23 apples originally. They used 20 to make lunch. So they had 23-20=3. They bought 6 more apples, so they have 3+6=9. The answer is 9.

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Expectations

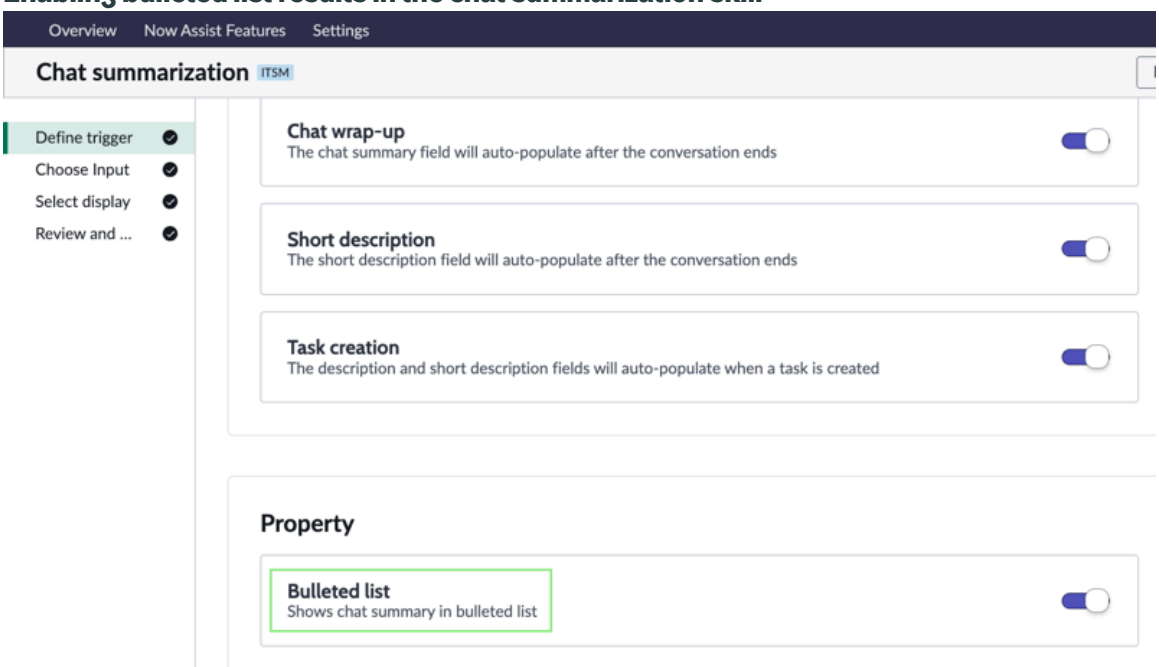
You can specify how you want your results to sound and look. For example, you can tell the LLM what kind of tone you want it to use.

Modifying the tone of LLM results

Instruction	LLM result	Evaluation of result
Greet the user with a casual, laid-back tone.	Hey there! (: Welcome to May 22, 2024, a Wednesday. Chill and have a great day!	Too casual!
Greet the user with a professional, business-like tone.	Good day, welcome to our business. How may I assist you today?	A little too formal.
Greet the user with a professional, but friendly tone.	Hello there! I'm glad to assist you today, May 22, 2024. How can I help you?	Great, but I don't want the date.
Greet the user with a professional, but friendly tone. Do not include the date.	Hello! I'm here to help. How can I assist you today?	Perfect.
Instruction	LLM result	Evaluation of result

In some Now Assist applications, you may have the option to specify formatting. In those cases, you can tell the LLM to provide answers in a bulleted list, for example. Bulleted lists are often easier to read.

Enabling bulleted list results in the chat summarization skill



Source

You can suggest a variety of sources that the LLM should use to find answers, including Microsoft Teams conversations, Microsoft SharePoint Online sites, incidents and cases, and

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internal knowledge articles. In order for an agent or skill to access all of these sources, an admin must configure access on the instance.

For developers, the sources that a skill or AI agent can access may vary depending on the desired outcome. For example, the incident summarization skill uses the Incident table as its source. AI agents use different tools and knowledge sources, customized for the task they perform.

For more information about configuring sources for skill or AI agent use, see the following topic areas:

- AI Search
- ServiceNow Otto for AI Search
- External Content Connectors
- Overview tab in AI Admin Hub
- AI Agent Studio (legacy)

Additional guidelines for Now Assist skills and tools

Resources for writing LLM instructions for Now Assist skills

Skill	Reference
App generation	
Analytics generation	Guidelines and example questions
Catalog item generation	Suggestions to describe catalog items
Code generation	General guidelines for code generation
Flow generation	Exploring flow generation
LLM topic skill for Virtual Agent	
AI Skill Kit	General guidelines for AI Skill Kit
RPA bot generation	General guidelines for RPA bot generation
Test generation	
UI generation	General guidelines UI generation

Long term stable models

Long term stable (LTS) models support regulated industries, such as financial institutions, with stronger AI lifecycle management, governance, transparency, and compliance tools.

Long term stable models enable you to adopt AI confidently while supporting customers in their operational and compliance needs. These models also integrate with tools like AI Control Tower to support customers with governance, monitoring, and compliance controls along with guidance for implementing AI responsibly.

LTS models provide predictable AI updates, longer model stability windows, and early access testing for smoother adoption.

You can configure long terms stable models in AI Control Tower. You can also navigate to **Manage model providers** section in the Now Assist settings and select Now LLM Service-LTS as a provider for specific Now Assist skills.

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Discrepancies when using different AI search tools

Different AI search tools may return different answers for the same or similar searches. This difference in results is expected. It occurs because each large language model (LLM) uses a different approach to find results and generate answers that match your search.

Overview of how LLMs create responses

Large Language Models don't retrieve answers from a single source. Instead, they generate responses by predicting the next most likely word, one at a time, based on patterns they've learned from the data they were trained on.

Because of that, several factors can make the answers vary each time. The factors include:

- Probability
- Multiple good answers
- Context sensitivity
- LLM variation

Answer generation involves probability, context, and variation. Therefore, responses to the same question can differ slightly each time it is asked, and from provider to provider.

For more information on differences in ServiceNow AI results, see Search result disparities between AI Search and ServiceNow Otto® search features.

Example: Now LLM Service response vs. Azure response

The difference in responses by Now LLM Service and Azure for information about tuition reimbursement

Providers and Models

You can bring your own large language model (LLM) provider and API to use with Now Assist.

Bringing your own large language model enables:

- Data Privacy & Compliance: Keep sensitive data within your own environment and meet regulatory requirements.
- Customization: Fine-tune models for domain-specific needs and control behavior.
- Integration Flexibility: Connect easily with existing infrastructure and preferred cloud providers.
- Cost Control: Use existing contracts and optimize resource usage to avoid extra charges.
- Strategic Autonomy: Maintain vendor neutrality and avoid lock-in for future-proofing.

Managing data for AI

Build the data foundation and search infrastructure that AI capabilities depend on to deliver accurate, relevant results.

The quality and accessibility of your enterprise data directly affects how effective your AI capabilities are. Generative AI outputs are grounded in the content your instance provides. If that content is outdated, incomplete, or poorly structured, AI-generated summaries, answers, and recommendations reflect those gaps.

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Connecting enterprise data

Workflow Data Fabric is the unified data foundation that connects enterprise data where it lives, governs it through stable contracts, and makes it ready for workflows, analytics, and AI. Data is often scattered across dozens of systems, and integrations are rebuilt team by team. Workflow Data Fabric addresses this challenge so that after data is connected and governed, any team can discover and reuse it without rebuilding pipelines or compromising data integrity. To learn about connecting enterprise data where it lives, governing it through stable contracts, and making it ready for AI, see Connecting enterprise data for AI.

Knowledge Graph

Knowledge Graph creates a connected representation of data that maps entities and their relationships, adding context and meaning to information across your enterprise. This semantic layer enhances Virtual Agent, AI agents, and generative AI skills by enabling natural language queries against structured data, providing user context such as role, department, and location for personalized responses, and simplifying interactions through automatic slot-filling in forms and chat requests. To map the entities and relationships that give AI the context for natural language queries, personalized responses, and automatic slot-filling, see Knowledge Graph.

AI Data Kit

AI Data Kit enables you to add datasets to a data catalog and create data collections for evaluation in the ServiceNow SDK. When the base system generative AI skills don't fit your needs, AI Data Kit provides the tools for creating custom datasets that can be used to develop and evaluate custom AI capabilities on your instance. To build custom datasets and data collections for developing and evaluating AI capabilities in the ServiceNow SDK, see AI Data Kit.

AI Search

AI Search is the retrieval layer that powers search experiences across the ServiceNow AI Platform®. AI Search indexes content from your instance and from connected external sources, then delivers relevant results through platform applications such as Global Search, Service Portal, Employee Center, and workspaces. Configuring AI Search effectively, including defining search sources, search profiles, and relevancy settings, is a high-impact step in your AI implementation. To learn about configuring the search sources, profiles, and relevancy settings that power retrieval across Global Search, portals, and workspaces, see AI Search on the ServiceNow AI Platform.

External Content Connectors

External Content Connectors index content and metadata from external source systems such as Confluence, SharePoint Online, Google Drive, and other supported repositories, making those systems searchable through AI Search. Indexing preserves the original user access permissions from the source system, so users only see content they are authorized to access. Connector administrators schedule content crawls and permission crawls to keep indexed content current. To learn about making external systems searchable through AI Search while preserving source permissions, see External Content Connectors on the ServiceNow AI Platform.

Note: Data quality is an ongoing effort. Establish regular review cycles for your knowledge base, search sources, and AI training data to maintain the quality of AI outputs as your organization evolves.

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Connecting enterprise data for AI

Workflow Data Fabric connects enterprise data across systems, governs it through stable contracts, and makes it available to AI agents, workflows, and analytics on the ServiceNow AI Platform.

AI capabilities on the ServiceNow AI Platform are only as effective as the data they can access. Workflow Data Fabric is the unified data foundation that addresses a common enterprise challenge: data scattered across dozens of systems, integrations rebuilt team by team, and AI agents lacking the governed context needed to act reliably. After data is connected and governed through Workflow Data Fabric, any team can discover and reuse it without rebuilding pipelines or compromising data integrity.

Workflow Data Fabric support for AI

AI agents, generative AI skills, and agentic workflows consume data through the governed contracts that Workflow Data Fabric provides. When an AI agent needs to retrieve information from an external system to complete a task, or when a workflow needs real-time data from a data warehouse to make a decision, Workflow Data Fabric supplies that data through stable, access-controlled interfaces. This means AI capabilities operate on trusted, contextualized data rather than on ad hoc integrations that may lack governance or break over time.

Workflow Data Fabric lifecycle

Workflow Data Fabric operates through four phases that separate planning, access, governance, and consumption:

Prepare

Explore the Data Catalog to find existing data products and data interfaces that may already meet your needs. ServiceNow Otto for Workflow Data Fabric (WDF) provides AI-guided recommendations that help you determine whether to reuse existing data or connect a new source.

Connect

Establish secure connections to external systems in Connect Hub. Connect Hub is a unified workspace for discovering, building, and managing integrations between the ServiceNow platform and external systems. Connection admins configure credentials, authentication, and metadata collectors for external data sources including databases, APIs, data lakes, and SaaS applications.

Understand

Convert raw connectivity into governed, reusable data. Metadata collectors automatically populate the Data Catalog with discovered schemas, lineage, and governance metadata. Data stewards author data interfaces in the Data Workbench — stable contracts that define how consumers access data. Data stewards then package these interfaces into data products with business context, documentation, and access controls.

Act

Discover published data products in the Data Catalog, request access through governance workflows, and consume data through Workflow Studio, dashboards, API queries, and AI agents. Data is consumed exclusively through data interface contracts, preserving governance boundaries and data quality.

Key components

Connect Hub

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A unified workspace for discovering, building, and managing integrations. Connect Hub supports prebuilt integration components including spokes and zero copy connectors, and provides access to Model Context Protocol clients for connecting AI agents to external tools.

Data Catalog

A self-service discovery layer where consumers browse and evaluate data products, data interfaces, and other cataloged assets. The Data Catalog displays trust scores, lineage, and governance metadata, enabling consumers to request access and confirm data usability before building on it.

Data Workbench

The interface where data stewards create data interfaces and data products. Data interfaces are stable, governed contracts that define the schema through which consumers access data. They support single table, JOIN, and UNION patterns, and enforce backward compatibility to protect consumers from breaking changes. Data products package one or more data interfaces with business meaning, documentation, and governance metadata.

Data fabric tables

A projection of an external data object that makes external data accessible as if it were a local ServiceNow table, without physically copying the data. Data fabric tables enable AI agents and workflows to query external data in real time using the same patterns they use for instance data.

ServiceNow Otto for Workflow Data Fabric (WDF)

An AI-guided entry point that helps you discover data fabric tables, connectors, and collectors, and request guidance on how to set up integrations. Describe what you need in natural language and Now Assist recommends whether to reuse existing data or connect a new source, then routes you to the right place.

Additional resources

To connect data sources, define the contracts that govern how that data is accessed, and make it available to AI agents, workflows, and analytics, see Workflow Data Fabric.

Knowledge Graph

The Knowledge Graph application, uses the structured and unstructured data from ServiceNow records, knowledge bases, and external sources to enhance the performance of *ServiceNow Otto for Virtual Agent*, AI agents, and generative AI skills.

https://player.vimeo.com/video/1179692919?h=0cfd1c5d45&badge=0&autopause=0&player_id=0&%E2%80%A6

Learn more about Knowledge Graph and how it can help fit your specific business needs.

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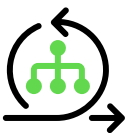
Get started

Explore Explore Knowledge Graph	Configure Configure Knowledge Graph	Use Knowledge Graph Create and edit Knowledge Graph schema
Using Enterprise Graph  Learn about the Enterprise Graph schema.	Natural Language queries in Knowledge Graph View example use cases of natural language queries in Knowledge graph.	Graph Query Builder Build and run queries on Knowledge Graph.
Reference Additional information to configure Knowledge Graph		

Exploring Knowledge Graph

Knowledge Graph provides a connected representation of data that maps entities and their relationships, adding context and meaning to information to enable intelligent search, insights, and AI-driven experiences.

Knowledge Graph overview

ServiceNow Knowledge Graph application enhances the ServiceNow AI Platform® by creating a semantic layer that connects data, relationships, and context across the enterprise. It structures information as a graph of entities and connections, bringing context and meaning to the available raw data. By leveraging AI, it powers personalized and intelligent experiences across the ServiceNow® platform including ServiceNow Otto for Virtual Agent, AI Agents, and AI Search to deliver more relevant insights and automation.

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By linking data and embedding semantic meaning, ServiceNow Knowledge Graph transforms raw data into actionable knowledge, fueling faster resolutions, richer insights, and more personalized AI-powered experiences.

ServiceNow Knowledge Graph application:

1. Natural language queries: Enables user to query structured ServiceNow data conversationally —for example, “Who is my manager?”, “What’s the status of my incident?”, or “What assets are assigned to me.” For more examples, see Natural language queries use cases and examples.
2. User context: Provide Now Assist in Virtual Agent and AI Agents with contextual information such as role, department, or location to deliver personalized and relevant responses.
3. Slot-filling: Simplify user interactions by automatically populating known information in forms or chat requests, reducing effort and friction.
4. Smarter AI Agents: Empower agents to retrieve insights, facts, and relationships directly from the knowledge graph to automate actions and improve accuracy.
5. Integration with Workflow Data Fabric: Use an integrated data layer that gives real-time, secure, and unified access to data from any source without duplicating it, enabling faster, data-rich workflows across the platform.

Knowledge Graph components

ServiceNow Knowledge Graph is a graphical representation of real-world entities (tables) and their relationships, stored in a database. Each graphical representation is called as a Knowledge Graph Schema that consist of relevant entities called nodes. The relationship between each entity is called an edge.

To create, edit and manage Knowledge Graph schema for your specific use cases, ServiceNow Knowledge Graph has introduced, Knowledge Graph designer.

Users can use these schema to customize and extend Knowledge Graph integrations with Now Assist Virtual Agent and AI agents, and Now Assist panel. ServiceNow also provides some Prebuilt integrations, that connects Knowledge Graph with Now Assist Virtual Agent and AI agents, and other ServiceNow applications, enabling seamless AI-powered workflows and personalized experiences.

Knowledge Graph Designer

Knowledge Graph Designer is a dedicated, no-code UI where Knowledge Graph administrators (kg_admins) can effortlessly:

- Design and manage Knowledge Graph schema, and configure the related nodes (tables), properties (columns), and their relationships.
- Analyze results of the Knowledge Graph APIs integrated in downstream products by auditing the schema using natural language queries and achieved responses.

The Knowledge Graph Designer streamlines the entire process, from schema creation and data ingestion to performance monitoring and results analysis. The new approach confirms a scalable, flexible, and intuitive way for Knowledge modeling.

Graph query Builder

Use the Graph query Builder to run queries visually by selecting an entity, adding relationships and filters,without any query syntax.

For more details, see Graph Query Builder

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Prebuilt Integrations

By unifying Knowledge across platforms and integrating with ServiceNow Otto, AI Search, AI agents, and skill kit, the prebuilt integrations of Knowledge Graph helps the customer drive productivity, enhance decision-making, and unlock the full potential of enterprise data, while maintaining robust data governance and permission controls.

In this release, the available prebuilt integrations are:

1. Integration with ServiceNow® Otto for Virtual Agent, ServiceNow Otto panel and AI agents for User Context: Helps users with personalized responses.
2. Integration with ServiceNow® Otto for Virtual Agent and ServiceNow Otto panel for Slot filling: Helps pre-fill the slots for Virtual Agent topics using the Natural Language Querying feature of Knowledge Graph.
3. Integration with ServiceNow® Otto for Virtual Agent and ServiceNow Otto panel for Employee schema: Helps requesters and fulfillers with personalized responses on people queries and Natural Language queries. Also supports people citation card. By default the user NLQ graph is connected which is used for people queries but you also have sample graph schema for other employee queries. To see more sample graphs for employee queries refer, KB article .
4. Integration with AI agents as a tool: Used to retrieve results in Natural Language and perform follow up tasks that are assigned to the AI agents.

Knowledge Graph users

Knowledge Graph users

User role	KG Functionality	Description
Knowledge Graph Admin (kg_admin)	Knowledge Graph Designer	The Knowledge Graph Admin can create and manage Knowledge Graph schemas.
Requester	Prebuilt integration with Virtual Agent and Agentic AI	Helps requesters with personalized answers, natural language queries, and fewer conversation turns with pre-filled slots for LLM topics and skills.
Fulfiller	Prebuilt integration with ServiceNow Otto panel and Agentic AI	Helps fulfillers with personalized answers, natural language queries, and fewer conversation turns with pre-filled slots for LLM topics and skills.

Knowledge Graph benefits

Knowledge Graph benefits

Benefit	Feature	Users
Enhance user experience (with prebuilt integration for downstream products like Virtual Agent and Agentic AI)	Provides accurate data with minimal user effort.	Requester
Simple and easy to use	Creates a complex data model called Knowledge Graph schema with numerous entities and	kg_admin

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Knowledge Graph benefits (continued)

Benefit	Feature	Users
	their relation within a few steps.	
Easy to manage	Editing Knowledge Graph schemas to add new nodes or edges is simple.	kg_admin
Customizable Knowledge Graph schema	Provides an option to copy the ServiceNow Knowledge Graph schemas for customization.	kg_admin
Test a Knowledge Graph schema	Provides an option to test a Knowledge Graph schema by running a query.	kg_admin
Use Workflow Data Fabric to retrieve information without saving or copying them from the source entity. This ensures efficiency and security.	Leverage Workflow Data Fabric tables in Knowledge Graph to retrieve data.	Requester
Create a Knowledge Graph schema with Workflow Data Fabric tables.	To create and manage Workflow Data Fabric tables, see Managing data fabric tables	kg_admin

What to explore next

To learn more about configuring and using Knowledge Graph, see:

- Configuring Knowledge Graph
- Using Knowledge Graph Designer
- Reference for Knowledge Graph

Access Knowledge Graph Schema

Use Knowledge Graph Designer to create, edit, and manage Knowledge Graph schema.

Before you begin
Role required: kg_admin

Procedure

Navigate to **All** > **Knowledge Graph** > **Knowledge Graph Designer**.
The Knowledge Graph Designer landing page displays a list of all the Knowledge Graph schemas available for users.

ServiceNow some provides prebuilt schema that are non-editable. Currently, the following prebuilt schemas are available:

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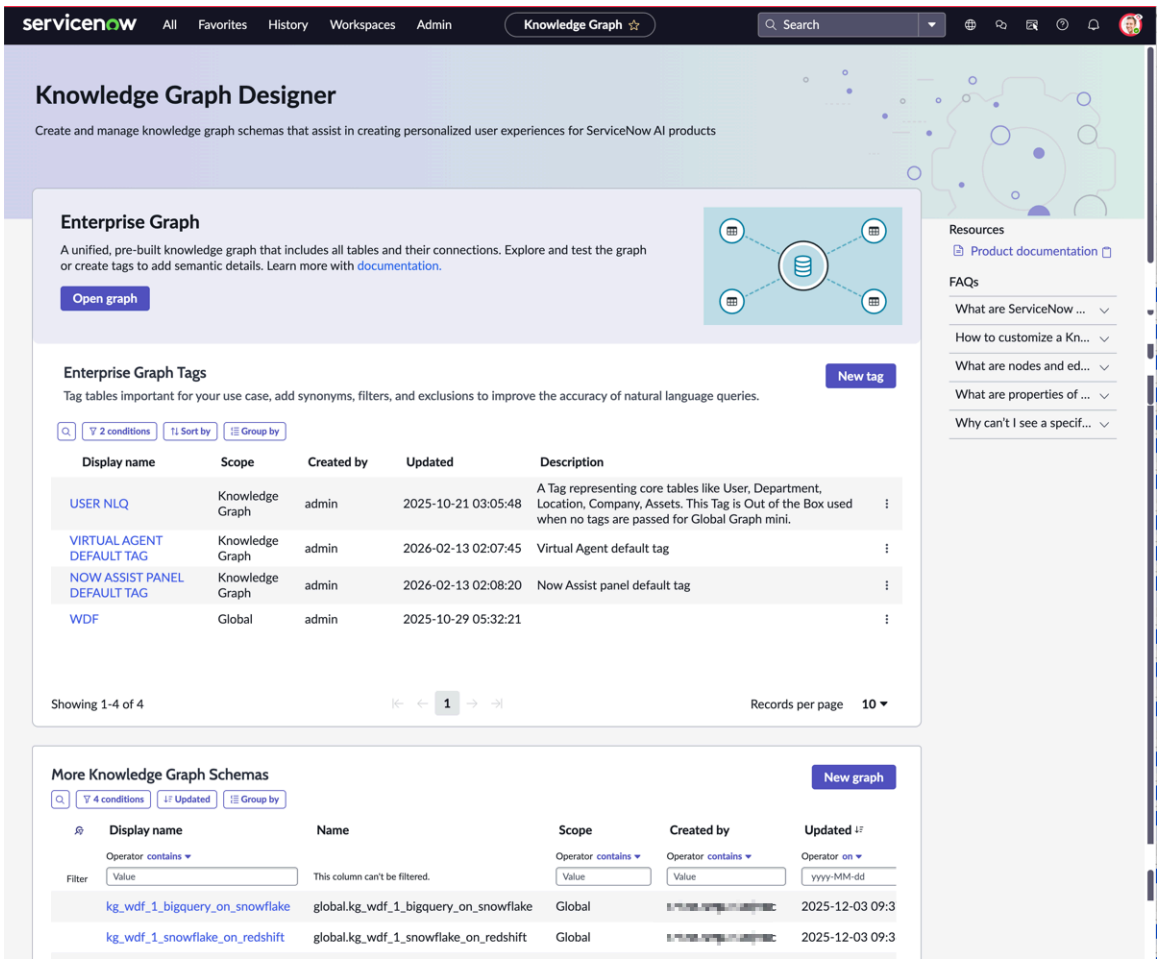
- User graph schema: Used to provide logged in user's details to Virtual Agent for personalized response. The profile section is used by AI agents for additional user context.
- Natural Language Query Scheme: Helps the requester with personalized responses on people queries and Natural Language queries. Also supports people citation card. By default the user NLQ graph is connected which is used for people queries but you also have sample graph schema for other employee queries. For more details on other prebuilt schema, see KB article.

ServiceNow® has also introduced Enterprise Graph, a pre-configured Knowledge Graph schema that maps all instance tables and their connections, enabling natural language queries from data across all tables. For more details, see Using Enterprise graph schema.

Along with Enterprise Graph, you can also create, edit and manage tags with Knowledge Graph Designer. You can use these tags to mark the key tables, that are important for answering natural language questions for specific use cases. For details, see Tagging in Knowledge Graph Designer

Knowledge Graph supports Admin to create Knowledge Graph schema with WorkFlow Data Fabric tables. This helps accessing data from different system in real time without moving it.

You can create a Knowledge Graph schema from the landing page.



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Knowledge Graph integration with ServiceNow® Otto for Virtual Agent and ServiceNow Otto® panel

Knowledge Graph integrates with ServiceNow® Otto for Virtual Agent and ServiceNow Otto® panel to provide personalized, permission-aware responses based on user context, relationships, and enterprise data.

In this release, the available prebuilt integrations with ServiceNow® Otto for Virtual Agent and ServiceNow Otto® panel are:

- Integration with ServiceNow Otto® for Slot filling: Helps requester and fulfiller in pre-filling the slots for LLM topics and skills execution using Natural Language Querying of Knowledge Graph.
- Integration with ServiceNow Otto® for User Context: Helps requester and fulfiller with personalized responses.
- Integration with ServiceNow Otto® for Natural Language Query graph: Helps requester and fulfiller with personalized responses on people queries and Natural Language queries. Also supports people citation card.

Note:

- To enable Knowledge Graph for ServiceNow® Otto for Virtual Agent, ensure that *sn_vad_genai.knowledge_graph.enabled* and *sn_ais_assist.enable_knowledge_graph_nlq* system properties are set to true. See Add a Knowledge Graph schema to a chat assistant
- To enable Knowledge Graph for external users, with user role `snc_external`, verify if the *sn_kg.enable_external_user_check* property is set to true.

For more information see Add a Knowledge Graph schema to a chat assistant.

Note:

- To enable Knowledge Graph functionality in the ServiceNow® Otto for Virtual Agent and conversational catalog, make sure to fill the Slot Filling Schema.
- To use Knowledge Graph for Question Answering from VA, fill out the Natural Language Query Schema in the ServiceNow Otto® panel.
- You can only have one active Knowledge Graph schema at a time for either Slot Filling or Natural Language Query. Multiple active Knowledge Graph schemas aren't supported.

Integration with ServiceNow Otto® for User Context

For the users of ServiceNow Otto®, Knowledge Graph integrates the context from the prebuilt User profile schemas that provide personalized responses.

By leveraging relationships between users, teams, and content, products like AI Search and ServiceNow Otto® can provide relevant, permission-aware answers instead of generic results.

With Knowledge Graph, responses are dynamically tailored based on:

- Who the user is: Role, department, and location
- Who they collaborate with: Manager, reportee
- What assets do they have

Here’s an example use case:

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- An employee uses ServiceNow® Otto for Virtual Agent for information on parental leave policy. They enter the query in the Virtual Agent window `What is my parental leave policy?`
- Virtual Agent receives the user information like. The employee is based in the country: USA, state: California, City: Santa Clara, from the Knowledge Graph User Profile Schema.
- This additional user profile context is used to personalize the synthesized response to the exact location of the employee
- Therefore, instead of getting a link to the parental leave policy document or a generic response, the employee gets a tailored contextualized answer:

```
Your company offers a generous parental leave policy to its
employees in California. As of January 2022, the company
increased paid time off for workers who give birth to a maximum
of 24 weeks from the previous 18. In addition to the company's
internal policies, California state law provides further
protections. The California Family Rights Act (CFRA) offers
eligible employees up to 12 weeks of unpaid, job-protected
leave to care for their own serious health condition or that
of a family member, or to bond with a new child. This is
complemented by the Pregnancy Disability Leave (PDL) law, which
provides up to four months of unpaid, job-protected leave for
employees disabled by pregnancy, childbirth, or related medical
conditions.
```

Integration with ServiceNow Otto® for Slot filling

Knowledge Graph enhances the ServiceNow Otto® user experience and makes the process seamless and efficient by reducing the slot-filling questions asked during conversations.

Here's an example use case:

An employee uses ServiceNow Otto® to request a laptop replacement. ServiceNow Otto® uses the assigned Knowledge Graph schema to find information and resolve the query with minimal user inputs.

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1. The user uses Virtual Agent to query `Need assistance in laptop replacement.`
2. Virtual Agent processes the query and generates the following prompts required for this request:
   - Topic: New laptop request
   - Name
   - Location
   - Department
   - Laptop model
   - Address
3. Virtual Agent first tries to gather this information using Knowledge Graph.
4. The Knowledge Graph schema leverages LLM to retrieve the data from all the relevant entities, called nodes using the relationship between these nodes, called edges, and provides the following output:
   - Topic: New laptop request
   - Name: John Doe
   - Location: Santa Clara
   - Department: Marketing
   - Badge Template: User input needed
   - Address: 123 Street, CA, USA
5. Virtual Agent requests verification of the output and add details for the missing fields.
6. The user can edit and verify the provided information before confirming. Once confirmed, the request is processed with minimal effort from the user.
7. Virtual Agent processes the user input and completes the user query.

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Knowledge Graph leverages the existing information available in the internal databases and auto-populates it to reduce the efforts while making the entire experience seamless.

Integration with ServiceNow Otto® for natural language queries

Knowledge Graph assist in answering natural language queries accurately. For more examples, see Natural language queries use cases and examples

ServiceNow Otto® can now provide users with information about people in your organization.

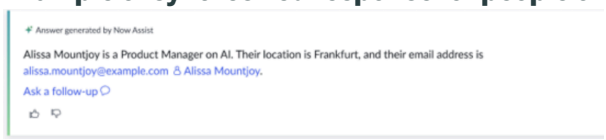
If you ask Virtual Agent about a person,the Information about that person you're searching for appears in the synthesized response, along with an inline people citation.

Inline citations appear at the end of the relevant synthesized response sentence. Selecting an inline citation results in a popover containing either a link to an article or source, or a description and action to start the action.

Note: Shared files only appear if Knowledge Graph admin has activated the *sn_kg_conn_user_shared_files* record in Knowledge Graph related data map [sn_kg_related_data_map_list] table. To active it, set the **Active** field to **True**.

Here's an example:

Example of synthesized response for people on the portal's search results page



Example of synthesized response with people inline citations in chat

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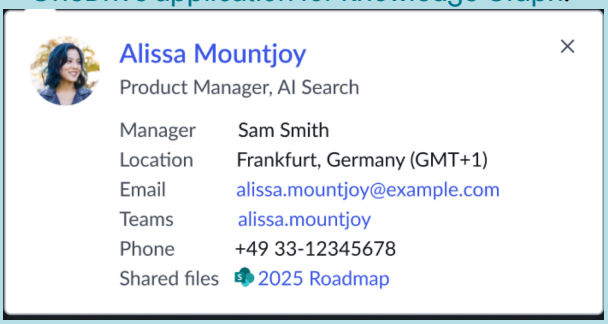
Selecting the person's name presents a popover. The information in the popover can include the following information:

- Manager
- Location
- Email
- Teams
- Phone
- Shared files

Important:

- Shared Microsoft SharePoint files between you and the person found, appear only on the people popover.
- The shared files only appear after you have completed the prompt to **Log in**, and signed in successfully. If you do not have a valid token, you will be prompted to sign in and re-directed to Microsoft login page.
- If you have not configured Microsoft OneDrive application, see Configure Microsoft OneDrive application for Knowledge Graph.



Integration with AI Search

Knowledge Graph is also integrated with AI Search. You can enable ServiceNow Otto® Multi-Content Response Genius Results to get answers from Knowledge Graph on AI Search.

Ensure that you have already configured Knowledge Graph with an assistant before enabling it on AI search.

To configure and enable the AI Search see Knowledge base articles Genius Results.

Knowledge Graph integration with AI agents

The prebuilt integrations of Knowledge Graph, improve live agent productivity by assisting AI agents in performing tasks and answering user queries.

In this release, the available prebuilt integrations with AI agents are:

1. Integration with AI agents for User Context: Helps users with personalized responses.
2. Integration with AI agents as a tool: Used to perform specific tasks that are assigned to the AI agents.

Integration with AI agents for User Context

ServiceNow AI agents integrates the context from the prebuilt User Profile schema to fetch relevant data and provide personalized responses.

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By using relationships between users, teams, and content, AI agents can fetch relevant, permission-aware user information and provide answers to reduce slot-filing requirement.

Here's an example use case of how Knowledge Graph is used within AI agents for user context.

- A user needs assistance in writing their resume, so they use ServiceNow AI agents called Resume builder.
- The user ads their task: `Build my resume`.
- AI agents uses Knowledge Graph to fetch the following information from the user profile schema:
  - First name
  - Last name
  - Location
  - Email ID
  - Phone number
  - Occupation
- AI agents reverts with the available information and request for the missing information to proceed building the resume.
- Once the agent as all the required information, it provides user with output.

Integration with AI agents as a tool

Knowledge Graph can now be used as a tool within AI agents. Users can choose Knowledge Graph to perform tasks, while creating an Agent.

You can define the flow action to use Knowledge Graph as a reusable operation in automating the ServiceNow AI Platform features without having to write code.

See Add a Knowledge Graph to an AI agent to add Knowledge Graph to an AI agents in AI Agent Studio.

Example use case:

- A user wants to view and retire all the assets assigned to another user. To execute this task, user will use Asset Manager agent.
- Asset Manager uses Knowledge Graph to fetch the asset information related to the user.
- After processing the query, the agent provides the following output:`User has the following assets:1.<asset1> 2.<asset2> 3.<productID>- <asset 3> <purchase date>. The email address for the user is <emailId> and username <username1>.`
- User then proceeds with the task of retiring the assets: `Proceed with retiring the assets associated with Username1.`
- The next tool, used execute this task, will take the table name and sysId displayed in Knowledge Graph output and proceed with the task.

Example: Knowledge Graph API output in AI agents

When a user ask a query `What is my Manager's name?` , AI agents reaches out to Knowledge Graph to fetch this information. Here's an example output of the query:

```
{
```

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```
    "Manager": [
        {
            "sys_user": {
                "user_name": {
                    "value": "abel.tuter",
                    "displayValue": "abel.tuter"
                },
                "sysId": "62826bf03710200044e0bfc8bcbe5df1",
                "name": {
                    "value": "Abel Tuter",
                    "displayValue": "Abel Tuter"
                },
                "first_name": {
                    "value": "Abel",
                    "displayValue": "Abel"
                },
                "last_name": {
                    "value": "Tuter",
                    "displayValue": "Tuter"
                }
            }
        }
    ]
}
```


In this example, the table that is called is `sys_user` and column referred is `user_name`. The output also displays sysId, example: `"sysId": "62826bf03710200044e0bfc8bcbe5df1"`.

Knowledge Graph integration with MCP server

The Knowledge Graph integration with MCP server provides a secure and governed access to Knowledge Graph functionality on a ServiceNow instance for AI applications with Model Context Protocol (MCP) servers.

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Use Knowledge Graph as a tool within MCP server console to help AI agents by providing context and insights based on live instance data and enable AI agents to complete their task.

Refer Create a tool from a Knowledge Graph to add Knowledge Graph as a tool and to expose it to Model Context Protocol (MCP) clients from an MCP Server.

Natural language queries use cases and examples

View example use cases of some natural language queries used in Knowledge Graph and Enterprise Graph.

Natural Language Query support in Knowledge Graph and Enterprise Graph allows users to interact with structured data using human-like language. This feature enhances the user experience by enabling more intuitive and flexible search capabilities within the ServiceNow platform.

Supported Queries

Knowledge Graph and Enterprise Graph, understand and process queries that reference specific tables, columns, choice values, and conditions. It also handles queries involving system-generated identifiers (sys-ids), person names, dates, and contextual pronouns. Additionally, it supports aggregate and sorting queries, enabling users to perform simple statistical analysis and order results.

Knowledge Graph also supports queries with Glidelist References.

Here are some examples of the supported query types:

Queries with specific reference

Queries having reference to all table names, column names, or choice values and conditions required are supported. Ensure that the conditions are specified exactly.

Here are some example queries and description of how they works in Knowledge Graph.

Example use cases

Example	Description
Show all stories which are ready for acceptance.	Stories refers to stories table and ready for acceptance refer to choice.
Find details of CI associated with P1 priority incident.	CI refers to look at configuration table and find those CI which are liked to incident with priority 1.
List all change requests with high risk.	Change request refers to change_request table, risk refers to column, and high refers to choice.
Give details of CI named "AppleMacBookPro15".	CI refers to configuration item table and named refers to name column. The exact name of CI is also specified.
Show all incidents which are open.	Incident refers to the table; "in progress," "new," and "on hold" are choice value in state column options that correspond to open.
Share all case task assigned to "Dev – Knowledge Graph" group.	Case task is reference to table, group is a reference to assignment group column, and exact condition to look for is specified exactly.

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Example use cases (continued)

Example	Description
Find Configuration items where manufacturer = Lenovo.	Configuration item is reference to cmdb_ci table, manufacturer is column, and the exact name of manufacturer is specified.
Show me assets assigned to <Person Name>.	Assets refer to asset table, assigned to is column and person name is well specified.
Find details of CI associated with P1 priority incident.	CI refers to look at configuration table and P1 indicated the choice value of the priority column.
Show me incidents that have at least one user on the watch list.	Incident refers to the incident table and watch_list refers to the glidelist field containing user references, and the condition checks for non-empty values to identify actively monitored incidents.
Show me the work_notes_list for INC0009009.	Incident refers to the incident table, work_notes_list refers to the glidelist field containing user references who have added work notes, and returns paired incident and sys_user records.

Queries with Sys-IDs, Person Names, and Date References

Queries having person names or references to dates such as yesterday, last month and contextual pronouns to the right person. Queries using system-generated identifiers (sys-ids) also works and can identify the table based on sys-ids.

Here are some example queries and description of how they works in Knowledge Graph.

Example use cases

Example	Description
Find details of request items linked to REQ0010144.	The request item refers to sc_req_item table and REQ sys-id refers to to sc_request table.
Show details for INC0000044.	INC as sys-id refers to incident table.
Get status for CHG000567.	CHG as sys-id refers to change request table and the status refers to the status column for that record.
Find department for person who requested RITM0010144.	The RITM sys-id refers to sc_request_item and department refers to department column from cmn_department which is linked to the person who requested RITM0010144.
Find details of problem linked to INC0000047.	This query requests the details of problem record linked to incident INC0000047.
Show incidents assigned to Fred Luddy.	Finds incident table with user in assigned to column.
List tasks created by Beth Anglin.	Task refers to task table and User name refers to created by column.

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Example use cases (continued)

Example	Description
Find approvals pending for Joe’s reportees.	Find approvals from the sysapproval_approver table for approval that are pending for the user's reportees.
Display incidents created more than 3 days ago and aren't resolved yet.	Uses incident table, created date, and state column to fetch the details.
Find certificates expiring in the next 30 days.	Certificates refer to table name, the next 30 days reference can be converted to date related condition and can be understood from the date reference in query.
Find case task created in last 30 minutes.	Case task refers to table, created refers to created column and time related condition can be understood from time reference in query.
What are the Problems open with my group?	Problem refers to problem table, group refers to column, ‘my’ reference will be resolved to the person asking the query.
Show my open incidents.	Uses incident table and 'my' reference is the person asking the query.
What is the status of my request?	Uses request table and 'my' reference is the person asking the query.
What are their pending approvals?	Uses `sysapproval_approver` table and 'their' reference is the person who was referred to in previous turn of conversation.
Give me the watchlist for incident INC0009009.	INC0009009 is the sys-id referring to the incident table, and watch_list refers to the glidelist field that contains related sys_user records associated with that incident.
Show watchlist users associated with incident INC0009009.	INC0009009 is the sys-id referring to the incident table and watch_list refers to the glidelist field containing user references. Returns all sys_user records linked to that incident.

Aggregate or Sorting Queries

These queries let users perform simple statistics and sorting directly in ServiceNow® Otto for Virtual Agent or ServiceNow Otto® panel.

Here are some example queries and description of how they works in Knowledge Graph.

Example use cases

Example	Description
Count of incidents grouped by priority.	Counts the records in incident table grouped by priority column.
Count of problems grouped by stage.	Counts the records in problem table grouped by stage column.

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Example use cases (continued)

Example	Description
Count case task assigned to group "Dev - Knowledge Graph ".	Counts the records in case task table that are assigned to assignment group = Dev – Knowledge Graph.
List in progress hr cases by ordered by created date.	Lists the HR cases from HR cases table ordered by the created date field.
Show top 5 users by number of incident assigned to them.	Lists the top 5 user by number of incidents from the incident table assigned to them.

Unsupported Query Categories

Knowledge Graph does not support the following types of queries:

Queries Missing References or with Misspellings

Queries that lack references to table, columns, choice values, or conditions, or contain misspellings, aren't supported.

Here are a few examples of unsupported queries that will work if rephrased, as suggested below:

Example unsupported queries

Example	Rephrase to:
Find incidents about SAP login issue.	Find incidents where short description = SAP login issue.
Find CI where manufacturer is Orrange. (Incorrect spelling)	Find CI where manufacturer is Orange.
Find CI in SanDiego city.	Find CI in San Diego city.
Locate changes related to patch upgrade.	Locate change request where description contains patch upgrade.
Change request for Abel Tuter.	Change request assigned to Abel Tuter or Change request opened by Abel Tuter.
Problem by Mark Andrew.	Problem updated by Mark Andrew or Problem closed by Mark Andrew.

Queries on Journal Fields or Document IDs

Queries involving journal entries, and document ID references aren't supported.

Here are a few examples of unsupported queries:

- Show latest comments added to INC0000044.
- What comments or work notes were added in the approval of change request CHG0000046.
- Show tasks with 'urgent' in comments.
- Find incident where Joe commented about email resolution steps.

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Keyword Queries or Queries Requiring KB Resolution

Keyword-based queries or those requiring resolution from the Knowledge Base (KB) are handled by AI Search, not the Knowledge Graph.

Here are a few examples of unsupported queries:

- VPN issue
- Password reset
- Incident SLA
- How can I request a windsurf license?
- How to install global protect for PC?

CMDB query support

Knowledge Graph supports CI Relationship (Rel CI) queries, enabling natural language questions about CMDB configuration item dependencies and infrastructure topology. For more details see Configuration item relationships and Knowledge Graph.

Workflow Data Fabric integration with Knowledge Graph

Knowledge Graph supports Workflow Data Fabric to fetch third party information securely without copying the data.

The integration of Workflow Data Fabric (WDF) with the Knowledge Graph allows organizations to seamlessly connect external and internal data sources. This integration extends the functionalities of the Knowledge Graph to external data, ensuring real-time access and enabling advanced insights, workflow automation, and personalization using external data.

The key feature of Workflow data fabric integration with Knowledge Graph are:

- Real-Time Access: Zero Copy connectors from WDF and the semantic layer of the Knowledge Graph ensure that external data is accessible in real-time.
- Deep Data Connection: WDF tables are automatically included in the Enterprise Graph, enhancing the connectivity and utility of external data within the ServiceNow platform.
- Natural Language Query Support: Users can ask natural language queries (NLQ) in Virtual Agent and AI Agents, leveraging both external (WDF) and internal data.

The benefits of using Workflow data fabric integration in Knowledge Graph are:

- Requestors and Fulfillers: Can ask NLQ questions and receive insights from external (WDF) tables integrated with the KG schema.
- Admins: Can create a KG schema with WDF tables and link it to the ServiceNow Otto panel, AI Agents, or ServiceNow® Otto for Virtual Agent.

Admins can add WDF tables to the Knowledge Graph just like any other internal table. However, only WDF tables configured with a primary key are supported.

Here are some integration best practices:

- Primary Key Requirement: Always add a primary key to your WDF table during configuration. This is mandatory for supporting WDF tables in the Knowledge Graph.
- Meaningful Naming: Use clear and meaningful names when creating WDF tables. Add synonyms to your tables in the Knowledge Graph schema as needed to improve the accuracy of natural language queries.

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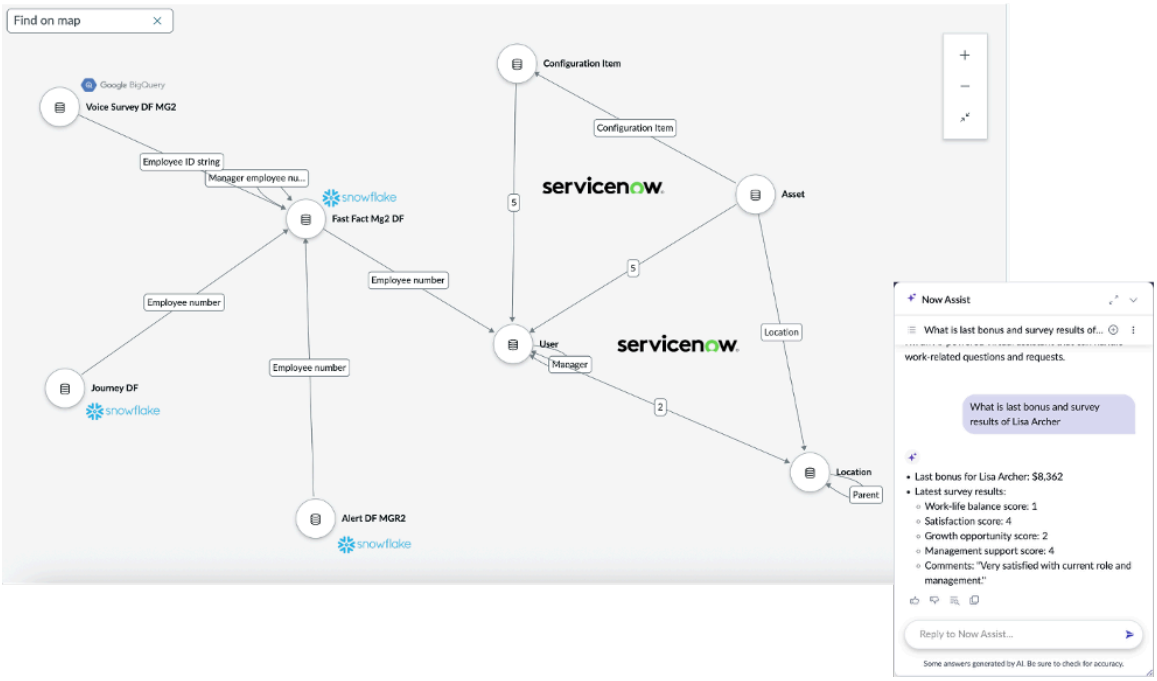
Here is some example use cases:

Snowflake and Google BigQuery Integration: WDF tables sourced from Snowflake and Google BigQuery can be added to the Knowledge Graph schema, allowing users to query and analyze data from these external sources within ServiceNow.



Configuration item relationships and Knowledge Graph

Configuration item (CI) Relationships enable Knowledge Graph to answer natural language questions about service dependencies and infrastructure topology by storing typed parent-child relationships between CMDB configuration items.

The *CMDB_REL_CI* table stores relationships between configuration items (CIs) in ServiceNow CMDB. Each relationship connects a parent CI to a child CI through a defined relationship type, enabling the Knowledge Graph to understand and traverse the topology of your IT environment.

CI relationship support in Knowledge Graph enables users to ask natural language questions. You can ask about how services, servers, databases, and other CIs relate to one another without writing queries or navigating CMDB tables directly.

Enabling CI relationship for Knowledge Graph

CI relationship support for the Knowledge Graph is inactive by default. Set both of the following system properties to true to enable it

System properties for CI relationship support

System Property	Purpose
sn_kg.description_generation.enable_cmdb_rel_ci	Enables description generation for CI relationship data
sn_kg.query.enable_cmdb_rel_ci	Enables Knowledge Graph querying against CI relationship data

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Note: After enabling both properties, allow time for CI relationship data to be fully indexed before running queries. Results may be incomplete until indexing is complete.

How CI relationship data is stored

Each record in the CI relationship table represents a bi-directional relationship between two CIs. Relationships are described by a relationship type that consists of a parent to child relationship and child to parent relationship, separated by double colons:

`<parent descriptor>::<child descriptor>`

This means every relationship can be read in two directions:

- Parent → child: read using the parent to child relationship (parent descriptor)
- Child → parent: read using the child to parent relationship (child descriptor)

For example, a record in the CI relationship table has Bond Trading (*cmdb_ci_service*) as the parent, lnux100 (*cmdb_ci_linux_server*) as the child, and a relationship type of `Depends on::Used by`. This relationship is read as:

- Bond Trading depends on lnux100
- lnux100 is used by Bond Trading

Note: The direction of the relationship affects how you phrase queries to the Knowledge Graph. Parent-to-child queries (for example, "depends on") return more reliable results than child-to-parent queries (for example, "used by").

Knowledge Graph support for CI relationships

The Knowledge Graph can answer questions about CI relationships when the query clearly specifies all three of the following:

- The class of the parent CI (for example, service)
- The relationship direction — either the parent to child relationship or child to parent relationship (for example, depends on)
- The class of the child CI (for example, Linux server)

Class hierarchy inheritance

When you define a relationship between two CI classes, the Knowledge Graph automatically extends that relationship to all classes higher up in the CI class hierarchy. This means users can query at a more general class level and still get results across all matching subclasses.

For example, a relationship defined between service and linux server also applies to server, which is a parent class of Linux server in the hierarchy. Querying for servers rather than Linux servers returns results across all server subclasses — including Linux server, windows server, UNIX server, and others.

Note: If a query returns fewer results than expected, try using a broader parent class in the hierarchy (for example, "server" instead of "Linux server") to include all inherited CI types.

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Supported query patterns

The following table shows examples of queries the Knowledge Graph can answer using CI relationship data. Each query specifies a parent class, a relationship descriptor, and a child class.

Supported query patterns

Scenario	Example Query
Service that depends on a specific Linux server	Which services depend on 'linux100' Linux server?
Servers that a specific service depends on	'Bond Trading' service depends on which UNIX server?
All server types a service depends on (using hierarchy)	'Bond Trading' service depends on which server?
Computers connected to a database	Which databases are connected by computers?
Multi-hop relationship across three CI types	What database runs on UNIX server that connects to 'nc6500-a01' network gear?

Unsupported query patterns

The following query types are not currently supported. Use the recommended alternatives to get the results you need.

Unsupported query patterns

Limitation	Unsupported Query	Recommended Alternative
Negation of a relationship	Which business capabilities have no related business applications?	Rephrase to ask for what does exist rather than what does not.
Unspecified relationship type	Show me services related to Linux servers.	Show me services depending on Linux servers.
Skipping steps in a multi-hop path	Show me servers in New York.	Show me servers in racks present in datacenters located in New York.

Configuring Knowledge Graph

Plan and configure Knowledge Graph implementation.

Configuration overview

Knowledge Graph is a ServiceNow AI Platform feature that is available with activation of any ServiceNow generative AI application.

On activation, the following Knowledge Graph plugins are installed by default:

- Graph QL plugin
- Knowledge Graph application

To implement the Knowledge Graph adoption, you must configure Knowledge Graph for Virtual Agent.

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For integration with Virtual Agent for Slot filling, configure Knowledge Graph in Virtual Agent. Refer Assistants overview for admin guided setup.

Knowledge Graph now supports Workflow Data Fabric that enables users to retrieve data from different systems without moving them. This ensures efficiency and security when working with sensitive information.To configure and integrate the Workflow Data Fabric tables for Knowledge Graph, see Managing data fabric tables

Configure LLM for Knowledge Graph

Choose which large language model (LLM) service provider for Knowledge Graph.

Before you begin

LLMs are part of the foundation for Knowledge Graph. Different LLMs can provide slightly different performance and responses. You can select which LLM to use for your Knowledge Graph schema.

Role required: admin

Procedure

1. Navigate to **All** > **sys_one_extend_capability.list** > **TextToResult**.
2. Open the TextToResult record and select **OneExtend Definition Configs** (related list).
3. For one of the following options, change the value of the default field to **True**.
   - **TextToResult (NowLLM)**
   - **TextToResult (Claude Large)**
   - **TextToResult (GPTLarge)**
   - **TextToResult (Gemini)**

   Once you select the default LLM, ensure that the Default field value for another LLM is set to **False**.
4. Select the LLM to open the record and update the default field to **True**.

Configure Microsoft OneDrive application for Knowledge Graph

Use Microsoft SharePoint for fetching user-specific external data, such as shared files, from external services through a Knowledge Graph API.

Before you begin

Knowledge Graph uses Microsoft OneDrive application for authentication of Microsoft SharePoint required to fetch external data such as shared files used for people citation in Virtual Agent. Use the following process to setup the necessary authentication, used for people citation in Virtual Agent.

To view the share files, configure the Microsoft OneDrive application with Knowledge Graph.

To complete the configuration, you must:

- Create Microsoft OneDrive application.
- Setup Knowledge Graph application on Microsoft OneDrive tenant.
- Update Microsoft OneDrive permissions for delegated access.
- Create client secret value and complete the authentication process.

Role required: admin

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Procedure

1. Go to portal.azure.com and select **view** to Manage Microsoft Entra ID.
2. To register the app, do the following:
   - Select **Manage** > **App registration** and select **New Application**.
   - Add a Name for the application
   - Select **Accounts in this organizational directory only** single-tenant apps for use.
   - Select Register.

     Note: Copy and save the Application ID and Tenant ID for future reference.
3. Once the new application is registered, add the client credentials:
   - Select **Add a certificate or secret**.
   - Select **New client secret** and add Description and Expiry duration.
   - Select **Add**.
   - Copy and save the New client secret value that is created.
4. Select **Overview** from the left navigation pane to add the redirect URL.
   - Select **Add a redirect URI**.
   - Select **Add a platform** from the platform configurations section.
   - Add `https://<instanceURL>/oauth_redirect.do` in **Redirect URIs** and **Front-channel logout URL** fields on the configure web page.

     Note: Replace the <instanceURL> with your instance path. Example: *`abc.service-now.com`*.
   - Select both the Access token and ID tokens option from the **Select the token you would like to be issued for authorization endpoint** section.
   - Select **Configure**.
5. Select **Manage** > **App permissions** from the left navigation pane, to add permissions.
   - Select **Add a permission**.
   - Select **Microsoft Graph**.
   - Select **Delegated permission**.
   - Add and select *`offline.access`* and *`Sites.Read.All`* in Select permissions section.
   - Select **Add permissions**.
   - Set the **Admin consent required** field to Yes for the newly added Microsoft Graph.
6. Go to your ServiceNow instance to change the Application registry settings:
   - Select **All** > **System OAuth** > **Application registry**
   - Select **KG MS OneDrive Delegated Connector**.
   - Add the copied Application ID in the **Client ID** field.
   - Add the Client secret in the **Client secret** field.
   - Add the Tenant ID in the placeholder for [tenantId] in the Authorization URL and Token URL field.

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- Verify that the Redirect URL is correct.
- Select **Update**.

Using Knowledge Graph Designer

Use Knowledge Graph Designer to create customized Knowledge Graph schema that consist of nodes and edges.

Knowledge Graph schema are the customized Knowledge graphs that consist of nodes and edges.

Like tables, nodes also denote and store details about entities such as user, location, department. You can add nodes to the Knowledge Graph schema so that the system can reach out to all the relevant tables to fetch the data. You can also edit node properties such as data source, start node, end node, and connected nodes.

Knowledge Graph enables you to select the node columns that can be queried.

The relationship or connections between these nodes are referred to as edges. You can select and edit the connecting edges and available edges for each node.

With Knowledge Graph Designer, you can create, edit, duplicate, or delete a Knowledge Graph schema.

Apart from ServiceNow tables, you can also create Knowledge Graph schema using WorkFlow Data Fabric tables to retrieve data from different systems in real time without moving it.

There's an option to test a Knowledge Graph schema by generating and running a query.

View Knowledge Graph schema

By default, ServiceNow published Knowledge Graph schema is available with the product. View the prebuilt schema provided by ServiceNow, or the schema created by your organization admin. There are currently two prebuilt schema available that are read-only but can be cloned and edited:

1. User profile schema
2. Employee schema

Create a Knowledge Graph schema

Create customized Knowledge Graph schema that will be used by Virtual Agent, AI Agents and ServiceNow Otto Panel.

Before you begin

Role required: kg_admin

Procedure

1. Navigate to **All** > **Knowledge Graph** > **Knowledge Graph Designer**.
   The UI displays a list of all the Knowledge Graph schemas on the landing page.
2. Start creating a Knowledge Graph schema by selecting **Create New**.

   Note: You can create Knowledge Graph schema using ServiceNow tables or the external Workflow Data Fabric tables.

3. On the form, fill in the fields.

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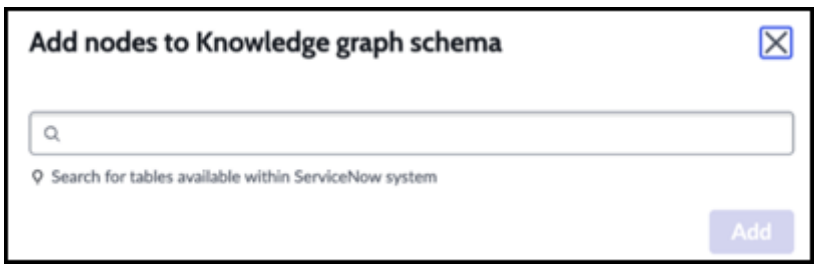
Edit Knowledge Graph schema details form

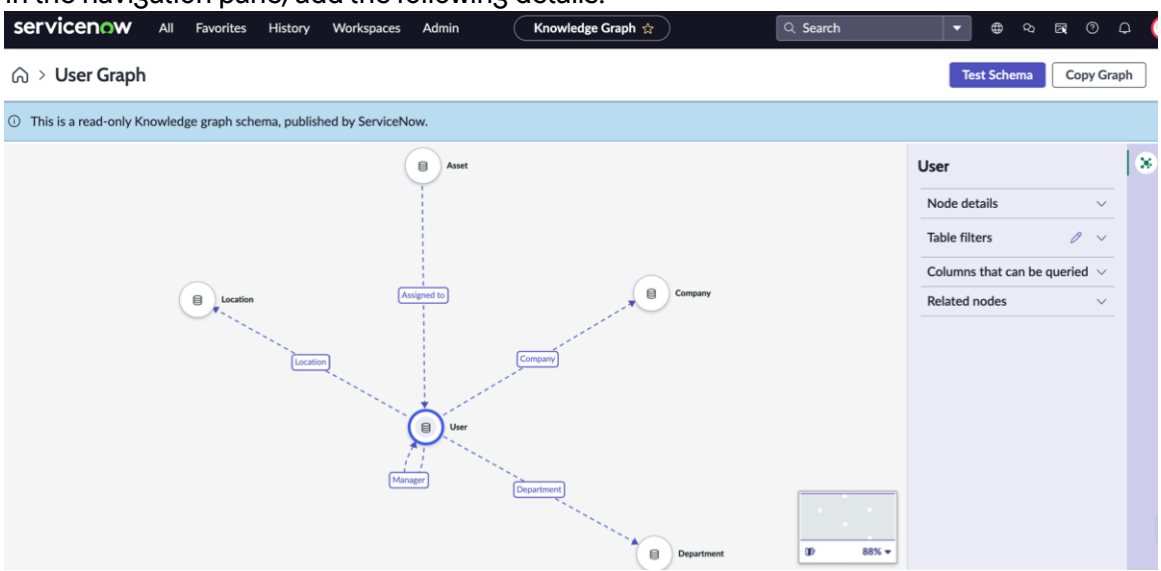
Field	Description
Display Name	Display name for the Knowledge Graph schema.
Name	Optional name for the Knowledge Graph schema.
Scope	Scope used when creating the Knowledge Graph schema. This field is a read-only.
Description	Knowledge Graph schema overview to provide additional information to users.

4. Select **Create**.
   The Add nodes to the Knowledge graph schema window is displayed.
5. Enter or search for the nodes that you want to add to the Knowledge Graph schema and select **Add**.



   You can search and select the Workflow Data Fabric tables, if integrated.

   The Knowledge Graph schema is created and displayed on the Knowledge Graph canvas.
6. In the navigation pane, add the following details:



7. In the Node details section, you can add or edit the following fields.
   - Add node synonym
   - Node description

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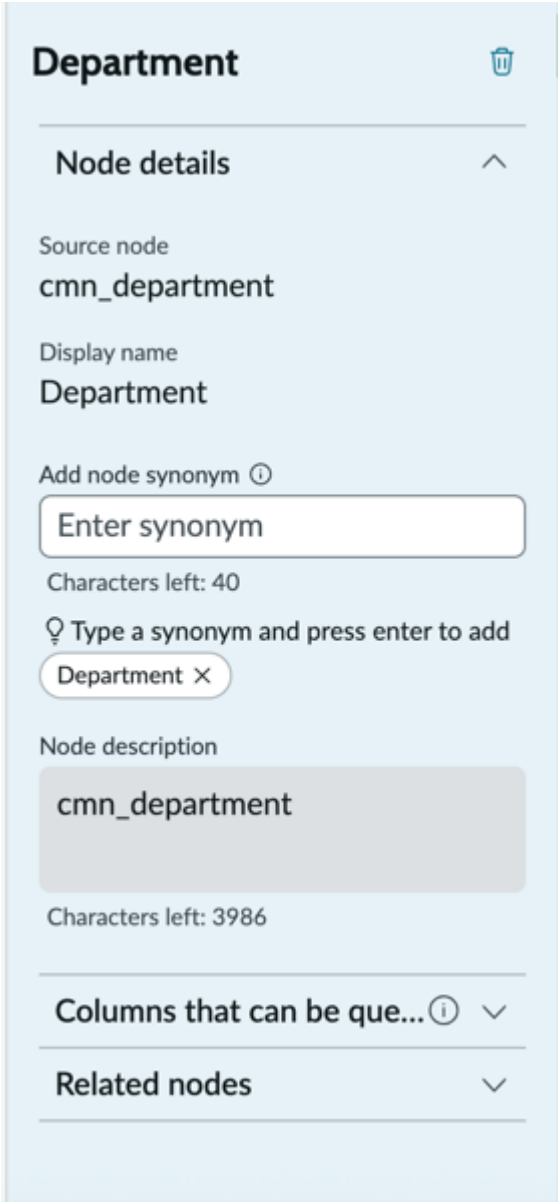

8. In the **Table filters** section, view and add filters to set rules that control which records are shown in query results.
   To add table filters, provide the following information:
   - Field
   - Operator
   - Value
   - Add Condition set: optional field to add an alternative filter condition.
   - Apply filters to child tables: optional check box to add the same filter conditions for the child table of the selected table in the graph.

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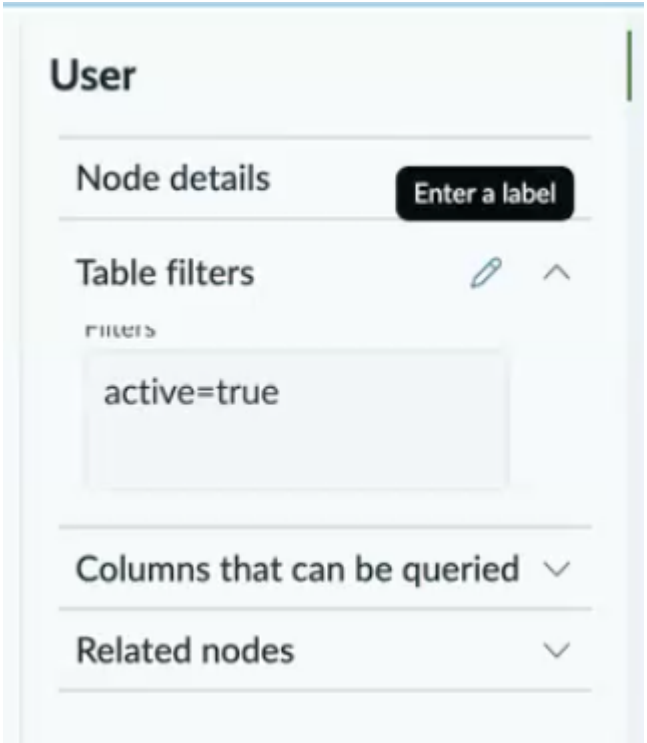

9. In the Columns that can be queried section, search for and select the desired columns and select **Save**.

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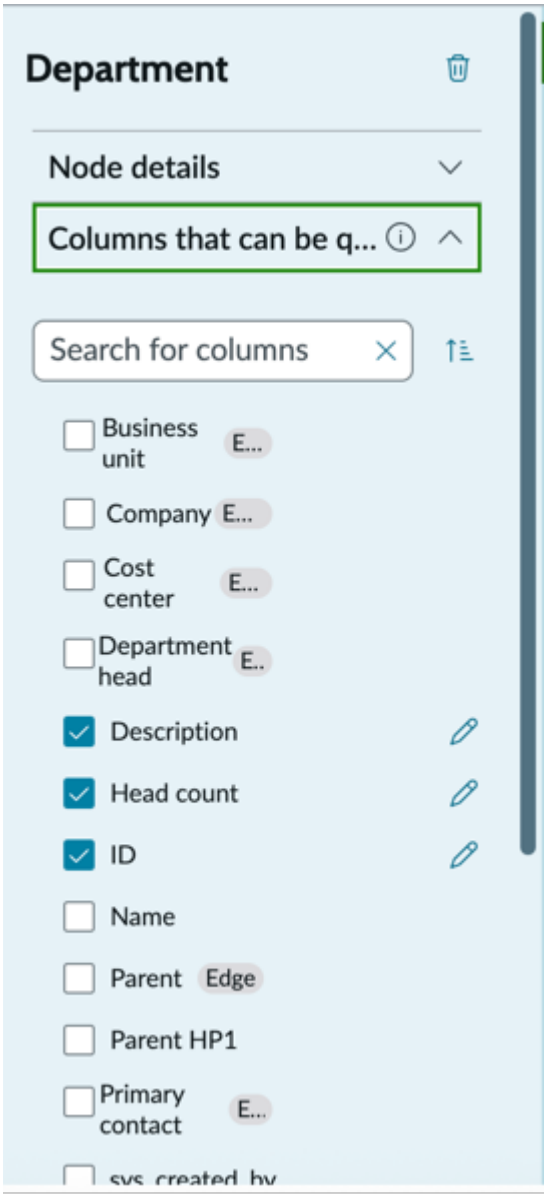

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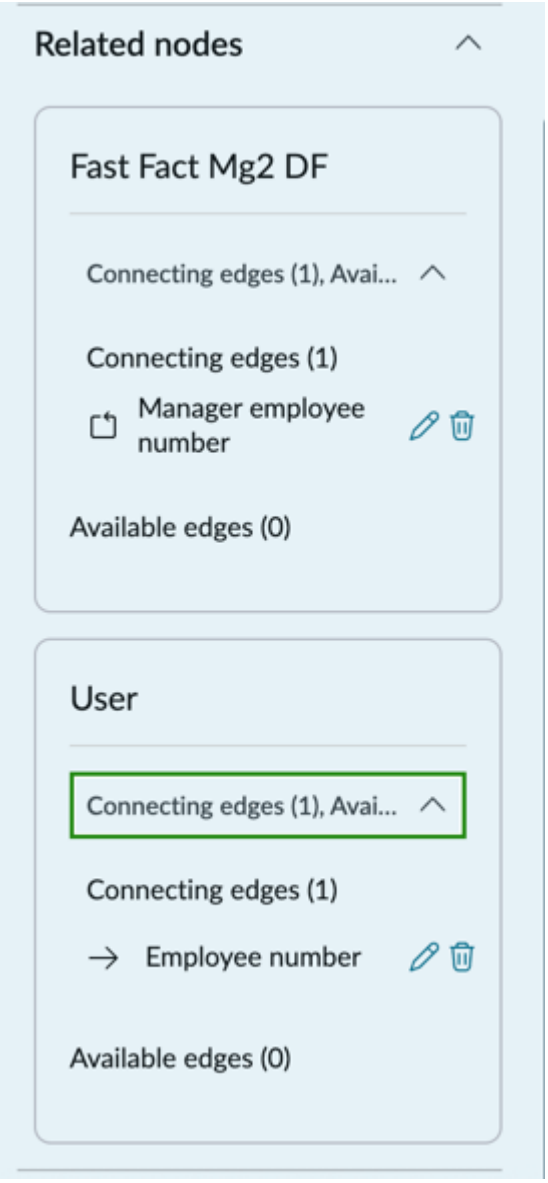
10. Add, delete, or edit edges in the Related nodes section and select **Save**.



Edit a Knowledge Graph schema

Edit a Knowledge Graph schema to customize or update the existing schema details.

Before you begin

Role required: kg_admin

Procedure

1. Navigate to **All** > **Knowledge Graph** > **Knowledge Graph Designer**.
   The UI displays a list of all the Knowledge Graph schema on the landing page.
2. From the list of existing Knowledge Graph schema, select a Knowledge Graph schema to edit.
   The Knowledge Graph schema opens in the Knowledge Graph canvas.
3. Select the edit icon ( ).
4. On the form, fill in the fields.

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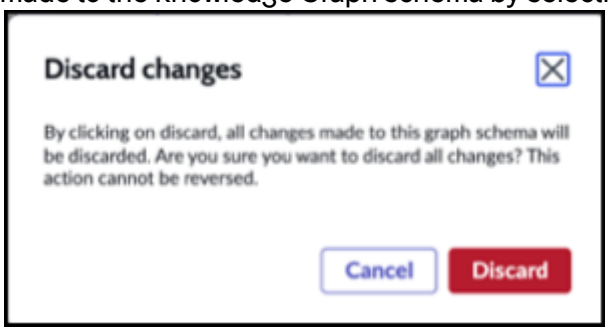
Edit Knowledge Graph schema details form

Field	Description
Display Name	Display name of the Knowledge Graph schema.
Name	Name of the Knowledge Graph schema.
Scope	Scope used to create the Knowledge Graph schema.
Description	Knowledge Graph schema overview for users.

5. To save the changes, select **Save**.
6. Delete all the changes made to the Knowledge Graph schema by selecting **Discard**.



Manage nodes in a Knowledge Graph schema

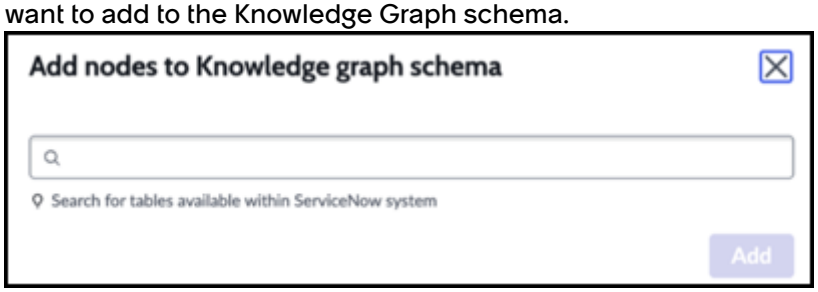
Add or delete a node from an existing Knowledge Graph schema.

Before you begin

Role required: kg_admin

Procedure

1. Navigate to **All** > **Knowledge Graph** > **Knowledge Graph Designer**.
   The UI displays a list of all the Knowledge Graph schemas on the landing page.
2. Select a Knowledge Graph schema from the list.
   The Knowledge graph schema opens in the Knowledge Graph canvas page.
3. From the toolbar, select the **Add nodes** option.
   The Edit Knowledge Graph Schema details form is displayed.
4. In the Add nodes to Knowledge graph schema window, enter or search for the nodes that you want to add to the Knowledge Graph schema.



   You can search and select the Workflow Data Fabric tables, if integrated.

5. Select **Add**.

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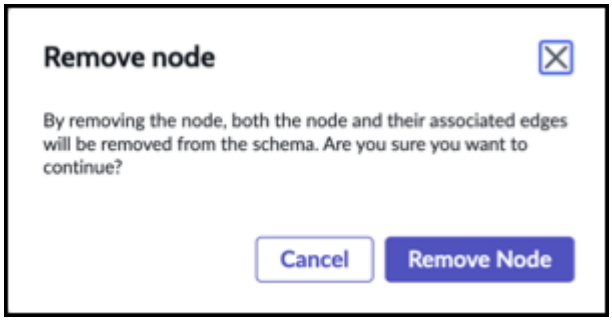
The nodes are added to the Knowledge Graph schema and displayed on Knowledge Graph canvas.

6. Select the node to update the node details in the side navigation pane.
7. Select **Save** to save your changes.
8. Select **Remove node** to delete a node from the schema.



Add or delete edges to a Knowledge Graph schema

Add, edit, or delete edges that connect the nodes to customize a Knowledge Graph schema.

Before you begin

Role required: kg_admin

Procedure

1. Navigate to **All** > **Knowledge Graph** > **Knowledge Graph Designer**.
   The UI displays a list of all the Knowledge Graph schemas on the landing page.
2. Select a Knowledge Graph schema from the list.
   The Knowledge Graph schema opens in the canvas.
3. From the Knowledge Graph schema, select a node to edit.
4. In the side navigation pane, select **Related nodes**.

   Each related node displays a list of connecting edges and available edges.

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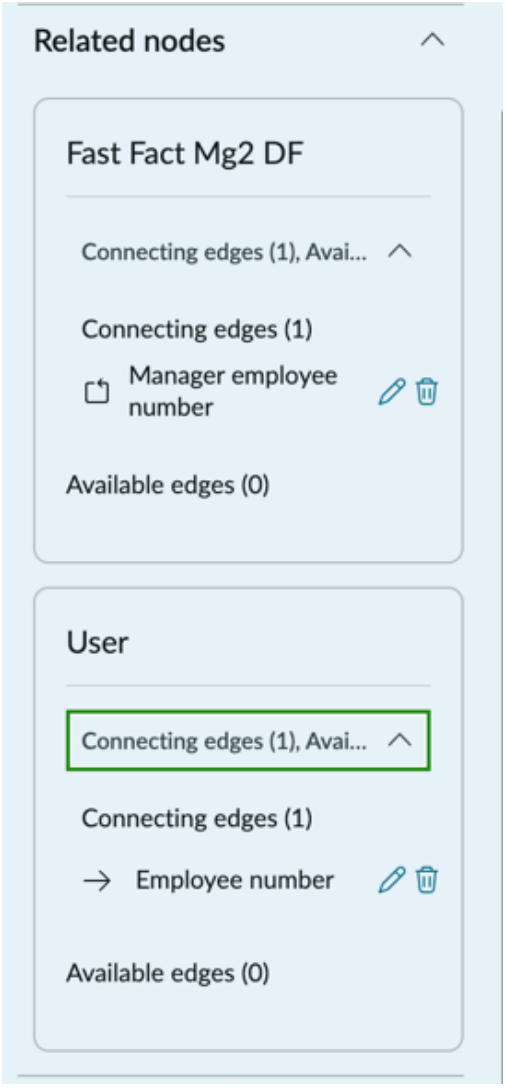

5. To establish a connection to an available edge, select the plus icon ( ) against the edge. The available edge is moved to **Connecting edges**. Select an edge to see its parent node and grandparent nodes in the hierarchy.
6. To reconfigure a connecting edge, select the edit icon (and update the following:
   - Edge type
   - Edge description
7. To delete an edge and move it to available edges, select the remove edge (
8. To delete the edge, select **Remove edge** when prompted.
9. To save your changes, select **Save** or to undo all your changes, select **Discard**.

Test a Knowledge Graph schema

Promote functionality by entering a query and testing the Knowledge Graph schema.

Before you begin
Role required: kg_admin

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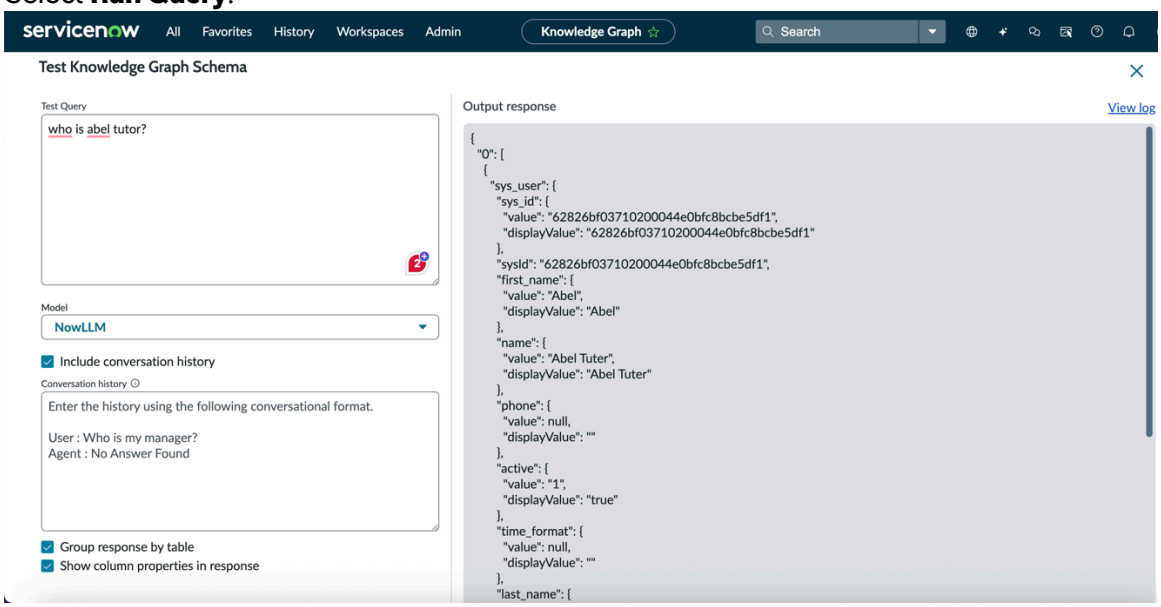
Procedure

1. Navigate to **All** > **Knowledge Graph** > **Knowledge Graph Designer**.
   The UI displays a list of all the Knowledge Graph schema on the landing page.
2. From the list of Knowledge Graph schema, select the Knowledge Graph that you want to test.
   The Knowledge Graph schema opens in the canvas.
3. From the toolbar, select **Test**.
4. In the Query section of the Test Knowledge Graph Schema window, enter your question.
5. Select an LLM model from the following:
   - **NowLLM**
   - **Claude**
   - **Gemini**
   - **GPT**
6. **Optional:** Select **Include conversation history** check box to add the any previous chats.
7. **Optional:** Select **Group response by table** to sort the results.
8. **Optional:** Select **Show column properties in response** to view the associated properties.
9. Select **Run Query**.



Analyze Knowledge Graph logs for debugging

Review Knowledge Graph logs and history to analyze performance and diagnose issues.

Before you begin

Don't make any changes to the production instance.

Role required: admin

Procedure

1. Navigate to **All** > **sys_properties.list** > **sn_kg.log.level** or **All** > **System Properties** > **All Properties** > **sn_kg.log.level**.
2. Open *sn_kg.log.level* and in the value field add `debug`.
   The default value is **Err** but you can use any of the following values:

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- emerg
- alert
- crit
- err
- warning
- notice
- info
- debug

3. Select **Update**.
   The logs will now be added to *syslog*.

Create a copy of a Knowledge Graph schema

Create a copy of a Knowledge Graph schema and duplicate it for further customization.

Before you begin

Verify that you have not selected a ServiceNow prebuilt Knowledge Graph schema that is non-editable.

Verify that the scope selected when creating a Knowledge Graph schema is the same as the scope of the existing Knowledge Graph schema.

Role required: kg_admin

Procedure

1. Navigate to **All** > **Knowledge Graph** > **Knowledge Graph Designer**.
   The UI displays a list of all the Knowledge Graph schemas on the landing page.
2. Select a Knowledge Graph schema.
3. Select the more icon ( ).
4. Select **Copy Graph**.
   Verify that the scope of the existing Knowledge Graph schema is the same as the new schema.
5. On the form, fill in the fields.

Field	Value
Display Name	Existing name of the Knowledge Graph schema.
Name	Name of the cloned Knowledge Graph schema.
Scope	Scope under which you want to create the Knowledge Graph schema.
Description	Knowledge Graph schema overview for users.

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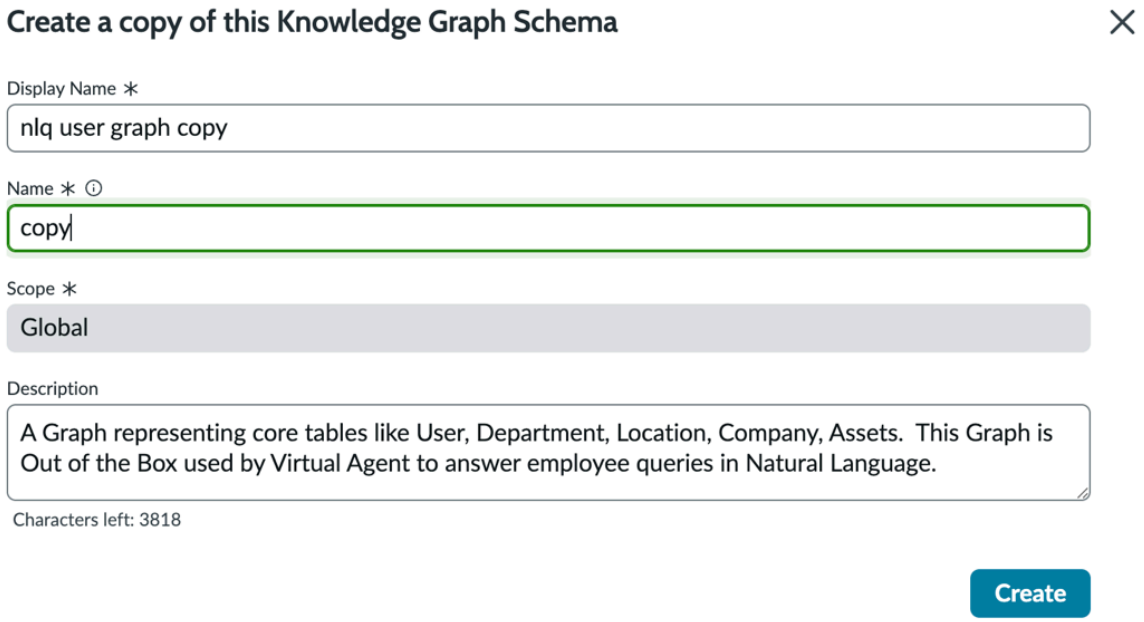

6. Select **Create**.

Using Enterprise graph schema

Use Enterprise Graph for accurate natural language query responses, across the entire database.

Enterprise graph is a pre-configured Knowledge Graph schema that maps all instance tables and their connections, enabling natural language queries for data across all tables.

To see some examples of the Natural Language query responses, refer Natural language queries use cases and examples.

Enterprise graph schema simplifies Knowledge Graph setup by providing a preconfigured schema, eliminating the need for custom schema creation in Knowledge Graph designer.

Admins can choose Enterprise graph as the Knowledge Graph schema when using AI agents, ServiceNow® Otto for Virtual Agent, or ServiceNow Otto panel admin and add tags to enhance accuracy.

By mapping all tables, the Enterprise graph schema expands query capabilities to cover the entire database, whereas a custom or out-of-the-box (OOTB) schema limits queries to only the tables included in its specific schema.

Benefits of Enterprise Graph on Prebuilt integration

Now Assist ServiceNow® Otto for Virtual Agent- With Enterprise Graph integration, ServiceNow® Otto for Virtual Agent can respond to a wide range of questions about their enterprise data from requester, helping to deflect queries.

ServiceNow Otto panel- With Enterprise Graph enabled, ServiceNow Otto panel allows fulfillers to obtain insights from the structured data in instance by asking natural language questions, which boosts their productivity.

AI agents- With Enterprise Graph enabled, AI agents can access relevant information from structured data in ServiceNow instance directly from the Knowledge Graph, giving them essential context for tasks.

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Modes of Enterprise Graph

Enterprise Graph has two modes:

- Enterprise Graph- regular mode
- Enterprise Graph (Small)

Regular mode is used for use cases with large number of tables (more than 50 tables), to:

- Searches across all tables, but gives more priority to tables which are included in the tag added at time of configuring Enterprise Graph in the consuming app (AI agent or VA).
- Useful for scenarios where answer is expected from large number of tables.

Enterprise Graph (Small) is a version of Enterprise Graph that limits the search to only the tables tagged with specific labels. This means it can only answer queries related to those tables. It's useful for:

- Searches only within tables which are included in the tag added at time of configuring Enterprise Graph (Small) in consuming app (AI agent or VA). Tagging is mandatory in this mode.
- Useful for latency-sensitive use cases with limit of 50 tables

Tags in Knowledge Graph

Tags are lists of key tables that are important for answering natural language questions in a specific use case. They are required to be used with Enterprise Graph and Enterprise Graph (Small).

Tagging in Knowledge Graph Designer

Use Knowledge graph tags to mark the key tables, that are important for answering natural language questions for specific use cases.

Use Knowledge Graph Designer to create and edit tags from the **Enterprise Graph Tags** section.

Tagging in different Enterprise Graph modes

Name	Description
Enterprise Graph- regular mode	Provides suggestion to Enterprise Graph on which tables to prioritize when retrieving information, to improve the accuracy of results. Tag up to 30 tables for regular mode as hints to prioritize while searching.
Enterprise Graph (Small)	Provides a list of tables to run the search operation. Enterprise Graph (Small) will only search on the tables provided by tags. It is mandatory to add a tag when Enterprise Graph (Small) is used with any of the prebuilt integration with AI agent, Virtual Agent or ServiceNow Otto panel. You can tag a maximum of 50 tables.

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Tagging in different Enterprise Graph modes (continued)

Name	Description
	Note that to enable querying on columns of table which are references to another table, also include referenced table in tags.

Creating tags

Tags are created by kg_admins using the Knowledge Graph Tags section. Tags has to be linked to schema when selecting the Enterprise Graph or Enterprise Graph (Small).

Link Knowledge Graph schema for your use case in Virtual Agent, ServiceNow Otto panel or AI agent.

Knowledge Graph ships the following prebuilt tags:

1. Virtual Agent DEFAULT TAG: A prebuilt tag listing common to core, ITSM, and HR tables for integrating Enterprise Graph with the Virtual Agent on the employee portal. Admins can edit this tag to include additional tables relevant for answering Virtual Agent queries.
2. ServiceNow OttoPANEL DEFAULT TAG: A prebuilt tag listing common to core, ITSM and HR tables which can be leveraged as general tag on ServiceNow Otto panel. Admins can edit this tag to add additional important table for answering questions on ServiceNow Otto panel.

Follow these steps to create or edit tags:

- Go to the Knowledge Graph Designer to view the existing tags and their associated tables. You can use an existing tag, edit one to fit your needs, or create a new tag for your particular use case.
- Navigate to the admin center for consuming apps.
  - For the Virtual Agent or ServiceNow Otto panel, go to your virtual agent's setup, select Information Sources, and open the Knowledge Graph.
  - For AI agent, proceed to its setup and open the Knowledge Graph tool for the AI agent.
- Select Enterprise graph or Enterprise Graph (Small) as the Knowledge Graph schema and select the required tag from Tag drop down to link it to graph schema.

Note: In this release, the Enterprise Graph option is hidden by default for Virtual Agent and ServiceNow Otto panel, and only Enterprise Graph (Small) can be selected as schema option. To use Enterprise Graph, Admins can enable it as a schema option by setting the property `sn_kg.va.enable_global_graph_all_modes` to true. The role required is Admin.

Recommended tables for different use cases

- Virtual Agent: For Virtual Agent, include the tables necessary to answer the expected user queries. For example if you want to deploy a new virtual agent on employee center portal, you should add a tag having tables relevant for answering employee questions.
- ServiceNow Otto panel: ServiceNow Otto panel operates as a unified assistant across multiple workspaces, hence it is essential to tag tables as follows:

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- An individual tag for each workspace that encompasses key tables relevant to that workspace. This ensures the ServiceNow Otto panel can deliver responses specific to queries related to the workspace tables when accessed within each workspace.
- Create a general tag that includes the most important tables required to answer users questions on ServiceNow Otto panel, allowing the panel to provide answers when used outside of any workspace.
- For more information on adding workspace tags in ServiceNow Otto panel, see Add a Knowledge Graph schema to a chat assistant.

- AI agent: For an AI agent use case, include key tables relevant to the agent's purpose. For example, for asset manager agents User, Asset, and other crucial tables should be included in the tag. For more information, see Add a Knowledge Graph to an AI agent.

Improving Natural Language Queries with Tag configuration

AI instructions add more business context to natural language queries. They guide users and promote responses that more closely align with their needs and expectations.

AI instructions

AI instructions help clarify how the knowledge graph interprets user queries and accesses data. When a user submits a query, relevant instructions at all applicable levels like node, property, and edge are considered.

AI Instructions are persistent, declarative guidance applied at three levels:

- Node (entity/table) level
- Property (column/attribute) level
- Edge (relationship) level

The Always Include flag

The option to set an **Always include** flag enables users to indicate that a particular instruction should be considered unconditionally. This is useful for enforcing critical business filters, such as always excluding certain asset statuses unless requested otherwise.

Instructions:

- Use **Always include** for business-critical filters that must apply regardless of user query phrasing.
- Omit **Always include** for context-sensitive instructions that should only apply when relevant.
- Verify that flagged instructions do not conflict with each other or produce duplicate results.

The following table shows common scenarios where AI instructions improve query accuracy and provide better business context.

Examples of how to use AI instructions effectively

No.	Instruction Pattern	Example Query	Behavior without AI instruction	Sample AI instructions	Behavior with AI ins
1	Preventing incorrect traversal paths	Which companies are located in New York?	When no instructions are added, the query goes from	Table Instruction on `core_company` table: `For company-city queries, always use`	When instruction the query matche field in core_comp and then filters cit

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Examples of how to use AI instructions effectively (continued)

No.	Instruction Pattern	Example Query	Behavior without AI instruction	Sample AI instructions	Behavior with AI ins
			core_company to cmn_location table and filters on city field by default. But if your use case requires to query location from city field of core_company table, you need to write an AI instruction to guide the system on the traversal path.	`core_company.city directly. Do NOT traverse through cmn_location.` This instruction avoids the system from using cmn_location path for city-based company queries.	York and returns a companies.
2	Providing column specific context	Who hosted BBS0000013 brown bag session?	When there is no AI instruction, the system will return sys_id without traversing to host_s. You need to add an instruction on host_s column to provide business context to use this column when query is about host.	Column Instruction on `host_s` of `x_snc_brown_bags_sessions` table: `Use s.host_s or :host_s relationship for the host of a brown bag session, NOT s.sys_created_by`	When instructions added, the query returns the name column.
3	Providing column specific context	What is Kelsey Rodriguez's tenure in current role (months)?	When there is no AI instruction, the system may not give accurate result as it may provide incorrect information for tenure column. You need to add an instruction to guide the system to refer right column for such queries.	Column instruction on `time_in_current_role` column: `Prioritize this column when query contains 'tenure in current role'`	When instructions added, the query returns the time fr `time_in_curr` column.
4	Providing context on what to prioritize in case of similar tables	Give me name of Allison Hill's reports having goals pastdue >0?	When there is no AI instruction, LLM will directly refer to “sys_user” table to fetch user details instead of traversing to WDF table where	Table instruction on WDF table – “x_snc_wdf_user” “Always give more priority to " x_snc_wdf_user”over sys_user and other glide tables”	When instructions added, the query refers to WDF tabl return results.

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Examples of how to use AI instructions effectively (continued)

No.	Instruction Pattern	Example Query	Behavior without AI instruction	Sample AI instructions	Behavior with AI ins
			this information is stored. We need to add an instruction to guide LLM to refer right table when there are similar tables.		
5	Providing context on what to prioritize in case of similar tables	What is your job title?	When there is no AI instruction, LLM will directly refer to “sn_hr_core_job” table to fetch job details instead of traversing tosn_hr_core_profile" table where this information is stored. We need to add an instruction to guide LLM to refer right table when there are similar tables.	Table instruction on table – “sn_hr_core_profile” “Always give more priority to "sn_hr_core_profile" over “sn_hr_core_job” when user specifically asks about job titles.	When instructions added, the query refers to “sn_hr_c table and return re
6	Disambiguate among multiple similar and confusing choice values	What are the hardware models that are in normalized state?	When there is no AI instruction, LLM will refer to “normalized” choice value of “normalization status” column which could confuse LLM whether to use other choice values or not as “normalization status” field has 5 choice values (normalized, manufacturer normalized, manually normalized, partially normalized, match not found).	Column instruction on “Column-normalization status”: “Always consider normalization status as normalized when choice values is any of the following choices: “normalized, manufacturer normalized, manually normalized”	When instructions added, the query considers all 3 ch “normalized, manu normalized, manu normalized” as no state and return re

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Examples of how to use AI instructions effectively (continued)

No.	Instruction Pattern	Example Query	Behavior without AI instruction	Sample AI instructions	Behavior with AI ins
			We need to add instruction to guide LLM on which all choices to include in normalization status.		

Best practices for AI instructions

Follow these guidelines when creating AI instructions to verify optimal performance and accuracy:

- Write clear, unambiguous, and actionable instructions tied to business logic. Always reference the correct tables (nodes), columns (properties), and relationships (edges). Use flags like Always include only when enforcing true default business behavior.
- Avoid vague or contradictory instructions. Instructions that do not align with the underlying data model can confuse the system and lead to incorrect results. For example, an instruction like "Filter by manufacturer" without specifying the column or condition is ambiguous.
- Use conditions to control when logic applies. Clearly state when an instruction should be applied (for example, only when the user asks for host information), rather than applying logic universally.
- Keep instructions focused and generalized. Instructions should guide intent interpretation across similar queries, not solve a single one-off case.
- Do not duplicate logic already handled elsewhere. Avoid restating filters or constraints that are already enforced through data filters to avoid conflict.

Support for Synonyms, Data Filters and hidden columns

Synonyms:

Knowledge Graph supports configuring synonyms for tables, columns, edges, and reverse edges to enhance flexibility and user-friendliness. Synonyms enable users to define alternate names for these entities, accommodating different terminologies.

- Each entity can have up to five synonyms.
- Synonyms promote broad coverage for commonly used alternate terms.
- Maintaining a manageable synonym set reduces ambiguity in query resolution.

Data Filters:

Data filters are applied deterministically as post-processing rules to refine query results. After initial Cypher generation, filters are systematically applied to promote consistency and reliability of outcomes.

- Filters are applied after Cypher generation, not during.
- Dynamic filters enable real-time adaptation based on user context.
- Improves precision and relevance of returned data. Does not modify the core graph query.

Hidden columns:

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Hidden columns cannot be queried and do not appear in the result.

For example: add Employee number as hidden columns for sys_user table to hide the employee number from query results.

Create Knowledge Graph tag

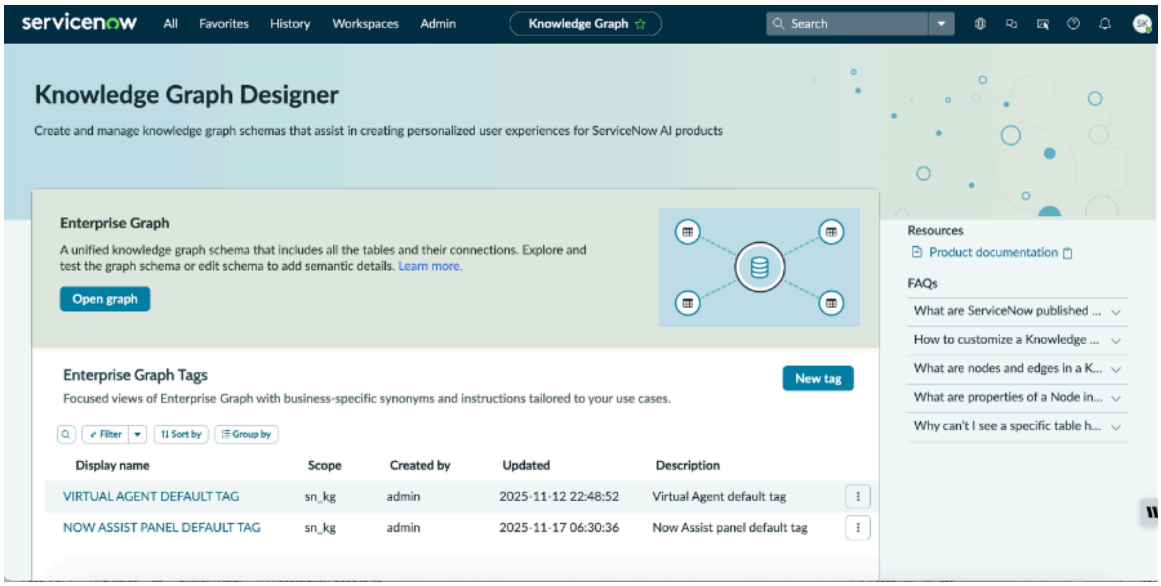
Create Knowledge Graph tags for Now Assist Virtual Agent, AI agent or Now Assist panel Enterprise Graph using Knowledge Graph Designer to improve accuracy of natural language queries.

Before you begin

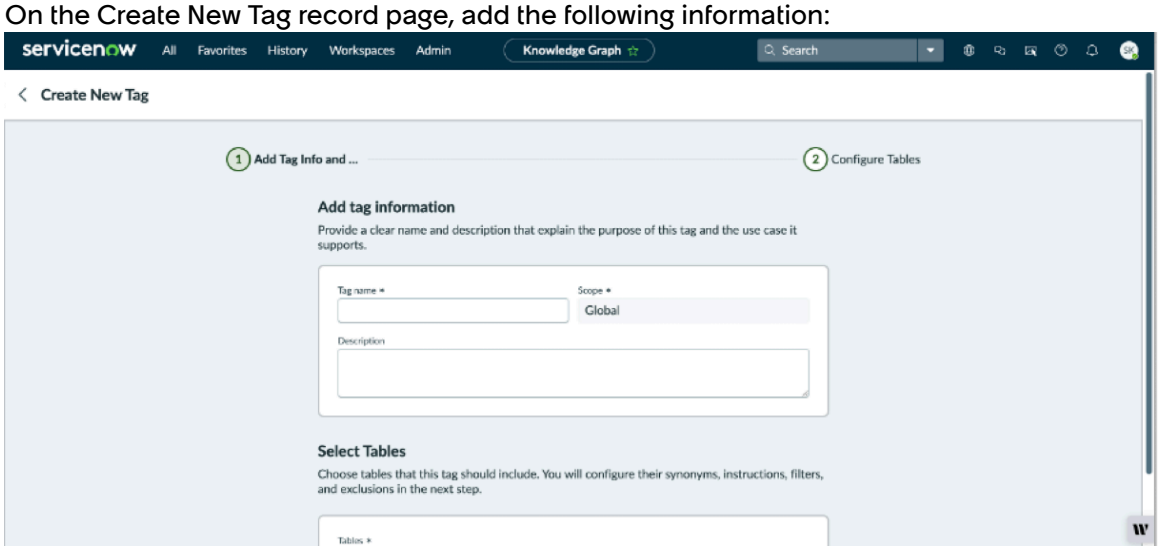
Role required: admin

Procedure

1. Navigate to **All** > **Knowledge Graph Designer** > **Enterprise Graph Tags** > **New tag**.
   You are navigated to the Create New Tag record page.



2. On the Create New Tag record page, add the following information:



   - Tag name: Name for the tag.
   - Description

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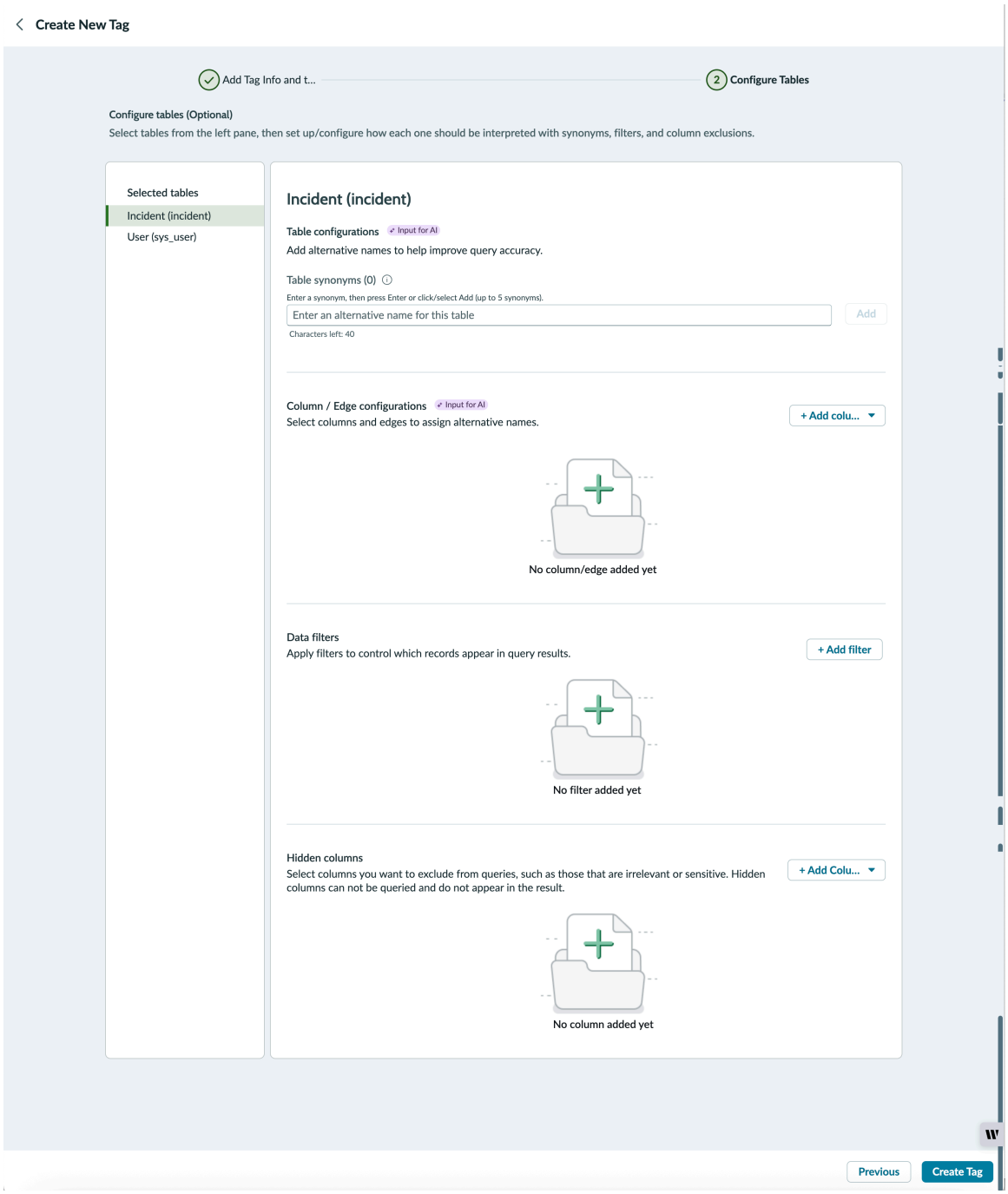
- Scope: The default selection in Global. Read-only field.
- Select Tables: The tables or nodes that you want to add to the tag.

3. Select **Next** to go to Configure tables page.

   The details that are added to the Configure tables page will help to further improve the accuracy of the natural language queries.

   The selected tables will be displayed on the left pane of the Configure tables page.



4. Select a table from the left pane to add the following: , column and edge configurations, data filters and hidden columns.
   - Tables configurations: Synonyms and AI instructions
   - Column and edge configurations: Synonyms and AI instructions

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- Data filters
- Hidden columns

AI Instructions injects business context directly into the Knowledge Graph natural language query engine, shaping how the system interprets and traverses data. Instructions can be configured at three levels:

- Node (entity/table)
- Property (column/attribute)
- Edge (relationship)

Each instruction can optionally be marked as **Always Include**, ensuring critical business logic applies unconditionally across all queries. For example, excluding retired assets or closed tickets by default unless explicitly requested.

For best results, write instructions as generalized, context-driven guidance rather than hard-coded references to specific table values. See Improving Natural Language Queries with Tag configuration to see detailed examples.

5. Add alternative names in the **Table synonyms** field and select **Add**.
   - Use the commonly used table names as synonyms to help AI recognize it in natural language queries.
   - Example: you can add Tickets as a synonym for the Incident table.
   - You can add up to five synonyms only.
6. To delete a synonym, select icon next to the synonym.
7. Add AI Instructions in the Table Configurations section and select **Add**.

   Note: Add up to 5 table specific business context in the **AI Instructions** field.

8. Select **Always include** to allow adding an instruction as a default business logic.
   For example, always include instruction to skip retired assets from the results unless user explicitly request for it.
9. Select **Add Column** and choose the columns and edges that you want to add synonyms to.
   - Add commonly used column and edge names as synonyms to help the AI match user terms to this field.
   - Example: you can add Opened On as a synonym for Created Date.
   - You can add up to five synonyms only.

   The selected columns and edges are added to the **Column / Edge configurations** section.
10. To delete a column from the section, select next to the column.
11. Add AI Instructions in the **Column/Edge Configurations** section and select **Add**.

    Note: Add up to 5 instructions per entity in the **AI Instructions** field.

12. Select **Add filter** option to add data filters for managing which records appear in the query results and add the following details:
    - Field
    - Operator
    - Value

    Examples:

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- To exclude inactive users from search results, apply `Active = True` filter.
- To include only active incidents in response, add a data filter to consider `state in (in progress, on hold)`.

13. Select **Apply filters to child tables** check box if you want to add the same filter conditions for the child table of the selected table in the tag.
    If enabled, these filters will also apply to child tables that inherit data from this table.
14. Select irrelevant or insensitive columns from the **Hidden column** drop-down to exclude them from queries.
    Hidden columns cannot be queried and do not appear in the result.

    For example, add `Employee number` as hidden columns for `sys_user` table to hide the employee number from query results.
15. Select **Create tag** and repeat the same process for each of the selected columns.

Managing Knowledge Graph tags

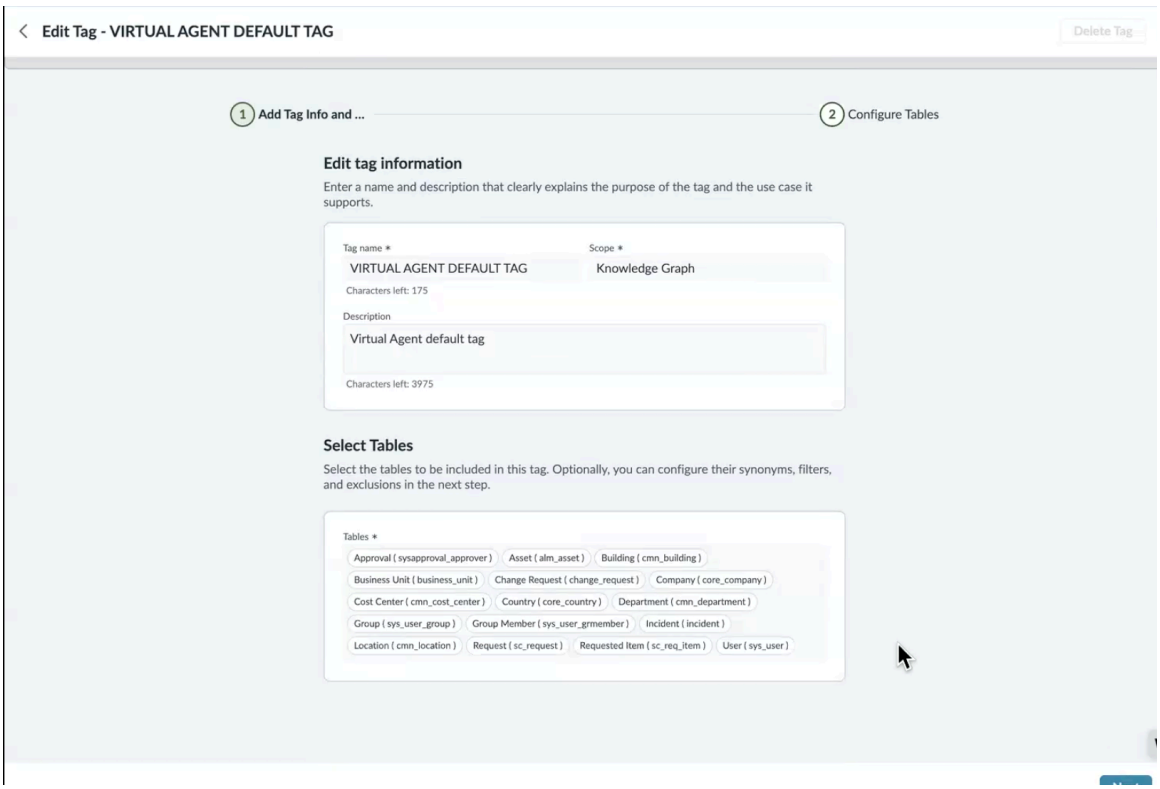
Edit or delete Knowledge Graph tags for Now Assist Virtual Agent, AI agent or Now Assist Panel Enterprise Graph use case.

Before you begin

Role required: admin

Procedure

1. To edit an existing tag, go to **All** > **Knowledge Graph Designer** > **Enterprise Graph Tags**.
2. Select a tag to open it in Knowledge Graph canvas.
   You can see all the tables that are part of the tag on the Knowledge Graph canvas.



3. Select **Edit tag** option to open the Edit Tags window or select a node to edit.
   If you select a node you will see the Tag configuration section on the right pane.

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4. You can also select the Edit tag configuration ( ) icon from the **Tag configuration** section to open the Edit Tags window.
5. To delete a tag, select the ⋮ icon next to a tag on Enterprise Graph tags section on home page.
6. Select **Delete** from the drop-down.
   You can also select the edit option here, to go to the Edit tags window.
7. When prompted, confirm the deletion process.

Setting up Enterprise graph in sub-production instance

Use these steps to setup Enterprise graph in sub-production instance manually.

Before you begin

Unlike production instances, the Enterprise Graph setup does not start automatically in the sub-production instance.

You have to manually enable the system property:
`sn_kg.description_generation.enable.non_production_envs`

When you enable this system property, the Enterprise Graph setup starts in the sub-production instances and can take several days to complete.

Until this setup is finished, the Enterprise Graph schema won't work effectively for answering queries.

This step creates the necessary descriptions for the Enterprise Graph to respond to queries.

Role required: kg_admin

Enterprise Graph initial setup in production instance

Setup and use Enterprise Graph Schema, a unified Knowledge Graph schema, that captures all the ServiceNow and third-party tables and their connections.

Before you begin

When you install Enterprise Graph, it automatically begins configuring instance tables. This may take several days and until the setup is complete, the schema won't respond effectively to queries.

If you have already completed the setup in sub-production instance, you can import the generated descriptions to production instance and fasten the process.

Assuming that you have completed the setup in sub-production instance, do the following to complete the initial setup in production instance:

- Create an integration user, in the sub-production instance. For more information, see Create a user
- Verify if the descriptions are generated in sub-production instance.
- Use the following procedure to:
  - Import the data into production.
  - Run the associated Transform Maps.
- Remove tracker records from the production instance.

Role required: admin

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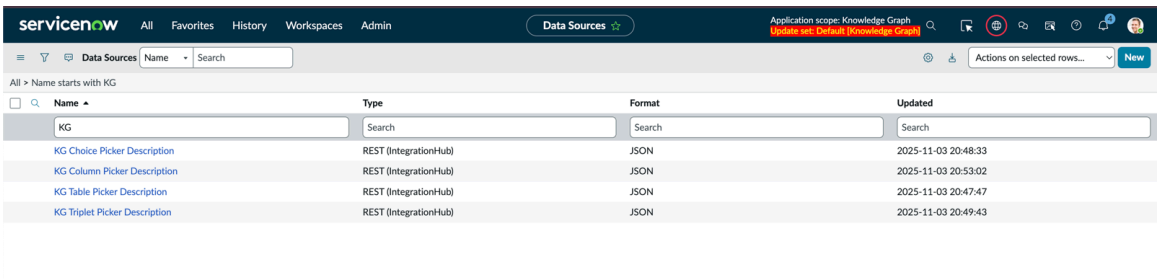
Procedure

1. Navigate to **All** > **Connections & Credentials** > **Connection & Credential Aliases**.
2. Open the record with name **Description_Connector**.
3. Select **Create New Connection & Credential** from the related links section.
4. Enter the required details in the **Create Connection & Credential** form.
5. Add the user name and password that was used, while creating the new user.
   See Create a user for more information.
6. Navigate to **All** > **System Import Sets** > **Administration** > **Data Sources**.
7. In the name field search bar, enter **KG** to view the related tables.
   The following tables are displayed:
   - KG Choice Picker Description.
   - KG Column Picker Description.
   - KG Table Picker Description.
   - KG Triplet Picker Description.



8. Open one of the displayed table and select **Load All Records** from the Related links section.
   Ensure the data is loaded.
9. Navigate to **System Import Sets** > **Advanced** > **Import Sets**, once the data is loaded.
   For detailed information, see import set documentation Import sets
10. Open the import set and select **Transform** from the Related links section.
    For detailed information, see Transform map documentation Transform maps
11. Select **Transform** to complete the transformation.
12. Navigate to the selected table and verify if the data is loaded.
13. Repeat the import set and transformation steps for other three tables.

Access Enterprise Graph schema

View and manage Enterprise Graph schema, select tables and test the schema with Knowledge Graph Designer.

You can view and manage the Enterprise Graph schema, go to **All** > **Knowledge Graph Designer** > **Open Enterprise Graph**.

Use Enterprise Graph to view and test the schema. You can also contribute synonyms to the schema for your use case. Synonyms will help improve the accuracy of Enterprise Graph for answering queries.

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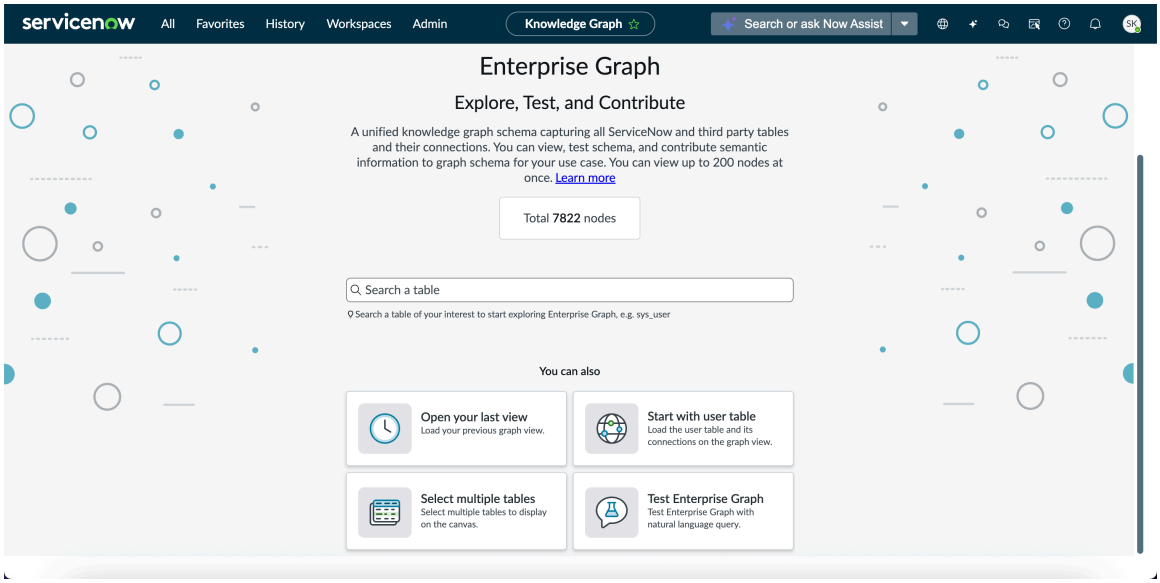

On the Enterprise Graph start page, use the search bar to search and select a table you want to view or manage. Alternately, you can use the **Open your last view** or **Start with user tables** to view the user and the related table.

The Enterprise Graph start page displays the total number of nodes. You can use the **Select multiple tables** option to select tables that you want to view in the schema.

Within **Select multiple tables** option, you can select an application, tag or individual tables. Once you select the node, you will see selected nodes and their associated tables on the schema.

You can also use the **Test Enterprise Graph** option to run a query on the Enterprise Graph schema.

View and manage Enterprise Graph schema

Use Knowledge Graph Designer to view and manage Enterprise Graph schema

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Knowledge Graph** > **Knowledge Graph Designer** > **Enterprise Graph**.
   You are navigated to the Enterprise Graph start page.

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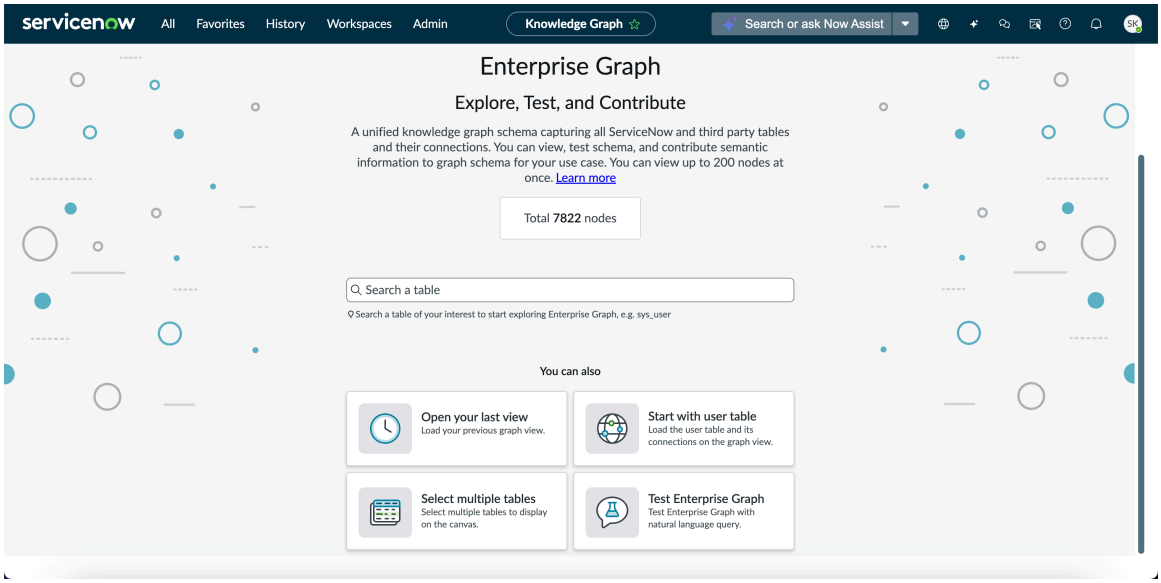
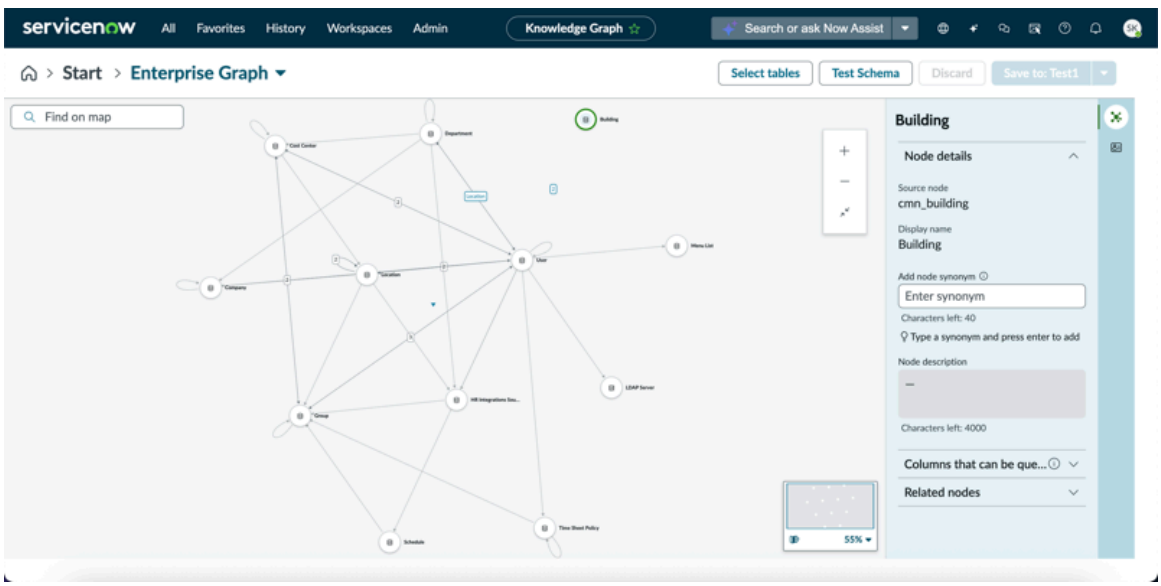


2. Do one of the following to go to the Enterprise Graph canvas:
   - Search and select a table from the search bar.
   - Select **Open your last view**.
   - Select **Start with user tables**.
   - Select**Select multiple tables**.



The Enterprise graph schema opens in the Knowledge Graph canvas page.

3. **Optional:** You can select a tag from the drop-down next to Enterprise Graph to see a specific tag.

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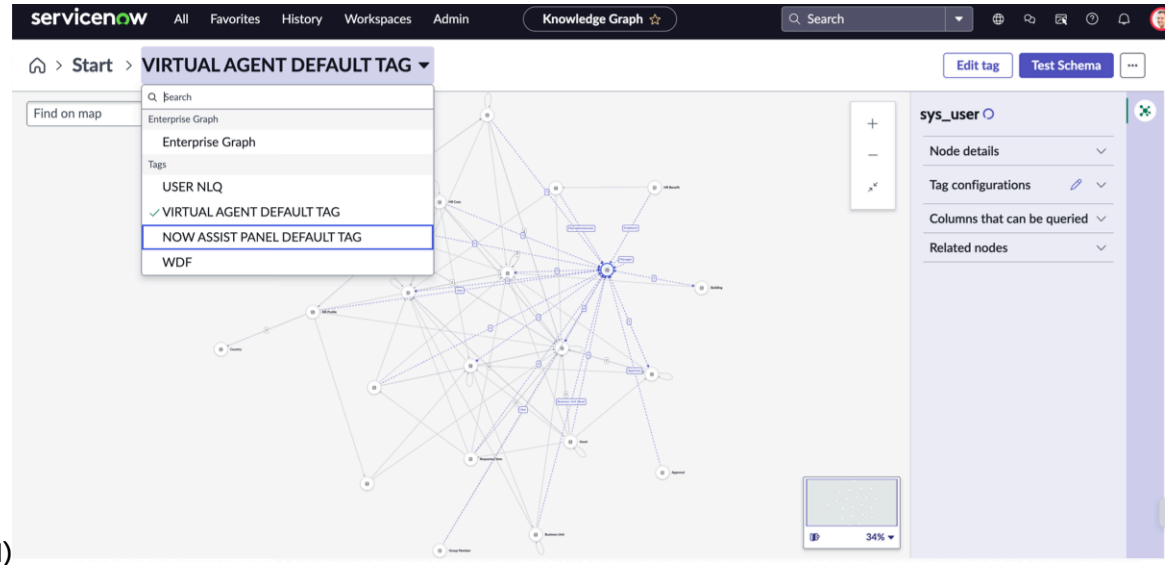
(Optional)



4. From the toolbar, select **Nodes details** option to view details or add a synonym for the node. The other fields are read-only and cant be edited. In the tag view of Enterprise Graph, you can also see tag configuration when you select a node.
5. Use the icon in the **Tag configurations** section to go to the Edit tag configurations page and update the following details:
   - Node synonyms
   - Column with synonyms
   - Data filters
   - Hidden columns
6. In the **Columns that can be queried** section, search and view the columns of the tables.
7. From the toolbar, select **Related nodes** to view the related nodes.
8. Select **Save** to save the synonyms that you have added.
   You can save to the most recent contribution or choose a another contribution from the drop-down, to save your changes.
9. Select **Discard** to delete your changes.

Select multiple tables

Choose one or multiple nodes to view in the Enterprise graph canvas.

Before you begin

You can select an entire group or individual tables to view in Enterprise Graph canvas. All the connected nodes or associated tables also gets populated, once you select the node. However, you can only choose up to 200 nodes at once.

Role required: admin

Procedure

1. Navigate to **All** > **Knowledge Graph Designer** > **Open Enterprise Graph** > **Select multiple tables**.
   Choose up to 200 nodes to customize your view. Once you select a node, all the related edges will also be selected.

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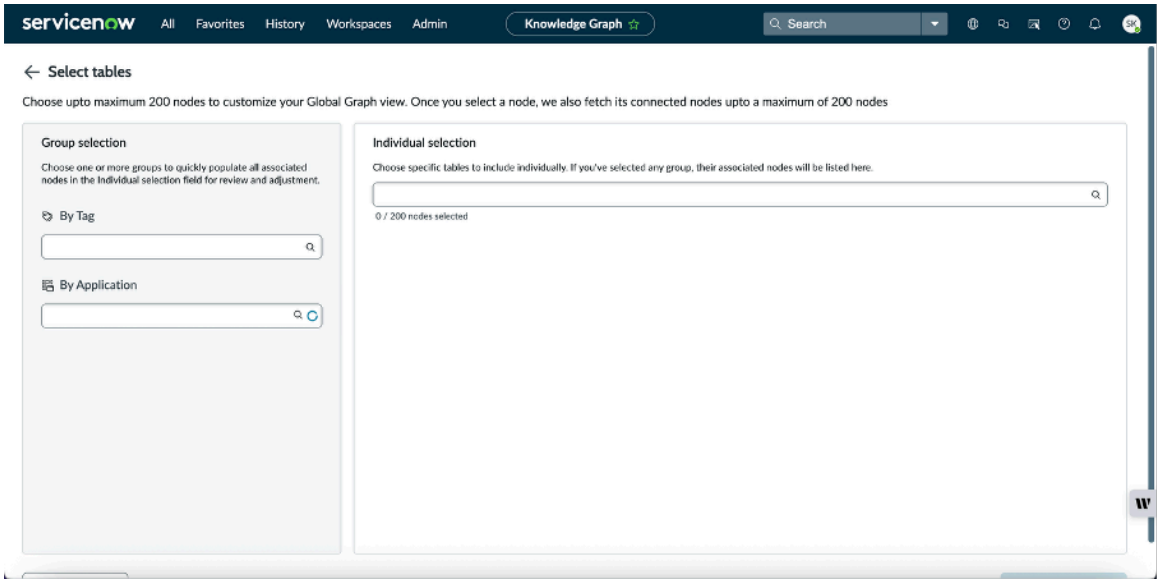

2. Select a group using the **By Tag** or **By Application** search bar.
   You can search and choose multiple groups and all the associated nodes. The selection will be listed in the Individual selection section.
3. Select an individual node using the **Individual Selection** search bar.
4. Select **Apply** to view these nodes and its related tables on Enterprise Graph canvas.

Test an Enterprise Graph schema

Promote functionality by entering a query and testing the Enterprise Graph schema.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Knowledge Graph** > **Knowledge Graph Designer** > **Enterprise Graph**.
2. Select **Open your last view** to load and view the recently opened Enterprise Graph schema.
   The Enterprise graph schema opens in the Knowledge Graph canvas page.
3. From the toolbar, select **Test**.
   You are navigated to Test Knowledge Graph Schema page.

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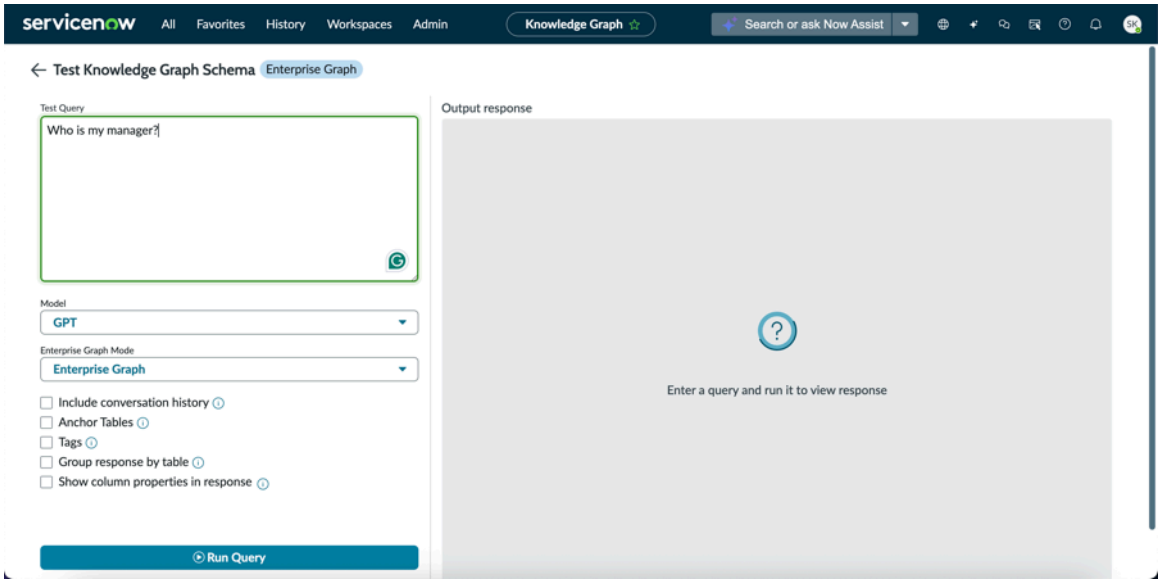

4. In the Query section of the Test Knowledge Graph schema window, enter your question.
5. Select an LLM model from the following:
   - **NowLLM**
   - **Claude**
   - **NowLLM-LTS**
   - **Gemini**
   - **GPT**

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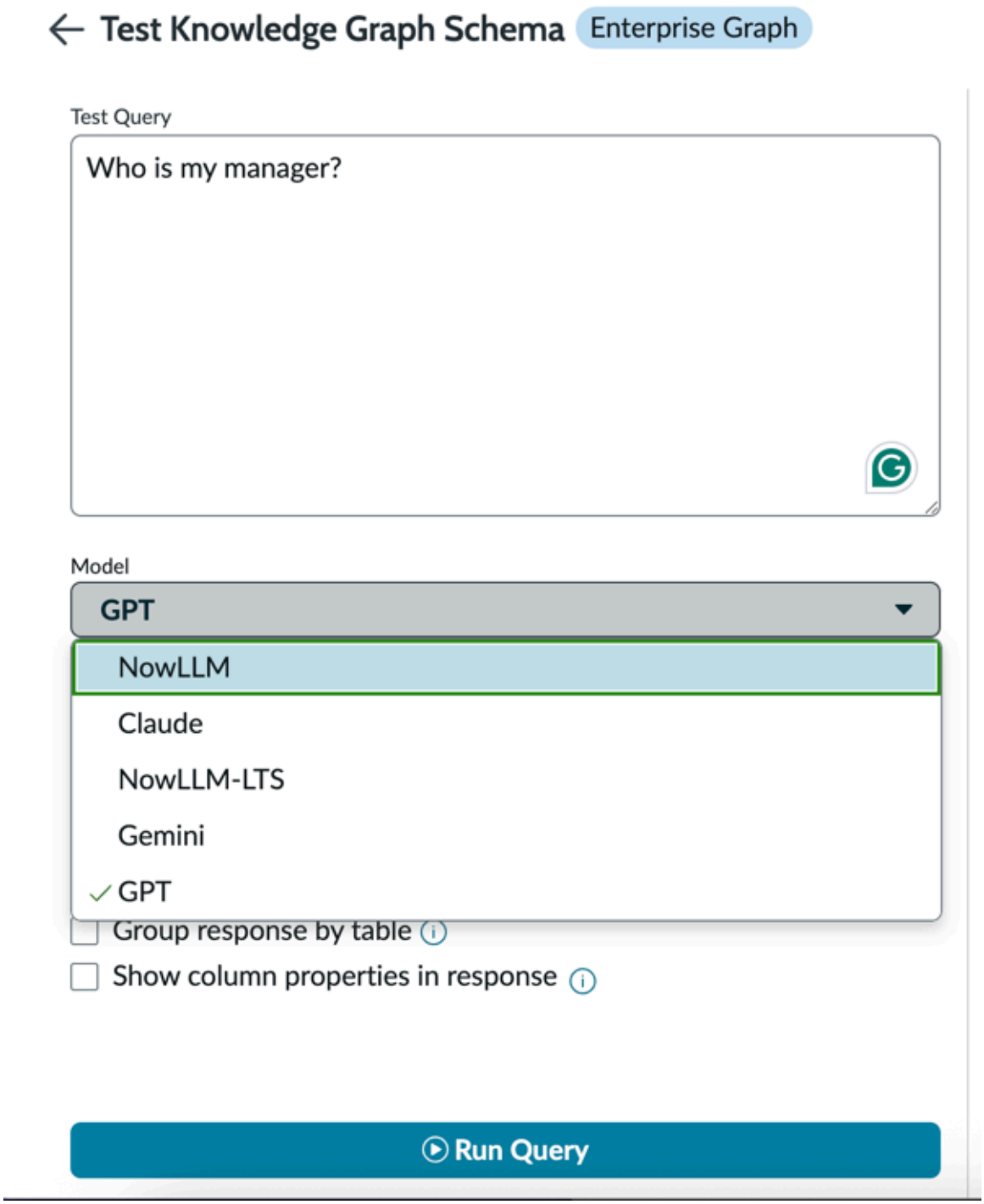

6. Select an Enterprise Graph mode.
   The options are:
   - Enterprise Graph
   - Enterprise Graph (Small)

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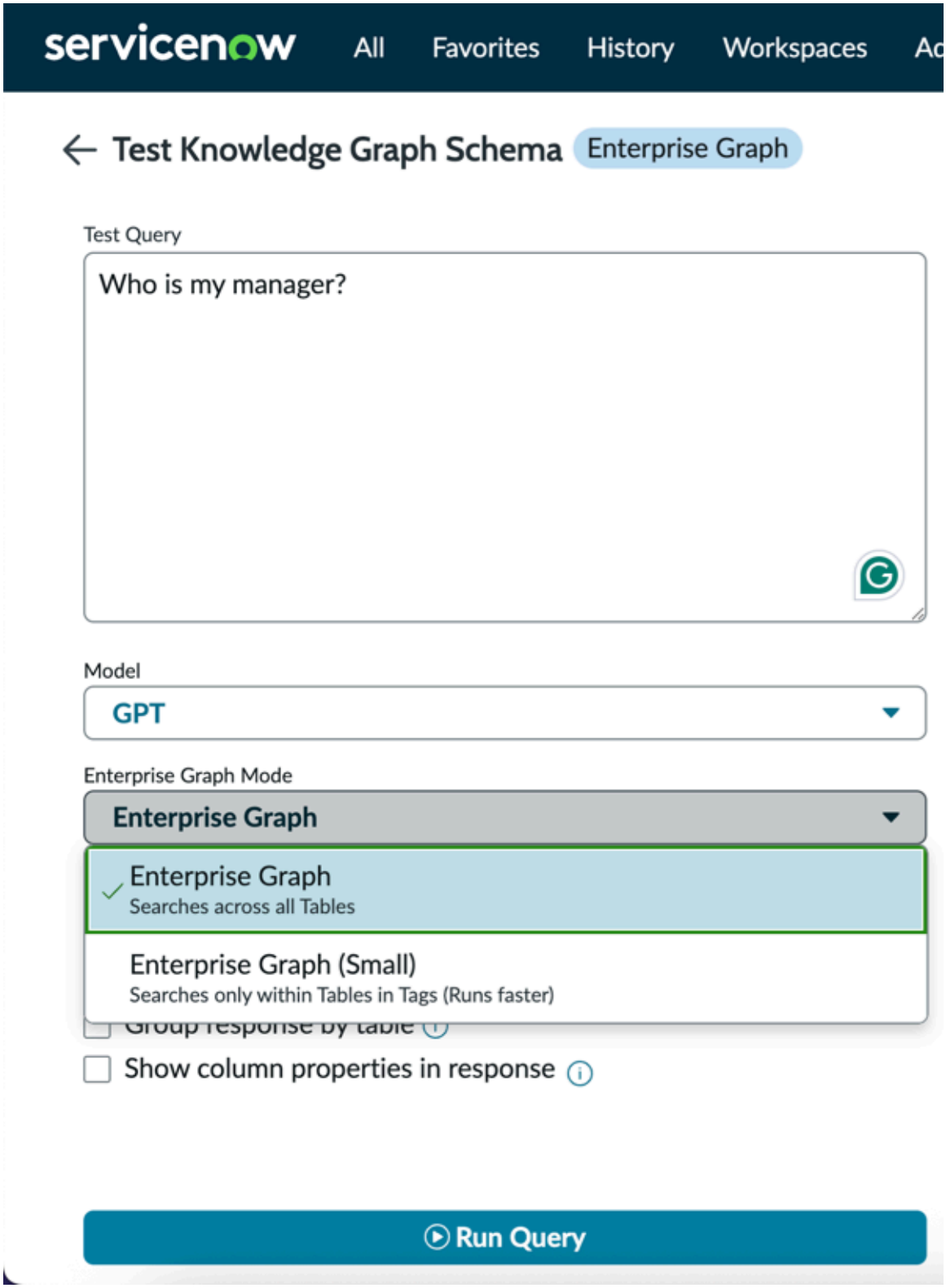

7. **Optional:** Select **Include conversation history** check box to add the any previous chats.
8. **Optional:** Select **Anchor Tables** check box to add the Anchor tables.
9. **Optional:** Select **Tags** check box to add the associated tags.
   In Enterprise Graph (Small) mode, tags are mandatory.
10. **Optional:** Select **Group response by table** to sort the results.

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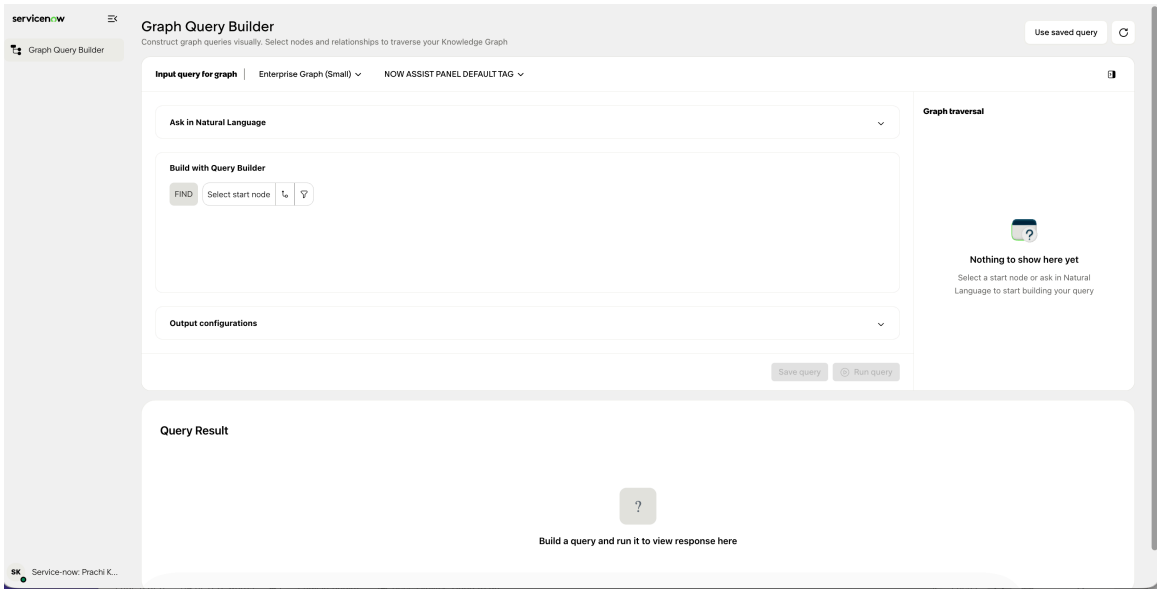
11. **Optional:** Select **Show column properties in response** to view the column properties along with associated data.
12. Select **Run Query**.

Graph Query Builder

Graph Query Builder provides a visual interface for building and running Knowledge Graph queries without writing code. You can also use natural language to generate queries.

You have two options on the Graph Query Builder page. You can either to ask query in Natural language or build your own query using the Query Builder.



If you prefer to build a query, you can select a graph between Enterprise Graph, Enterprise Graph Small, or a user-created graph. Choose a starting entity and add relationships to the connected entities by applying **AND** or **OR** filters on the properties. You can define which output fields appear in the results and whether to return individual records or aggregated results.

As you build, a live graph in the right panel shows the query taking shape. You can confirm it matches your intent before running it.

You can also skip this manual query construction and ask a natural language question instead. Graph Query Builder converts your natural language input into a query using the LLM of your choice and lets you review, edit, and rerun it.

Example natural language query: `Show me all incidents assigned to the Finance team.`

You can save the successful queries as private or for everyone who has access. This prevents rebuilding common or complex queries.

Graph Query Builder benefits

Discover what you can actually query: Explore the entities, relationships, and properties available in a graph, instead of guessing at the underlying data model.

Build complex queries without writing syntax: The UI guides you through multi-hop traversal, relationship selection, and filters, step by step.

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See your query before you run it: A live graph view builds alongside you as you add entities and relationships, so you can confirm the query matches your intent before executing it.

Get results in the shape you need: Choose a list of records or an aggregated result, such as a count, so the output matches what you want to answer.

Reuse and share your work: Save a successful query for yourself, or share it with everyone who has access, so complex or recurring queries aren't required to be built from scratch.

Review and refine your query: Ask a natural language question and Query Builder shows you the exact query it generates, revealing how the question would be interpreted by ServiceNow® Otto for Virtual Agent or an AI agent. It is useful to refine phrasing and building trust in AI-assisted results.

Access Graph Query Builder

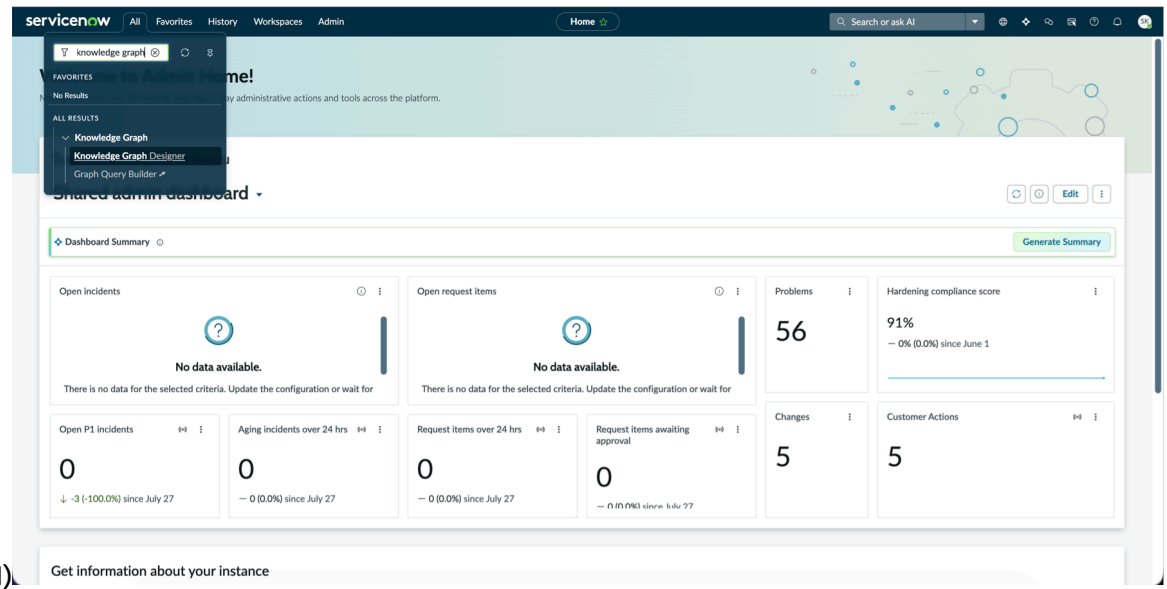
Open Graph Query Builder directly from drop-down menu options on the home page of ServiceNow UI or from the Query Builder section within Knowledge Graph Designer.

Before you begin

Role required: kg_admin

Procedure

1. Navigate to **All** > **Knowledge Graph** > **Graph Query Builder**.
2. **Optional:** You can also navigate to **All** > **Knowledge Graph** > **Knowledge Graph Designer** > **Query Builder** and select **Open Query Builder** from home page.



(Optional)

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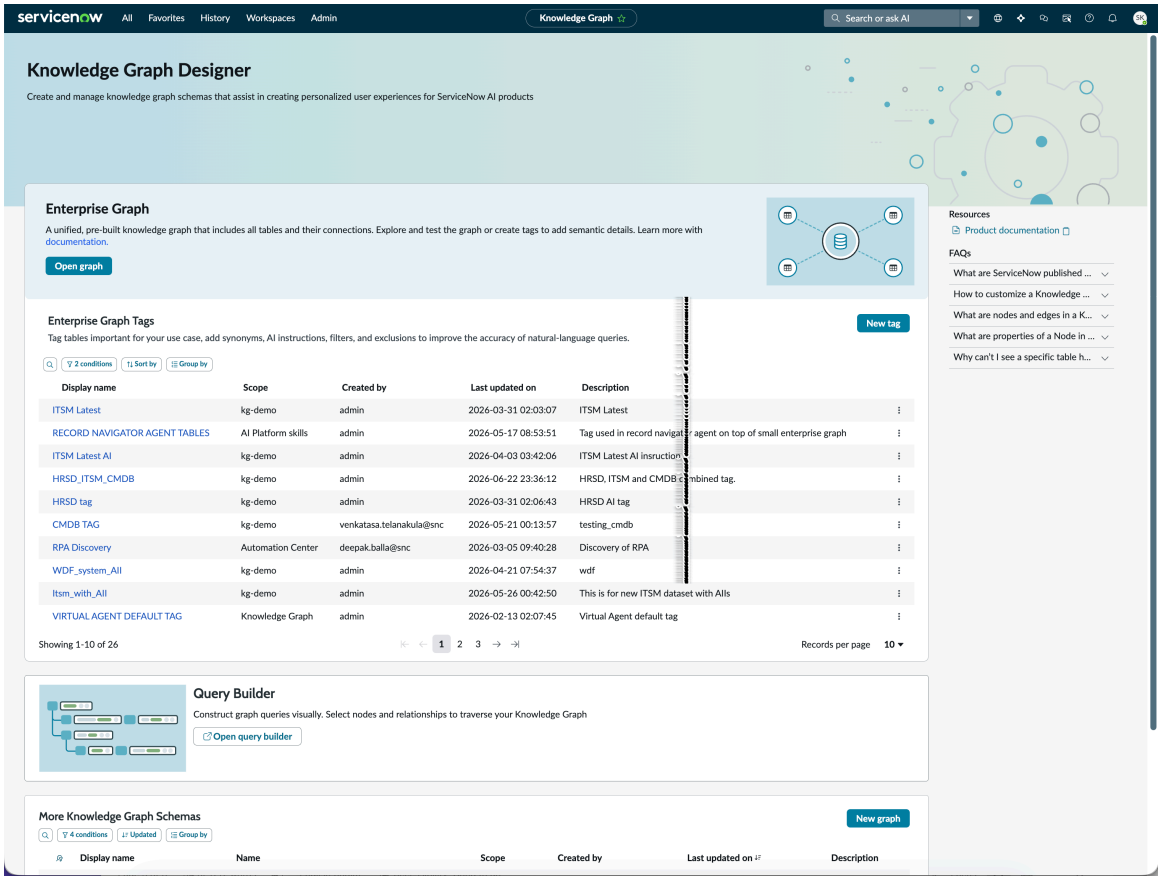

Graph Query Builder opens in a new browser tab, separate from Knowledge Graph Designer window.

Build a query in Graph Query Builder

Use Graph Query Builder to build a query by selecting the entities and their relationship, apply filters, choose the output columns and run the query.

Before you begin

Role required: kg_admin

Procedure

1. Navigate to **All** > **Knowledge graph** > **Graph Query Builder**.
2. Select a graph from the graph drop-down in the **Input query for graph** section.

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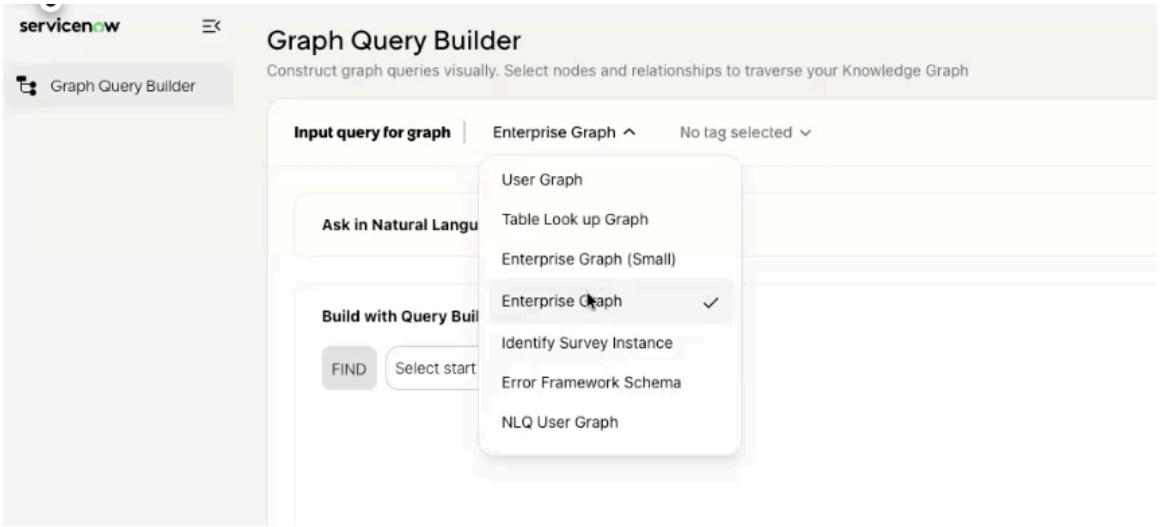
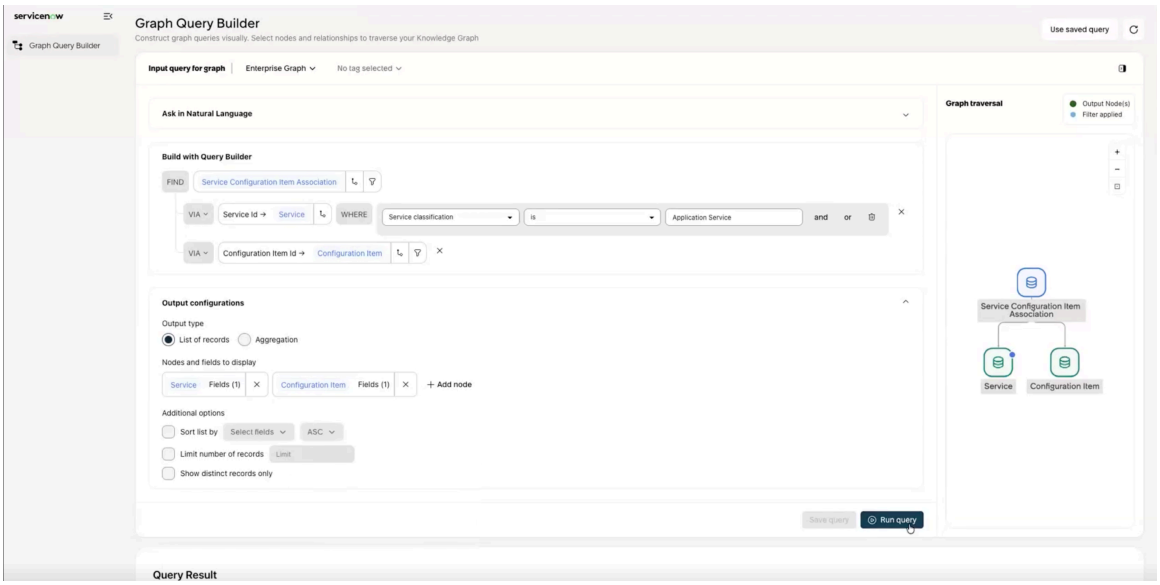


If you select Enterprise Graph or Enterprise Graph (small), you will see an additional tag selection field to scope the available entities to specific tables.

Note: Tags aren't available for user created graphs.



3. **Optional:** Select one or more tags from the drop-down, if you want to run a query using Enterprise Graph or Enterprise Graph (small).
4. Select a start node from the **Build with Query Builder** section.
5. **Optional:** Select the option to add filters and option to add relationships and hop onto another node.
   The selected node is the root of your query. As you add conditions and relationships, you can see a live graph view of the query alongside the builder, in the right panel.
6. **Optional:** Combine multiple filters with AND or OR and add second-level conditions and relationships to the existing conditions, if required.

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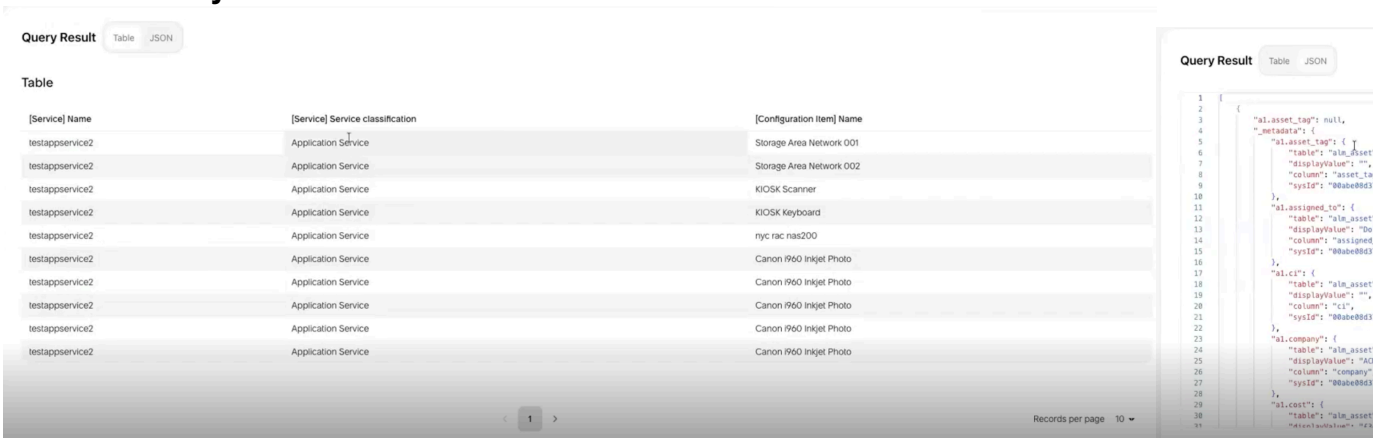
- You can add a relationship to traverse to a related entity. Add connection on the node to see the outgoing, incoming, and self-referencing relationships related to that entity, including any related CMDB tables.
- Select a relationship to add the connected entity to your query.
- You can add more entities, relationships, and filters to build a multi-hop query.

7. Select an output type from the **Output configurations** sections.
   The options are:
   - List of records: For a list, select the output entity and the specific columns you want returned. You can rename any column with an alias.
   - Aggregation: Select **Add numbers** and an option from the drop-down. You can then select a node and field and also rename any column with an alias, to show it in the results.
8. **Optional:** Select the **Group numbers by** check box and select a field from the drop-down.
   The options are
   - Sort list by: select a field to sort the list of records in ascending or descending order.
   - Limit number of records: To limit records in the results.
   - Show distinct records only: To show only distinct results.
9. **Optional:** Select **Group numbers by** option for aggregation and an option to sort the output.
   The options are:
   - Sort the output by a column
   - Limit the number of records returned
   - Restrict results to distinct records
10. Select **Run Query**.



Graph Query Builder runs the query and displays the results in table view and as JSON.

Build a query using natural language in Graph Query Builder

You can also ask a question in natural language, the Graph Query Builder populates the query in the builder and runs it to get results.

Before you begin

Role required: kg_admin

Procedure

1. Navigate to **All** > **Knowledge graph** > **Graph Query Builder**.
2. Select a graph from the graph drop-down in the **Input query for graph** section.

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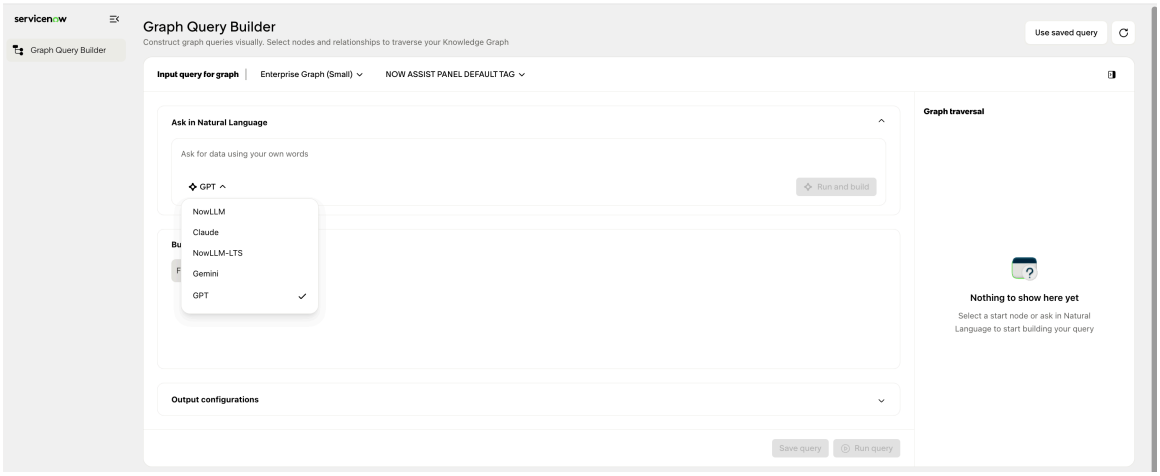
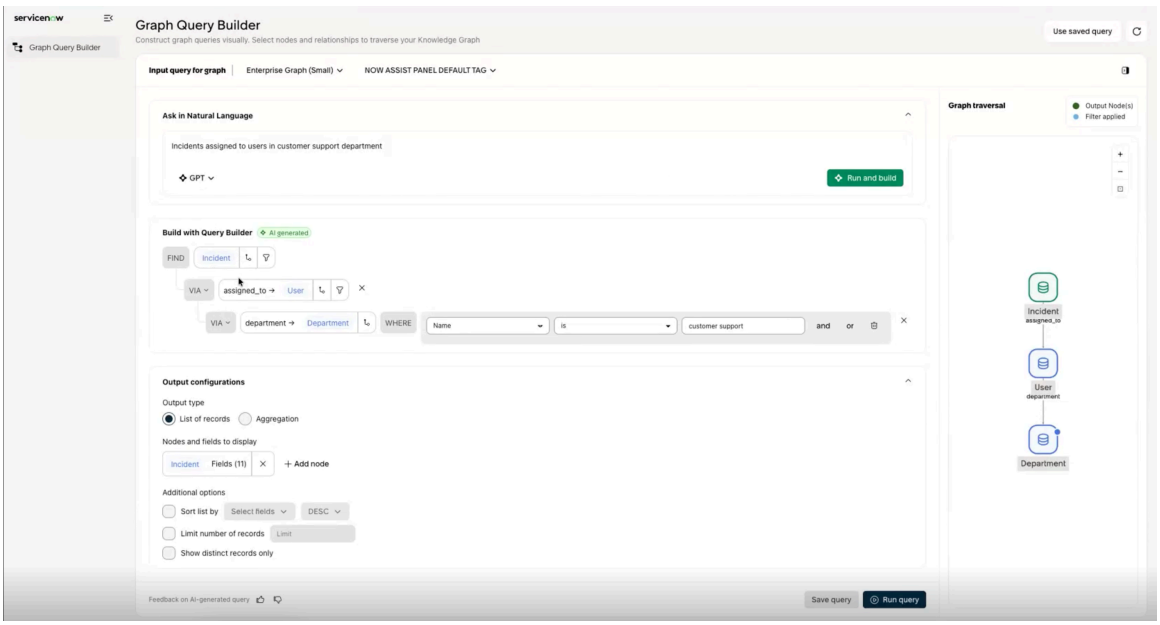
If you select Enterprise Graph or Enterprise Graph (small), you will see an additional tag selection field to scope the available entities to specific tables.

Note: Tags aren't available for user created graphs.



3. **Optional:** Select one or more tags from the drop-down, if you want to run a query using Enterprise Graph or Enterprise Graph (small).
4. Enter a natural language question in the **Ask in natural language** section.
   Example: `Show me all the incidents assigned to users in customer support department`.



5. Select an LLM to use from the following options:
   - NowLLM
   - Claude
   - NowLLM-LTS
   - Gemini
   - GPT
6. Select **Run and build**.

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Graph Query Builder generates a query from your input, populates it in the query builder, runs it, and displays the results in the Query results section.

7. Review the generated query and edit it directly in the query builder.
8. **Optional:** Select **Run** to re-run the query after editing and save it, if you want to reuse it later.

Save and reuse a query in Graph Query Builder

Save and share a successfully run query to load and rerun it later in Graph Query Builder

Before you begin

You must run a query successfully at least once before you can save it.

Role required: kg_admin

Procedure

1. Navigate to **All** > **Knowledge graph** > **Graph Query Builder**.
2. Build and run a query successfully from the Ask Natural Language Query or Build with Query Builder section.
   Once you run the query, **Save query** option is enabled.
3. Select **Save query**.
   Save query window is displayed.
4. Choose whether to save as a new query or to add to an exiting query.
5. Add a query name and assign permissions.
   For permission, the options are:
   - Me: only you can see and load the saved query.
   - Everyone: all users with access to Query Builder can see and load the saved query.
6. Select **Save**.
7. **Optional:** Select **Use saved queries** option to load saved queries.
8. Choose a query from either **My queries** or **Others** section on saved queries window.
9. Select **Load query** to view and load the query.
10. Edit the query, if required and select **Run**.
    - You can rename a saved query, but you can't edit its underlying logic directly.
    - To change the logic, build the updated query in the builder and save it as a replacement.
    - Queries saved by other users might be visible to everyone but can't be edited or deleted by you.
    - You can only delete the queries that you have saved.

Reference for Knowledge Graph

Knowledge Graph uses the following terminologies.

Terminologies

Term	Description
Knowledge Graph Schema	Structured representation of real-world entities and their relationships, stored in a graph database.

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Terminologies (continued)

Term	Description
Knowledge Graph Canvas	The editor used to create and edit Knowledge Graph Schemas. You can also use it to add or delete nodes and edges.
Node	An entity or object that represents a data point such as a person, place, product, or concept.
Data Source	The source table that is linked to a node.
Node Properties	The attributes or columns of the source table linked to a node.
Connected Node	The nodes that have a connection with the selected node.
Edge	Represent the relationships or interactions between nodes.
Connecting Edges	The edge that connects two nodes.
Available Edges	Available connection between selected nodes.
Start Node	The start data point for creating an edge or relationship.
End Node	The end data point for creating an edge or relationship.

Knowledge Graph roles

Certain roles are required to use Knowledge Graph functionality.

Knowledge Graph Admin [kg_admin]

This user can create and update Knowledge Graph schema using Knowledge Graph designer.

Contains Roles

List of roles contained within the role.

Knowledge Graph administrator [kg_admin].

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Avoid granting an admin role when more specialized roles are available.

AI Data Kit

Use ServiceNow® AI Data Kit to add datasets to a data catalog. The curated data works with AI Skill Kit to enable AI skill development and evaluation.

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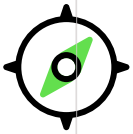
https://player.vimeo.com/video/1088497625?h=40305c5af0&badge=0&autopause=0&player_id=0&app_id=58479

Get started



Explore

Learn how AI Data Kit can help create custom datasets

Configure

Configure AI Data Kit for prompts and skills

Use

Use AI Data Kit to create datasets to add to data collections

Reference

Reference information for AI Data Kit

Important: Some Now Assist products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Please check for availability updates in future releases.

Important: Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.

Troubleshoot and get help

- Ask questions and explore other resources for AI Data Kit in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

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Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

Exploring AI Data Kit

The AI Data Kit plugin for ServiceNow Otto enables you to add datasets to a data catalog and create collections for use in AI Skill Kit.

AI Data Kit overview

If the base system ServiceNow Otto skills don't fit your needs, use AI Data Kit to create custom datasets and data collections. These can be used in AI Skill Kit for evaluation.

AI Data Kit users

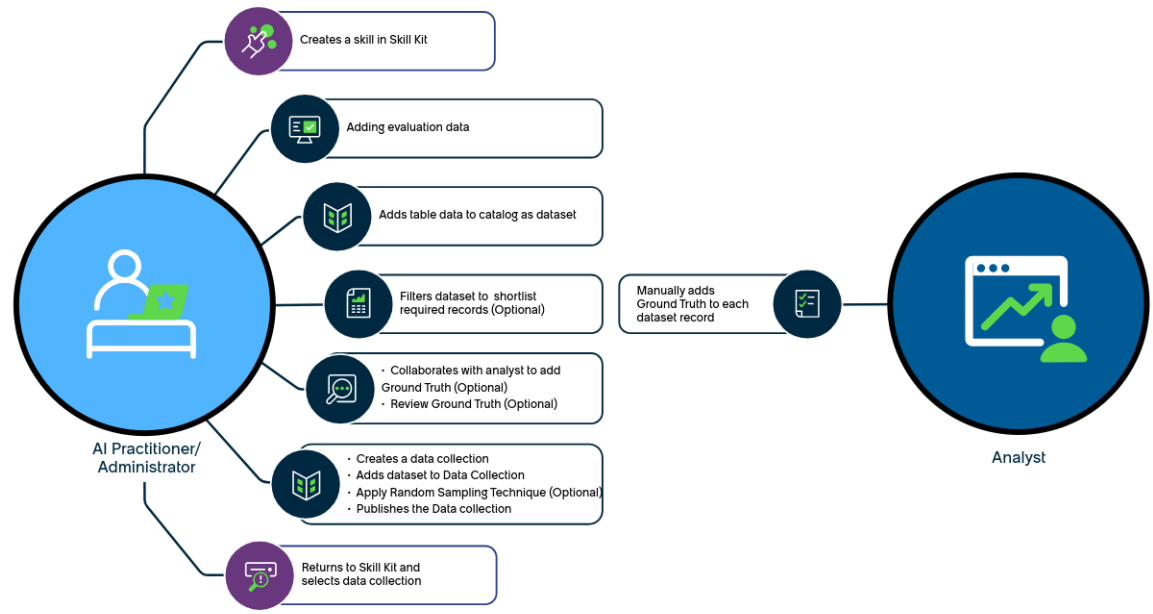
Users

User	Description
AI practitioner	AI practitioners manage data set creation in AI Data Kit. They develop and evaluate skills and other technical solutions for various use cases.
Analyst	Analysts confirm data quality for AI development and evaluation. They work with AI practitioners to follow data curation guidelines set for specific AI use cases.

AI Data Kit workflow

The following diagram shows the user journey for AI Data Kit.

User journey for AI Data Kit



Two users take part in this workflow. The AI practitioner does most of the work. An analyst can enter and review ground truth values.

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1. Create a skill in AI Skill Kit.
2. Add records from an instance table to the data catalog as a dataset. If you don't have suitable records, generate synthetic data instead.
3. (Optional) Create a derived dataset to work with a smaller set of records.
4. (Optional) Check the dataset before you use it:
   - Scan for sensitive data and cleanse what the scan finds.
   - View data insights to see completeness and distribution.
5. (Optional) Add a ground truth to each dataset record. The AI practitioner creates the guidelines. An analyst can enter and review the values.
6. Create a data collection and add one or more datasets to it.
7. (Optional) Apply a sampling method to choose which records go into the collection.
8. Publish the data collection.
9. Return to AI Skill Kit, select the data collection, and run the evaluation.
10. Review the results, iterate on the prompt if needed, and publish the skill.

AI Data Kit benefits

Benefits

Benefit	Feature	Users
Curate records from an instance table into a dataset that you can reuse for AI development and evaluation.	Add a dataset	AI practitioner
Create a smaller dataset from an existing one so that you can evaluate a skill without processing every record.	Create a derived dataset	AI practitioner
Generate records when you don't have production data, or when using production data raises privacy concerns.	Generate synthetic data	AI practitioner
Scan a dataset for sensitive data, such as names and email addresses, and cleanse what the scan finds.	Find and cleanse sensitive data	AI practitioner

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Benefits (continued)

Benefit	Feature	Users
Check the completeness and distribution of a dataset before you use it, so that gaps don't affect your evaluation results.	View data insights	AI practitioner
Record the expected output for each record so that an evaluation can compare a skill's response against a known result.	Add a ground truth to each dataset record	AI practitioner, Analyst
Combine one or more datasets into a data collection and publish it for use in AI Skill Kit.	Create a data collection	AI practitioner

What to explore next

To learn more about configuring and using AI Skill Kit, see:

- Configuring AI Data Kit
- Using AI Data Kit
- AI Data Kit reference

Configuring AI Data Kit

Set up AI Data Kit so that users in your organization can start working with datasets.

Configuration overview

1. #unique_748

   Install AI Data Kit and its dependent applications and plugins from Application Manager.

2. Assign the sn_data_kit.admin role or the sn_data_kit.analyst role to users, depending on the tasks they perform.

Using AI Data Kit

Use AI Data Kit to add datasets to a data catalog to create collections for use in ServiceNow SDK.

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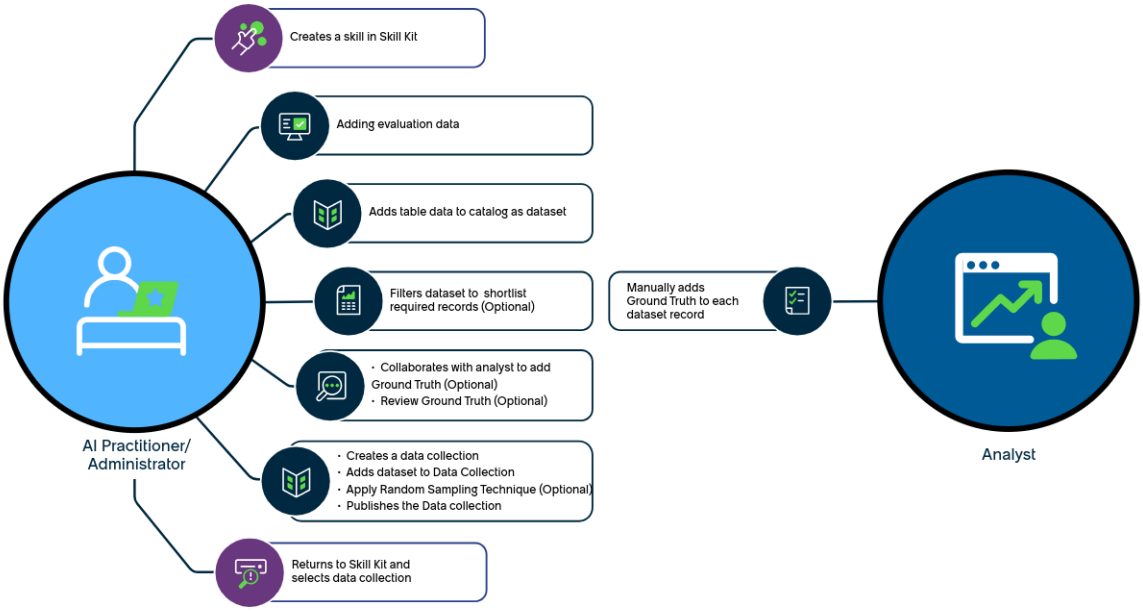
Overview of AI Data Kit

AI Data Kit work flow



1. Create a skill

   Create a custom skill for ServiceNow Otto. Creating a custom skill enables you to have greater flexibility with the ServiceNow Otto generative AI capabilities.

2. Configure deployment and skill settings

   Configure the deployment settings for the skill that you create. The deployment settings enable you to choose where the administrator can find the skill in AI Admin Hub.

3. Navigate to **AI Data Kit** to Add a dataset.

Add a dataset

Add the data from a table to a data catalog as a dataset through generative AI by using the AI Data Kit application. Adding a dataset is required to create and publish a data collection.

Before you begin
Role required: sn_data_kit.admin

Procedure

1. Navigate to **All** > *AI Data Kit* > **Home**.
2. Navigate to Discover datasets and select **Get started**.
3. On the **Datasets** tab, select **New**.
4. Select where to curate data from.
   - I'll import data from instance table
   - I'll import data from my computer
5. On the **Choose data** form, select the table and columns.

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If a column does not appear as a possible selection, then the field is not a supported data type. For example, Watch List fields are the glide_list datatype, which is not supported, so Watch List is not a selectable field.

6. **Optional:** Select **Add column via scripting** if you have columns, such as work notes or comments, that aren't stored in the table.
   This is an example script for adding worknotes.

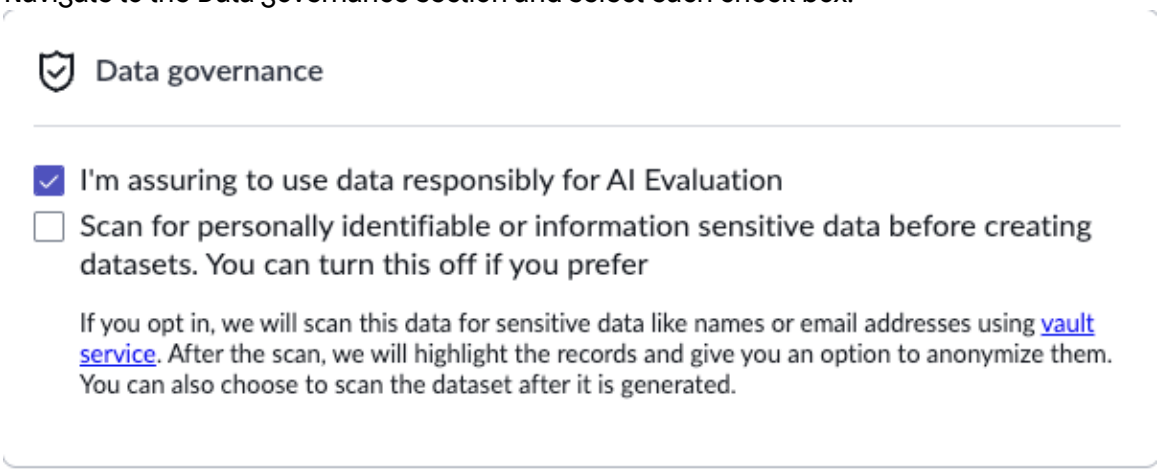
```
(function generate(current) {
//Current is the Gliderecord object of current record.
// //Sample script for adding worknotes
// var gr = new GlideRecord("sys_journal_field");
// gr.addQuery('name', current.getTableName());
// gr.addQuery('element_id', current.getUniqueValue());
// gr.query();
// var records = [];
// while (gr.next()) {
//     var obj = {
//         "value": gr.getValue("value"),
//         "type": gr.getValue("element"),
//         "created": gr.getValue("sys_created_on"),
//         "created_by": gr.getValue("sys_created_by")
//     };
//     records.push(obj);
// }
// return records;
})(current);
```

7. Select **Edit filter condition**.
8. Review the records and select **Continue**.
9. On the form, fill in the fields.

Add dataset info form

Field	Description
Dataset name	Name of the dataset.
Dataset description	Description of the dataset.

10. Add tags to identify the dataset.
11. Navigate to the Data governance section and select each check box.



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- I'm assuring to use data responsibly for AI Evaluation
- Scan for personally identifiable or information sensitive data before creating datasets. You can turn this off if you prefer.

  Note: If you opt in, your data is scanned for sensitive data like names or email addresses using vault service. After the scan, records will be highlighted and give you an option to anonymize them. You can also choose to scan the dataset after it is generated.

12. Select **Generate dataset**.
    Fields of any data type are stored as strings when converted to a data asset.
    The dataset is added to the data assets.

What to do next

After your dataset is added to the data catalog, you can choose to create a smaller dataset. TO do this,c reate a derived dataset or add a ground truth to your existing data set. For more information, see Create a derived dataset or Add a ground truth to each dataset record.

Create a derived dataset

Create a smaller dataset from an existing dataset through generative AI by using the AI Data Kit application. A derived dataset enables you to choose a smaller dataset.

Before you begin

Role required: sn_data_kit.admin

About this task

After you add a dataset to the data catalog, you can create a smaller dataset or derived dataset from the Create derived dataset page.

Procedure

1. Select the dataset where you want to create a derived dataset.
2. Select **Create derived dataset**.

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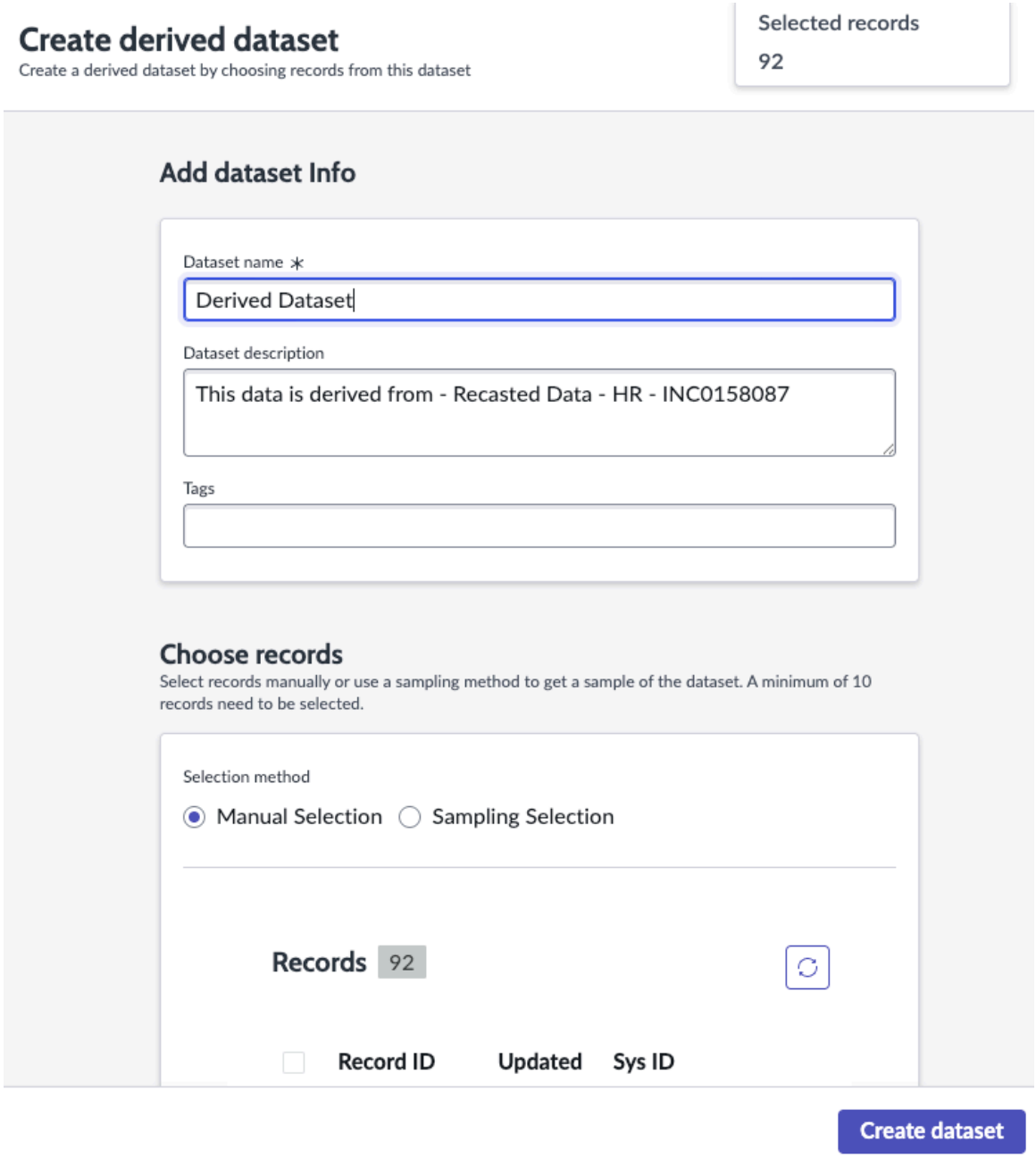
3. Add information for the new derived dataset.



New derived dataset info form

Field	Description
Dataset name	Name of the dataset.
Dataset description	Description of the dataset.
Tags	Tags to identify the dataset.

4. Navigate to the Choose records section and select a data selection method for your user. You can select records manually or use a sampling method to choose the data. If you select a sampling selection, use the drop-down menu and then enter a number in the sample size box.
5. Select **Run**.

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6. Preview the record results and select **Create dataset**.
   The derived dataset is added to the data catalog as a separate dataset.

What to do next
After the derived dataset is completed, you can add the ground truth.

Generate synthetic data

Create synthetic data with a sample dataset and a prompt through generative AI by using the AI Data Kit application. You can use synthetic data to create training for a test model or an evaluation dataset.

Before you begin
Role required: sn_data_kit.admin

Procedure
1. Navigate to **All** > **AI Data Kit** > **Home**.
2. Select the **Synthetic datasets** tab.
3. Select **Generate dataset**.
4. Choose how you want to generate data.

Way to generate synthetic data

Method	Description
Use a default generator	The Default Data Generator creates flat records based on a fixed schema with files like name, description, and short description. By providing a few examples, the model learns the structure and generates consistent, realistic data, making it suitable for typical use cases. These configurations can also be saved as templates for easy reuse.

5. On the Add job info page, fill in the fields.

Add job info form

Field	Description
Job name	Name of the generated data.

6. Navigate to **Define data** .
7. **Optional:** Select a template.

Synthetic data templates

Template	Description
Catalog item	Service Catalog is a user-friendly interface that allows end-users to browse, request, and manage services and products offered by the

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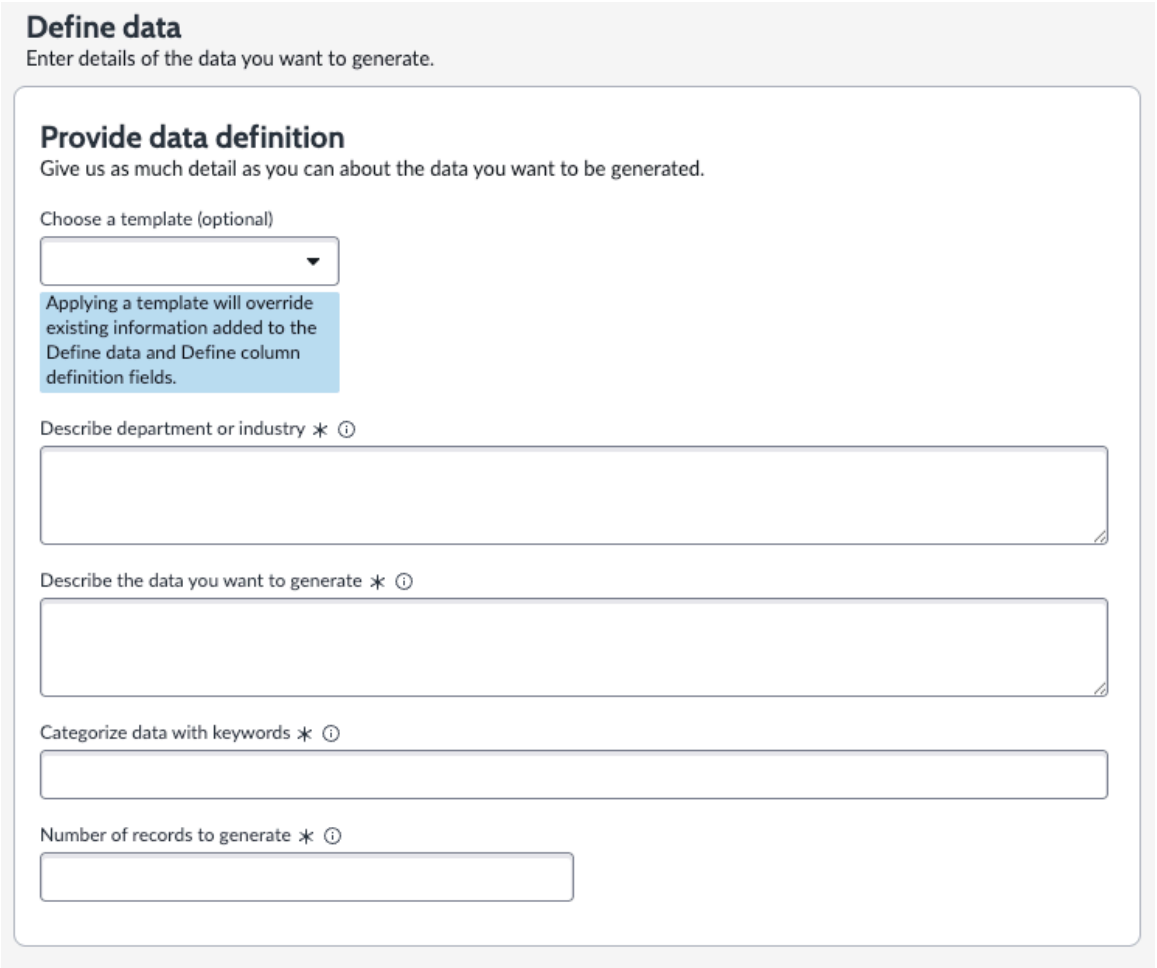
Template	Description
	organization, streamlining self-service and improving operational efficiency.
Incident data	Information Technology Service Management is a business function that involves managing IT services and processes to meet business needs effectively.



8. On the form, fill in the rest of the fields.

Define data form

Field	Description
Name	Department or industry where the data belongs.
Type	Data that you want to generate.
Category	Data that has been categorized with keywords.
Count	Number of records to generate.

Note: If you have sample data available, you can navigate to Select the sample data to enhance the accuracy of the generated data. If you don't have sample data, refer to the in-product help for guidance.

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9. Select **Continue**.
10. Add your sample data by navigating to Define columns to generate data.
    The columns are populated when you add the sample data. If no sample data is available, you must manually populate the columns with data.
11. Select **Continue**.
12. **Optional:** Add additional rules to improve generated data.
13. Select the number of records to generate for testing.
14. Select **Start generation**.

Select the sample data

Add the available sample data to enhance the accuracy and relevancy of the generated data in the AI Data Kit application. The sample data can be curated, added into the data collection, or published.

Before you begin
Role required: sn_data_kit.admin

Procedure

1. Navigate to **Select sample data**.
2. In the Select table and columns pop-up window, select an existing dataset in the Data collection field.
3. Navigate to **Continue** to select up to three records.
   The data is populated in the different columns.
4. Enter the descriptions for each column that you want to generate the data for.
   Describe the columns for the large language model (LLM) to generate values accordingly.
5. Set the key column toggle switch on one column.
   The key column is required and used as a baseline for creating the data in the other columns.
6. Navigate to **Test generation** to preview a small number of records before generating a full dataset.
   When previewing a small number of records, you can make adjustments before generating a full dataset.
7. Select the records to generate for testing.
8. Select **Start testing**.
   You see the preview generation data results page. If you want more refined results, select **Define data** or **Select sample data** to update the criteria.
9. If you're satisfied with the preview results, select **Start generation** for all the data.
   The generated data is completed.

Define columns to generate data

Provide detailed definitions to preview a test for each column that you want the data to generate the results for.

Before you begin
Role required: sn_data_kit.admin

About this task
For better quality data, use fewer than 20 columns.

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Procedure

1. Enter a description for each column that you want to generate data for.
   Describe the columns for the large language model (LLM) to generate values accordingly. This description can include a range and any rules or limitations to be considered.
2. Enable one column as the key column.
   The key column is required and used as a baseline for creating data in other columns.
3. Select **Continue**.
   The test generation page opens.
4. Navigate to **Test generation** to preview a small number of records before generating a full dataset.
5. Select the records to generate for testing.
6. Select **Start testing**.
   You see the preview generation data results page. If you want more refined results, navigate to **Define data** or **Select sample data** to update the criteria.
7. Select **Start generation**.
   The generated data is completed.

Add a ground truth to each dataset record

Add a ground truth, which is the real-world data that is used to train and test AI models to each dataset record. You can do this task by using the AI Data Kit application.

Before you begin

Role required: sn_data_kit.admin, sn_data_kit.analyst

Procedure

1. After you create a data set, select **Create ground truth guidelines**.
2. On the form, fill in the fields.

Add ground truth info form

Field	Description
Type	○ Manual
Ground truth type	○ Summarization ○ Content generation ○ Other
Instructions	Guidelines for labelers and linguists who manually add the ground truth.
Column type	If you chose AI generated ground truth, select the column type. ○ String ○ Number ○ JSON
Column label	The name of the column that is added for the ground truth in the dataset.

3. Select **Confirm**.
   A new Record detail page opens.

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4. On the form, fill in the fields.

Record detail info form

Field	Description
Form label	Incident record number.
State	Time of the record creation.
Summarization	Manual entry of the ground truth.

You can manually enter the ground truth and rate the ground truth. These options appear in a separate column in the dataset record.

5. Select **Save and next**
The ground truth column is added in a separate column in the dataset.

What to do next
To combine this dataset with others and make the records available for evaluation, see Create a data collection.

Create a data collection

Combine one or more datasets into a data collection, choosing the columns and records to include. Then, publish the collection so that you can use it to evaluate a skill in AI Skill Kit.

Before you begin
Role required: sn_data_kit.admin

At least one dataset must exist. To learn more, see Add a dataset.

About this task
A data collection is the object that AI Skill Kit uses to evaluate a skill. A collection can combine records from more than one dataset.

Procedure

1. Navigate to **All** > *AI Data Kit* > **Home**.
2. In the **An overview of your data assets** section, select the **Datasets** tab.
3. Select the dataset that contains the records that you want.
4. At the top of the dataset page, select **Add to data collection**.
   - To create a collection, enter the data collection name, description, and relevant tags.
   - To add the dataset to an existing collection, clear the **Create Data Collection** check box. Then select the collection from the **Available data collection** field.
5. Select **Confirm**.
6. Select **Next**.
The **Add to data collection** page displays.
7. On the **Choose columns** form, select the columns that you want to add to the data collection.
8. In the **Choose records** section, select a selection method.

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Selection method	Action
Manual Selection	Select the check box for each record that you want to include. If you don't select any records, all records in the dataset are added to the collection.
Sampling Selection	In the **Sampling Method** field, select **Random Sampling**. In the **Sample size** field, enter the number of records to include, and then select **Run**. The sampled records appear in the records list.

9. At the bottom of the page, select **Add to data collection**.

   For sampling selection, this button is available only after you run the sample.

10. Select the data collection to preview the records.
11. Select **Publish** to make the data available for evaluation.

    When you publish a collection, the collection freezes curation and becomes available for use through AI Skill Kit.

12. Select **Confirm** to make your collection available.
    The data collection is published.

What to do next
Select the published data collection in AI Skill Kit and run the evaluation.

View data insights

You can view data insights to see the completeness and distribution of your generated data.

Before you begin
Role required: sn_data_kit.admin

Procedure
1. Navigate to **All** > **AI Data Kit** > **Home**.
2. In the Generate Data section, select **Start now**.
3. Select the generated data job that you want to see data insights for.
4. Select the **Data insights** tab.
5. Select **View records** to see the records associated with each metric.

Data insight metrics

Metric	Description
Completeness	This metric helps you find empty fields and duplicated values in all records and calculates the percentage for each column.
Distribution	This metric helps you understand the categorical or statistical distribution of your

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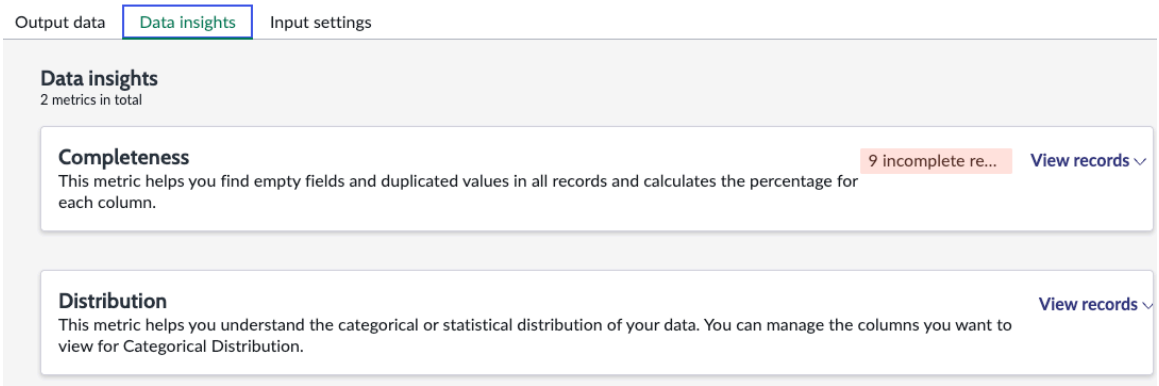
Metric	Description
	data. You can manage the columns you want to view for Categorical Distribution.



Find and cleanse sensitive data

You can scan your datasets for sensitive data, like personally identifiable information (PII). If you find sensitive data, then you can cleanse it from your datasets.

Before you begin

Role required: admin

Plugins required: sn_data_discovery, sn_dp_store_app, com.glide.data_privacy.

Procedure

1. Navigate to **All** > **AI Data Kit** > **Home**.
2. From the Discover datasets section, select **Get started**.
3. Select the dataset that you want to scan for sensitive data.
4. Select **Scan Data**.
5. If there is sensitive data in your dataset, select **Cleanse Data** to remove it.
   You can also see the records that contain sensitive data by viewing the Data Insights tab. To learn more, see View data insights.

AI Data Kit reference

Reference topics for AI Data Kit.

AI Data Kit roles (sn_data_kit.analyst)

This user can edit and save ground truth in AI Data Kit. This role has read only access within AI Data Kit.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

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Special considerations

None.

AI Data Kit admin (sn_data_kit.admin)

Provides access to all AI Data Kit features, including everything that the analyst role allows.

Contains Roles

List of roles contained within the role.

- canvas_user
- fd_read_operations
- global_tags_creator
- sn_data_kit.analyst
- sn_diagram_builder.db_read
- sn_udc.basic_read
- sn_workflow_studio.workflow_studio_read
- snc_required_script_writer_permission

Groups

List of groups this role is assigned to by default.

None.

Special considerations

- This role doesn't include AI Skill Kit roles. To evaluate skills with data collections, assign the required AI Skill Kit roles separately.
- This role doesn't grant read access to instance tables. To add records from a table as a dataset, you also need a role that can read that table.

AI Search on the ServiceNow AI Platform

AI Search is how the ServiceNow AI Platform finds and delivers the information you need.

AI Search does not operate as a standalone search engine. It is embedded in the ServiceNow AI Platform so that every AI feature has a consistent, intelligent retrieval layer to draw from. AI Search automatically locates the most relevant information from across your ServiceNow environment and makes it available to AI features.

The ServiceNow AI Platform brings together the services, models, and infrastructure that power AI-driven experiences across ServiceNow. AI Search is a core component of that platform. It is the layer responsible for finding and delivering relevant information whenever an AI feature needs it, whether that feature is generating a response, completing a task, or helping a user find what they need.

AI Search retrieves information from the sources you configure and connects AI features such as Now Assist, AI agents, and virtual assistants to your organization's data. These sources include:

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- Native platform data: tables, records, knowledge articles, catalog items, and other structured data within your ServiceNow instance.
- External enterprise content: documents and data from external repositories that are connected through External Content Connectors.
- Custom indexed sources: table and data sources you configure in AI Search to make content available for search applications, AI agents, and Now Assist.

The content AI Search can access is determined entirely by configuration. Sources must be indexed to be visible to AI Search and to be used by AI features.

How AI Search works on the ServiceNow AI Platform

AI features on the ServiceNow AI Platform follow a Retrieval-Augmented Generation (RAG) request pattern. AI Search is the retrieval half of that pattern. Without it, AI features on the ServiceNow AI Platform lose their connection to your data and can't return responses that are accurate or relevant to your environment.

RAG request pattern:

1. A request is received. A user asks a question, issues a command, or triggers an AI feature, a virtual assistant, or a search interface.
2. AI Search retrieves relevant information, and processes the request using keyword matching, context, and machine learning-based ranking. It queries across your configured sources and returns the most relevant content.
3. The retrieved context is passed to the AI feature. The results from AI Search provide the factual foundation that generative AI, AI agents, and other AI features use to generate responses, take actions, and present answers.
4. The user receives a grounded response. As the response is built on retrieved enterprise data, not general AI knowledge alone, it reflects your organization's actual environment, records, and context.

AI Search Admin

The AI Search Admin console integrates advanced AI Search features. It is a central hub for managing and monitoring AI Search capabilities across search applications. System administrators can use the AI Search Admin console to set up and manage AI Search in search applications, track AI Search activity, add features to AI Search, or access AI Search resources.

For more details, see AI Search Admin console.

ServiceNow Otto for AI Search

ServiceNow Otto for AI Search combines AI Search retrieval with generative AI to deliver answers alongside search results. When a user submits a question, AI Search retrieves the most relevant content from your configured sources and provides it to the LLM (large language model), which generates a contextual response grounded in that content. These AI-generated answers appear as Genius Results in Global Search, Service Portal, Employee Center, and the Virtual Agent, helping users resolve issues through self-service without contacting support.

For more details, see ServiceNow Otto for AI Search.

What happens without AI Search

AI Search is not an optional add-on to the ServiceNow AI Platform. It is the component that gives AI features access to information. Without AI Search:

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- AI can't ground its responses in your organization's knowledge base, records, or catalog. Answers become generic or incomplete.
- AI agents can't locate the necessary records, tasks, or data. Automated workflows stall or produce inaccurate results.
- Virtual assistants can't surface relevant self-service content or route users to the right resources.
- Search experiences fall back to basic keyword matching, losing the semantic understanding, intent recognition, and relevance ranking that AI Search provides.

When AI Search is configured and maintained, the entire ServiceNow AI Platform benefits. AI Search continuously improves its relevance ranking based on user activity and engagement, which means AI features can return more relevant results as user activity increases.

Instance requirements

To set up AI Search as part of the ServiceNow AI Platform:

- Activate and configure AI Search on your instance.
- Define data sources for AI Search indexing.
- Create search profiles for your applications, virtual assistants, and AI agents.
- Connect ServiceNow Otto to your search profile to activate generative AI features.

For configuration steps, administration guidance, and integration details, see Using AI Search Admin console.

External Content Connectors on the ServiceNow AI Platform®

The External Content Connectors application helps make ServiceNow AI more useful and context-aware. It enables the ServiceNow AI Platform to securely access content stored in external repository systems and bring that content into AI-driven experiences.

The external content connectors provided by the application act as bridges between the ServiceNow AI Platform and your external content repositories. They enable ServiceNow AI to access and use knowledge from those repositories.

This means you can ask questions, search for information, or interact with AI assistants in the ServiceNow AI Platform and receive answers that include relevant content from your organization's external content repositories without switching between systems. The result is a more connected experience, where critical information is available directly within ServiceNow AI workflows.

To learn more about the External Content Connectors application, see External Content Connectors.

External content connector overview

An external content connector is an application or integration that links the ServiceNow AI Platform to an external source system, such as Microsoft SharePoint Online or Atlassian Confluence Cloud.

Within the ServiceNow AI workflow, external content connectors serve as the content ingestion and enrichment layer. Their role includes the following key stages:

Content retrieval

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The connector connects securely to a source system and retrieves content and metadata from entities stored in that system. These may include policy and procedure documents, knowledge base articles, team sites, shared files, attachments, project documentation topics, or other entities supported by the specific source system.

Indexing and enrichment

The connector feeds its retrieved content to AI Search, which indexes it for search. As part of indexing, AI Search tags and structures the retrieved content for easier comprehension, making it easier for AI features to interpret and summarize it.

During indexing, AI Search preserves the original content's security access permissions. As a result, indexed content is only visible to ServiceNow AI Platform users who could access that content in the source system.

AI consumption and delivery

ServiceNow AI features use the indexed content to answer your questions, provide recommendations, suggest relevant documents, and summarize information in context.

Benefits of external content connectors for AI end users

Using external content connectors to populate ServiceNow AI features with your data improves your everyday experience in the following ways:

Unified search experience improves productivity

Ask your question in a single location and get results that include both ServiceNow AI Platform content and content from your external source systems.

More complete AI responses support better decision-making

ServiceNow AI feature answers are more complete and relevant. Responses can include information from your external source systems and can reference the internal knowledge that you rely on daily.

Reduced context switching offers a consistent experience

AI answers are surfaced directly within your ServiceNow workflow. You don't need to access multiple source systems or modify your search to work with each source system's search function.

Personalized access keeps vital information secure

AI features only show you content that you already have access to in the source system. Sensitive documents retain their access restrictions.

Generative AI skills

Generative AI skills use large language models to enterprise data to complete tasks within workflows. You can activate and configure skills, or build custom skills for your organization.

Generative AI

Generative AI skills apply large language models to your enterprise data to complete a single task within a workflow, such as summarizing a record or drafting a reply. To learn what they are, why they matter, and when to use them rather than an AI agent, see Understanding generative AI skills.

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ServiceNow AI assets

AI assets are the building blocks that skills and agents use, including prompts, tools, and configurations. Some skills and agents are turned on by default when you install a product, so reviewing your active assets after installation is an important early step. To check which assets are on by default, see AI agents, skills, and agentic workflows on by default.

Generative AI skills

A skill delivers a generative AI feature plus the use case to the user. Skills are organized by the workflows they serve: IT Service Management, Customer Service Management, HR Service Delivery, and others. When you activate a product for a specific workflow, the associated skills become available. ServiceNow products provide features and skills tailored to meet the needs of users in different workflows.

Note: Start with high-impact, low-complexity skills like incident summarization or case summarization. These provide immediate value with minimal behavioral change required from your users.

To find the skills available for each workflow and activate the ServiceNow products that deliver them, see Generative AI skills.

AI Skill Kit

AI Skill Kit is a development environment for building custom generative AI skills. A skill is a self-contained unit of generative AI functionality that runs a prompt against an LLM (large language model) and returns a response. Skills can gather data using tools before the prompt runs, and can be deployed to the ServiceNow Otto panel, UI actions, flow actions, virtual assistants, and UI Builder.

Each skill is made up of a prompt (the instruction template sent to the LLM), inputs (data passed in when the skill is triggered), outputs (the structured data the skill returns), optional tools (utilities that gather additional context before the prompt executes), and deployment settings that control where the skill is available. AI developers create and test skills in AI Skill Kit, then publish them for a Now Assist admin to activate in AI Admin Hub.

To build, test, and publish custom skills with their own prompts, inputs, outputs, and deployment targets, see AI Skill Kit.

AI Admin Hub

The AI Admin Hub is where admins manage generative AI on the instance. Administrators install plugins, manage skills, choose which skills to turn on and which users can access them, and analyze usage and performance. The console provides a unified view of all active skills across your instance, so you can see what is running, where it is running, and how users are interacting with it. To install plugins, choose which skills are on and who can use them, and analyze usage across your instance, see AI Admin Hub.

ServiceNow AI Lens

ServiceNow AI Lens uses generative AI to read visual data (such as images, screenshots, scanned handwritten notes, and documents), extract the information it contains, and auto-fill forms with that data. Users can capture or upload content from a browser or the desktop application, preview what ServiceNow AI Lens extracts, and create or update records without manual data entry. ServiceNow AI Lens is a skill that administrators enable in the AI Admin Hub.

To scan images and documents, extract the data they contain, and auto-fill forms, see ServiceNow AI Lens.

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Understanding generative AI skills

Generative AI skills use large language models to process your enterprise data to complete a single, well-defined task within a workflow, such as summarizing a record, drafting a reply, or recommending a next action. Skills reduce manual effort in work your users already do, without changing how they work.

A generative AI skill completes one task that is triggered in the moment that you need it. The skill sends a prompt and your data to a large language model, then returns a result you can use directly in the record or conversation you're working in, such as a summary, a drafted message, or a recommended action. Because each skill targets a specific task, you can adopt skills one at a time and see results without redesigning your processes.

Why generative AI skills matter

Skills reduce the manual, repetitive effort that slows down everyday work. A user who summarizes a long case in seconds, or who drafts resolution notes from a single prompt, spends less time writing and searching and more time resolving the issue. Skills run inside the interfaces your users already work in, so the productivity gain comes with little training and little change to established habits.

Skills also give your organization a measured entry point into AI. You can start with a common, self-contained task, review the result, and add more skills as your users build confidence.

Generative AI skills compared with AI agents

A skill and an AI agent solve different kinds of problems. A skill performs one bounded task on demand and returns control to the user, who decides what to do with the result. An AI agent, working within an agentic workflow, pursues a broader goal across multiple steps and can plan, act, and adapt with limited human intervention.

Consider a service request. A skill can summarize the request or draft a reply when a user asks for it. An agentic workflow can take the request further on its own by interpreting it, gathering the information it requires, completing the required actions, and reporting the outcome. Skills are the building blocks for individual tasks, and agents coordinate those capabilities to carry a process from start to finish.

When to use generative AI skills

Choose a generative AI skill when the work is a single, predictable task that a person starts and reviews, such as summarizing, drafting, translating, or recommending content. Skills fit well when you want an early, measurable result, when the user stays in control of each result, and when you're introducing generative AI to a team for the first time.

When an outcome requires several coordinated steps, decisions that depend on changing conditions, or actions across multiple systems without a person driving each one, an AI agent and an agentic workflow are the better fit.

AI agents, skills, and agentic workflows on by default

Starting with the Zurich Patch 4 release, some AI agents, generative AI skills, and agentic workflows are turned on by default in the ServiceNow AI Platform.

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Important: Some generative AI skills, agents, and agentic workflows are turned on by default. The default behavior works as follows:

New customers

When you install an AI product, designated generative AI skills, AI agents, or agentic workflows are turned on automatically.

Existing customers who are upgrading (starting with Zurich Patch 4)

There is no change to skills, agents, or agentic workflows that are currently enabled and customized.

An AI asset is turned on if:

- The AI plugin is installed, but the asset was never turned on.
- An admin has never adjusted roles for the skill.

An AI asset is not turned on if:

- The asset was previously turned on, and then turned off again.
- An admin has adjusted roles for the asset.

For more information, see AI agents, skills, and agentic workflows on by default.

Note: Some workflow skills support ServiceNow Otto functionality. Deactivating these skills can negatively affect some features.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

AI assets that are on by default

For a list of changes by release, see Release notes.

Product	Type	Asset name	Effective date
Enterprise Asset Management	Agentic workflow	Help repair enterprise assets	April 9, 2026
Impact	Skill	Outcome summarization	December 11, 2025
ServiceNow Otto for Accounts Payable Operations (APO)	Skill	Invoice case summarization	December 11, 2025
		Purchase order summarization	December 11, 2025
ServiceNow Otto for Cloud Cost Management (CCM)	Skill	Cloud cost summarizer	September 10, 2026
ServiceNow Otto for Collaborative Work Management (CWM) (CWM)	Skill	Acceptance criteria generation	December 11, 2025
		Doc generation	December 11, 2025

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Product	Type	Asset name	Effective date
		Task generation	December 11, 2025
ServiceNow Otto for Configuration Management Database (CMDB)	Skill	Configuration item (CI) summarization	December 11, 2025
		Manage duplicate CIs	December 11, 2025
		Service Graph Connector diagnosis	December 11, 2025
		Summarize CMDB readiness	July 9, 2026
	Agentic workflow	Search CMDB	December 11, 2025
Contract Management Pro	Skill	Contracts query enhancer	December 11, 2025
		Contracts query classifier	April 9, 2026
		Duration to days converter	December 11, 2025
		Search contract with contextual input	December 11, 2025
ServiceNow Otto for Core Business Suite (CBS)	Agent	CBS bulk upload agent	April 9, 2026
		CBS configuration agent	April 9, 2026
		IA orchestration agent	April 9, 2026
		Manage groups and roles agent	April 9, 2026
		Notification agent	April 9, 2026
	Skill	Next Best Action	April 9, 2026
		Error Resolution	April 9, 2026
	Agentic workflow	AI agentic workflow for the CBS setup	April 9, 2026
ServiceNow Otto for Creator	Skill	Spoke generation	December 11, 2025
		Playbook summarization	June 11, 2026
ServiceNow Otto for Customer Service Management (CSM)	Skill	Live Agent Assist - Followup Query Enhancer	April 9, 2026

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Product	Type	Asset name	Effective date
		Live Agent Assist - Interaction Analyser	July 9, 2026
		Live Agent Assist - KG Query Generator	July 9, 2026
		Live Agent Assist - Recommendation Generator	July 9, 2026
	Agent	Live Agent Assist	July 9, 2026
		AI voice	April 9, 2026
		Update case AI voice	June 11, 2026
ServiceNow Otto for Employee Experience	Skill	Case summarization for approvals	April 9, 2026
		Requested item summarization for approvals	April 9, 2026
		Request summarization for approvals	April 9, 2026
ServiceNow Otto for Enterprise Architecture (EA)	Skill	ADR DOC actions	December 11, 2025
		ADR DOC summarization	December 11, 2025
		Business application insights	December 11, 2025
		Create diagram from image	June 11, 2026
		Diagram change analysis	December 11, 2025
		Refine text	December 11, 2025
	Agent	Enterprise Architecture query agent	
Operational Sustainability Management (formerly Environmental, Social, and Governance)	Skill	Extract data from utility invoices	December 11, 2025
ServiceNow Otto for Hardware Asset Management (HAM)	Agent	User resolution mapping agent	December 11, 2025
	Skill	Generate hardware asset insights	April 9, 2026

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Product	Type	Asset name	Effective date
	Agentic workflow	Help repair hardware assets	December 11, 2025
ServiceNow Otto for Health and Safety	Skill	Incident summarization	December 11, 2025
		H&S Action Planner	June 11, 2026
ServiceNow Otto for Integrated Risk Management (IRM)	Skill	Common control objective creation	December 11, 2025
		Control objective impact analyzer	December 11, 2025
		Issue summarization	December 11, 2025
		Recommendation of similar control objectives	December 11, 2025
		Regulatory alert summarization	December 11, 2025
		Regulatory alert impacted citations	December 11, 2025
		Regulatory alert impacted control objectives	December 11, 2025
		Regulatory alert impacted controls	December 11, 2025
		Regulatory alert impacted policies	December 11, 2025
		Risk assessment summarization	December 11, 2025
		Risk event summarization	December 11, 2025
	Agent	Control objective change agent	December 11, 2025
		Regulatory change task planning agent	December 11, 2025
		Report an issue	June 11, 2026
		Risk suggestion AI agent	December 11, 2025
	Agentic workflow	Get regulatory analysis	December 11, 2025
		Generate regulatory action plans	December 11, 2025
		Suggest potential risks	December 11, 2025

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Product	Type	Asset name	Effective date
		Optimize issue resolution	June 11, 2026
IT Operations Management	Skill	Analyze service health	March 12, 2026
		Analyze service observability dashboard	March 12, 2026
		Alert analysis	January 20, 2026
		Alert investigation	January 20, 2026
	Agentic workflow	Manage alerts autonomously	January 20, 2026
		Analyze alert impact	June 11, 2026
	Agent	Azure Monitor MCP Server	August 6, 2026
		AWS Observability	June 11, 2026
		SolarWinds Observability	June 11, 2026
		Datadog APM MCP Server	June 11, 2026
		Dynatrace MCP Server	June 11, 2026
		Gemini Cloud Assist A2A Investigation	August 6, 2026
		Kentik analysis	June 11, 2026
		New Relic MCP Server	June 11, 2026
		Prometheus API	June 11, 2026
		Prometheus Observability	July 9, 2026
		Splunk MCP Server	June 11, 2026
		Splunk Observability	August 6, 2026
		Service level objective (SLO) creator	March 12, 2026
		ThousandEyes Observability	June 11, 2026

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Product	Type	Asset name	Effective date
ServiceNow Otto for IT Service Management (ITSM)	Skill	Change request summarization	December 11, 2025
		Chat summarization	December 11, 2025
		Generate change risk assessments answers and reasoning	July 9, 2026
		Incident summarization	December 11, 2025
		KB generation	April 9, 2026
		Resolution notes generation	April 9, 2026
		Chat reply recommendation	April 9, 2026
		Investigate boot time issues	April 9, 2026
		Investigate Zoom call quality issues	April 9, 2026
	Agentic workflow	Incident assist	April 9, 2026
Legal Service Delivery	Skill	Legal matter summarization	December 11, 2025
		Legal request summarization	December 11, 2025
		Conversational intake for Conflict of Interest request	March 12, 2026
	Agentic workflow	Triage legal requests	December 11, 2025
AI in Manufacturing Commercial Operations	Agent	Plan and execute recall campaign phases and sub-phases	March 12, 2026
Operational Technology (OT) Manager Foundation	Skill	Search for a related record	December 11, 2025
	Agentic workflow	Import OT device spreadsheet into OT CMDB	December 11, 2025
ServiceNow Otto for Operational Technology (OT) Service Management	Skill	OT incident summarization	March 12, 2026
		OT resolution notes generation	March 12, 2026

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Product	Type	Asset name	Effective date
	Agentic workflow	Generate OT KB articles agentic workflow	March 12, 2026
ServiceNow Otto for Privacy Management	Skill	Common control objective creation	December 11, 2025
		Control objective impact analyzer	December 11, 2025
		Recommendation of similar control objectives	December 11, 2025
		Risk assessment summary	December 11, 2025
Public Sector Digital Services (PSDS)	Agent	Investigative Case Management AI agents	March 12, 2026
ServiceNow Otto for Purchase Order Management (POM)	Agentic workflow	Define PO exception mitigation strategy	March 12, 2026
		Intent to Action	March 12, 2026
ServiceNow Otto for Security Incident Response (SIR)	Skill	Correlation insights generation	December 11, 2025
		Post-incident analysis	December 11, 2025
		Resolution notes generation	December 11, 2025
		Security incident quality assessment	December 11, 2025
		Security incident recommended actions	December 11, 2025
		Security incident summarization	December 11, 2025
	Agentic workflow	Analyze security operations metrics	March 12, 2026
		Close security incident	March 12, 2026
		Generate SIR shift handover report	March 12, 2026
		Resolve security incident	March 12, 2026
ServiceNow Otto for Software Asset Management (SAM)	Skill	Publisher compliance summarization	December 11, 2025
		Product compliance summarization	December 11, 2025
		Recommended actions	December 11, 2025

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Product	Type	Asset name	Effective date
		SaaS user resolution	December 11, 2025
		Error log summarization	April 9, 2026
		Error resolution recommendation	April 9, 2026
		Contract entitlement data extraction	April 9, 2026
		Product match reviewer	June 11, 2026
		Software normalization	June 11, 2026
	Agentic workflow	Reclamation rule creation	December 11, 2025
		Removal candidate evaluation	December 11, 2025
ServiceNow Otto for Strategic Portfolio Management	Skill	EAP doc summarization	December 11, 2025
		Identify similar records	December 11, 2025
		Multi feedback summarization	December 11, 2025
		Planning item doc summarization	December 11, 2025
		Project doc summarization	December 11, 2025
		Project insights generation	December 11, 2025
		Refine records	December 11, 2025
		Target generation	December 11, 2025
		Demand summarization	March 12, 2026
	Agentic workflow	Create stories	December 11, 2025
		Monitor project tasks	December 11, 2025
ServiceNow Otto for Sourcing and Procurement Operations (SPO)	Skill	Negotiation summarization	December 11, 2025
		Procurement case summarization	December 11, 2025

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Product	Type	Asset name	Effective date
		Purchase requisition summarization	December 11, 2025
		Sourcing event summarization	December 11, 2025
		Sourcing request summarization	December 11, 2025
ServiceNow Otto for Supplier Lifecycle Operations (SLO)	Skill	Supplier case summarization	December 11, 2025
		Supplier performance summarization	March 12, 2026
		Email response	March 12, 2026
		Sentiment analysis	March 12, 2026
ServiceNow Otto for Sales Customer Relationship Management for Telecommunications	Agent	Move order voice AI	March 12, 2026
ServiceNow Otto for Telecommunications, Media, and Technology (TMT)	Agentic workflow	Squad resource identifier	March 12, 2026
		Product release email communication	March 12, 2026
	Agent	Service Exchange Knowledge Assistant	July 9, 2026
GRC: Third-party Risk Management (TPRM)	Skill	TPRM issue summarization	December 11, 2025
		TPRM issue recommendation	March 12, 2026
ServiceNow Otto for Threat Intelligence Security Center (TISC) (TISC)	Skill	TISC case summarization	June 11, 2026
		TISC report authoring	July 9, 2026
Vulnerability Response	Skill	Generate remediation assistance	December 11, 2025
		Now Assist recommendation	December 11, 2025
		SEM insights	December 11, 2025
		SPC setup connector	December 11, 2025
		Suggest vulnerability solutions	December 11, 2025

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Product	Type	Asset name	Effective date
		Vulnerable item deduplication	December 11, 2025
ServiceNow Otto for Vault	Agentic workflow	Access observer configuration	April 9, 2026
		Field encryption and auto-generate access policies	September 10, 2026
		Field encryption with Vault module	April 9, 2026
		Securing custom apps with Vault agents	April 9, 2026
		Summarize access observer logs	April 9, 2026
		Classify assets with ServiceNow Vault agents	October 10, 2026
ServiceNow Otto for Workplace Service Delivery (WSD)	Skill	Workplace case summarization	March 12, 2026
	Agentic workflow	Workplace Concierge	April 9, 2026
ServiceNow Otto for Zero Copy Connector	Skill	ERP data discovery	December 11, 2025
		ERP data query	December 11, 2025
ServiceNow Otto for Platform Analytics	Skill	Analytics follow-up generation	December 11, 2025
		Analytics hidden insights generation	December 11, 2025
		Analytics insights generation	December 11, 2025
		Analytics query generation	December 11, 2025
		Dashboard and visualization export	January 20, 2026
Now Assist Platform	Skill	AI agents	December 11, 2025
		Conversational Help	December 11, 2025
		Custom skills	December 11, 2025
		Extract information from documents	April 9, 2026
		Now Assist Multi-Turn Catalog Ordering	December 11, 2025

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Product	Type	Asset name	Effective date
		Now Assist Q&A Genius Results	December 11, 2025
		Now Assist Topics	December 11, 2025
		Requester approval checklist	February 5, 2026
		Smart documents	July 9, 2026
		Subflows and actions	December 11, 2025
Platform agentic workflows	Agentic workflow	Error Analysis and Remediation workflow	June 11, 2026
ServiceNow AI Platform AI agents	Agent	Error Analysis and Remediation agent	June 11, 2026

Generative AI skills

ServiceNow AI Platform products contain generative AI skills that are tailored to meet the needs of users in different workflows.

By default, all skills exist in the global domain. When you use AI in a domain-separated environment, users are only able to access data in their domain. For example, if a user uses the summarization skill, AI only uses material that exists in the user's domain when generating that summary. Additionally, there is no co-mingling of data for domain-separated instances when using generative AI skills. The data resides only on the instance, and the shared services used for generative AI do not persist any requests (prompts) and responses. For more information, see Domain separation in the AI Admin Hub console. (Note that global domain is not the same as global scope. For more information, see Exploring Next Experience pickers.)

Important: Some generative AI skills, AI agents, and agentic workflows are turned on by default. For more information, see AI agents, skills, and agentic workflows on by default.

Note: Some workflow skills support ServiceNow Otto functionality. Deactivating these skills can negatively affect some features.

IT and digital operations

Product	Available skills
ServiceNow Otto for Collaborative Work Management (CWM)	• Acceptance criteria generation • CWM subtask generation • CWM contextual task generation • Docs summarization • Doc generation • Task generation

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Product	Available skills
ServiceNow Otto for Cloud Cost Management (CCM)	Cloud cost summarizer
ServiceNow Otto for Enterprise Architecture (EA)	• ADR DOC summarization and actions • Business application insights • Review AI-generated business process map diagram • Diagram change analysis • Refine text • Register a business application • Register a digital integration
ServiceNow Otto for Hardware Asset Management (HAM)	• Generate hardware asset insights
IT Operations Management	ITOM Visibility • Service mapping candidate • Service mapping candidates impact ITOM AIOps • Alert analysis • Alert group analysis • Alert group description generation • Past incident analysis • AI-generated incident creation • Analyze service observability dashboard • Analyze service health • Error analysis
IT Service Management	• Change request risk explanation • Change request summarization • Chat reply recommendation • Chat summarization • Email recommendation • Generate change risk assessments answers and reasoning • Incident activity response generation • Incident assist • Incident sentiment analysis • Incident summarization • Investigate boot time issues

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Product	Available skills
	• Investigate Zoom call quality issues • KB generation • Major incident management email content recommendation • Release notes generation • Request activity response generation • Requested item activity response generation • Resolution notes generation • Sidebar discussion summarization • Suggested steps generation
Operational Technology (OT) Manager Foundation	Search for a related record
ServiceNow Otto for Operational Technology (OT) Service Management	• OT incident summarization • OT resolution notes generation
ServiceNow Otto for Software Asset Management (SAM)	• Extract entitlements from contract • Error log summarization • Error resolution recommendation • Publisher compliance summarization • Product compliance summarization • Recommended actions • SaaS user resolution • Contract entitlement data extraction • Product match reviewer • Software normalization • Spend transaction software classification • Spend transaction software normalization
ServiceNow Otto for Strategic Portfolio Management	• Acceptance criteria generation • Create a demand • EAP doc summarization • Epic status assessment • Goal insights • Identify similar records • Multi feedback summarization • Planning item doc summarization

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Product	Available skills
	• Portfolio insights • Project doc summarization • Project insights generation • Project plan generation • Refine records • Risk generation • Story generation • Target generation • Write planning item

Security and Risk

Product	Available skills
ServiceNow Otto for Operational Sustainability (formerly ESG)	Extract data from utility invoices
ServiceNow Otto for Integrated Risk Management (IRM)	• Common control objective creation • Control objective impact analyzer • Generate recommendation for similar control objective • Issue summarization • Recommendations for regulatory alert impacted areas • Recommendation of similar control objectives • Regulatory alert summarization • Regulatory alert impacted citations • Regulatory alert impacted control objectives • Regulatory alert impacted controls • Regulatory alert impacted policies • Risk assessment summarization • Risk event summarization Risk event summarization in the classic UI
ServiceNow Otto for Privacy Management	• Control objective impact analyzer • Common control objective creation • Recommendation of similar control objectives • Risk assessment summary • GRC case summarization

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Product	Available skills
GRC: Compliance Case Management	GRC case summarization
GRC: Third-party Risk Management (TPRM)	TPRM issue summarization
ServiceNow Otto for Smart Assessment Engine (SAE)	Draft response generation
ServiceNow Otto for Security Incident Response (SIR)	• Correlation insights generation • Generate content for shift handover • Post-incident analysis • Resolution notes generation • Security incident quality assessment • Security incident recommended actions • Security incident summarization • Security operations metrics analysis
Threat Intelligence Security Center	TISC case summarization
Vulnerability Response	• Approval recommendation • Now Assist recommendation • SEM insights • SPC setup connector • Suggest vulnerability solutions • Vulnerable item deduplication

Customer experiences (CRM)

Product	Available skills
ServiceNow Otto for Customer Service Management (CSM)	• Activity response generation • Automated quality assurance • Call summarization • Case summarization • Chat recommendation • Chat summarization • Create case based on service definition recommendations • Customer summarization • Email recommendation

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Product	Available skills
	• KB generation • Resolution notes generation • Sentiment analysis case • Sentiment analysis dashboard • Sentiment analysis for email interactions • Sidebar summarization • Special handling notes summarization • Suggested steps generation • Trending topics dashboard
Field Service Management	• KB generation • Sidebar summarization • Work order task summarization
Financial Services Operations (FSO)	• Case summarization • Disputes intake via Virtual Agent • Customer profile summarization • Customer interaction context summary
Sales Customer Relationship Management (Sales CRM)	Order summarization
Public Sector Digital Services (PSDS)	• Government case summarization • Chat summarization • Document screening • Investigative case narrative refinement • Investigative case summarization
Customer Success Management	• Account onboarding case summarization • Analyze metric trend • Customer play summary • Engagement summary • Internal play summary • Renewal insight engine • Risk signal and issues summary

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Product	Available skills
	• Success initiative summary • Touchpoint summary
Product Support for Technology	• Event-context candidate recommender • Executive insight generator
Telecommunications, Media, and Technology (TMT)	• Comprehensive summary of linked records • Customer service summary • Deadlock letter draft generation • Generate Telecom Customer 360 insights • Remote hands request summarization • Resolution notes generation • Resolution notes generation for ADR • Service problem case summarization • Test summarization •
Service Exchange	Transform mapping assist

Employee experiences

Product	Available skills
ServiceNow Otto for Employee Experience	• Requested item summarization for approvals • Request summarization for approvals • Case summarization for approvals
ServiceNow Otto for Health and Safety	Incident summarization
ServiceNow Otto for HR Service Delivery (HRSD)	• Case summarization • Chat reply recommendation • Chat summarization • Email recommendation • KB generation • Employee information summarization • Resolution notes generation • Sentiment analysis for HR case

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Product	Available skills
	• Sentiment analysis for HR task • Sidebar discussion summarization
Legal Service Delivery	• Get category of the legal request • Legal matter summarization • Legal request summarization • Triage legal request AI Search • Triage legal request capability
Contract Management Pro	• Contract analysis • Contract metadata extraction • Contract obligation extraction • Contracts query classifier • Conversational contract search and insights
ServiceNow Otto for Workplace Service Delivery (WSD)	• Reserve Space Virtual Agent topic • Workplace case summarization
ServiceNow Otto for Accounts Payable Operations (APO)	• Email response for invoice case • Email response for invoice task • Invoice case summarization • Invoice inquiry solution generator • Knowledge article generation for invoice case • Purchase order line mapping • Purchase order summarization • Sentiment analysis
ServiceNow Otto for Supplier Lifecycle Operations (SLO)	• Email response • Sentiment analysis • Supplier case summarization • Supplier summarization • Supplier performance summarization
ServiceNow Otto for Sourcing and Procurement Operations (SPO)	• Negotiation summarization • Procurement case summarization • Purchase requisition summarization

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Product	Available skills
	• Sourcing event summarization • Sourcing request summarization

AI Platform

Product	Available skills
Now Assist skills in the Platform workflow	• Article optimization • Catalog item form slot-fill • Complete record generation • Conversational Help • Document summarization • Dynamic Guidance • Extract information from documents • GAF skills • Identify duplicate articles • Knowledge content recommendation • Navigation • New column data generation • Potential knowledge gaps • Requester approval checklist • ServiceNow Lens • Smart documents • Standard ticket page • TextToResult • Voice Assist for Docs
ServiceNow Otto for Configuration Management Database (CMDB)	• Analyze the CMDB search request • CI form contextual help • Configuration item (CI) summarization • Manage duplicate CIs • Service Graph Connector diagnosis • Summarize CMDB readiness

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Product	Available skills
ServiceNow Otto for Vault	• Check role access • Generate custom data pattern • Schedule Data Discovery job
ServiceNow Otto for Zero Copy Connector	• ERP data discovery • ERP data query
Now Assist skills for Analytics	AI Data Explorer skills • Analytics exploration • Exploration summarization • Refine text in exploration Query Generation skills • Analytics query generation • Analytics insight generation • Analytics follow up generation • Analytics hidden insight generation Skills installed by default with Platform: • Dashboard and visualization export • Data visualization generation
Localization Workspace	Generate Glossary

App development

Product	Available skills
ServiceNow Otto for App Engine	Custom app record summarization
Creator	• Build Agent • Catalog item generation • App summary generation • Summarize a client script using ServiceNow Otto • Code Assist autocomplete • Code Assist edit • Code assist summarization • Code Assist generation • Event handler generation • Create an AI-generated experience

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Product	Available skills
	• Turn on the Flow execution analysis skill • Flow generation • Flow generation with images • Flow recommendations • Flow summarization • Mobile card generation • Playbook generation • Playbook generation from KB • Playbook generation with images • Playbook recommendations • Playbook summarization • Process inefficiency highlights • Robotic Process Automation (RPA) bot generation skill • Spoke generation • Work notes analysis

Impact

Product	Available skills
Impact The Impact workflow contains technical accelerators that can help you get started more quickly with some Now Assist features.	• Jumpstart Your ServiceNow Otto for Creator • Jumpstart Your ServiceNow Otto for Document Intelligence • Jumpstart Your ServiceNow Otto for Virtual Agent • Jumpstart Your ServiceNow Otto Skill Kit

Now Assist skills in the Platform workflow

Most Now Assist generative AI products include skills in the Platform workflow, such as product navigation. Some Now Assist products include skills for the conversational user and platform experience, as well as knowledge article recommendations.

Auto activation of generative AI platform skills

Starting with the Zurich Patch 4 release, some generative AI platform skills for Now Assist will be active by default. This is applicable for commercial and regulated market customers.

- New users: When you install the Now Assist plugins, the related Now Assist skills will be turned on automatically.
- Existing users: When you upgrade the Now Assist plugins, any unused skill will turn on.

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1. If you have installed the plugins but never configured, activated or changed roles for a skill, any skill with 'Default On' status will be enabled individually, after the upgrade.
2. If you have modified any role for a skill, turned it off and then back on, that skill will stay turned off after the upgrade; maintaining your last known selection.

Some skills, such as the Group Action Framework (GAF) skills, support Platform functionality and may require specific configuration.

Article optimization

The article optimization skill in ServiceNow AI Platform provides recommendations for improving the quality and health of knowledge articles, providing actionable feedback to authors and managers. The recommendations for knowledge articles become available after you activate the Article Optimization skills in Now Assist Admin.

Article optimization is a Platform skill that is enabled by the admin from the Knowledge feature card. The skill allows agents and authors to review and use article optimization recommendations to improve the quality and health of their knowledge articles.

For more information, see Review and optimize articles using Article Optimization.

Catalog item form slot-fill

With the catalog item form slot-fill skill, Now Assist can automatically complete catalog item forms based on what users search for.

For instance, if requester looks up a standard laptop with 256 GB storage in silver color, the resulting form will have those specifications already filled in provided they're part of the form. Requester can quickly review these pre-filled forms, making requests faster and more efficient.

To enable this feature, activate the catalog item form slot-fill skill so that requesters see their search criteria reflected in the catalog item request forms. As soon as requesters searches for an item, relevant fields in the form are populated with their search information, minimizing repetitive entry and streamlining the request process.

Pre-filled fields show AI icons to help users validate values populated by Now Assist.

Note: Order guides, as well as the following variables, are not supported:

- MRVS (Multi-Row Variable Sets)
- Custom and custom with labels
- Attachments
- Masked
- Break
- Container
- UI page
- HTML

Now Assist Conversational Help

This skill uses Generative AI application capabilities to provide answers to the questions on the Now Assist panel.

https://player.vimeo.com/video/1088792812?h=bceb334712&badge=0&autopause=0&player_id=0&app_id=58479.

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Important: Starting with the Australia release, Conversational Help Skills is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported. For details, see the Deprecation Process article [KB0867184] in the Now Support Knowledge Base.

You can install the External Content Connectors Application Suite from the ServiceNow store

and use NAp Synthesized Search with ServiceNow Docs.

Important: This generative AI skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see AI agents, skills, and agentic workflows on by default.

The Now Assist Conversational Help skill displays as **Get Help** on the Now Assist panel.

Note: The Get Help feature is available as a part of Now Assist entitlements and no new subscription is required. The feature is enabled by default and you can turn it off in the AI Admin Hub **Settings**.

How Conversational Help works

You can ask your question by selecting **Get Help** skill and submit a query to use the help option in the Now Assist panel. Your query goes through the following steps to retrieve the best response.

Note: Conversational Help Skills is not available as auto-discoverable as a help skill within Now Assist panel.

1. AI search

   The query is be sent to a **central ServiceNow instance**, where **AI Search** will search the knowledge table that stores content from product doc content.

   We use Instance Data Replication (IDR) that synchronizes product documentation content from Now Support instances.

   Note: Multiple central ServiceNow instances are deployed across three regions: US East or US West, EMEA, and APJC.

2. The top matching chunks (or records) along with the user's query, are sent to the Now Assist Q&A Genius Result configuration to generate a meaningful, contextual answer.
3. Re-ranking

   The Now Assist Q&A, an out of box (OOB) capability, re-ranks the retrieved chunks to ensure better relevance.

4. Cache lookup
   - If the user query exists in the cache, the pre-stored answer is returned.
   - If the query is not cached, the query and re-ranked chunks are sent to Now LLM to generate a meaningful answer.

The Now LLM retrieves the most relevant result from https://www.servicenow.com/docs/ portal and displays it in the same panel.

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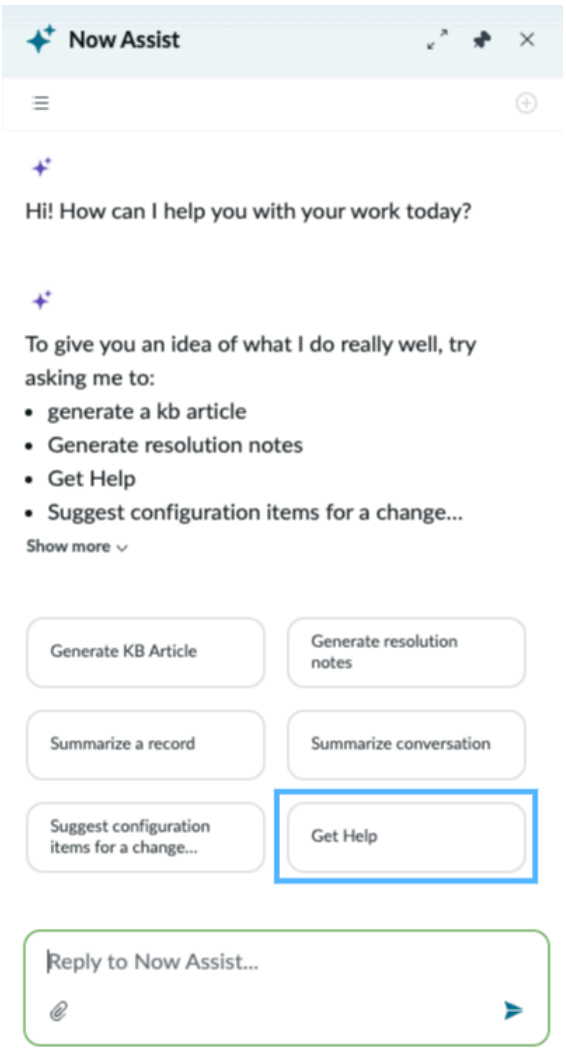
Note: Effective from this release, the query will retrieve results based exclusively on the release version of the user's current instance. This enhancement is integrated into the query process to ensure the delivery of precise results that reflect the latest updates and features.



For more information, see Fetch end points in Now Assist Conversational Help skills.

Now Assist extract information from documents

The extract information from documents skill allows you to use Now Assist predictions to extract information from document and image files.

Now Assist uses generative AI capabilities to extract values from the document based on the fields, tables, and questions defined in the skill's use case. The extracted information is turned into structured data that can be used in the platform.

Agents can use the Document Intelligence workspace to review and confirm the extracted information.

Extracted information in the Document Intelligence workspace

For more information, see .

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Knowledge content recommendation

Knowledge generative AI skills on the ServiceNow AI Platform provides recommendations for editing a knowledge article. Once activated, this skill is available on the ServiceNow Otto context menu.

The ServiceNow Otto Knowledge content recommendation is a Platform skill that is enabled by the admin from the Knowledge feature card. The skill allows agents and authors to use the ServiceNow Otto context menu to elaborate and shorten content in a knowledge article.

For more information, see Edit an article using the ServiceNow Otto context menu.

Navigation

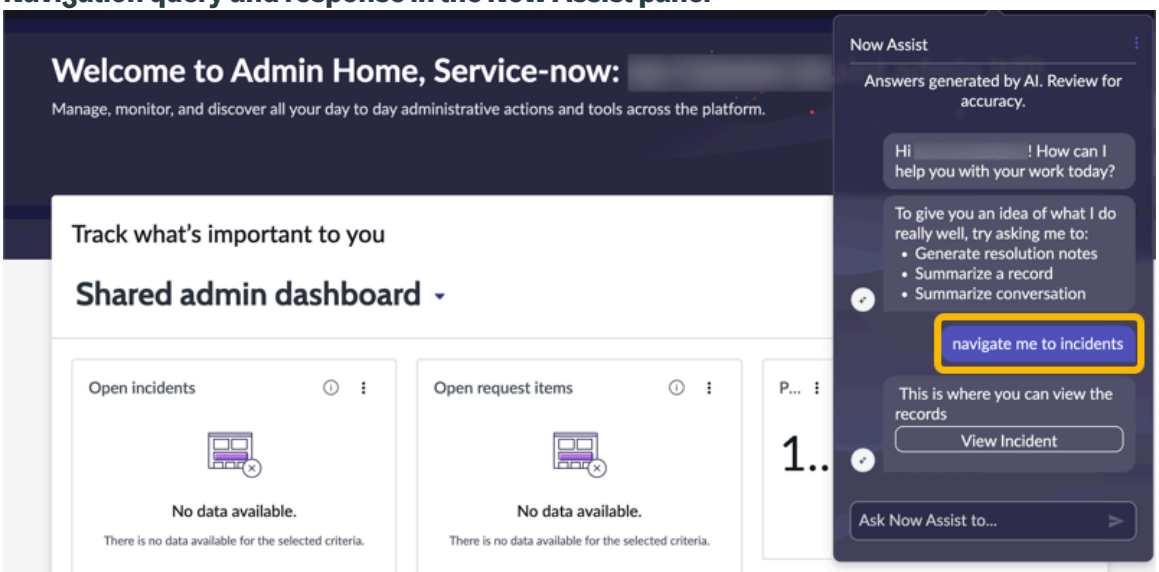
Use the navigation skill in Now Assist to take you where you want to go on the ServiceNow AI Platform.

Overview of navigation

Navigation is a skill in the Now Assist panel that handles record search requests during a chat. When you ask for records or tables in plain language Now Assist shows you links in the chat to take you to the best match to your request. For example, you could enter `Show me incident records`.

In the following figure, the user entered `navigate me to incidents` in the Now Assist panel. Now Assist responds with a link to the Incidents table.

Navigation query and response in the Now Assist panel



When you click the link, the list of all records in the Incidents table displays.

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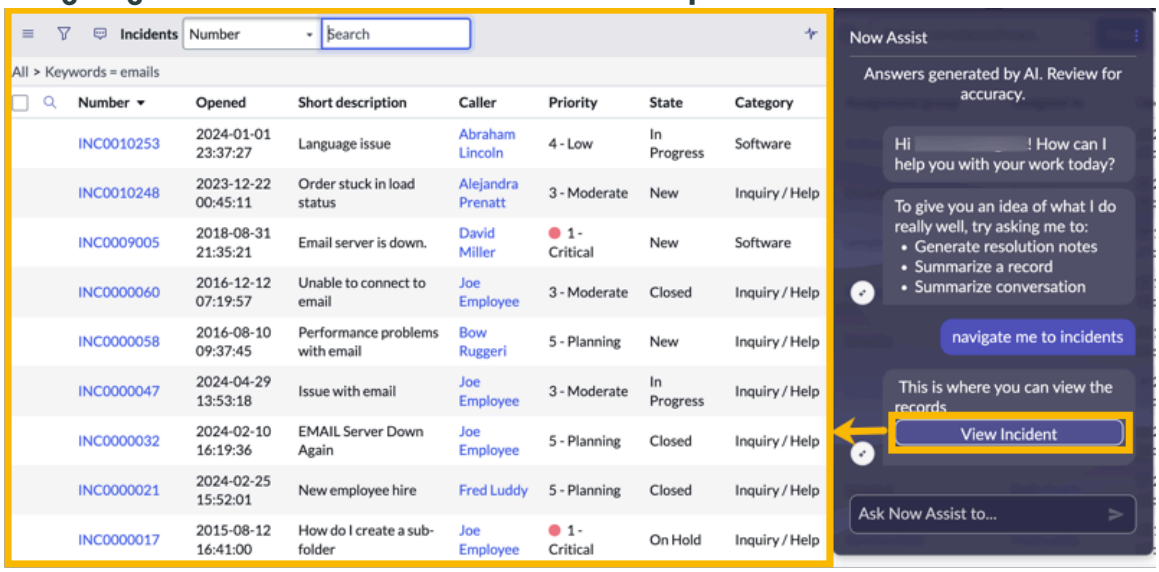
Navigating to the Incidents table from the Now Assist panel

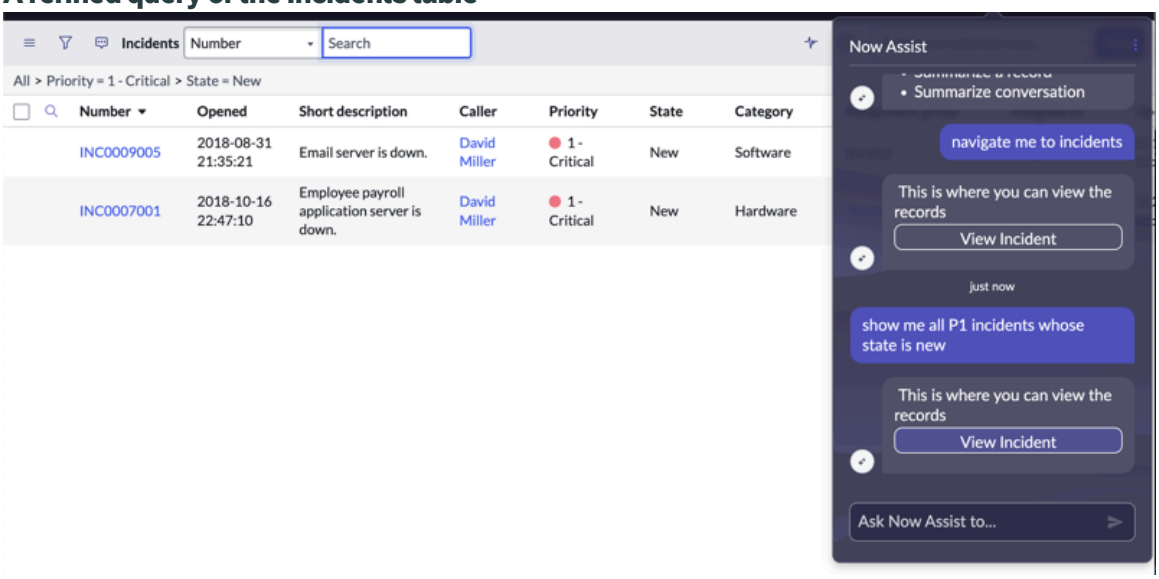


Refining your results

You can refine your results further by using more detailed requests. If you enter `Show me all incident records whose status is Complete`, Now Assist shows you only the records in the table with a Complete status.

In the following example, the user asks for all P1 incidents that are in the New state.

A refined query of the Incidents table



The number of results is based on how many potential results Now Assist finds in response to your request. If Now Assist finds more than 10 results, the list is paginated. In the following example, Now Assist finds two possible tables: the Catalog Item table and the Catalog table.

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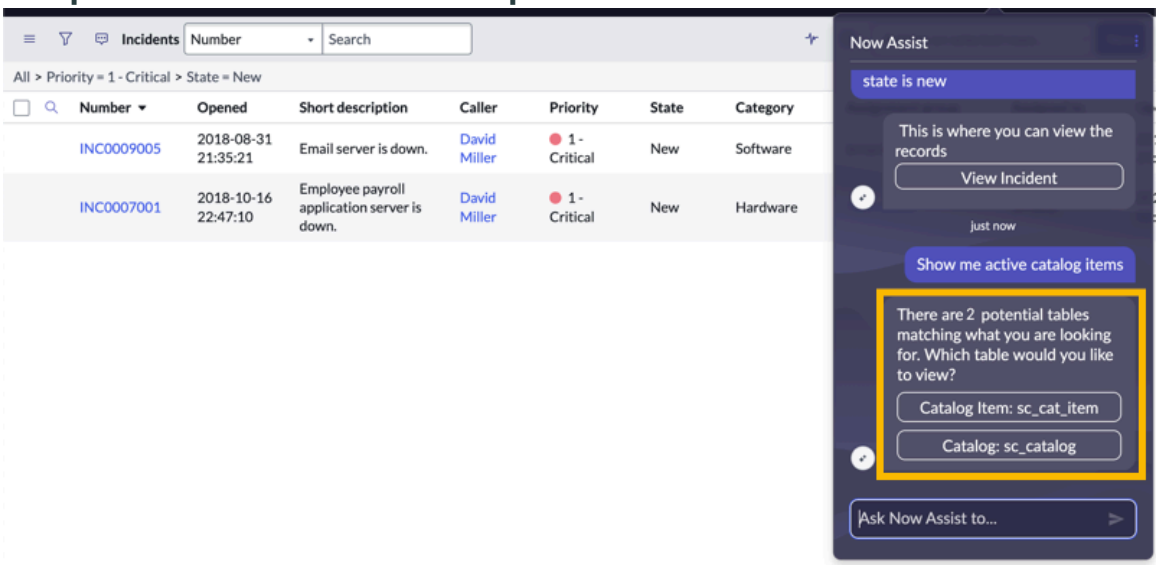
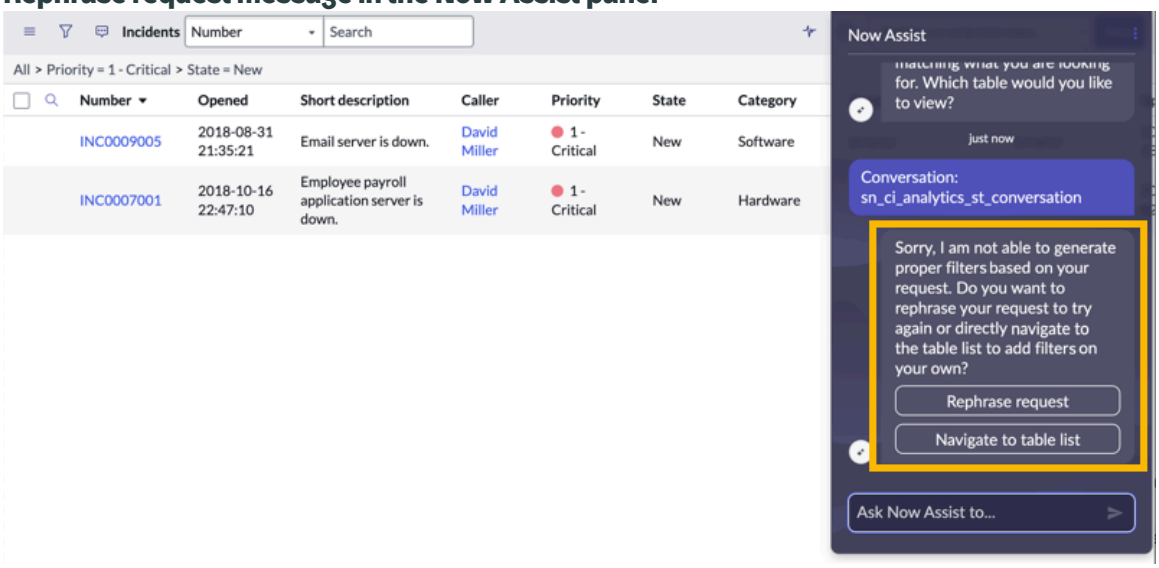
Multiple table results in the Now Assist panel



If Now Assist does not understand your request, you receive an error message asking you to rephrase your request. You can also choose to navigate to a "best guess" based on your previous request.

Rephrase request message in the Now Assist panel



ServiceNow Otto in Standard Ticket Page

The ServiceNow Otto in Standard Ticket Page skill allows you to display summaries generated by ServiceNow Otto, providing overviews of recent activities and ticket details.

When this skill is active, the standard ticket page on the Service Portal displays a **Summarize** button. If requesters want to see the ticket activity and a summary of information generated by ServiceNow Otto, they can select the **Summarize** button.

The **Summarize** button appears when at least one field is configured. If no field values are configured, the button does not appear, regardless of whether the ServiceNow Otto in Standard Ticket Page skill is active.

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Potential knowledge gaps

The Potential Knowledge Gap helps in finding missing or incomplete knowledge coverage by analyzing service interactions. Gap recommendations is set to available after you activate the Knowledge Gaps skills in AI Admin Hub.

The Knowledge Gaps feature (also known as Potential Gaps) helps knowledge managers and service teams discover missing or insufficient knowledge articles by analyzing service case and incident patterns. When the relevant skills are activated, generative AI generates gap recommendations to guide the creation or improvement of knowledge content.

For more information, see Manage potential knowledge gaps

Requester approval checklist skill

The requester approval checklist skill in the ServiceNow AI Platform® generates a structured checklist by mapping real-time request data against your organization's knowledge articles.

Important: This generative AI skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see AI agents, skills, and agentic workflows on by default.

This skill is available within Now Assist Agents for Requester v3.1 and is designed to provide instant, data-backed decision support across in-product, agentic, and workflow experiences.

The skill uses information from the following sources to promote accuracy:

Knowledge articles

Defines the evaluation criteria based on your company policy.

System data

Fetches requester profiles and historical data from ServiceNow.

Approval request

Analyze the details submitted in a live request.

Requester Approval Checklist structure

The output is presented in a two-step format: Criteria (what is required) and Reason (why it passed, failed, or has missing information). Each item has one of the following statuses: Met, Not met, or Unknown.

Note: All referenced knowledge base articles are provided as links at the end of the checklist for easy verification.

Key skill considerations

Integration

The skill is built for workflows and agentic experiences, but doesn't support follow-up questions and answers.

Decision support

The skill provides information only. It doesn't perform actions like Approve, Reject, or Comment.

Flexibility and control

The Requester Approval Checklist respects the approval configuration to provide flexibility and control.

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For more information, see Using the approval assistance AI agent and Configure Service Portal Approval Configuration record.

Smart Documents Skill

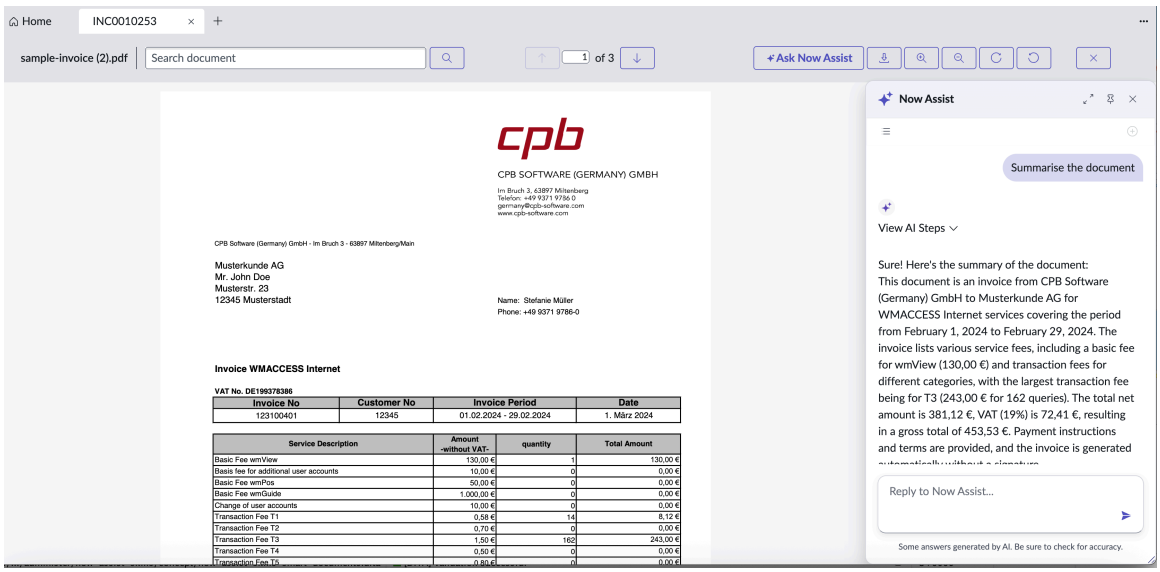
Accelerate document insights with instant summaries, interactive Q&A, and FAQs using Now Assist in Document Management.

Smart Documents Skill overview

The Smart Documents skill provides a concise summary of the document associated with a workflow, along with interactive Q&A and FAQs, enabling you to quickly understand the content, explore key insights and get answers to specific questions.

You can summarize a document in a workspace, ask interactive questions, and view FAQs. To learn how, see Generate summary and ask questions using ServiceNow Otto in Document Management

The following diagram shows that by using the Smart Document skill, you can quickly get insights from a document, such as a white paper, report, policy, contract, or case file.



Availability

Now Assist Products and Workflows

Workflow	Product
Technology	ServiceNow Otto for IT Service Management (ITSM)
Customer	ServiceNow Otto for Customer Service Management (CSM)
Employee	ServiceNow Otto for HR Service Delivery (HRSD)
Governance,Risk, and Compliance	

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AI Skill Kit

Use ServiceNow® AI Skill Kit to create and publish custom prompts and skills for ServiceNow Otto. Creating custom skills and prompts gives you greater flexibility with ServiceNow Otto's generative AI capabilities.

https://player.vimeo.com/video/985874233?h=2ccc18794b&badge=0&autopause=0&app_id=58479

Get started

Explore

Learn more about AI Skill Kit and creating effective prompts.

Configure

Configure AI Skill Kit prompt and deployment settings.

Use

Use AI Skill Kit to create custom skills.

Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

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Troubleshoot and get help

- Ask questions and explore other resources for AI Skill Kit in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

Exploring AI Skill Kit

Use the AI Skill Kit plugin for ServiceNow Otto to create and activate custom prompts and skills for Otto.

AI Skill Kit overview

Use AI Skill Kit to create custom skills when base system Otto skills don't fit your needs. Custom skills give you greater flexibility with Otto's generative AI capabilities.

Before you build a custom skill

Because you create the prompts that drive your skills, you should be comfortable with the fundamentals of prompt engineering and with how a large language model (LLM) behaves.

Before you begin, you should understand:

- How an LLM produces output, including its probabilistic nature and the fact that the same prompt can produce different results on different models.
- How to write, test, and refine a prompt based on the output it produces, rather than on how you expect the model to interpret your wording.
- The use case you want to solve and the persona you're building the skill for.

Effective skill development depends on testing the prompt against representative data from your instance and refining it based on the results, not on a single example. For the full set of guidelines and the phases of building a skill, see General guidelines for AI Skill Kit. For help defining requirements and outcomes before you build, see Skill scoping guidelines.

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Get AI Skill Kit

To use AI Skill Kit, you must update your Otto plugins in the Application Manager. For example, update your ServiceNow Otto for ITSM plugin to the latest available release.

You must also assign the *sn_skill_builder.admin* role to anyone who uses AI Skill Kit.

AI Skill Kit users

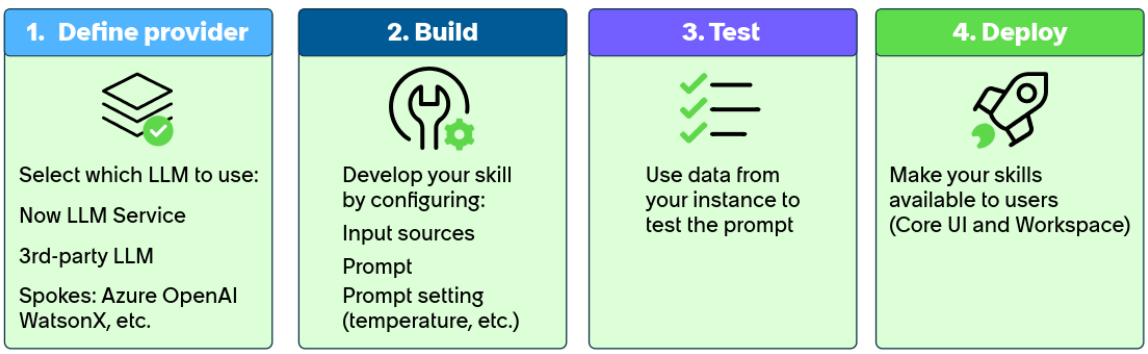
AI Skill Kit users

User	Description
AI developer	Creates new skills, writes and refines the prompts, and configures the skill settings. This user must have the *sn_skill_builder.admin* role. Building an effective skill requires prompt engineering experience and an understanding of LLM behavior.
Otto admin	Reviews and activates published skills so that they're available at the configured touch points. This user must have the *admin* role.

AI Skill Kit workflow

The following diagram shows the user journey for AI Skill Kit.

User journey for AI Skill Kit



Define the provider

Understand the benefits and potential downsides of each large language model (LLM) that you're considering using.

Build the prompt

You must have an understanding of the architecture of your instance and be able to define where input data should come from. You should also have an understanding of LLM fundamentals to build an effective prompt.

Test the prompt

AI Skill Kit enables you to test your prompt from the editor.

Deploy the skill

AI Skill Kit enables you to deploy your skill to the ServiceNow Otto panel, ServiceNow Otto Context Menu, Virtual Agent, Flow Action, or a UI Action.

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AI Skill Kit benefits

AI Skill Kit enables you to design your own custom generative AI functionality that you can then deploy to the ServiceNow platform. Custom skills can augment workflows with generative AI to increase effectiveness and efficiency.

AI Skill Kit benefits

Benefit	Feature	Users
Create custom solutions by building a custom skill or workflow.	Create a skill	AI developer
Create and edit prompts for skills and configure where you want to bring in data from to augment your prompt.	Create a prompt	AI developer
Test and iterate on your skill before activating it.	Test a prompt	AI developer

What to explore next

To learn more about configuring and using AI Skill Kit, see:

- Configuring AI Skill Kit
- Using AI Skill Kit

General guidelines for AI Skill Kit

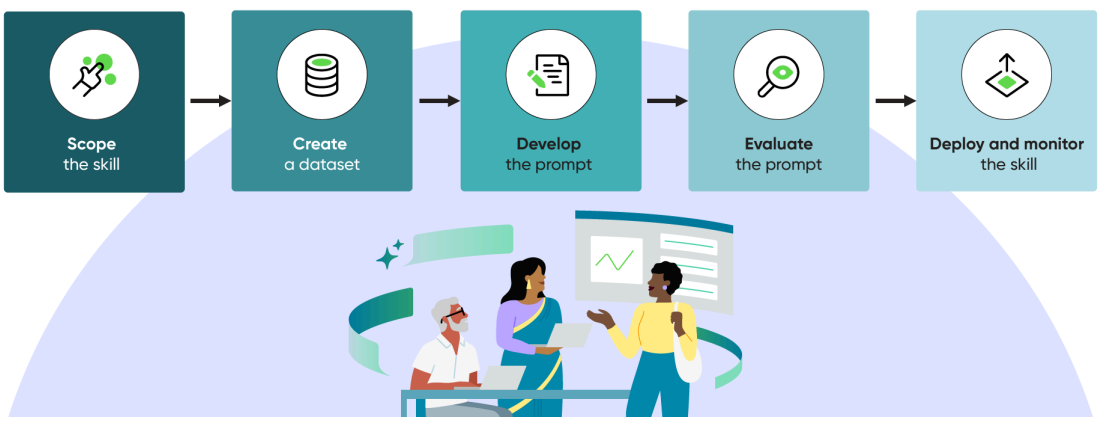
Building a custom skill in AI Skill Kit follows five phases, from scoping the skill to deploying and monitoring it.

AI Skill Kit skill-building phases

Think about the process of building a custom skill as having the following phases:

1. Scoping the skill
2. Collecting data and creating a dataset
3. Developing the prompt
4. Conducting a performance evaluation
5. Deploying and monitoring the skill

Stages of building a custom skill



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Adopt a data-driven mindset while you build a skill. A data-driven mindset means emphasizing evidence-based decisions and minimizing speculation about how a large language model (LLM) can interpret the specific wording of a prompt.

Using AI Skill Kit requires intermediate prompt engineering skills. If you're not a developer, build that knowledge before you work with the tool.

Tooltips throughout the product explain individual fields and options.

To keep duties separate, a developer or generative AI practitioner creates the skill and then publishes it. After the skill is published, a AI Admin Hub activates the skill so that it appears at the configured touch points and is available to use.

Skill scoping guidelines

Scope a custom skill before you build it to define its requirements and expected outcomes.

Before you begin

Before you start to build a custom skill with AI Skill Kit, review the base system skills that are available in the AI Admin Hub console. Use these pre-existing skills whenever possible.

User prerequisites

AI Skill Kit is intended for developers and people with generative AI experience. Because you must write the initial prompt template, you should:

1. Be knowledgeable about prompt engineering, including:
   - Having familiarity with the development and testing of machine learning systems.
   - Having informed expectations about the behavior and capabilities of a prompted large language model (LLM). You should understand:
     - The fundamentally probabilistic nature of LLMs.
     - That performance can vary greatly across different LLMs and different target tasks.
   - Having experience or training with writing and evaluating prompts for LLMs.
2. Have an in-depth understanding of the use case that you're trying to solve and the persona that you're building the skill for.

Design

Before you begin building a custom skill, you must think about the overall design and document the requirements. Consider the following:

1. What precisely do you want the skill to do?
   - What are the inputs to the model?
   - What should be the outputs of the model? (Both content and format)
   - Who uses the skill?
   - How can you characterize success?
2. What don't you want the model to do?
   - It's useful to think about the possible risks and downsides of using generative AI outputs so that you can try to guard against them during development and testing.
   - It's worth listing any specific model behaviors (LLM outputs) that would be detrimental or harmful in your specific use case.

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Dataset guidelines for AI Skill Kit

A representative, appropriately sized, and isolated dataset gives you a reliable measure of how your skill prompt performs.

AI Skill Kit dataset creation

A data-driven approach to skill development relies on the collection of a high-quality dataset to develop and test the skill. When you use AI Skill Kit, you can also use the existing capabilities of the ServiceNow AI Platform to create a high-quality dataset.

When collecting data for this purpose, create datasets that are:

1. Representative of the skill's intended deployment environment. The data should:
   - Seek to reflect the expected distribution of inputs in the deployment environment.
   - Capture variance along several identified axes, for example, input length, urgency.
   - Include any examples of inputs that are known to be important to the use case.
   - Consider edge cases that might be rare but are suspected to cause problems, for example, long inputs.
2. Sized appropriately for the team's risk appetite.
   - It's possible to develop and deploy a skill with little data. However, a lack of data creates more uncertainty about how the skill performs in deployment.
   - Produce confidence intervals for any associated performance scores and prompt comparisons.
3. Isolated from the data used for developing and writing the prompts.
   - Split the collected data into development and testing sets so that some data is reserved for evaluation.
   - If you use all the data during the process of developing the prompt, your final evaluation of the skill is biased, meaning that it over-reports performance. This bias is because of a phenomenon known as prompt overfitting.

Prompt development guidelines

Write a skill prompt that is specific, clear, and grounded in context so that the model is more likely to return the output that you expect.

Prompt design guidelines

Base prompt development decisions on the model outputs that a prompt generates across many different inputs. The following guidelines can help you get started with prompt design.

1. Be specific

   Define your desired outcome clearly. Be specific about the task that you want the model to fulfill. Clearly identify the inputs that you're providing to the model, and specify the output you're expecting from the model (including formatting).

2. Include the right context

   Provide background information and context relevant for fulfilling the task. This information can generate a more focused response.

3. Use clear language

   Use precise and unambiguous language while writing the prompt.

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4. Include demonstrations

   If possible, experiment with providing completed examples, or demonstrations, in the prompt after the instructions to illustrate what you want the model to produce. Demonstrations can increase the likelihood of generating a desirable output. However, the performance changes depending on the demonstrations selected.

5. Start simple and test variations

   Break down complex tasks into smaller and clearer instructions. Have a controlled and iterative approach. Experiment with different structures.

Other considerations

- Subtle differences in wording can lead to substantial differences in performance. Trying to reason about how a large language model (LLM) may “interpret” the instructions in a prompt only gets you so far. Which specific choice of prompt wording works best depends on the underlying model and should ideally be chosen based on evidence (that is, looking at lots of outputs).
- In data-constrained settings, iteratively develop several candidate prompts using the development data, then measure the performance of each candidate prompt on the test set, choosing the best one.

Prompt evaluation guidelines

Evaluate a skill prompt during development and again before deployment, using batches of test data and metrics that suit your use case.

Evaluation approach

To determine the effectiveness of your prompt, you should evaluate batches of test data. You should copy the model-generated responses and perform evaluations outside of AI Skill Kit.

During prompt development

Ongoing, improvised evaluation should take place alongside the development of the prompt. This ongoing evaluation enables you to adapt the prompt based on observed model outputs. Testing a change to a prompt against one or two examples can be tempting. To avoid reacting to noise, look at larger batches, and consider the statistical significance of the performance differences that you observed.

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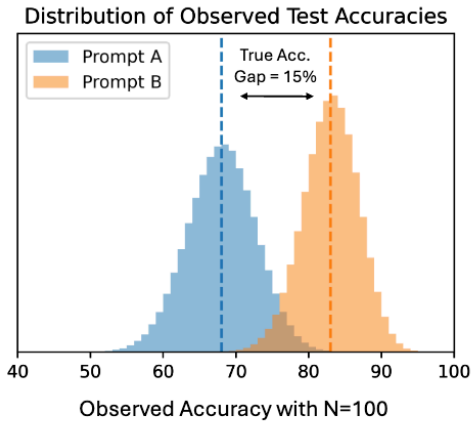

Chance of Seeing Better Performance from the Worse of Two Prompts

Data used in evaluation	"True" Underlying Accuracy Gap			
	5%	10%	15%	20%
N=10	30%	21%	14%	9%
N=25	28%	16%	8%	3%
N=50	24%	10%	3%	0.6%
N=100	18%	4%	0.5%	0.02%
N=250	9%	0.4%	<0.01%	<0.001%
N=500	3%	0.01%	<0.001%	<0.0001%

The approximate probability of observing better performance from the less accurate prompt among two (2) candidates, tabulated as a function of the evaluation dataset size (N) and the "true" underlying accuracy gap between the prompts (as measured on "infinite" data).

Final performance evaluation

Before you deploy a skill, you should test the prompt on a representative batch of data that was isolated from the development process, that is, "test" data. You want to use isolated test data because of a phenomenon known as prompt overfitting. Iteratively editing a prompt based on the model outputs generated on the same data that is used for testing can lead to significant overestimates of performance. This result is because the prompt can become overspecialized to the specific examples used in development. Even though the effect is typically less dramatic than what occurs when fitting machine learning model parameters to a test dataset, it's rooted in the same underlying principles, and should be avoided.

Evaluation metrics

Selecting the right metrics for evaluation is an important consideration. The following list provides a few approaches, each of which may be more or less appropriate depending on the use case.

- Classification-based assessment of short generations

  This approach requires labeled records, and it works best when the labels are short, well-defined "right answers," for example, true or false, multiple-choice, or category selection. In these cases, the model outputs can usually be parsed and formatted, then metrics like precision, recall, F1 scores, and so on can be directly calculated.

- Assessment of longer generations

  Many generative AI use cases require longer model generations, and there are many possible "right answers." In these cases, the output can be scored (by human evaluators) along several different axes, for example:

  - Faithfulness

    Is the generated text faithful to the context provided in the skill prompt? (The opposite of faithfulness is hallucination, which is to say that the model injects out-of-context information.)

  - Correctness

    Is the generated text correct relative to the skill instruction?

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- Helpfulness

  Is the generated text helpful relative to the task that the skill performs? (Helpfulness is subjective but it's important to try to measure. Doing so properly requires a solid understanding of the needs of the people who ultimately use the skill.)

- Fluency

  Is the generated text grammatically correct? Does it have any typos, issues with coherency, and so on?

Note: It's useful to score these properties on a scale, such as 1 through 5, rather than with yes or no.

Deploying and monitoring the skill

After you evaluate the prompt, you can deploy the custom skill and monitor its effectiveness.

AI Skill Kit deployment and monitoring

Build and evaluate the skill in a non-production instance. After you're satisfied with the final performance evaluation on a batch of test data in the non-production instance, you can begin to move a skill toward deployment.

1. Identify where the skill should be available to end users. Configure the deployment settings accordingly.
2. Perform end-to-end user testing in the non-production instance with different users and inputs.
3. After the results are acceptable, deploy the skill to the production instance.
4. Monitor the skill.

Example use case for AI Skill Kit

As an AI developer, you can create custom skills with AI Skill Kit. For this example, create a custom skill for child incident summarization.

As an AI developer, you must create a skill for child incident summarization. Creating this skill can help you organize and understand multiple incidents that are related to the same parent.

Create and configure the skill

To create the skill:

1. Navigate to **All** > **AI Skill Kit** > **Home**.
2. Select **Create new skill**.
3. On the form, fill in the fields. The following information is used to fill in the form for this example:
   - Skill name: `Child incident summarization`
   - Description: `Summarization of child incidents`
   - Default provider: `Now LLM Generic`
   - Provider API: `Now LLM Generic`

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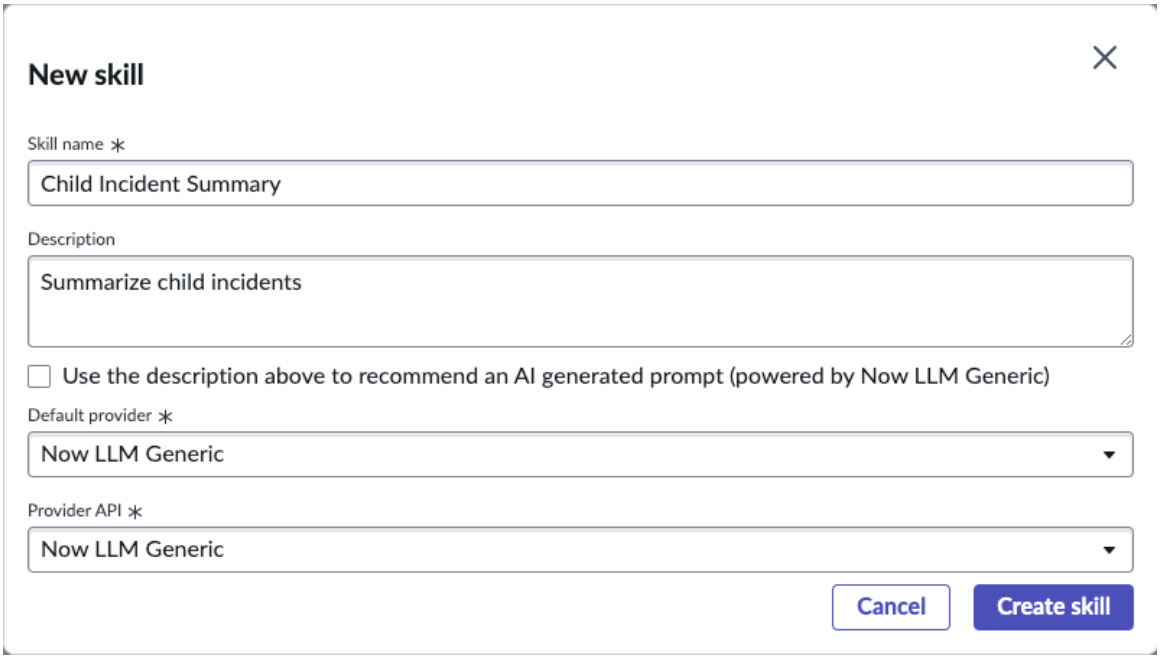
Create a skill modal



4. Select **Create skill**.

After you create the skill, you must configure the skill settings.

1. Select **Configurations**.
2. Select the model that you want to use. For this example, you can select `llm_generic`.
3. Select a temperature between 0 and 1 to determine the randomness and creativity of the output, such as 0 . 2.

Develop the prompt

After you create the skill and configure the settings, you must develop the prompt. To follow this example, you can use the following prompt:

```
You are a customer service representative. Summarize the child
incidents of the below given parent incident. The summary
should contain key issues and impact across the child incidents,
highlighting any patterns, recurring problems, or significant
outliers. When summarizing, please consider the following: Parent
incident short description: {{incident.short_description}} Parent
incident description: {{incident.description}} Here are the child
incident details: {{ChildIncidents.output}}
```

Select the **Inputs** for the skill. For this example, the record is selected as the input.

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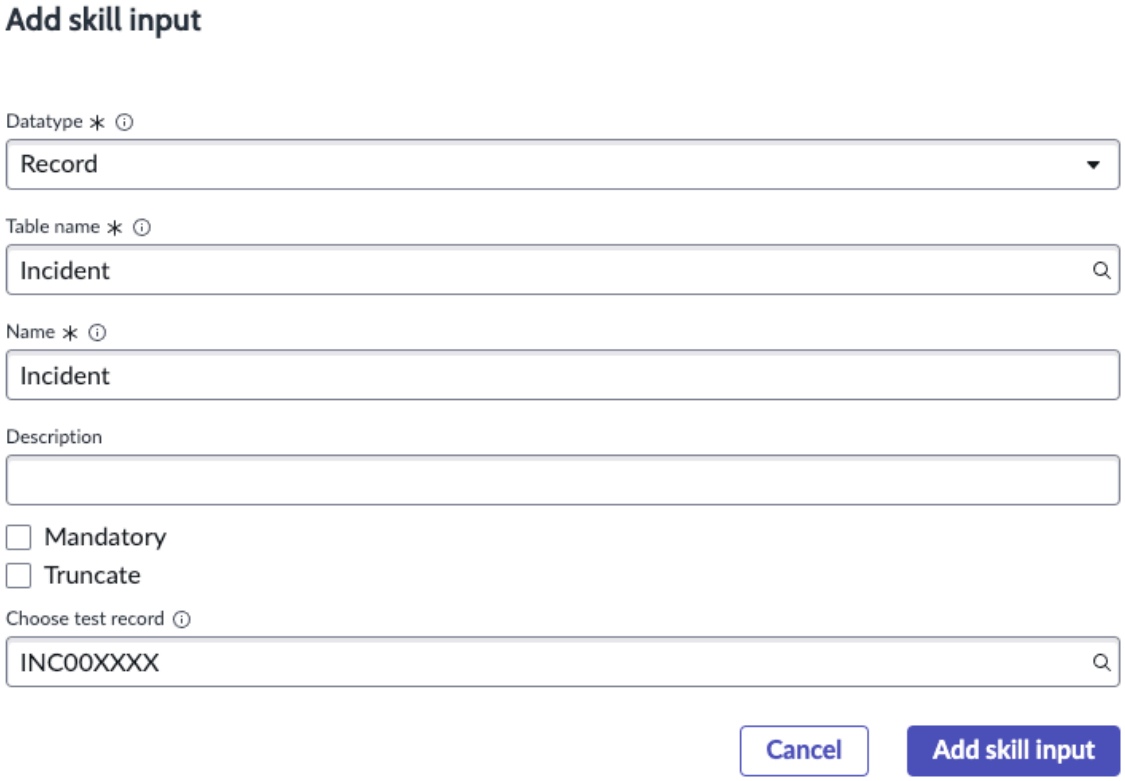
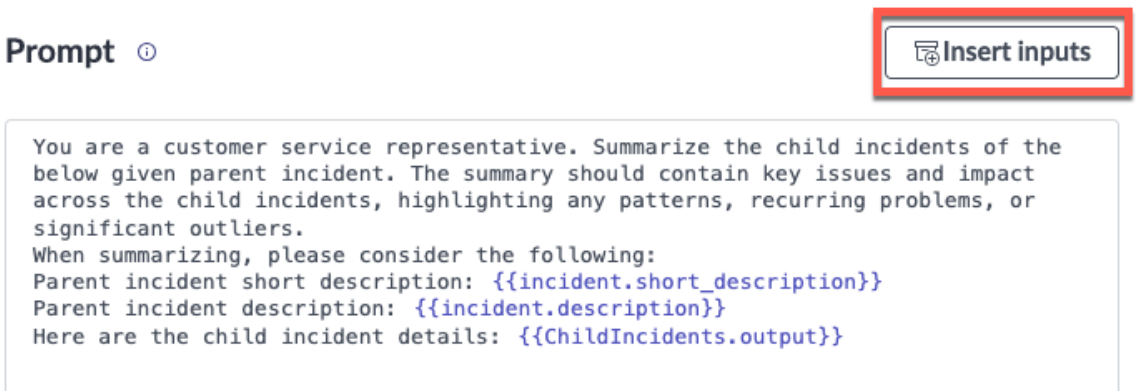
Add skill input modal



Select **Insert inputs** for the prompt.

Prompt modal



For this example, the following is used:

```
Parent incident short description: {{incident.short_description}}
Parent incident description: {{incident.description}} Here are
the child incident details: {{ChildIncidents.output}}
```

Select the tools for the skill. For this example, select **Flow Action** and the *`IncidentDetailsFetcher`* flow resource.

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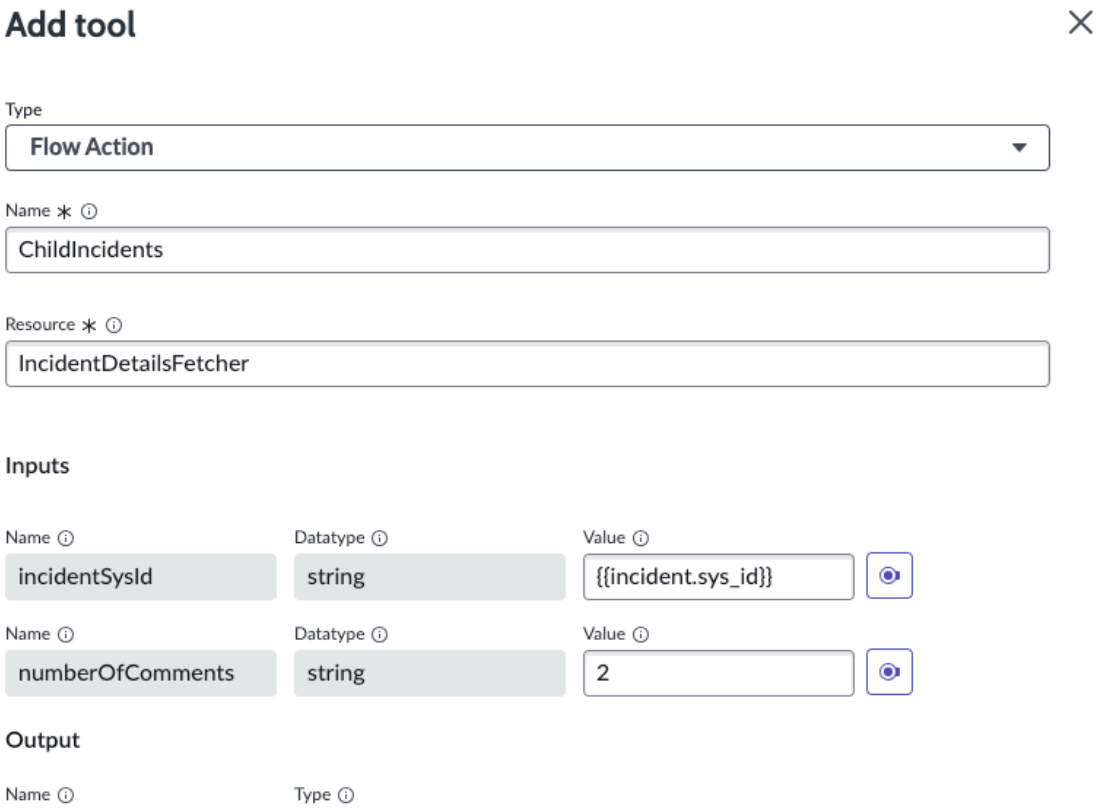
Add tool modal



Configure the skill deployment options

The next step is to configure the skill deployment options. These options enable you to choose where to find the skill in AI Admin Hub.

1. Select the **Skill settings** tab.
2. Select **Deployment Settings**.
3. Enable the admin to enable the skill from the Core UI by selecting the **UI Action** check box.
4. Select **Save**.

Test and publish the skill

Test your skill prompt to verify that it pulls in the correct type of data.

1. Select **Run tests**.
2. Choose a record or incident.
3. Select **Run test**.

Look at the response.

To see the data that was brought into the prompt from your skill inputs and tools, you can look at the **Grounded prompt** tab.

If the output is correct, select **Finalize prompt**. After you finalize the prompt and you are ready to implement it, select **Publish**.

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Activate the skill

After you test, finalize, and publish your skill, an admin must activate it in AI Admin Hub. To learn more about activating skills, see Activate a skill.

Configuring AI Skill Kit

Configure prompts and skills for AI Skill Kit.

Configuration overview

To use AI Skill Kit, you must update your Otto plugins in the Application Manager. For example, update your ServiceNow Otto for ITSM plugin to the latest version.

After you install the plugin, configuring a skill in AI Skill Kit has two parts. First, you must configure how to deploy the skill. Next, you must configure the prompt.

Configure a skill prompt

Configure a skill prompt to set its large language model (LLM), the randomness of its responses, and its token limits.

Before you begin

Role required: sn_skill_builder.admin

Procedure

1. Navigate to **All** > **AI Skill Kit** > **Home**.
2. Select the skill that you want to configure.
3. Select **Configurations**.

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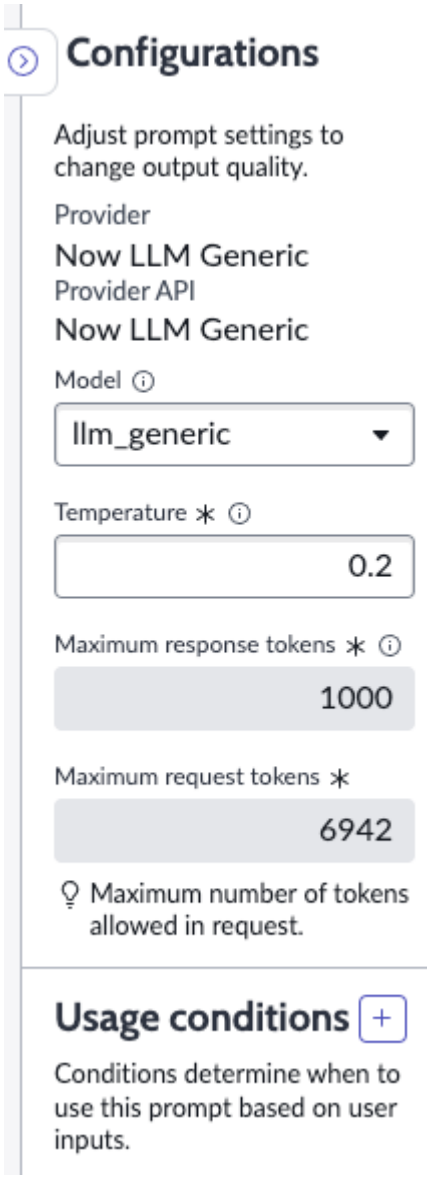

4. On the form, fill in the fields.

Configurations form

Field	Description
Model	Large language model (LLM) to use for the prompt.
Temperature	Randomness and creativity of the output. A higher value increases randomness. The value must be from 0 through 1.
Maximum response tokens	Maximum number of tokens that the model can return. If you're using Now LLM Service, the maximum is 1,000.
Maximum request tokens	Maximum number of tokens allowed in a request.
Structured output	Option to return prompt responses in a consistent JSON format.

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Field	Description
	Note: Only Google Gemini and Azure OpenAI support structured output. This option is not available when using Now LLM Service.

5. Add **Usage conditions** to determine when to use the prompt.

What to do next

After you configure your skill prompt, you can test it. To learn more about testing skills, see Test a prompt.

To learn more about configuring the skill, including models and tokens, see AI Skill Kit FAQs on the ServiceNow Community.

Configure deployment and skill settings

Configure where a skill appears in AI Admin Hub, review general information, set security controls, choose a provider, and add evaluation metrics.

Before you begin

Role required: sn_skill_builder.admin

About this task

The **Deployment and skill settings** tab contains five sections that you can configure in any order:

- **Deployment settings**: Choose where the admin can find and activate the skill in AI Admin Hub.
- **General information**: Review or edit the skill name and description.
- **Security controls**: Restrict which roles can run the skill.
- **Providers**: View the language model providers available for the skill.
- **Evaluation metrics**: Add metrics that measure the quality of skill responses.

Procedure

1. Navigate to **All** > **AI Skill Kit** > **Home**.
2. Select the skill that you want to configure.
3. Select the **Deployment and skill settings** tab.
4. Configure the **Deployment settings** section.

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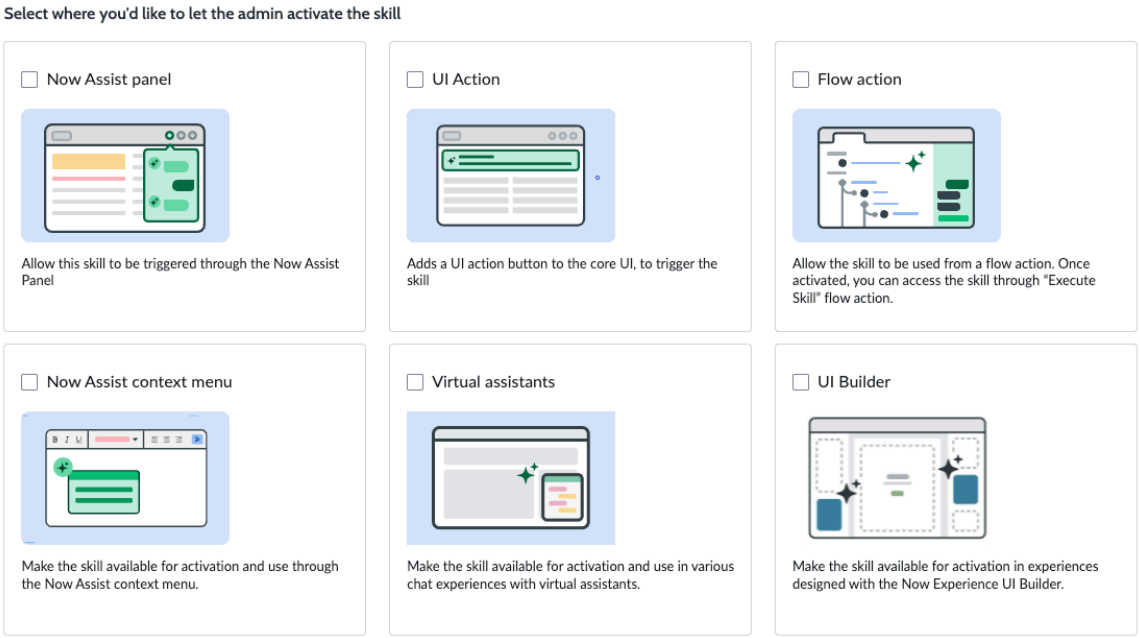

Under **Now Assist features**, fill in the fields.

Deployment settings form

Field	Description
Workflow	High-level category for the skill, such as **Technology**, **Employee**, **Creator**, or **Platform**. You can also select **Other** if none of the categories fit. The workflow that you choose is where the skill appears in the AI Admin Hub console.
Product	Product that the skill operates within, such as ITSM, ITOM, HR Service Delivery, or AI Admin Hub.
Feature	Feature that the skill is used in, such as Agent Chat, Knowledge, or Virtual Agent. You can also define a custom feature.
Name	Name of the feature.
Description	Description of the feature.

Under **Select where you'd like to let the admin activate the skill**, select one or more activation points.

- **Now Assist panel**
- **UI Action**
- **Flow action**
- **Now Assist context menu**
- **Virtual assistants**

  For more information about Now Assist in Virtual Agent, see Assistants overview.

- **UI Builder**

5. Review the **General information** section.

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This section shows the information that you added when you created the skill. You can edit the skill name and description here.

6. Configure the **Security controls** section to restrict which roles can run the skill.

   For the procedure, see Configure security controls for a skill.

7. Review the **Providers** section.

   The **Providers** section lists the language model providers available for the skill. Each provider is tagged as **Default** or **Not supported** where applicable.

   > **Important:** The runtime model depends on the configuration in AI Admin Hub and may differ from what's shown in the **Providers** section.

8. **Optional:** Add one or more **Evaluation metrics** to measure the quality of skill responses.

   (Optional) Evaluation metrics attached in this section apply to every prompt test that you run on the skill.

   > **Important:**
   >
   > LLM-judged evaluation metrics consume additional Now Assist assists during prompt testing. Metric execution is billed as a custom call at one assist per 1,000 output tokens, so metrics that produce longer output consume more assists.
   >
   > Script-based metrics (metrics with a script instead of a judge prompt) don't consume assists.
   >
   > For details about Now Assist consumption during prompt testing, see Test a prompt.

   a. In the **Evaluation metrics** section, select the add icon +.

   b. From the list of available metrics, select the metric that you want to add.

      (Optional) Metrics are grouped by category. Each metric shows the language model provider that runs the metric, such as **Amazon Bedrock**, **Now LLM Generic**, or **Multiple LLMs**. Metrics that run as scripts don't display a provider tag.

      For descriptions of the available metrics, see Evaluate a prompt.

   c. Review the metric details.

      Metric detail tabs

Tab	Description
About	Description of the metric, how it works, when to use it, and its output format.
Judge Prompt / Script	Prompt that a language model uses to judge the response, or script that evaluates the response, depending on how the metric is implemented.

   d. Select **Add**.

9. Select **Save**.

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What to do next
After you configure the deployment and skill settings, you can publish your skill. To learn more about publishing skills, see Finalize and publish a skill.

Configure security controls for a skill

Define an access control list (ACL) and role restrictions for every skill. The ACL limits which user roles can access and run the skill, and role restrictions limit the roles that the skill runs with.

About this task
Existing skills without an ACL continue to run. However, if you edit the skill and republish it, you must add an ACL.

If you try to execute a skill when you don't have permission, you see an error that you aren't authorized.

Before you begin
Role required: sn_skill_builder.admin

Procedure
1. Navigate to **All** > **AI Skill Kit** > **Home**.
   A dialog box that explains ACLs appears. You can select **Got it** or **View skills without ACLs**.
2. Add an ACL and role restrictions to an existing skill.
   a. Select the skill that you want to add an ACL to.
   b. Select the **Deployment and skill settings** tab and then select **Security controls**.
   c. Select **Add ACL**.
   d. Select an option.

Options for ACL roles

Option	Description
Any authenticated user	Any logged-in user can access and run the skill.
Select roles	Select the roles that a user must have to execute the skill. **Note:** If you select multiple roles, a user needs only one of the roles to run the skill.

   e. Add role restrictions.
   f. Select **Apply**.
3. Add an ACL to a new skill.
   a. Create a skill.
   b. In the **Configure security controls** section, select an option for the access control list.
   c. Apply role restrictions to the skill.
   d. Continue creating the skill.

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Using AI Skill Kit

Use AI Skill Kit to create and publish prompts and custom skills for Otto.

Building a custom skill in AI Skill Kit is a sequential process. The following steps take you from an empty skill through to activation, where end users can trigger it from the platform.

Create a skill

Create a skill or clone an existing base system skill. Clone a Otto skill if it's close to what you need but requires modification.

- Create a skill
- Clone and edit a ServiceNow skill

Build the prompt

A prompt is an instruction template sent to the AI model when the skill runs. Define what information the skill receives as inputs, write the prompt text, and optionally add tools that gather additional context before the prompt executes.

- Create a prompt
- Add a tool
- Add a retriever
- Add a web search
- Use prompt assistance

Test and evaluate

Before publishing, test your prompt against real records on your instance to verify the output. You can also run a formal evaluation, which measures output quality against expected results using correctness and faithfulness scores.

- Test a prompt
- Evaluate a prompt

Publish and activate

When your skill is ready, finalize the prompt and publish it. Publishing makes the skill visible to a Otto admin, who then activates it in AI Admin Hub to make it available to your users.

- Finalize and publish a skill
- Activate a skill

Call a skill from a script

After a skill is published, you can call it from a server-side script, so that you can integrate the skill into automated workflows or business rules. For more information, see Call a custom skill from a script.

Create a skill

Create a custom skill for Otto. Custom skills extend the generative AI capabilities of Otto to fit your own use cases.

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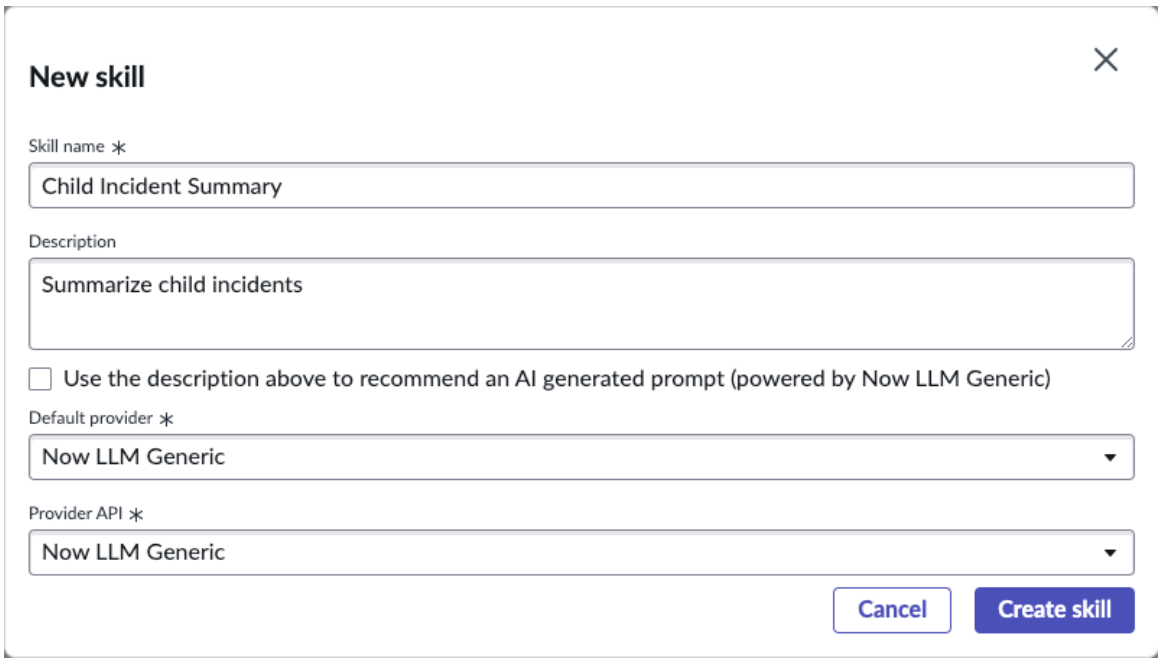
Before you begin

Role required: sn_skill_builder.admin

Note: When you update AI Skill Kit also update Generative AI Controller so that your skills continue to work as expected.

Procedure

1. Navigate to **All** > **AI Skill Kit** > **Home**.
2. Select **Create new skill**.
3. On the form, fill in the fields.



New skill form

Field	Description
Skill name	Name of the skill.
Description	Description of the skill.
Default provider	Available providers: ○ Now LLM Service ○ External LLM You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all generative AI skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the AI Admin Hub console. For more information, see Large language models on the ServiceNow AI Platform. ▪ Spokes ▪ Custom LLM For more information on setting up a custom large language model (LLM), see Configure a generic large language model (LLM) connector

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Field	Description
	Available prebuilt spokes that enable you to connect with an external LLM: ○ Microsoft Azure OpenAI Generative AI Spoke ○ OpenAI Generative AI Spoke ○ Aleph Alpha ○ IBM watsonx ○ Google Gemini (MakerSuite and Vertex AI) **Note:** The spokes don't consume Integration Hub transactions. The spokes consume assists.
Provider API	Provider of the API for the selected LLM.
User access	○ Any authenticated user Any logged-in user can access and run the skill. ○ Select roles Select the roles that a user must have to execute the skill. **Note:** If you select multiple roles, a user needs only one of the roles to run the skill.
Role restrictions	Roles that the skill runs as. Access control lists (ACLs) determine which user roles can trigger the skill, while role restrictions determine the roles that the skill operates with when it runs.

4. Select how you want to create the prompt for the skill.
   - Write from scratch
   - Choose one from library
     a. Find the prompt that you want to use.
     b. Select **View**.
     c. Select **Use prompt**.
   - Use an AI-generated prompt

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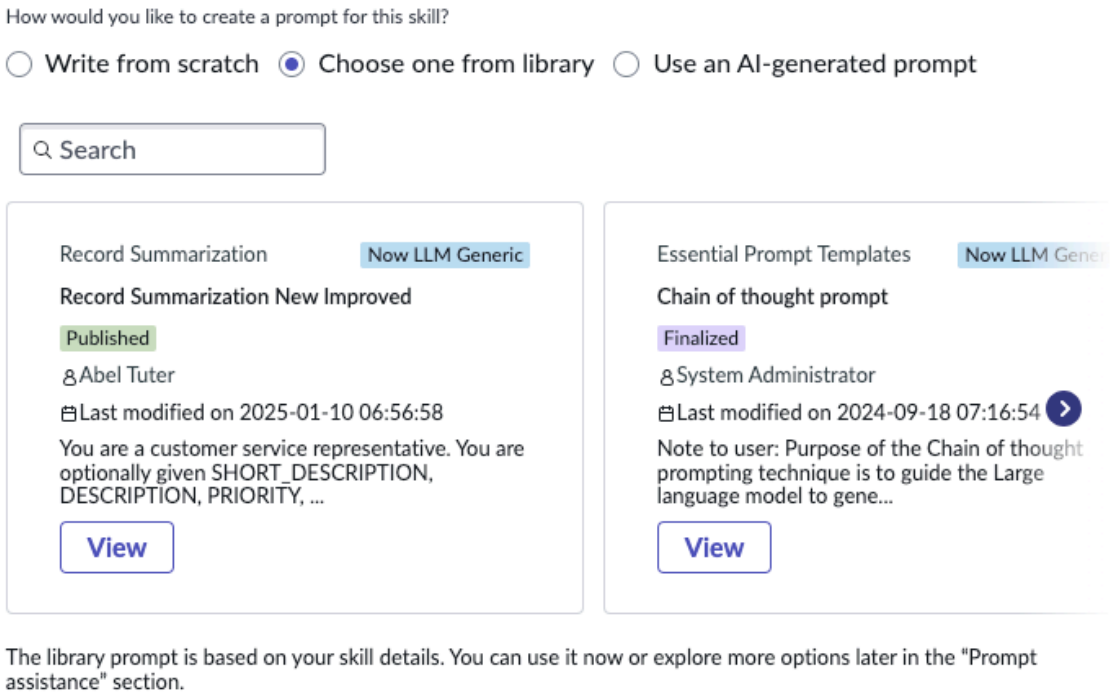

5. Select **Next**.
6. **Optional:** Add skill inputs and outputs.
7. Select **Go to summary**.
8. Select **Finish**.

What to do next

After you create the skill, you must configure it. To learn more about configuring a skill, see Configure a skill prompt.

If you don't need to set any configurations for your skill, you can create your skill prompt and tools. To learn more, see Create a prompt and Add a tool.

Clone and edit a ServiceNow skill

Clone an eligible skill provided in ServiceNow Otto applications in AI Skill Kit so that you can edit its prompt or change its AI service provider. Editing the prompt lets you control the format and content of the large language model (LLM) response.

Before you begin

Role required: sn_skill_builder.admin

Procedure

1. Navigate to **All** > **AI Skill Kit** > **Home**.
2. Select ***ServiceNow*** **skills**
3. Select the ***ServiceNow*** skill that you want to clone.
4. Select **Clone Skill**.
5. On the form, fill in the fields.

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Clone skill form

Field	Description
Skill name	Name of the skill.
Description	Description of the skill.
Default provider	Available providers: ○ Now LLM Service ○ External LLM ▪ Spokes ▪ Custom LLM For more information on setting up a custom large language model (LLM), see Configure a generic large language model (LLM) connector Available prebuilt spokes that enable you to connect with an external LLM: ○ Microsoft Azure OpenAI Generative AI Spoke ○ OpenAI Generative AI Spoke ○ Aleph Alpha ○ IBM watsonx ○ Google Gemini (MakerSuite and Vertex AI) **Note:** The spokes don't consume Integration Hub transactions. The spokes consume assists.
Provider API	Provider of the API for the selected LLM.

6. Select **Clone**.

Note: When you clone a skill, you can't change the skill outputs, tools, or deployment settings.

7. Select the edit icon to add skill inputs.

Edit inputs form

Section	Description
Base input table fields	Each skill relies on a base input table and input fields with descriptions to provide context for the LLM to generate a response.
Rule conditions	Rule conditions determine when the input template is used. By default, record state determines which input template the LLM uses.

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Section	Description
Additional input data sources	You can add input data sources such as related tables, activity streams, and relationships to provide more context to the LLM. You can also add rule conditions to these additional data sources.

8. **Optional:** Select **Clone prompt** to edit the prompt.
   The list shows all prompts that use the same supporting skill for each provider.
9. Add **Prompt usage conditions**.
   Prompt usage conditions determine when a prompt runs.
10. To test the prompt, select **Run test** and add test values.
11. Select the **Skill settings** tab.
12. **Optional:** In the **General information** section, select the toggle to change the default provider.

What to do next

Create your skill prompt. To learn more about creating a prompt, see Create a prompt.

After you clone and edit the skill and prompt, you can evaluate your prompt. To learn more about evaluating a prompt, see Evaluate a prompt.

Create a prompt

After you create a custom skill, create a prompt. The prompt defines the instructions that the skill sends to the LLM and the skill inputs that it uses.

Before you begin

Role required: sn_skill_builder.admin

Procedure

1. Navigate to **All** > **AI Skill Kit** > **Home**.
2. Select the skill that you want to create a prompt for.
3. Select the edit icon and name the prompt.
4. Write the prompt.
5. Select **Skill Inputs**.

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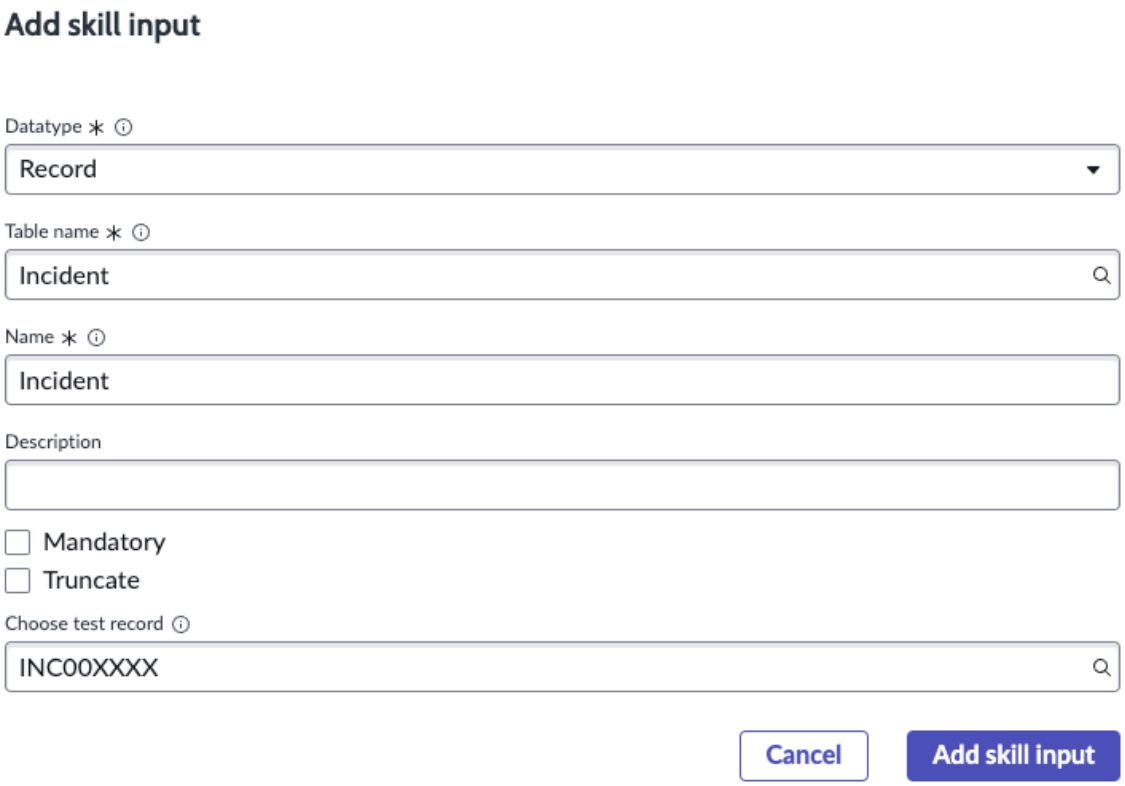

Skill input options

Input type	Description
Datatype	○ Record ○ String ○ Numeric ○ Boolean ○ Simple Array ○ JSON Object ○ JSON Array
Name	Name of the input.
Description	Description of the input.
Mandatory	Option to require a value for the input when the skill runs.
Truncate	Option to shorten the prompt context to fit the model context length when the prompt is too large.
For records	
Table name	Name of the table that contains the test record.
Choose test record	Record used to test the prompt.
For String, Numeric, Boolean, Simple Array, JSON Object, and JSON Array	
Test values	Values used to test the prompt.

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6. Select **Add skill input**.
7. Select **Insert inputs**.
   The input options change depending on the data type that you select.
8. Search for the inputs that you want to use for the prompt.
   For example, you can search for the incident short description or priority.
9. If you're not ready to finalize the prompt and publish the skill, select **Save** or **Save as**.

> **Note:** Skills can have multiple prompts. Usage conditions determine which prompt is executed. If no conditions are met, the default prompt is executed. To configure prompt usage conditions, see Configure a skill prompt.

What to do next
After you create a prompt, test it. To learn more about testing your prompt, see Test a prompt.

Add a tool

Add and manage tools visually in the Tools editor, including decision branching, to execute different tools for your skill. Adding decision branches between tools enables you to define the conditions that must be met for a tool to run. If no conditions are met, the default branch's step is executed.

Before you begin
Role required: sn_skill_builder.admin

About this task
A tool is a utility that is configured to convert skill inputs into skill outputs. The tool outputs can be referenced in a prompt template to introduce context to a prompt. The input for a tool can be a skill input or the output of another tool.

You can use the Tool editor to configure tools and link them to each other.

Decision nodes enable you to execute different tools, based on the logic of the branch. A decision node can contain multiple branches but needs one default branch.

Procedure
1. Navigate to **All** > **AI Skill Kit** > **Home**.
2. Select the skill you want to add a tool to.
3. Select the **Tool editor** tab.
4. Select the (+) icon to add a node.
5. Select the type of node that you want to add.

Add a node

Node type	Steps
Tool node Types of tools: ○ Script ○ SubFlow ○ Flow Action ○ Retriever	**a.** Select a tool type. **b.** Name the tool. **c.** Select a condition.

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Node type	Steps
○ Skill ○ Web search **Note:** If you select Google as your web search tool provider, the web search tool uses Grounding with Google Search, offered under a Global Standard deployment. Because grounding is not data resident, Google's global infrastructure routes traffic to a global data center for each web search request. This processing location may be different from the data processing location that you chose for your ServiceNow instance. Consider your organization's data policies before enabling skills that have Google web search tools. ○ Predictive Intelligence	
Decision node	**a.** Name the node. **b.** Select **Add branch** **i.** Name the branch. **ii.** Select a Destination node. **iii.** Set the conditions. **c.** Select a Destination node.

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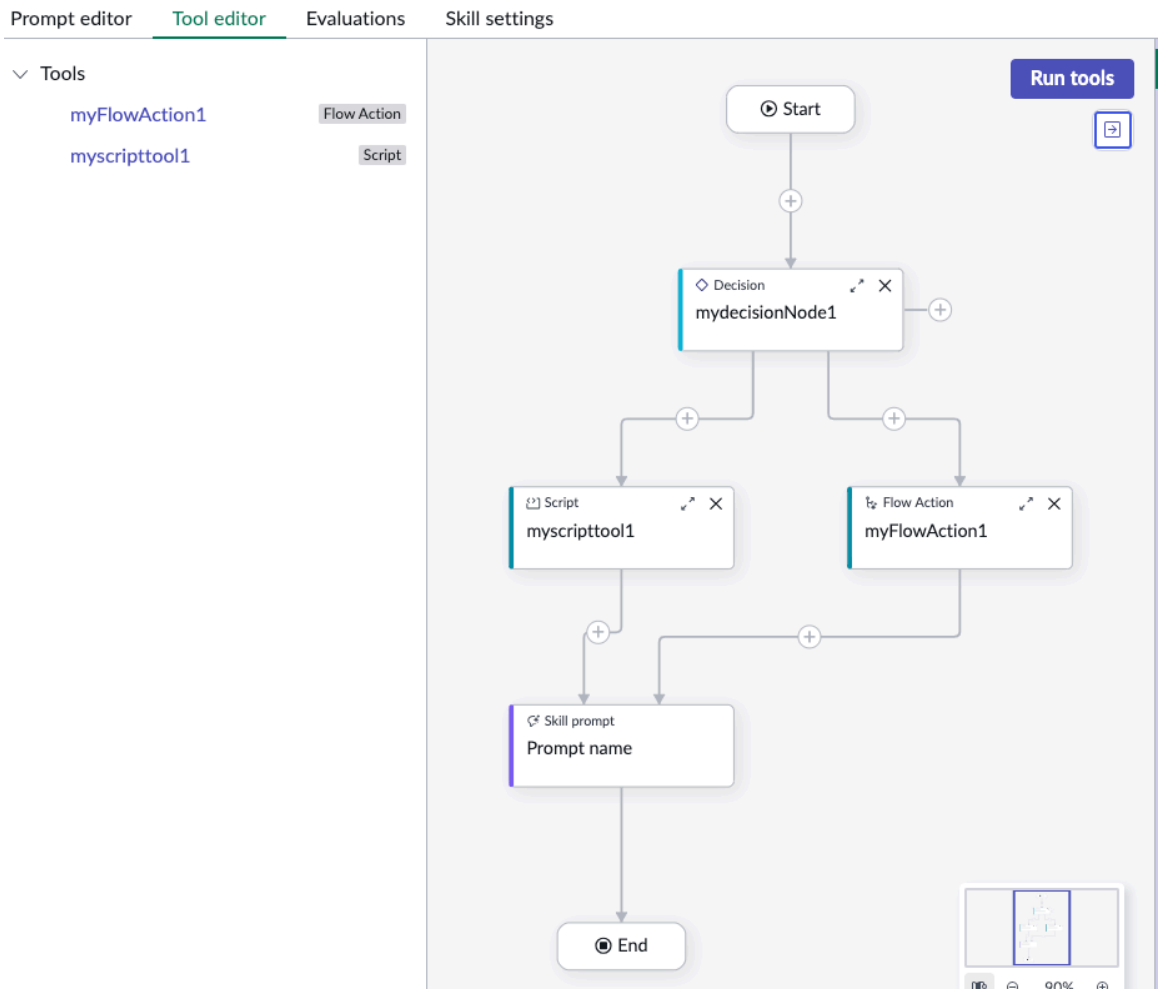

6. Select **Add**.
7. Select **Run tools** to test the tools.

Add a retriever

Add a retriever to your skill to augment your prompts with relevant context from AI Search results.

Before you begin

Role required: sn_skill_builder.admin

About this task

Using a retriever in a skill enhances the relevance and coherence of a response by pulling relevant information from a source and then feeding it to a large language model (LLM) to create the final output. This process doesn't require model fine-tuning.

A retriever enables the chatbot to access external knowledge by fetching relevant background information, resulting in more factual, in-depth, and informed responses.

Procedure

1. Navigate to **All** > **AI Skill Kit** > **Home**.
2. Create a skill or select the skill that you want to add a retriever to.
3. Select the **Tool editor** tab.
4. Select the (+) icon to add a node.

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5. Select **Tool node**.
6. Select **Retriever** from the drop-down menu.
7. Select **Configure retriever**.
8. On the form, fill in the fields.

Add tool form

Field	Description
Name	Name of the retriever.
Search query	Information to search for. The value can be static text or a skill input.
Search space type	○ Table-based ○ Search-profile-based
Search profile	A group of search sources.
Search sources	Tables in ServiceNow that have been indexed and can be used for search.
Fields returned	Fields to return from the search sources and send to the LLM.
Limit	Maximum number of results to return.
Search criteria	○ Hybrid ○ Semantic ○ Keyword **Note:** If you choose Hybrid or Semantic, you can make selections for chunking and reranking. To learn more about chunking and reranking, see Configure retriever chunking and reranking.

9. Select **Next**.
10. Select an embedding model.
    To learn about embedding models, see Configuring your embedding model.
11. If you selected **Hybrid** or **Semantic** search criteria, select a semantic index.
    A semantic index enables you to search for data based on contextual meaning.
12. **Optional:** If you selected **Hybrid** or **Semantic** search criteria, select **Advanced** to change the document matching threshold.
    The document matching threshold is the threshold for semantic matching. The default value is 0. You can input any value from 0 to 1. You can get more precise results with a higher value.
13. Select **Next**.

Note: If you selected **Hybrid** or **Semantic** search criteria, see Configure retriever chunking and reranking to complete setting up your retriever.

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14. Review the retriever tool information.
15. Select **Add tool**.

Configure retriever chunking and reranking

Configure chunking and reranking for a retriever that uses hybrid or semantic search to control how retrieved content is split, ranked, and passed to the LLM.

Before you begin

Role required: sn_skill_builder.admin

About this task

To set up the chunking and reranking options for a retriever, you must have a retriever tool added to your skill with the **Hybrid** or **Semantic** search criteria. The following steps come after the semantic configuration in Add a retriever.

Procedure

1. Navigate to **All** > **AI Skill Kit** > **Home**.
2. Select the skill that you're adding a retriever to.
3. Add a retriever.
4. On the form, fill in the fields.

Chunking and reranking form

Field	Description
Max number of chunks per document	Maximum number of chunks to return per document. The default value is 10.
Chunking strategy	○ Fixed size Fixed size breaks down the full text into smaller passages. You can choose the passage size limit in number of words or number of sentences. ○ Small to big Small to big enables you to choose the top K best-matched indexed chunks and expand them to include surrounding chunks. Then the expanded chunks are linked together into a large text and broken into smaller passages. Don't use the small to big chunking strategy if you're using full text or truncate index chunking configuration.
Chunking unit	○ Words ○ Sentences
Chunk size	Size of the returned chunks. The default value for word size is 750. The default value for sentence size is 40.
Expanded snippet size	Size of the expanded chunks included when you select the small to big chunking strategy.

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Field	Description
Top K results	Number of chunks that the reranker returns. If this field is empty, the reranker returns the number of results set in the retriever Limit field.

5. Select **Next**.
6. Select the type of condition to evaluate when the tool runs.
7. Select **Next**.
8. Review the selections that you made for the tool and select **Add tool**.

Add a web search

Add a web search as a tool in AI Skill Kit to include web search results in your skill prompts.

Before you begin

Role required: sn_skill_builder.admin or admin.

A search engine API key from your provider must be configured on the ServiceNow AI Platform.

Procedure

1. Navigate to **All** > **AI Skill Kit** > **Home**.
2. Create a skill or select the skill that you want to add web search to.
3. Select the **Tool editor** tab.
4. Select the (+) icon to add a node.
5. Select **Tool node**, and then **Add**.
6. Select **Web Search** in the **Tool type** field.
7. Select **Configure tool**.
8. On the General info form, enter a name in the **Name** field and select **Web Search** in the **Resource** field.
9. Select **Continue**.
10. On the Tool inputs form, fill in the fields.

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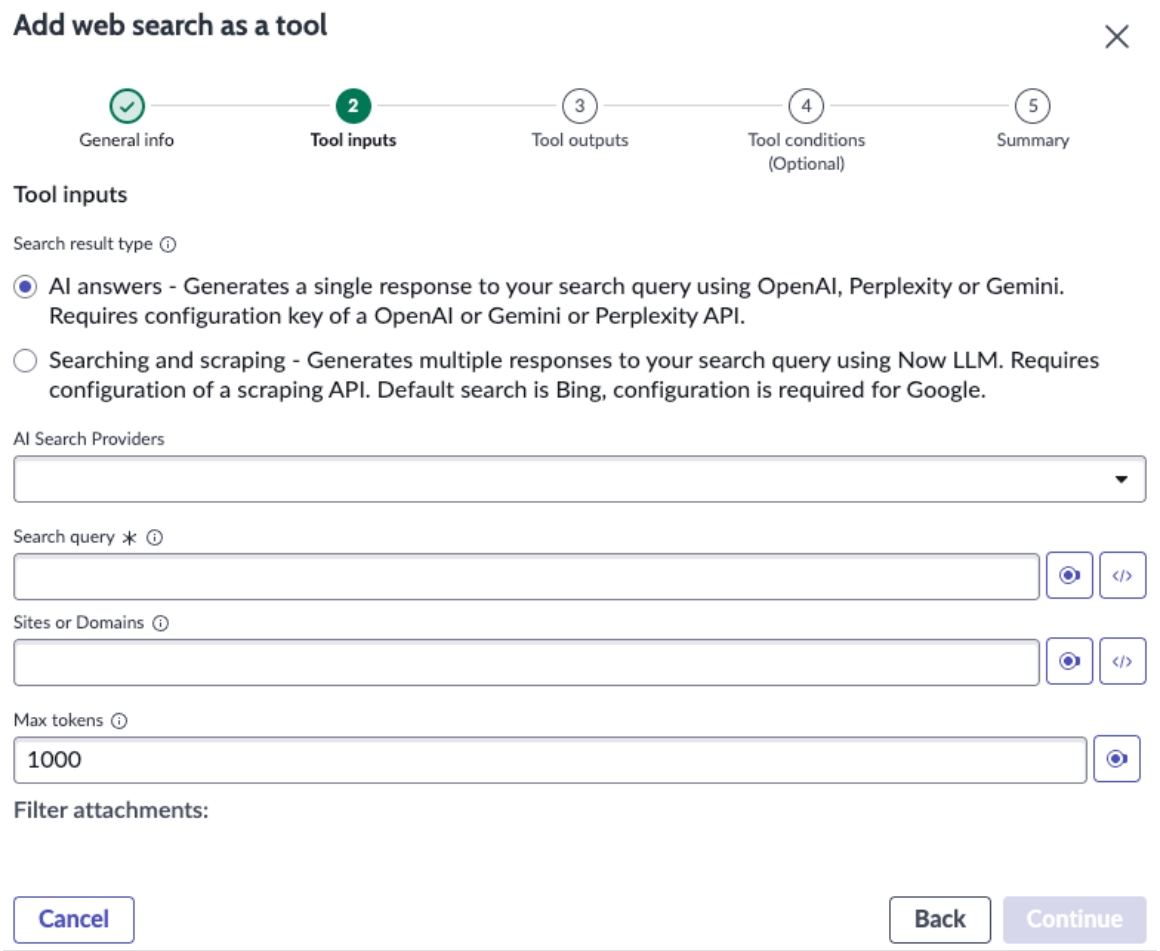

Web search configuration form

Field	Description
Search result type	**AI answers** is the type of result that you want from the search. **AI answers** generates a single response to the search using Perplexity, OpenAI, or Gemini.
AI search providers	The AI search provider used to perform the search.

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Field	Description
	Note: If you select Perplexity or OpenAI, you must complete the API key setup in the AI Search answers OneExtend capability table. For more information on that process, see Configure AI search answers capability for web search. Azure OpenAI appears as an option, but it doesn't support web search. If you select Google as your web search tool provider, the web search tool uses Grounding with Google Search, offered under a Global Standard deployment. Because grounding is not data resident, Google's global infrastructure routes traffic to a global data center for each web search request. This processing might differ from the data processing location chosen for your ServiceNow instance. Consider your organization's data policies before adding a web search tool with Google as the provider.
Search query	Word, words, or phrase to search for.
Sites or domains	This field appears but it's not supported.
Max tokens	This field appears but it's not supported.

11. Select **Continue**.
12. On the Tool outputs form, select **Continue**.
13. On the Tool conditions (optional) form, select **Continue**.
14. On the Summary screen, select **Add tool**.

Add Predictive Intelligence

Add Predictive Intelligence as a tool in AI Skill Kit. Predictive Intelligence models predict values, estimate outcomes, and identify patterns that you can use to route work, populate forms, and estimate wait times.

Before you begin

Role required: sn_skill_builder.admin

Procedure

1. Navigate to **All** > **AI Skill Kit** > **Home**.
2. Create a skill or select the skill that you want to add predictive intelligence to.
3. Select the **Tool editor** tab.
4. Select the (+) icon to add a node.
5. Select **Tool node**.

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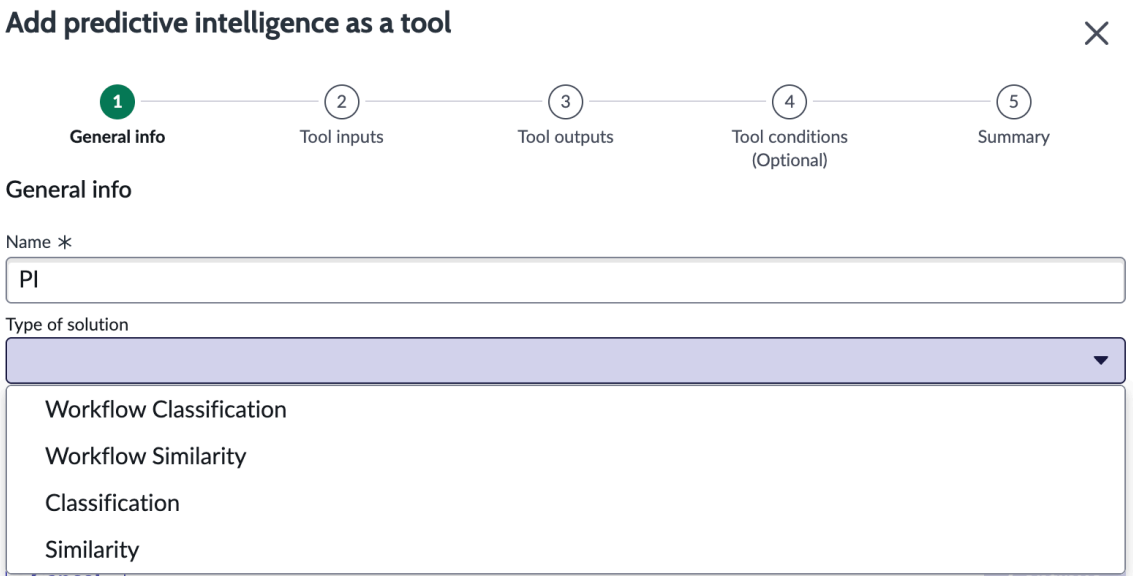
6. Select **Predictive Intelligence**.
7. On the form, fill in the fields.

Predictive intelligence form

Field	Description
Name	Name of the tool.
Type of solution	○ Workflow classification ○ Workflow similarity ○ Classification ○ Similarity



8. Add tool inputs.
9. Add tool outputs.
10. **Optional:** Select tool conditions.
11. Select **Add tool**.

Add Document Intelligence

Add Document Intelligence as a tool in AI Skill Kit to extract structured data from documents as part of your skill's execution flow.

Before you begin

Role required: sn_skill_builder.admin

Procedure

1. Navigate to **All** > **AI Skill Kit** > **Home**.
2. Create a skill or select the skill that you want to add Document Intelligence to.
3. Select the **2. Add tools** tab.
4. Select the (+) icon to add a node.
5. Select **Tool node**.

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6. Select **Document Intelligence**.
7. On the form, fill in the fields.

Add document intelligence form

Field	Description
Name	A name to identify the tool.
Action	**Ask a Question** Ask a question about the file content. **Extract information** Pull structured data and insights from file content. **Summarize files** Generate a summary of the file contents.

8. Add tool inputs.
9. Add tool outputs.
10. **Optional:** Select tool conditions.
11. Select **Add tool**.

Use prompt assistance

Use prompt assistance to start your prompt from an example in the prompt library or from a prompt that ServiceNow Otto generates.

Before you begin

Role required: sn_skill_builder.admin

Procedure

1. Navigate to **All** > **AI Skill Kit** > **Home**.
2. Create a skill or select the skill that you want to use prompt assistance for.
3. Select the prompt assistance icon .
4. Select the **Library** tab to search for a prompt from the prompt library.

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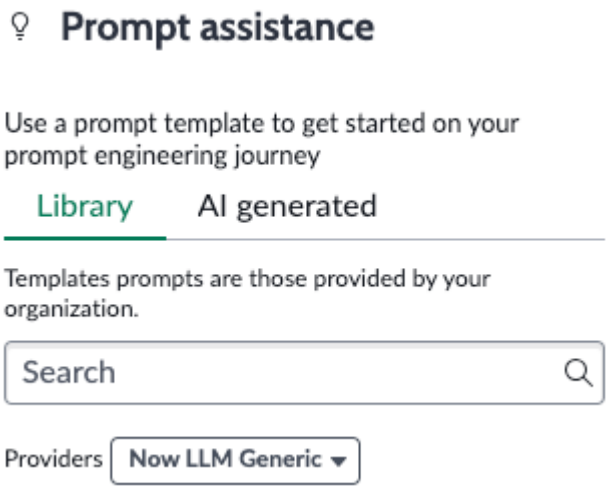
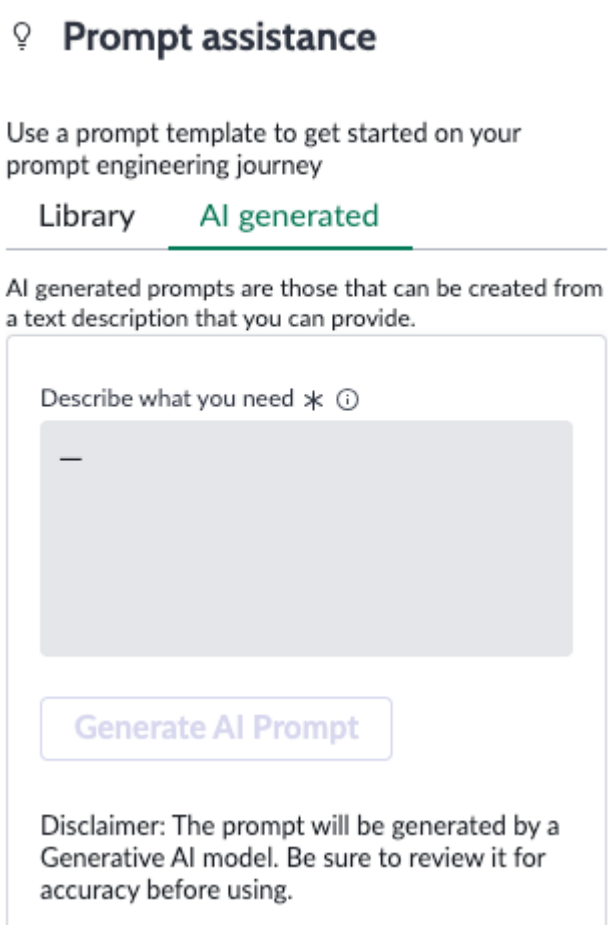


5.

6. Select the **AI generated** tab to generate a prompt from a description of what you need.



Test a prompt

After you create a prompt for your custom skill, test it before you finalize it to verify that it returns the expected results.

Before you begin

Role required: sn_skill_builder.admin

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Procedure

1. Navigate to **All** > **AI Skill Kit** > **Home**.
2. Select the skill that you created the prompt for.
3. In the Test prompt section, select **Run tests**.
4. Select a test record, such as an incident.
5. Select **Run test**.

> **Important:**
>
> Testing a skill consumes at least one Now Assist assist for the base prompt call.
>
> If the skill has LLM-judged evaluation metrics attached on the **Deployment and skill settings** tab, each metric execution consumes additional assists. Metric execution is billed as a custom call at one assist per 1,000 output tokens. Script-based metrics (metrics with a script instead of a judge prompt) don't consume assists.
>
> For information about adding evaluation metrics, see Configure deployment and skill settings.

Prompt results

Tab	Description
Response	Result that the large language model (LLM) returns for the prompt.
Grounded prompt	Prompt with the data from your skill inputs and tools filled in. Use this view to verify that your skill inputs and tools return the correct data.

6. **Optional:** If the skill is deployed as a flow, turn off the *com.glide.oneapi.fdih.async.quick.mode* system property, and then turn on flow reporting.
   This property controls whether flow execution details are generated when running flows, subflows, and actions from a custom skill. You can use flow execution details to test and troubleshoot your flow, subflow, or action. For more information about the system property, see Workflow Studio flow system properties.
7. **Optional:** Refine the prompt and repeat testing as needed.
8. **Optional:** Select the run test history icon to see the results from your previous run tests.

What to do next

After you test your prompt, finalize the prompt and publish the skill. To learn more about publishing a skill, see Finalize and publish a skill.

If you have not configured the deployment settings for your skill, see Configure deployment and skill settings.

Evaluate a prompt

Use the AI Skill Kit evaluation tools to measure how your skill prompts perform against a dataset, using automated metrics and human feedback.

Before you begin

Role required: sn_skill_builder.admin

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Procedure

1. Navigate to **All** > **AI Skill Kit** > **Home**.
2. Select the skill that you want to evaluate.
3. Select the **Prompt performance** tab.
4. Select the **Evaluation runs** tab.
5. Create a dataset from a table or data collection.

Create a dataset

Method	Steps
Create a dataset from a table	**a.** Give the dataset a name and description. **b.** Select **Table**. **c.** Find the table that you want to use. **d.** Select the maximum number of records that you want to use. **e.** Add conditions. **f.** Select **Generate Preview**. **g.** Select the mappings. **h.** Select **Create**.
Create a dataset from a data collection	**a.** Give the dataset a name and description. **b.** Select **Data Collection**. **c.** Select a data collection that you created in AI Data Kit. **d.** Select **Generate Preview**. **e.** Select the mappings. **f.** Select **Create**.

6. Select the add icon + for **Evaluation Runs**.
7. Give the evaluation run a name and description.
8. Select one or more prompts that you want to evaluate.
9. Select **Save & Next**.
10. Select a dataset.
11. Select **Save & Next**.
12. Expand the **Quality** tab.
13. Select the metrics that you want to evaluate.

Evaluation metrics

Evaluation method	Metric	Description
Human	Human Feedback	Human evaluation is the default option available for all prompt executions that generate a response. You can rate the response with a thumbs up or thumbs down, based on your satisfaction. You

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Evaluation method	Metric	Description
		also have the option to provide more detailed feedback to explain your evaluation choice.
Automated	Correctness	The correctness metric assesses the generated response's accuracy, completeness, pertinence, and writing quality relative to the given instruction. This metric helps to check that the text accurately reflects the instruction, covers all important points, remains relevant, and is well written.
Automated	Correctness with Golden Response	The correctness with golden response metric uses a predefined reference to assess the generated response's accuracy, completeness, pertinence, and writing quality relative to the given instruction. This metric helps to check that the text accurately reflects the instruction, covers all important points, remains relevant, and is well written. Use this metric when a reference response is available.
Automated	Faithfulness	The faithfulness metric assesses whether a generated response accurately reflects the information and context provided in the given instruction. This metric helps to check that the text contains no hallucinations, fabricated facts, or unsupported conclusions, maintaining alignment with the source material.

14. Select **Save & Next**.
15. Review the evaluation choices that you made.
16. Select **Save & Evaluate**.
17. **Optional:** Give a human evaluation.
    a. Select **Human evaluation**.
    b. Select a record to use in the evaluation.
    c. Expand the prompt and read the result.
    d. Select the thumbs up or thumbs down icon to give your evaluation.
    e. Add more information and select **Submit**.

Finalize and publish a skill

Finalize at least one prompt and publish your custom skill so that a Otto admin can activate it.

Before you begin

Role required: sn_skill_builder.admin

About this task

Publishing a skill is a two-part process. First, you must finalize at least one prompt. Finalizing a prompt marks it as ready for use and is required before the skill can be published. Then you publish the skill, which changes its state from Draft to Published and makes it visible to a Otto admin for activation in AI Admin Hub.

Tip: Make sure your deployment settings are configured before publishing. After it's published, the skill appears in AI Admin Hub under the workflow category you selected. To learn more, see Configure deployment and skill settings.

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Procedure

1. Navigate to **All** > **AI Skill Kit** > **Home**.
2. Select the skill that you want to publish.
3. Make any necessary changes to the prompt and test it.
   To learn more about testing your prompt, see Test a prompt.
4. In the **Skill contents** sidebar, select the prompt that you want to finalize.
5. Select the lock icon (**Finalize prompt**) next to the prompt name to finalize the prompt.

   The lock icon is located in the header row of the prompt editor, next to the **Manage prompt** button. Selecting it marks the prompt as finalized and removes the lock icon from view. You must finalize at least one prompt before you can publish the skill.

   Note: If you edit a finalized prompt, you must finalize it again before republishing.

6. Repeat the previous two steps for each additional prompt that you want to finalize.
7. Select **Publish skill**.

   The skill status changes from Draft to Published. The skill becomes visible in AI Admin Hub and ready for an admin to activate.

What to do next

A Otto admin must activate the skill before users can trigger it. To learn more about activating a skill, see Activate a skill.

To create a copy of a published skill to use as a starting point for a new one, see Clone and edit a ServiceNow skill.

To set a prompt as the default for a skill, use the **Set as the default prompt** toggle in the prompt editor. To learn more about managing prompts, see Create a prompt.

Activate a skill

After you create and publish a custom skill, you must activate it in AI Admin Hub. Activating the skill enables you to trigger the skill within the UI.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Features**.
2. Find the custom skill that you created.
3. Select **Activate skill**.
   Make sure you are in the correct application scope when you activate the skill. To learn more about application scopes, see Application scope.

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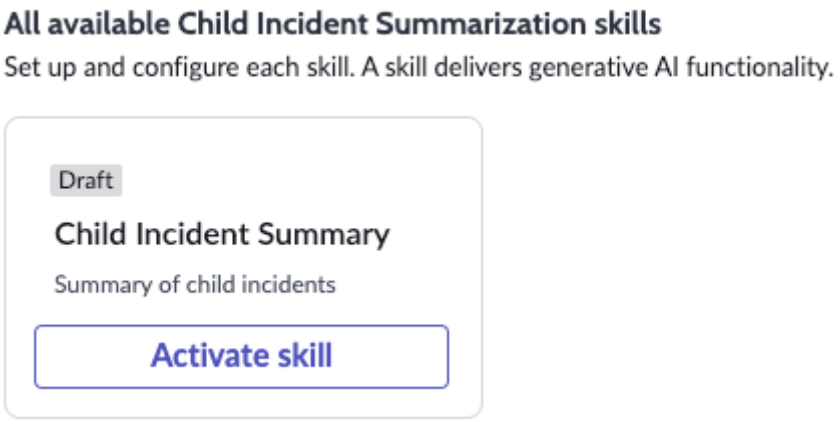

Note: Some skills might need to be reviewed and approved by a data steward before you can activate it.

What to do next

You can enable AI Guardian for your skills. To learn more about AI Guardian, see AI Guardian

Call a custom skill from a script

Call a custom skill from a UI action script so that you can run the skill and use its output in your instance logic.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System UI** > **UI Actions**.
2. Create a UI action.
   For more information on creating UI actions, see Create a UI action.
3. Add your script.

   The following script is an example. You can replace the variables with your data.

```
var inputsPayload = {};

// create the payload to deliver input data to the skill

inputsPayload[‘input name’] = {

  tableName: 'table name',

  sysId: 'sys_id',

  queryString: ''

};


//create the request by combining the capability sys ID and the
 skill config sys ID
```

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```
var request = {

    executionRequests: [{

        payload: inputsPayload,

        capabilityId: ‘capability sys id’,

        meta: {

            skillConfigId: ‘skill config sys id’

        }

    }],

    mode: 'sync'

};


//run the custom skill and get the output in a string format
try {
var output =
 sn_one_extend.OneExtendUtil.execute(request)['capabilities'][r
equest.executionRequests[0].capabilityId]['response'];
var LLMOutput = JSON.parse(output).model_output;
} catch(e) {
 gs.error(e);
 gs.addErrorMessage('Something went wrong while executing the
 skill.');
}
action.setRedirectURL(current);
```

AI Skill Kit reference

Look up the roles, general guidelines, and log tables that support custom skill development in AI Skill Kit.

AI Skill Kit roles

Certain roles are required to use AI Skill Kit functionality.

Role types in AI Skill Kit

Three separate role concepts apply when you build and deploy a custom skill. Understanding the difference helps you plan access before you start and troubleshoot permission errors after you deploy.

Roles required to use the AI Skill Kit

Users need specific roles to perform activities in AI Skill Kit, such as installing the plugin, building a skill, or activating a published skill. These roles are assigned to the people on your team who build and manage skills. For a list of the roles required for each activity, see the Roles required for common tasks table.

Roles required to trigger skills

Roles that a user must have to trigger a published skill on your instance. These roles are configured within the skill configuration as part of its access control list (ACL).

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The ACLs are separate from the roles required to build the skill. To learn more, see Configure security controls for a skill.

Roles that a skill runs under

The roles that a skill operates with while it runs, which control what data and actions the skill can access on behalf of the triggering user. These are configured on the skill as role restrictions. Role restrictions are also separate from the roles required to build the skill. To learn more, see Configure security controls for a skill.

Two roles ship with AI Skill Kit:

- sn_skill_builder.admin for building, editing, and publishing skills.
- sn_skill_builder.model_admin for managing the LLMs available to skills.

The platform admin role is also required at two points: to install AI Skill Kit and to activate a published skill in AI Admin Hub. In many deployments, one person holds all three roles.

Note: The ACL and role restriction concepts apply to the skill's runtime users, not to the people building the skill. If you're planning access for your build team, you only need the roles listed in the Roles required for common tasks table.

Roles required for common tasks in AI Skill Kit

Most work in AI Skill Kit requires the sn_skill_builder.admin role, including creating, cloning, editing, configuring, testing, evaluating, and publishing skills, and calling skills from scripts.

Two activities require the platform admin role instead: installing AI Skill Kit and activating a published skill in AI Admin Hub.

Triggering an activated skill from the UI requires whatever roles are configured in the skill's ACL. To learn more, see Configure security controls for a skill.

Skill kit admin (sn_skill_builder.admin)

Users with this role can create, update, and publish skills in AI Skill Kit. This role is required to use AI Skill Kit.

Contains roles

List of roles contained within the role.

None.

Groups

None. This role is not assigned to any groups by default.

Tasks requiring this role

The *sn_skill_builder.admin* role is required for the following tasks:

- Create a skill
- Clone and edit a ServiceNow skill
- Create a prompt
- Configure a skill prompt
- Configure deployment and skill settings

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- Configure security controls for a skill
- Add a tool
- Add a retriever
- Add a web search
- Use prompt assistance
- Test a prompt
- Evaluate a prompt
- Finalize and publish a skill

Special considerations

This role grants access to the AI Skill Kit application and all skill authoring functionality. It does not grant the ability to activate skills in AI Admin Hub. Activating skills requires the *admin* role.

When configuring access control lists (ACLs) for a skill, the roles you specify in the ACL determine which users can invoke the skill. The *sn_skill_builder.admin* role only controls who can author skills, not who can use them. To learn more about configuring skill ACLs, see Configure security controls for a skill.

Field of use for AI Skill Kit

AI Skill Kit is included in various ServiceNow Otto packages that cover your ability to build Otto skills.

The following table clarifies how custom skills can be created and deployed in each of your environments.

Expected field of use

Workflow extensibility	AI Skill Kit enables you to supplement your use of licensed, prebuilt Otto skills, such as incident summarization. AI Skill Kit also enables you to create workflow-related skills within the scope of your Otto purchases. For example, within ITx for ITSM Pro/Enterprise Plus, within ITx and HR for customers with ITSM, and HRSD Pro/Enterprise Plus.
Non-duplicative	Refer to the Now Assist Overview to see the prebuilt skills that are currently available for purchase in ServiceNow Otto packages. You must build from the purchased skills instead of attempting to create duplicative versions of licensable ServiceNow skills without purchase.
Custom tables	Custom skills can be built using AI Skill Kit to enable generative AI functionality on the custom tables that are provided in your licenses.

Web search custom skill

The web search custom skill performs an internet search to answer a query. Web search runs when the LLM and AI Search can't provide results or whenever web search mode is activated.

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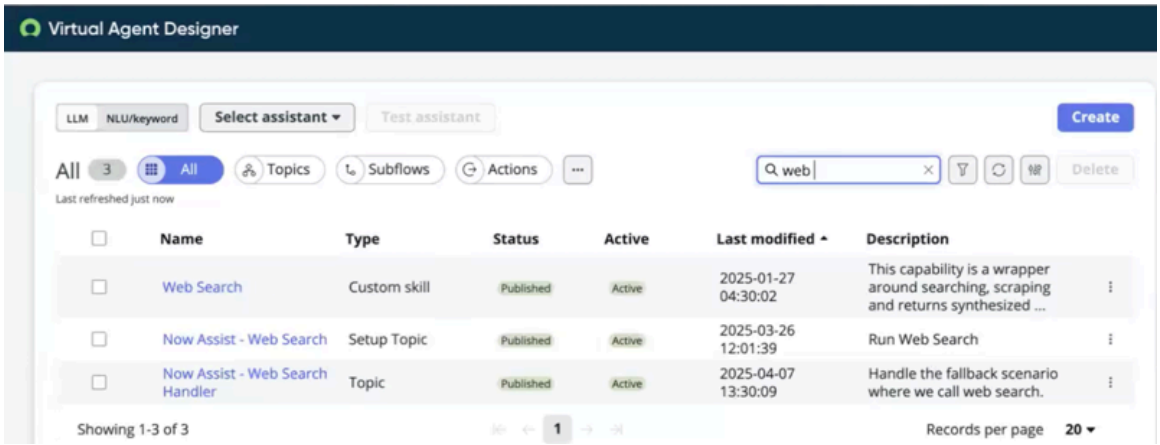
The web search custom skill is based on a prebuilt topic block in Virtual Agent Designer, and is available when you turn on Otto in Virtual Agent. This feature is automatically triggered when both AI Search and the LLM can't find information to answer an end user's query. This feature can also be manually triggered whenever end users select the Web search results icon to enter into web search mode. After web search activates, a third-party AI service performs the search and returns an answer.



For more information about the web search mode end-user display and functionality, see Web search.

Web Search AI choices are available in the OneExtend Definition Configs related list within the *`AI Search answers`* entry in the OneExtend Capabilities [sys_one_extend_capability_list] table. Select one of the AI definitions there, such as Perplexity, and set its value to `true`. Activate a matching AI credential by navigating to **All** > **Connections & credentials** > **Credentials**, and setting the matching API key (such as *`Perplexity API key`* active value to `true`).

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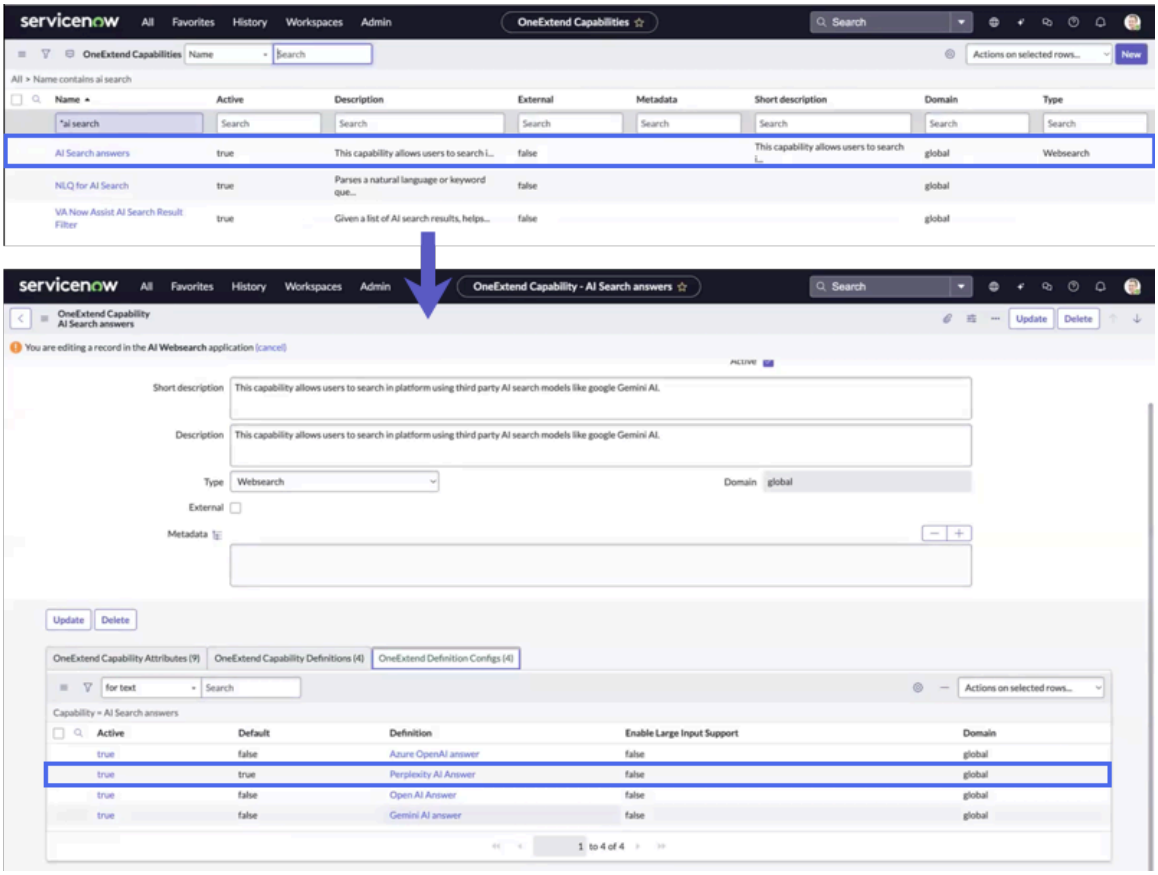

For more information on how to work with the *AI Search answers* OneExtend capability, see Configure AI search answers capability for web search.

For more information on how to add web search as a tool in the AI Skill Kit, see Add a web search.

AI Admin Hub

ServiceNow Otto uses generative AI to enhance user productivity and efficiency through conversation and proactive experiences.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows and AI agents. For more information see ServiceNow product tiers.

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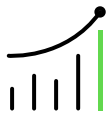
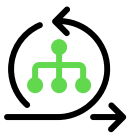
See https://www.servicenow.com/community/now-assist-articles/now-assist-quick-start-guide/ta-p/2685044 to read about the foundation of generative AI at ServiceNow®.

Get started

Explore Learn more about ServiceNow Otto on the ServiceNow AI Platform.	**Configure** Explore, configure, use, and analyze generative artificial intelligence (AI) features and skills.	**Analyze**  Analyze and monitor Now Assist performance.
Now LLM Service model updates Learn about the Now LLM Service models.	**Reference** Learn about user roles, data usage policy, and domain separation in Now Assist.	**Generative AI Controller**  Customize your generative AI experience on the ServiceNow AI Platform with the Generative AI Controller.

Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-

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making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

Exploring AI Admin Hub

Learn how ServiceNow Otto Admin brings generative AI capabilities to the ServiceNow AI Platform. With ServiceNow Otto Admin, you can improve the productivity and efficiency in your organization, deliver better self-service, recommend actions and provide answers, and empower your users to search more effectively.

ServiceNow Otto Admin overview

ServiceNow Otto is a growing cross-platform family of generative AI features, which are tasks that a large language model (LLM) can perform. Generative AI features are based on the initial training and architecture.

A skill delivers a feature plus the use case to the user. An example of a skill is chat summarization within a customer workspace. ServiceNow Otto products provide features and skills that are tailored to meet the needs of users in different workflows.

ServiceNow Otto framework

ServiceNow Otto products include some or all of the following foundational platform tools for ServiceNow Otto. For more information, see ServiceNow Otto skills in the Platform workflow.

- Administrators install plugins, manage skills, and analyze usage and performance with the Overview tab in AI Admin Hub.
- Users can take advantage of ServiceNow Otto skills by using the ServiceNow Otto panel on the instance.
- Use ServiceNow Otto for AI Search to generate answers for AI Search.
- Use ServiceNow Otto for Mobile to run generative AI skills in a mobile environment.
- Use to create conversational catalog experiences and author topics that use LLM topic discovery.
- Developers can use the Generative AI Controller to integrate generative AI features in custom flows and conversations by using your own third-party large language model (LLM) licenses.

ServiceNow Otto benefits

Benefit	Feature	Users
Leverage the power of search with the Now LLM generative AI model to answer questions in user searches with actionable AI-generated summaries of relevant knowledge articles.	ServiceNow Otto for AI Search	Everyone

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Benefit	Feature	Users
Install and configure ServiceNow Otto applications and the skills they provide.	ServiceNow Otto Admin console	Administrators
Choose which skills to turn on, and which users can access them.	ServiceNow Otto Admin console	Administrators
Monitor the usage and performance of generative AI features and capabilities offered under ServiceNow Otto.	ServiceNow Otto Analytics	Administrators
Access generative AI skills in context through a user-friendly interface.	ServiceNow Otto panel	Everyone
Use ServiceNow Otto skills on mobile devices.	ServiceNow Otto for Mobile	Everyone
Customize your workflows and use your own third-party LLM license.	Generative AI Controller	Administrators or developers
Use ServiceNow Otto in other platform features.	ServiceNow Otto skills in the Platform workflow	Administrators or developers
Monitor ServiceNow Otto consumption on your instance.	Monitoring ServiceNow Otto usage in Subscription Management	Administrators

Overview tab in AI Admin Hub

The AI Admin Hub console provides quick and effortless access to the important information that you need to set up, configure, and monitor ServiceNow Otto applications and features.

x ServiceNow Otto Admin overview

AI Admin Hub overview tab

Begin your exploration of the ServiceNow Otto features and skills in the AI Admin Hub console. This console has everything you need to install the plugins, configure the skills, and learn about the different generative AI features on the ServiceNow AI Platform.

The following example shows the AI Admin Hub Overview page.

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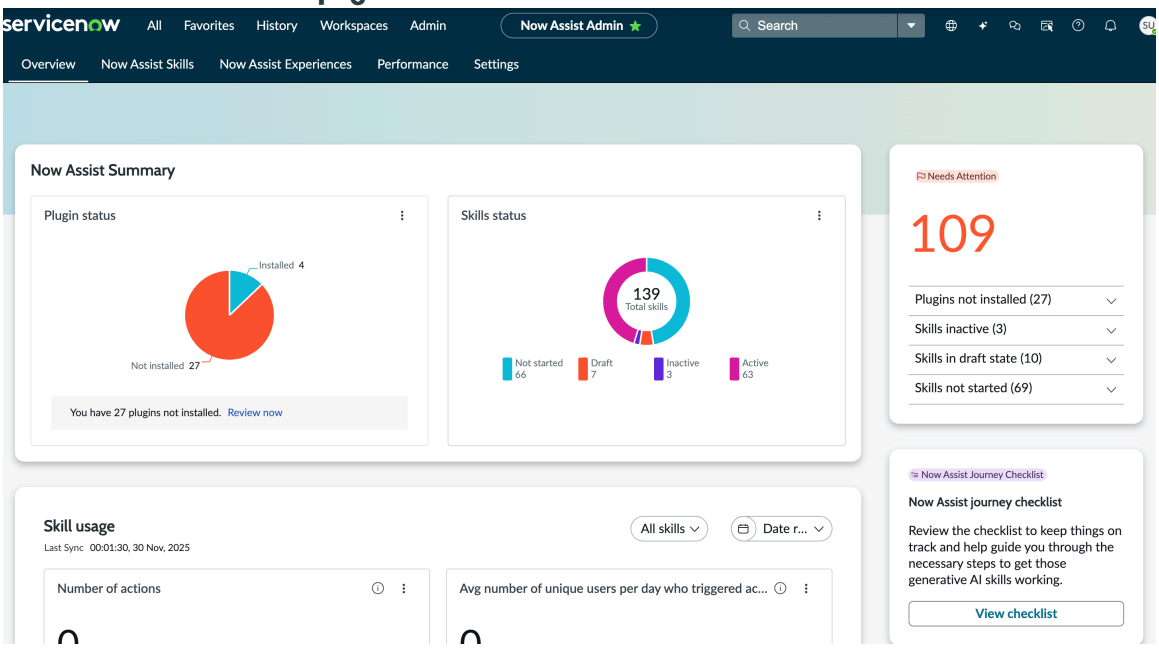
AI Admin Hub Overview page



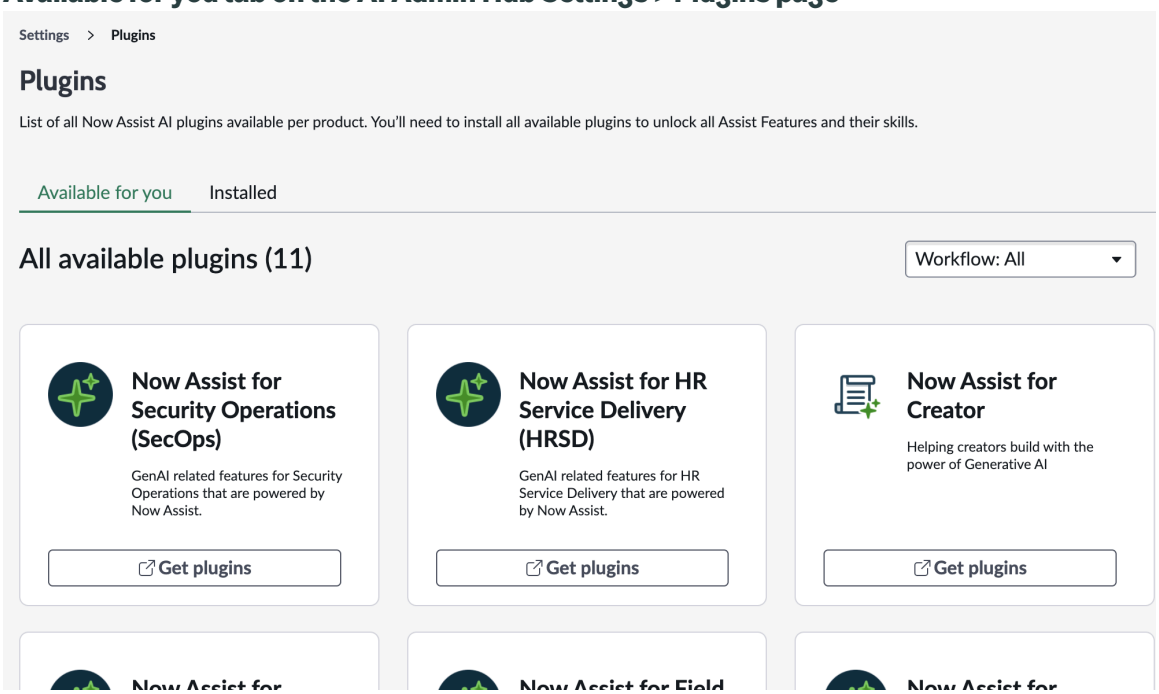
AI Admin Hub workflow

Take five steps to begin using the AI Admin Hub console.

1. **Install plugins.**

   On the **Available for you** tab of the Settings page, you can review the available plugins and install the ones that are relevant to your business needs. Each plugin contains the skills that you can activate to enable generative AI features on your instance. The following diagram shows the **Available for you** tab.

   ### Available for you tab on the AI Admin Hub Settings > Plugins page

2. **(Optional) Turn on the Now Assist panel.**

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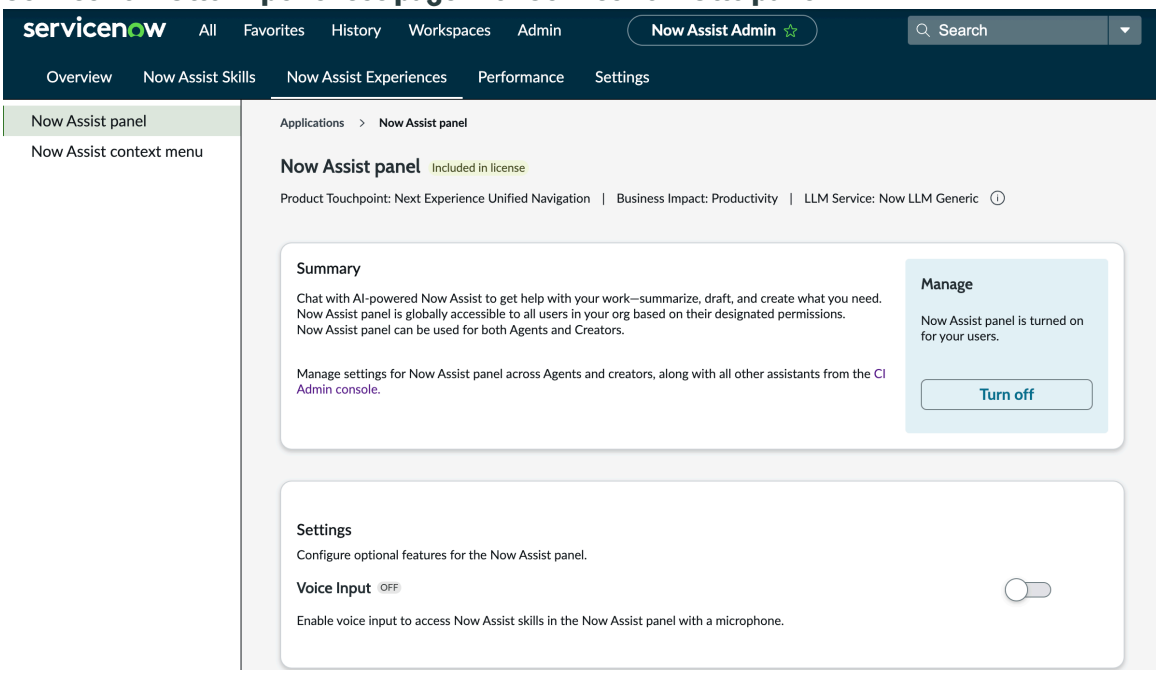
The ServiceNow Otto panel integrates the ServiceNow Otto skills into the Next Experience UI. By turning on the Now Assist panel directly from the AI Admin Hub console, you enable agents to access skills from anywhere on the ServiceNow AI Platform.

For more information about the ServiceNow Otto panel, see ServiceNow Otto panel overview.

This step is optional because the skills can also display in-product in the Core UI and in Workspaces.

You can turn the ServiceNow Otto panel on from the ServiceNow Otto Experiences page of the Admin console.

ServiceNow Otto Experiences page with ServiceNow Otto panel



3. Activate skills.

Skills are features that are created for a specific use case in a ServiceNow Otto application. Use the ServiceNow Otto Skills page to explore the skills that are available with your installed plugins. The following diagram shows the available features and skills in the Technology workflow.

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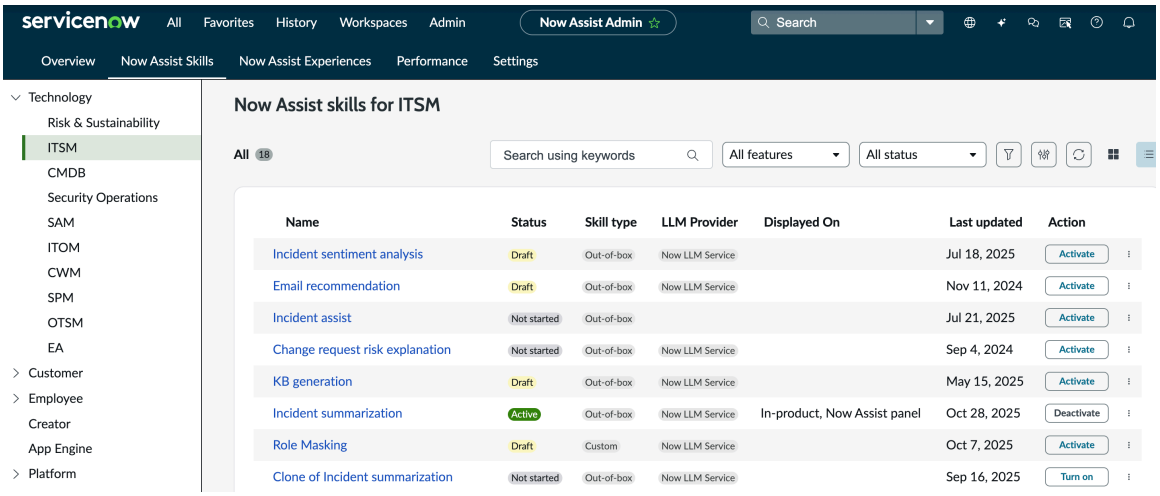
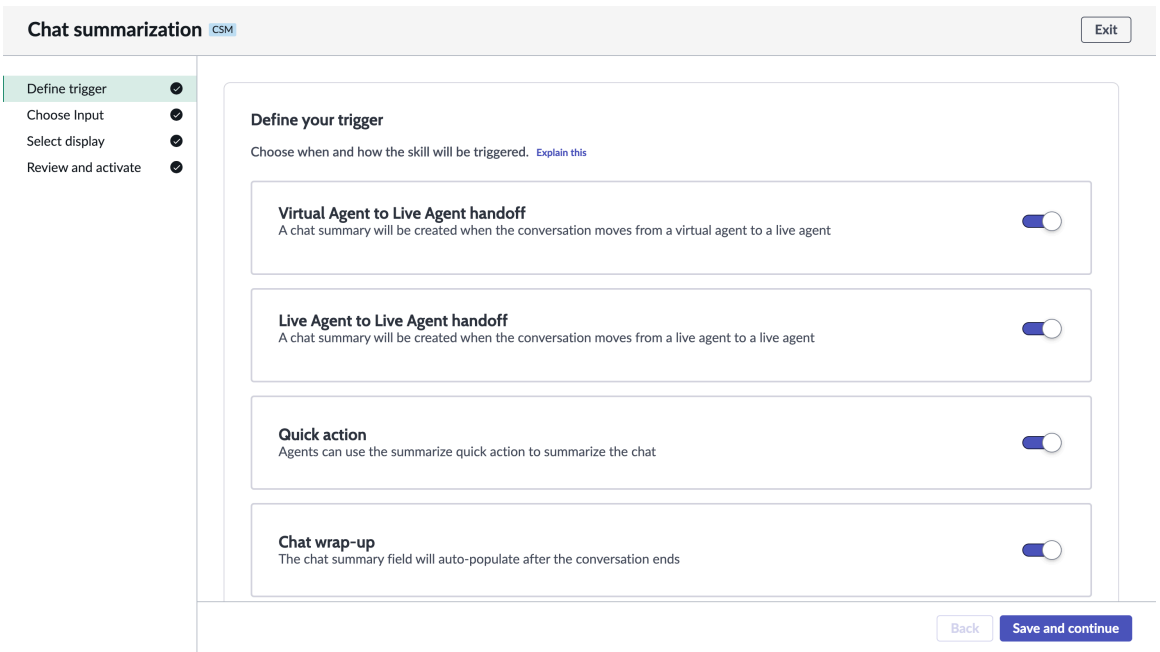
Available ServiceNow Otto features and skills in the Technology workflow



After deciding which skills best fit your business needs, you can activate them from the console. Some skills require configuration so that you can customize the skill to your needs, such as determining the skill inputs and triggers. You can select the skills that you want to configure in the AI Admin Hub Features page.

The following example shows a step in the guided setup of the skill activation process, which is choosing where to display the skill. Skills can be displayed in-product, including the Core UI and Workspaces, or in the ServiceNow Otto panel. You can choose either or both locations. The following diagram shows the process for chat summarization activation in AI Admin Hub.

Chat summarization activation in AI Admin Hub



4. Review your ServiceNow Otto account settings.

The ServiceNow Otto Admin console Settings page enables you to set up language support, if you have Dynamic Translation enabled on your instance, and review your account details. Get up-to-date information about what plugins are available to you and the status of data sharing on your instance.

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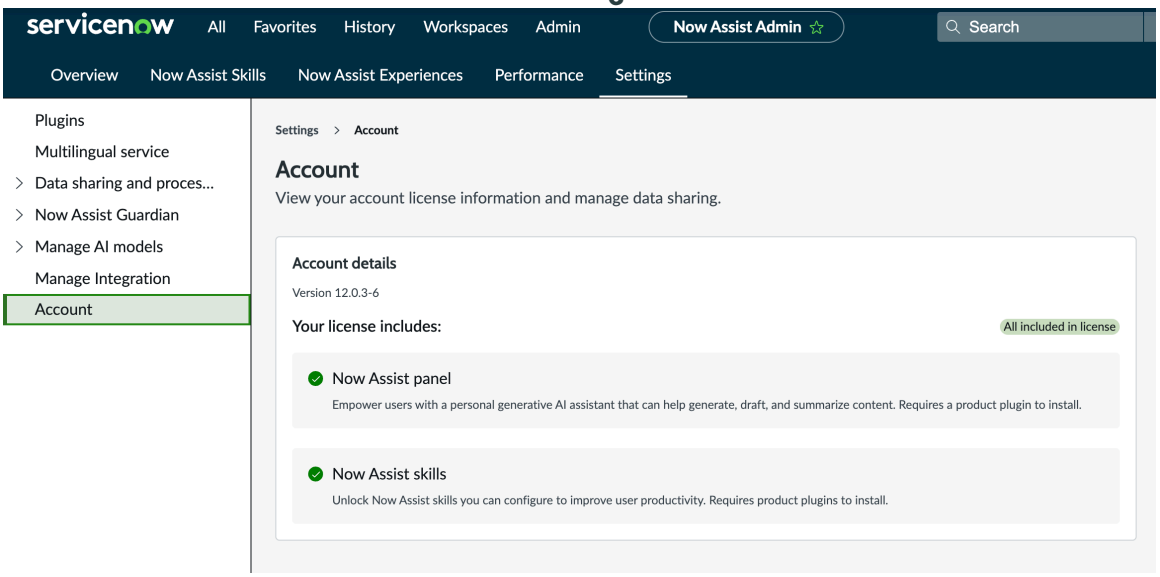
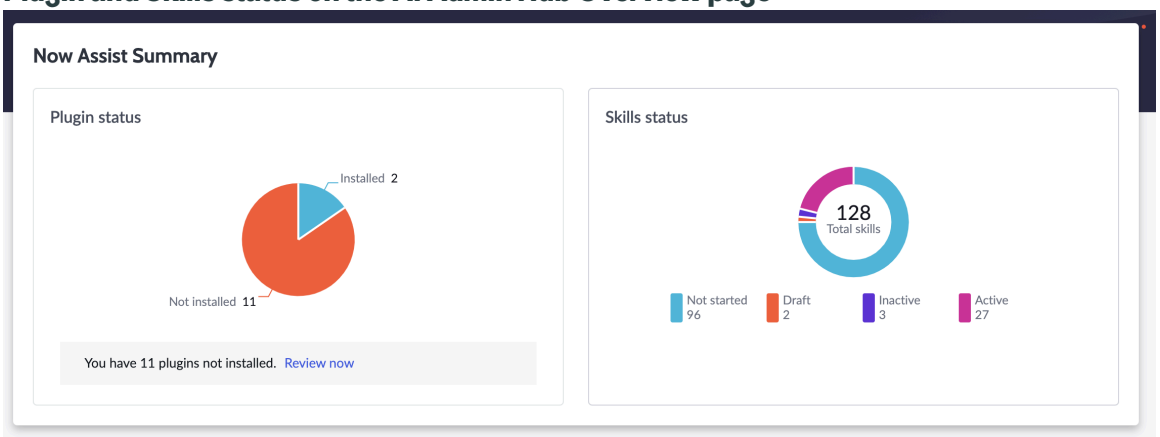
ServiceNow Otto Admin console account settings



5. Monitor and analyze skill performance.

Use the metrics available on the Overview page to review the summaries, performance information, and issues that need your attention. The following example shows the current plugin status, as well as the number of active skills.

Plugin and Skills status on the AI Admin Hub Overview page



The AI Admin Hub console contains the **ServiceNow Otto journey checklist** with additional instructions for implementing ServiceNow Otto on your instance.

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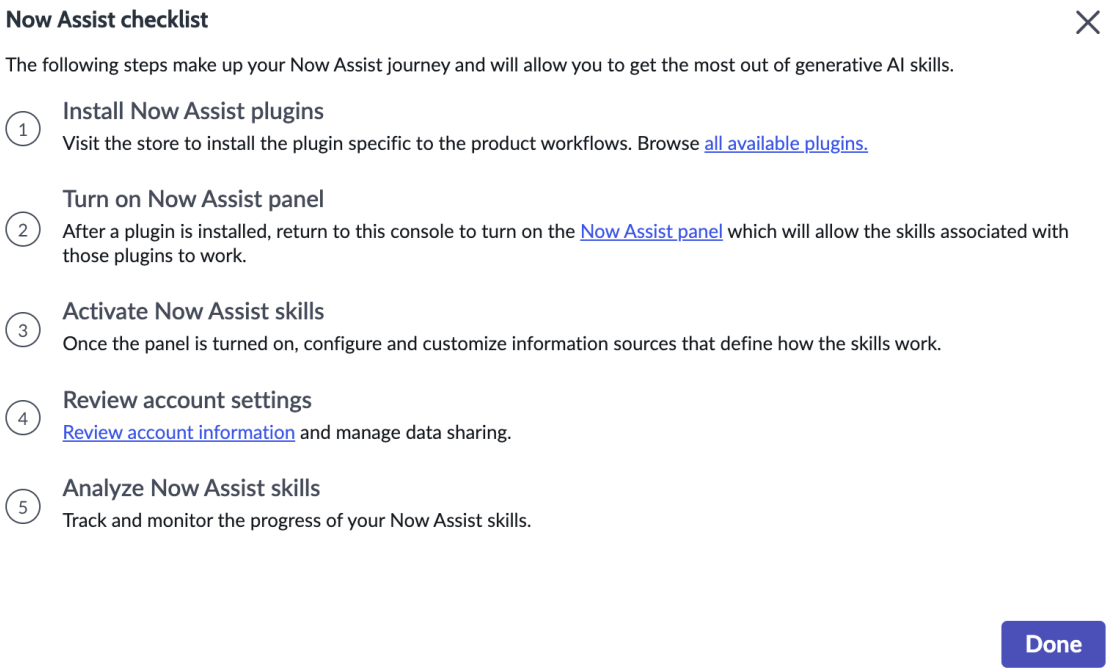
ServiceNow Otto journey checklist

You can consult the following checklist from the AI Admin Hub console Overview page at any time to guide your implementation of ServiceNow Otto applications, features, and skills.



Learn more about the ServiceNow Otto journey

- Get an overview of the ServiceNow Otto framework.
- Discover the ServiceNow Otto panel.
- Explore the ServiceNow Otto skills available.
- Activate and configure a ServiceNow Otto skill using the AI Admin Hub console.
- Analyze and monitor ServiceNow Otto skill usage and performance.

ServiceNow Otto Experiences

Explore ServiceNow Otto panel and ServiceNow Otto context menu under the **ServiceNow Otto Experiences** tab of ServiceNow Otto Admin.

ServiceNow Otto panel

With the ServiceNow Otto panel, you can get assistance from generative AI experiences to solve customer issues faster. Use this conversational interface to summarize a chat, case, or incident, get help, or generate resolution notes so that you can get the context of this information more quickly.

You must fulfill the following conditions to use the ServiceNow Otto panel:

- Next Experience must be enabled. For more information, see Considerations for activating Next Experience.
- You must have the now_assist_panel_user role.
- Your role must be applied to at least one active ServiceNow Otto skill to use skills in the ServiceNow Otto panel.

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There are three versions of ServiceNow Otto panel chats: standard, enhanced, and premium. Select one of the versions to learn more:

- Standard chat - provides conversational support assistance within a standard, static chat window. To activate the ServiceNow Otto panel standard chat, see Activate the ServiceNow Otto panel standard chat.
- Enhanced chat - provides conversational support assistance within a dynamic window that gives a more intuitive and personalized experience. You must activate the ServiceNow Otto panel enhanced chat and configure your ServiceNow Otto instance to use the enhanced chat. See Activate the ServiceNow Otto panel enhanced chat for more information.
- Premium chat - provides conversational support assistance within a fully agentic chat experience that enables the assistant to reason across multiple sources and execute complex workflows without leaving the conversation. You must activate the ServiceNow Otto panel premium chat and configure your ServiceNow Otto instance to use the premium chat. See Display your assistant on Platform or ServiceNow Studio for more information.

If you want to use assistants, you must activate them. See Assistants overview for information on activating assistants.

Note: Voice input is automatically activated when you activate the ServiceNow Otto panel. As of the Zurich Patch 4 release, voice input is configured in the Configure Next Experience accessibility preferences.

Warning: Do not modify or remove the default AI disclaimer. If you modify or remove the default AI disclaimer, you're responsible for communicating to end users that they are interacting with an AI system and any associated risks. ServiceNow is not responsible for the effects of any changes made.

For help with installation, see Solving installation and configuration issues with ServiceNow Otto.

Standard chat

With the ServiceNow Otto panel standard chat, you can get assistance from generative AI experiences to solve customer issues faster. Use this conversational interface to summarize a chat, case, or incident, get help, or generate resolution notes so that you can get the context of this information more quickly.

Note: Next Experience must be enabled to use the ServiceNow Otto panel. For more information, see Considerations for activating Next Experience.

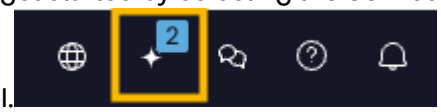
ServiceNow Otto panel overview

Agents can use the ServiceNow Otto panel to interact with and get assistance from generative AI. On the ServiceNow Otto panel, you can increase your productivity and efficiency by using the generative AI experience to summarize a chat, case, incident, or generate resolution notes.

Conversational aspects of the ServiceNow Otto panel, such as skill detection, are powered by Now LLM Service.

Note: ServiceNow Otto skills must be enabled to appear on the ServiceNow Otto panel. For more information, see Generative AI skills.

Let's get started by selecting the ServiceNow Otto icon to display the ServiceNow Otto panel.



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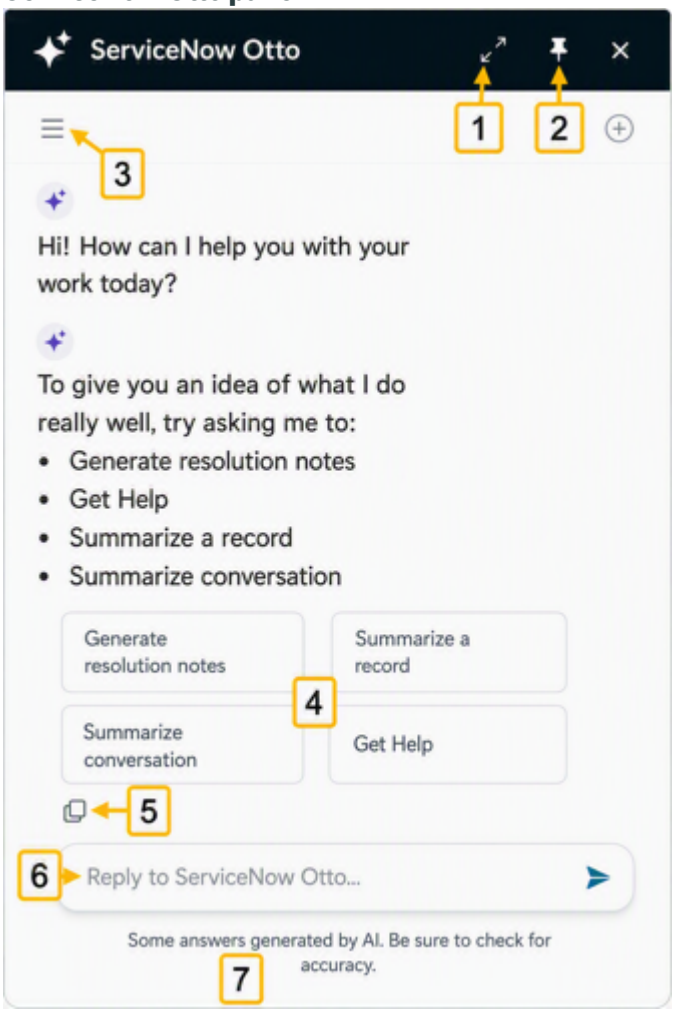
If a number in a square appears, it indicates how many messages you missed when the ServiceNow Otto panel was closed.

ServiceNow Otto panel



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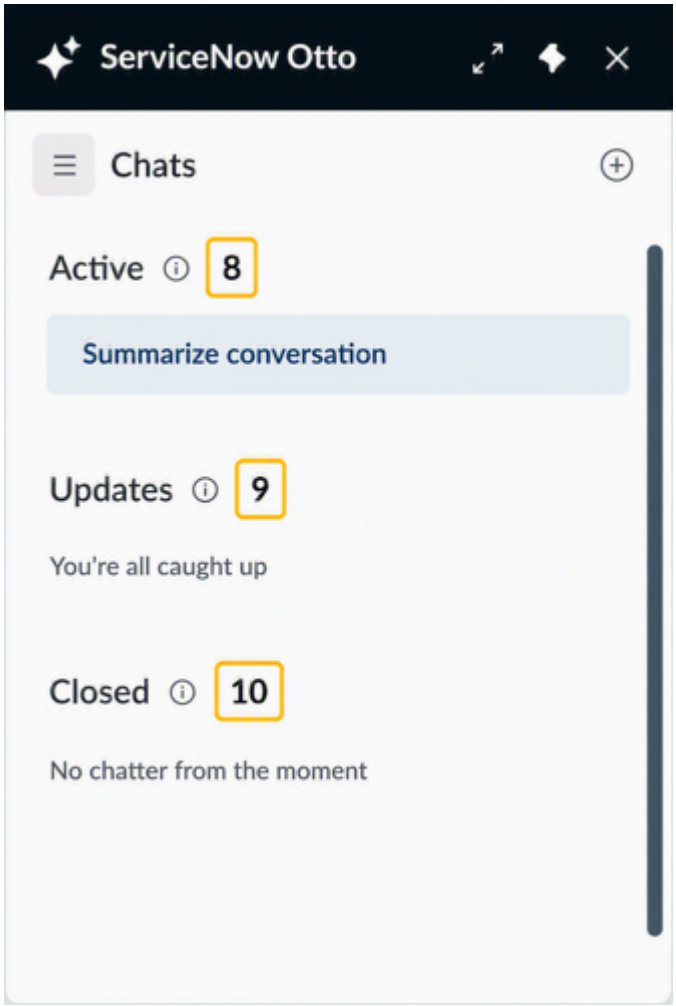

The ServiceNow Otto panel includes:

Item number	Description
1 - Enter modal button	Expands the chat into a 90% screen-size window.
2 -	Positions, or pins, the ServiceNow Otto panel to the screen.
3 - Display chats button	Displays the Chats window.
4 - Option buttons	Displays the available options.
5 - Copy message button	Copies the ServiceNow Otto panel message.
6 - Reply to ServiceNow Otto... field	Enter actions.
Voice Input	If Voice Input is activated, select the microphone icon or the keyboard shortcut to use your voice to interact with the ServiceNow

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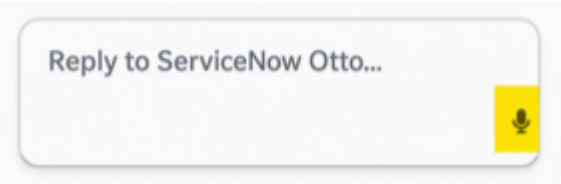
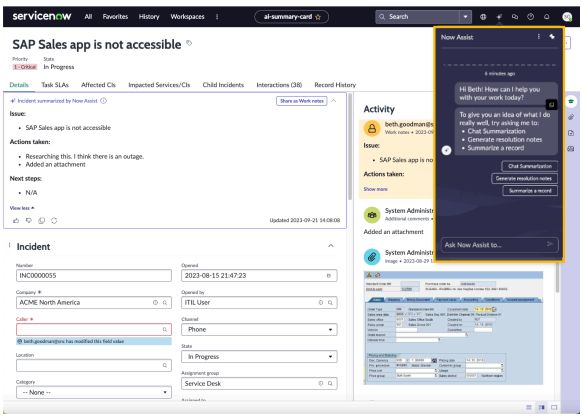
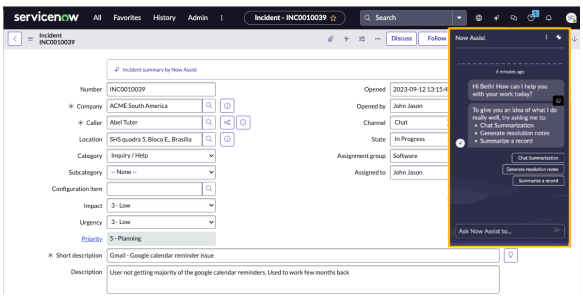
Item number	Description
	Otto panel. After you speak, there's a pause while the system transcribes the text and then displays it on the screen. See Enable voice input for ServiceNow Otto panel for information on enabling Voice Input. See Next Experience keyboard shortcuts for the ServiceNow Otto menu (Voice Input mode) shortcuts for Microsoft and macOS.
8 - Active chats	All active chats display in the Active chats section. in the Active chats section of the ServiceNow Otto. You can create additional chats by selecting the + icon in the heading.
9 - Updates	Displays important updates and reminders.
10 - Closed chats	Displays all closed chats. If you select one of the closed chats, you can see that chat's history.

ServiceNow Otto panel is available on Next Experience and ServiceNow Studio. The following screenshots show the ServiceNow Otto panel in a workspace and on Core UI screens under Next Experience.

ServiceNow Otto panel

Next Experience	Core UI
	

Navigating from the ServiceNow Otto panel

Navigate from the ServiceNow Otto panel without leaving the current conversation by entering a navigation request in the **Ask ServiceNow Otto to...** field. If you enter "navigate me to active incidents," ServiceNow Otto displays a button that enables you to view the active incidents.

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Chat summarization

Quickly learn the details of a chat by reading a chat summarization. The chat summarization gives you enough details about the chat so that your requester doesn't have to repeat the same information to you.

To generate a chat summarization from the ServiceNow Otto panel, select **Chat Summarization** or enter `summarize chat` in the **Ask ServiceNow Otto to** field.

Note: You can also generate a chat summarization by using the `/summarize` quick action in Agent Chat.

Case or incident summarization

Quickly learn the details of a case or incident by reading a case summarization. The summarization gives you enough details about the interaction so that your requester doesn't have to repeat the same information to you.

You can generate a case or incident summarization from the ServiceNow Otto panel for ServiceNow Otto for CSM, ServiceNow Otto for HRSD, or ServiceNow Otto for ITSM:

- For ServiceNow Otto for CSM, select **Summarize record** or enter `summarize a record` in the **Ask ServiceNow Otto to** field.
- For ServiceNow Otto for HRSD, select **Summarize record** or enter `summarize a record` in the **Ask Service Now Otto to** field.
- For ServiceNow Otto for ITSM, select **Summarize incident** or enter `summarize an incident` in the **Ask ServiceNow Otto to** field.

Conversation Help

Get specific and accurate answers to your queries by using the Get Help skill option on the ServiceNow Otto panel. This skill is available to everyone entitled to ServiceNow Otto capabilities.

For more information about the ServiceNow Otto Conversational Help skill which represents as Get Help on the ServiceNow Otto panel, see Now Assist Conversational Help.

Resolution notes generation

Quickly learn the details of how an interaction was resolved by generating and reading resolution notes.

To generate resolution notes from the ServiceNow Otto panel, select **Generate resolutions notes** or enter `generate resolutions notes` in the **Ask ServiceNow Otto to** field.

Streaming responses

After you enter a question or request on the ServiceNow Otto panel, ServiceNow Otto gathers information from Knowledge Base articles, external content, product documentation, catalog items, and workflows and combines them into a synthesized, comprehensive answer. Instead of waiting for the entire message to render, the synthesized response streams in real time and stops streaming after the entire message has been delivered. An animated sparkle icon (✦) appears while the response is generated and changes to the static sparkle icon after the response has fully loaded.

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Enhanced chat

ServiceNow Otto panel enhanced chat is a conversational support experience within a dynamic window that also includes the ability to have multiple active conversations and superior search capabilities. Use ServiceNow Otto panel enhanced chat to improve your productivity and efficiency by leveraging generative AI to perform tasks such as summarize a chat, case, or incident, request help, generate resolution notes, among others.

Agents can use the ServiceNow Otto panel enhanced chat to interact with and get assistance from generative AI. You can move the chat window by selecting the header and dragging the chat window to the desired location. You can resize the chat window by using the window's edges to resize to your desired size or use the toolbar icons.

Conversational aspects of the ServiceNow Otto panel, such as skill detection, are powered by Now LLM Service.

Note: To use the full capabilities of ServiceNow Otto panel enhanced chat, AI Search must be enabled for your portal. Without it, ServiceNow Otto panel enhanced chat functions in a limited capacity. Basic conversational interactions such as predefined topic flows and simple questions and answers are available, but knowledge article retrieval, AI responses grounded in instance content, and semantic search capabilities require AI Search. For more information, see Enable and configure AI Search in Service Portal.

Prerequisites

You must fulfill the following conditions before using the ServiceNow Otto panel enhanced chat:

- Next Experience must be enabled. For more information, see Considerations for activating Next Experience.
- You must have the now_assist_panel_user role.
- Your role must be applied to at least one active ServiceNow Otto skill to use skills in the ServiceNow Otto panel.
- ServiceNow Otto panel enhanced chat must be activated before you can use it. See Activate ServiceNow Otto panel enhanced chat for more information.
- ServiceNow Otto skills must be enabled to appear on the ServiceNow Otto panel. For more information, see ServiceNow Otto skills.
- If you want to use assistants, you must activate them. See Activate ServiceNow Otto assistants for information on activating assistants.
- If you want to use voice input, you have to enable voice input Enable voice input for ServiceNow Otto panel.

  Note: Voice input is automatically activated when you activate the ServiceNow Otto panel. As of the Zurich Patch 4 release, voice input is configured in the Configure Next Experience accessibility preferences.

ServiceNow Otto panel enhanced chat overview

Let's get started by selecting the ServiceNow Otto icon ✦ to display the ServiceNow Otto panel.

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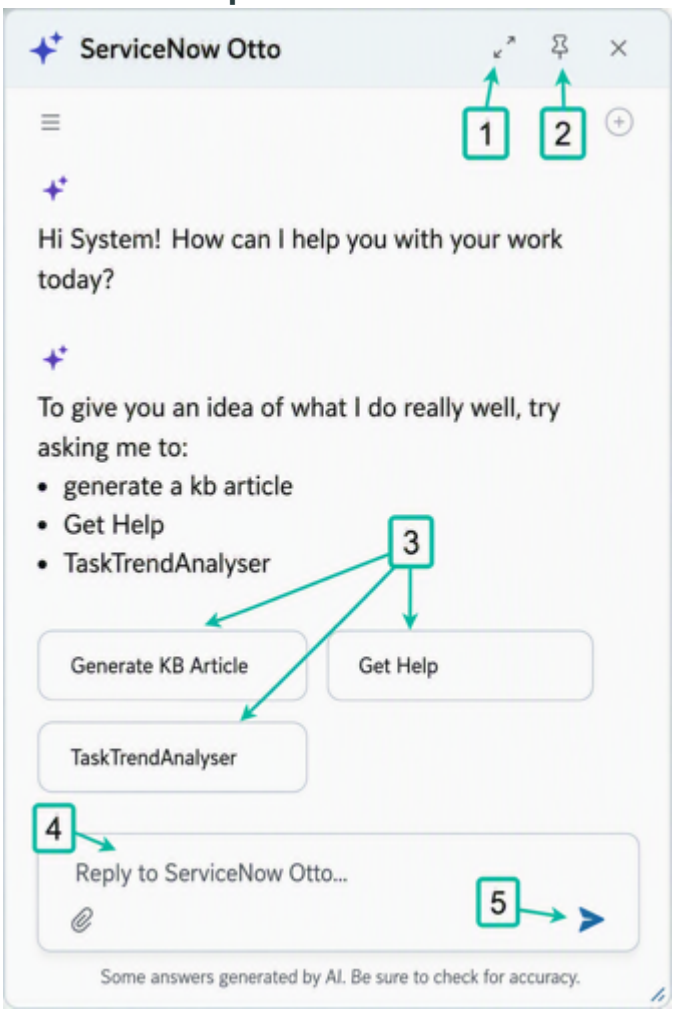
ServiceNow Otto panel



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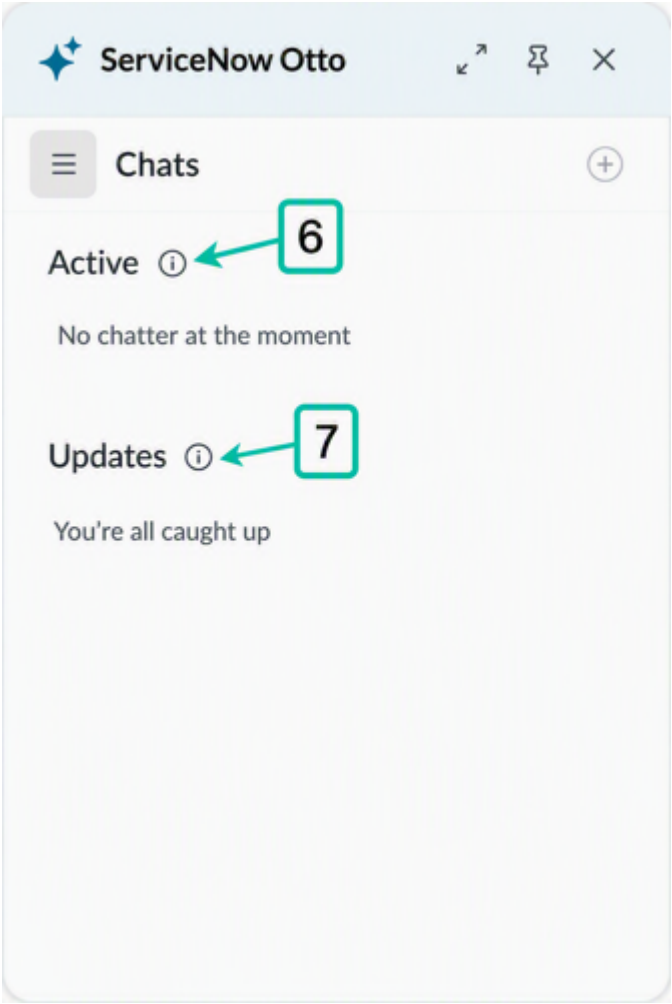

The ServiceNow Otto panel includes:

Item number	Description
1 -	Expands the chat into a 90% screen-size window. The 90% screen-size window can't be resized or moved. Selecting the icon again resizes the chat back into the floating window.
2 -	Positions, or pins, the ServiceNow Otto panel to the screen.
3 - Option buttons	Displays the available options.
4 - Reply to ServiceNow Otto...	Enter actions.
5 - ServiceNow Otto message	Indicates that the answers are generated by AI.
6 - Active chats	All active chats display in the Active chats section. in the Active chats section of the

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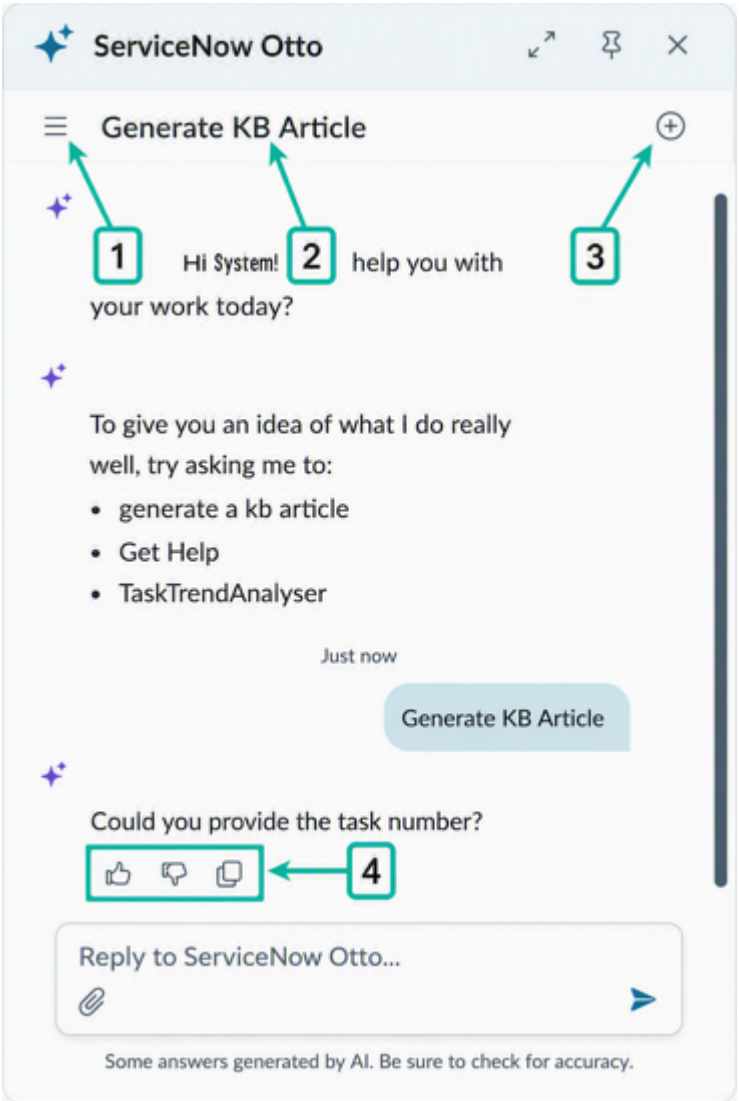
Item number	Description
	ServiceNow Otto. You can create additional chats by selecting the + icon in the heading.
7 - Closed chats	Displays all closed chats. If you select a closed chat, the chat's history displays.

The ServiceNow Otto subheader consists of these elements:



ServiceNow Otto subheader elements

Element	Description
1. Chats ( )	All chats appear. Chats are organized with the most recent conversations at the top. Selecting a chat opens the chat in the conversation area. If there are unread chats or notifications, a badge number appears on the Chats icon

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ServiceNow Otto subheader elements (continued)

Element	Description
	(☰). Any unread chat or notification appears with a red dot next to it and the chat title appears in bold. Additionally, if you switch to a new chat while another active chat is ongoing, a pop-up message on the Chats icon (☰) appears: `Your previous chat was saved. You can revisit all of your past chats and continue ones that are still active.` The following list includes the chat sections that you may see in the chats area. • Active: Chats where you can continue the conversation. If applicable, active chats move to the Closed chats section after two hours of inactivity. This 2 hour time limit can be configured within the Messaging Channels {sys_cs_channel.list} table. To change the inactivity time limit, from the Messaging Channels {sys_cs_channel.list} table, select the **NASS** record and populate the **Conversation Idle Timeout** field with your preferred active chat time limit. If you have no active chats, `No chatter at the moment` is displayed. If more than 12 active chats are running, a **Show more** link appears to view more chats. Selecting **Show more** displays an additional 10 chats. • Updates: Updates for important notifications and reminders can be configured to display. When *`sn_nowassist_va.nass_notification_enabled`* is set to `true` (the default), simple (nonactionable) ServiceNow Otto panel notifications appear on your portal home page. After selecting a notification, you're redirected to this Updates section. If you have no updates, `You're all caught up` is displayed. If more than four updates are available, a **Show more** link appears to view more updates. Selecting **Show more** displays an additional 10 updates. **Note:** If *`sn_nowassist_va.nass_notification_enabl`* is set to `false`, the Updates section doesn't appear. • Closed: Closed chats can be configured to display. A message closes when the designated time has passed (2 hours of

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ServiceNow Otto subheader elements (continued)

Element	Description
	inactivity) or you receive the following response in the chat: `It looks like you're finished with this chat, so I'll go ahead and close it.` Turn on closed chats by selecting the **Show closed chats** check box within **Conversational Interfaces** > **Assistants** > **[Selected Assistant Name]** > **Chat experience** > **Closed chats**. After being turned on, closed chats are displayed for as long as they’re available within the Conversations (sys_cs_conversation) table. Closed chats appear in a read-only mode and can’t become active again. If more than four closed chats are available, a **Show more** link appears to view more closed chats. Selecting **Show more** displays an additional 10 closed chats. After a conversation has closed, you can’t reopen it. Hovering over a closed chat displays the delete icon (). Confirm the chat deletion on the Delete this chat? modal to permanently delete the chat from the interface.
2. [Chat name]	The name of the conversation. If you select a promoted asset or query, that asset's title appears as the chat name. If instead you enter an utterance into the **Reply to ServiceNow Otto** field, your initial utterance becomes the chat name. The chat name appears in both the Now Assist subheader and **Chats list** > **Active** section.
3. New chat ( )	A new conversation begins. You may be prompted with a greeting message along with any promoted conversational assets such as topics, subflows, and/or actions, or suggested queries.
4. Feedback icons panel	You can indicate if the response was helpful by selecting the like thumbs up icon or if the response wasn't helpful, you can select the dislike thumbs down icon . You can also copy the response by selecting the copy message icon .

ServiceNow Otto panel is available on Next Experience and ServiceNow Studio. The following screenshots show the ServiceNow Otto panel in a workspace and on Core UI screens under Next Experience.

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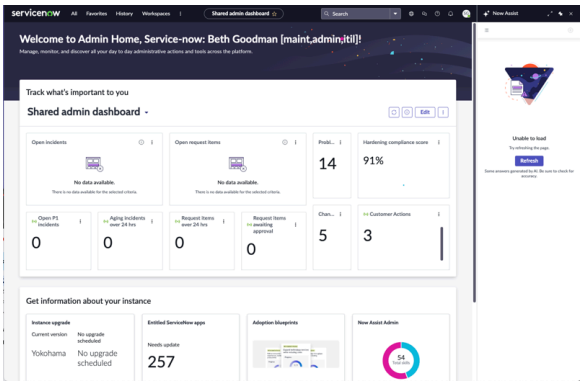
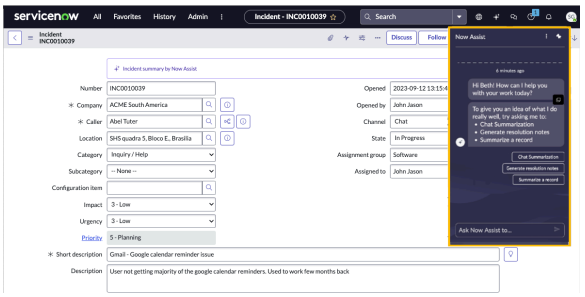
ServiceNow Otto panel

Next Experience	Core UI
	

Agentic conversations

> **Note:** Admins must first enable AI agents before end users can experience agentic conversations. ServiceNow Otto panel discovers and executes agentic workflows. For more information on agentic workflows, see Agentic workflows and Multiple conversations in ServiceNow Otto AI agents.

When you ask a question to the ServiceNow Otto panel enhanced chat, the agent understands the query and begins a flow. When you submit a message with multiple questions or requests, ServiceNow Otto panel enhanced chat answers the multiple questions consecutively in its response. It can reason, plan, and execute across AI agents, ServiceNow Otto panel topics, conversational actions and subflows, catalogs, Knowledge Base articles, custom skills, and any ServiceNow Otto supported skills to help you. You receive on-screen messages to let you know where the agent is in the agentic processing flow prior to receiving the response. After the processing has completed its flow, a View AI Steps section header appears, where the processing flow steps can be expanded and viewed. You can stop the agentic processing flow at any time by selecting the End flow icon ( ). After an action starts, it can't be stopped. Selecting the End flow icon only stops the proceeding processing steps.

Navigating from the ServiceNow Otto panel

You can navigate from the ServiceNow Otto panel without leaving the current conversation by entering a navigation request in the **Ask ServiceNow Otto to...** field. If you enter "navigate me to active incidents," ServiceNow Otto displays a button that enables you to view the active incidents.

Chat summarization

Quickly learn the details of a chat by reading a chat summarization. The chat summarization gives you enough details about the chat so that your requester doesn't have to repeat the same information to you.

To generate a chat summarization from the ServiceNow Otto panel, select **Chat Summarization** or enter `summarize chat` in the **Ask ServiceNow Otto to** field.

> **Note:** You can also generate a chat summarization by using the `/summarize` quick action in Agent Chat.

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Case or incident summarization

Quickly learn the details of a case or incident by reading a case summarization. The summarization gives you enough details about the interaction so that your requester doesn't have to repeat the same information to you.

You can generate a case or incident summarization from the ServiceNow Otto panel for ServiceNow Otto for CSM, ServiceNow Otto for HRSD, or ServiceNow Otto for ITSM:

- For ServiceNow Otto for CSM, select **Summarize record** or enter `summarize a record` in the **Ask ServiceNow Otto to** field.
- For ServiceNow Otto for HRSD, select **Summarize record** or enter `summarize a record` in the **Ask ServiceNow Otto to** field.
- For ServiceNow Otto for ITSM, select **Summarize incident** or enter `summarize an incident` in the **Ask ServiceNow Otto to** field.

Conversation Help

Get specific and accurate answers to your queries by using the Get Help skill option on the ServiceNow Otto panel. This skill is available to everyone entitled to ServiceNow Otto capabilities.

For more information about the ServiceNow Otto Conversational Help skill that represents as Get Help on the ServiceNow Otto panel, see ServiceNow Otto Conversational Help.

Resolution notes generation

Quickly learn the details of how an interaction was resolved by generating and reading resolution notes.

To generate resolution notes from the ServiceNow Otto panel, select **Generate resolutions notes** or enter `generate resolutions notes` in the **Ask ServiceNow Otto to** field.

Streaming responses

After you enter a question or request on the ServiceNow Otto panel, ServiceNow Otto gathers information from Knowledge Base articles, external content, product documentation, catalog items, and workflows and combines them into a synthesized, comprehensive answer. Instead of waiting for the entire message to render, the synthesized response streams in real time and stops streaming after the entire message has been delivered. An animated sparkle icon (✦) appears while the response is generated and changes to the static sparkle icon after the response has fully loaded.

Fallback options

Note: For more information about where and how to enable fallback options, see Manage an assistant chat experience.

A fallback state can occur whenever search results are unavailable. Scenarios where search results are unavailable include when ServiceNow Otto didn't understand the query, complaint small talk was found, or an error occurred. When search results are unavailable, the **Search the web** fallback option may appear. If you select the **Search the web** fallback option, the web search mode is triggered and uses the internet to search for the results.

Note: Only the last query entered into the conversation is considered when entering web search mode via this **Search the web** fallback option.

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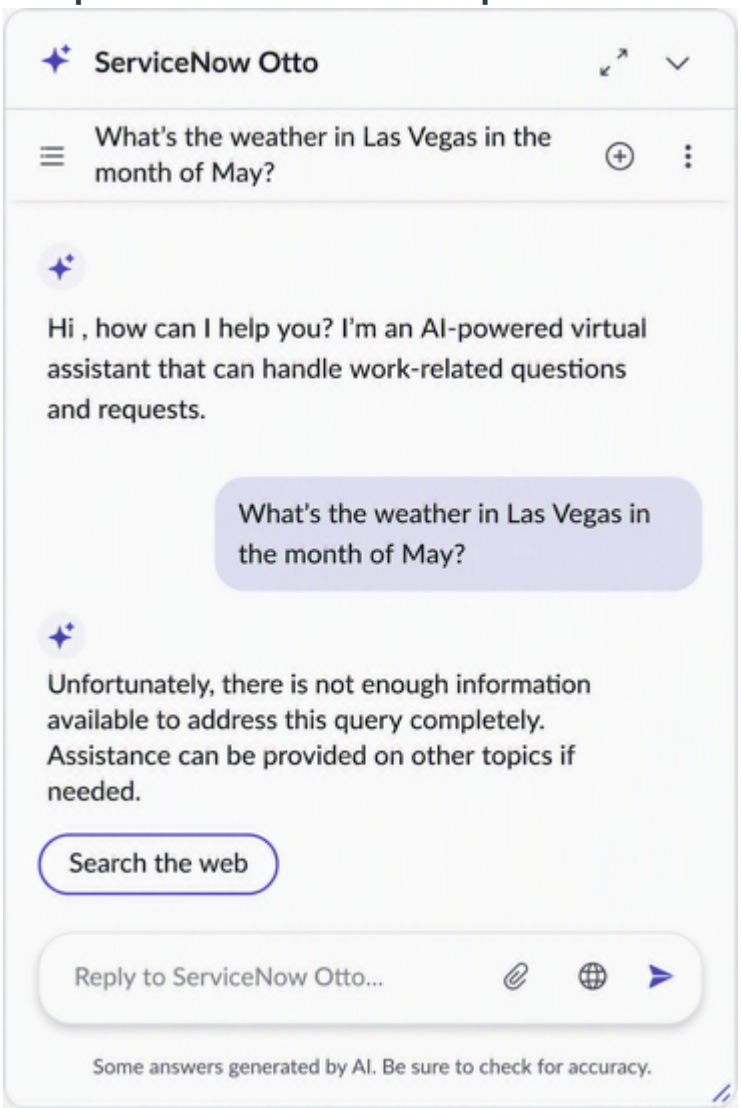
Example of Search the web fallback option



Premium chat

ServiceNow Otto panel premium chat is an AI chat experience built into your ServiceNow environment. Ask questions, get answers from your organization's knowledge, and take action on records. It supports file uploads, web search, and multi-step agentic tasks, so you can handle more complex requests without leaving the panel.

Important:

- Next Experience must be enabled to use the ServiceNow Otto panel. For more information, see Considerations for activating Next Experience.
- ServiceNow Otto panel must be activated before you can use it. See Display your assistant on Platform or ServiceNow Studio for more information.
- To use assistants, you must activate them first. See Assistants overview for information on activating assistants.
- To use the full capabilities of ServiceNow Otto panel, AI Search must be enabled for your portal. Without it, ServiceNow Otto panel functions in a limited capacity. Basic interactions such as predefined topic flows and simple questions and answers are available without AI Search. Knowledge article retrieval, AI responses grounded in instance content, and semantic

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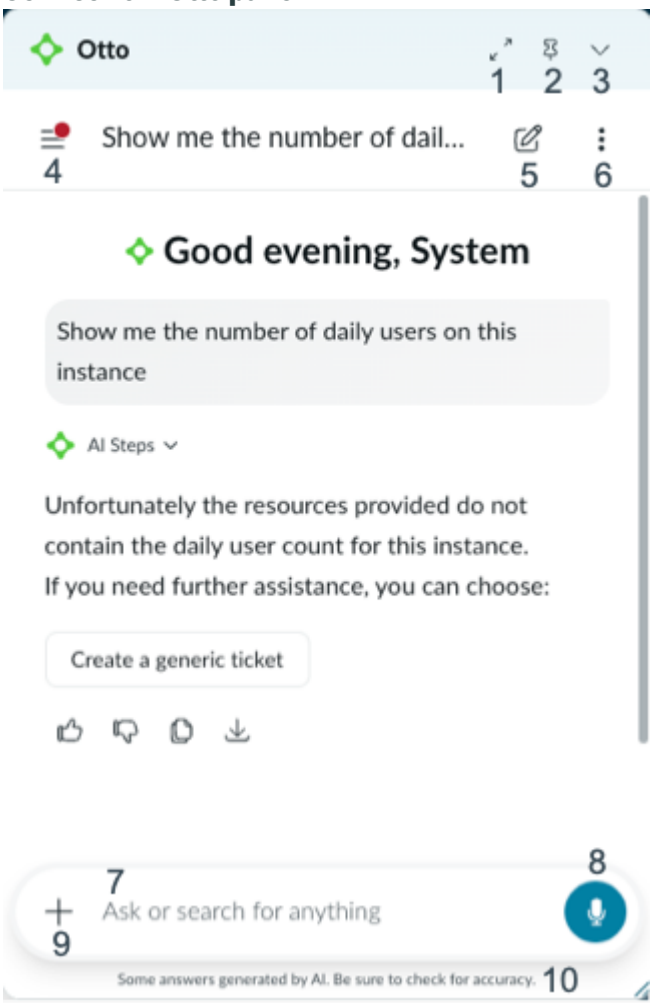
search capabilities require AI Search. For more information, see Enable and configure AI Search in Service Portal.

- ServiceNow Otto skills must be enabled to appear on the ServiceNow Otto panel. For more information, see Activate an AI skill.
- Conversational aspects of the ServiceNow Otto panel, such as skill detection, are powered by Now LLM Service.

To begin, select the ServiceNow Otto icon to display the ServiceNow Otto panel.

ServiceNow Otto panel



The ServiceNow Otto panel includes:

Item number	Description
1 - Expand	Expands the chat into a 90% screen-size window. The 90% screen-size window can't be resized or moved. Selecting the icon again resizes the chat back into the floating window. You can also resize the chat window using the window's edges.

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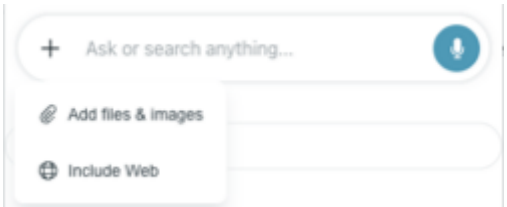
Item number	Description
2 - Pin	Positions, or pins, the ServiceNow Otto panel to the screen.
3 - Close	Closes the ServiceNow Otto panel.
4 - Chat history Chat history with unread chats	Displays the Chat History window. A red dot appears on the icon if you have any unread chats.
5 - New conversation	Starts a new ServiceNow Otto panel conversation.
6 - Page history	Displays previously viewed pages and sources. When you open any of the following items in the interactive view during a conversation, they appear here so you can easily move between them: • Form catalogs • Knowledge Base articles • Attachments • Organization charts • People profiles
7 - Input bar	Enter your prompt or request.
8 - Voice input	If voice input is enabled, select the microphone icon and speak your message. Your speech is transcribed and appears in the input bar in real time. When you speak in the default language selected in your profile, your speech is transcribed into text in that same language. **Note:** Voice input must be enabled by an administrator before it is available. Administrators can enable or disable voice input at the instance level. Individual users can also turn voice input on or off.
9 - Add files & images/Include Web 	Add files and images Upload files during conversations to help the assistant interpret your request. The assistant reads uploaded files and uses that content to fill required fields and answer questions. You can also upload images to help the assistant interpret a visual situation. The assistant analyzes the uploaded content and can answer natural-

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Item number	Description
	language questions about it, generate summaries, and recommend or execute actions based on what it sees. For example: • Upload a screenshot of an error message and ask, "What error is shown here?" • Upload a photo of a damaged device and ask ServiceNow Otto to create an incident When referencing visual content, the assistant can identify specific image regions in its response. Uploaded files are retained only during your active session and cleared automatically when the session ends. Supported file formats are: • PDF • JPEG • PNG • TXT • PPTX • DOCX • XLSX • CSV You can upload a maximum of 10 files per conversation and a total upload limit of 50 MB. You can change the model provider at the instance level by navigating to **ServiceNow Otto Admin** > **Skills** > **Settings**. If the provider is set to anything other than Azure, the Add files & images option isn't visible. Include Web If you select the Include Web option, the assistant's search is expanded to include internet results alongside internal knowledge base articles and catalog items. Your prior conversation context carries over when Include Web is enabled. However, sensitive personal information such as your name, email address, and phone number is removed before being shared externally. To help answer location-aware or company-specific questions, publicly available information such as your location and company name may be included in the web search. Responses indicate which parts of the answer come from web sources, and citations for web results show the page title and web link. The Include Web setting is preserved if you return to a past conversation that had it enabled.

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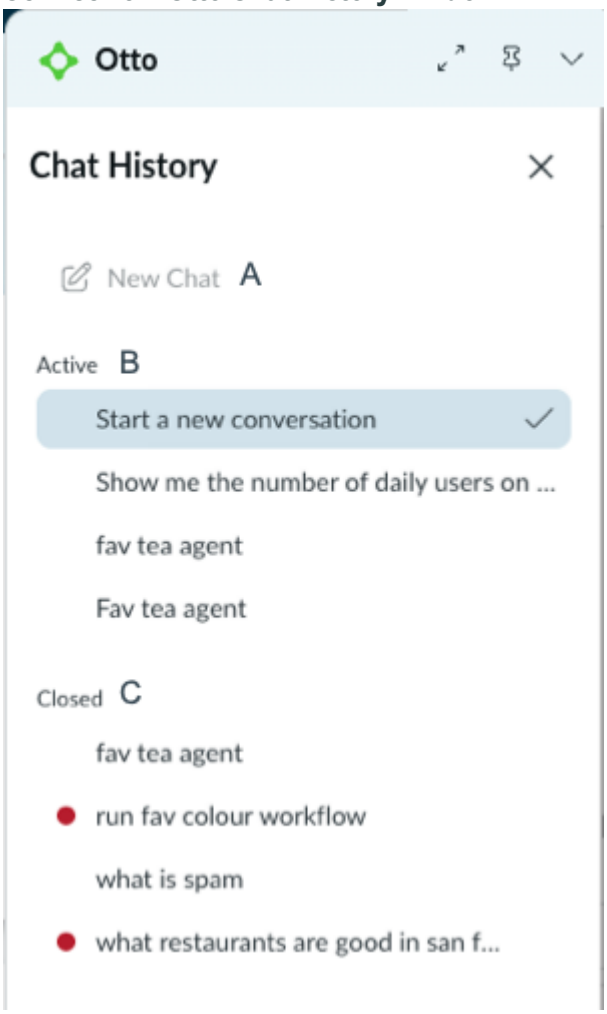
Item number	Description
10 - ServiceNow Otto message	Indicates that the answers are generated by AI. AI-generated responses may contain inaccuracies, so review them before you act on them.

If you select the Chat History icon , the Chat History window appears:

ServiceNow Otto Chat History window



The Chat History panel displays the following items:

Item	Description
A - New Chat	Start a new conversation. You may be prompted with a greeting message along with any promoted conversational assets such as topics, subflows, and actions, or suggested queries. If more than 6 promoted topics are enabled, the first 6 topics appear along with a View all topics option that displays the complete list.
This record	Conversations related to the current record you're viewing.

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Item	Description
	This section appears only when you're viewing a specific record, such as an incident or case. When you open the ServiceNow Otto panel while on a record, the most recent conversation associated with that record is automatically displayed. Conversations in this section are identified by the record number prefix in the conversation title—for example, INC0012345 — My laptop won't turn on. The same conversation may appear in both This record and Active sections if it's still in progress. When you navigate to a different record, the This record section updates to show conversations for the new record. When you navigate to a home page or list view, this section is hidden.
B - Active	Chats where you can continue the conversation. Unread chats are indicated with a red dot. Active chats include both record-specific conversations and general conversations. Record-specific conversations may also appear in the This record section if you're currently viewing that record. Active chats move to the Closed chats section after two hours of inactivity. Configure this 2-hour time limit in the Messaging Channels [sys_cs_channel] table. To change the inactivity time limit, select the **NASS** record from the Messaging Channels [sys_cs_channel] table and populate the **Conversation Idle Timeout** field. If more than 12 active chats are running, a **Show more** link appears. Selecting **Show more** displays an additional 10 chats. When you navigate to a record page, the panel displays the most recent conversation associated with that record in the This record section of Chat History. If you navigate away and return to the same record, the panel restores that conversation automatically. If you switch to a different record, the This record section updates to show conversations for the new record. Conversations tied to a specific record are identified by the record number prefix in the conversation title — for example, INC0012345 — My laptop won't turn on.
C - Closed	A chat closes when the designated time passes (2 hours of inactivity) or you receive this response: `It looks like you're finished with this chat, so I'll go ahead and close it.` Turn on closed chats by selecting the **Show closed chats** check box in **Conversational Interfaces** > **Assistants** > **[Selected Assistant Name]** > **Chat experience** > **Closed chats**. After being turned on, closed chats are displayed for as long as they're available in the Conversations [sys_cs_conversation] table. If more than four closed chats are available, a **Show more** link appears. Selecting **Show more** displays an additional 10 closed chats. Closed chats can't be reopened. Hovering over a closed chat displays the delete icon.

The ServiceNow Otto feedback icons panel consists of these elements:

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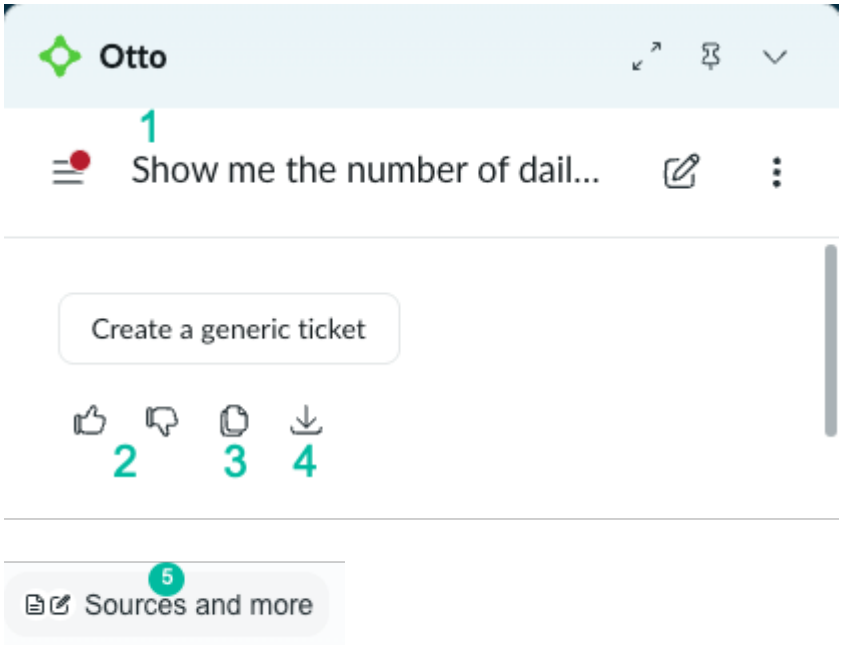
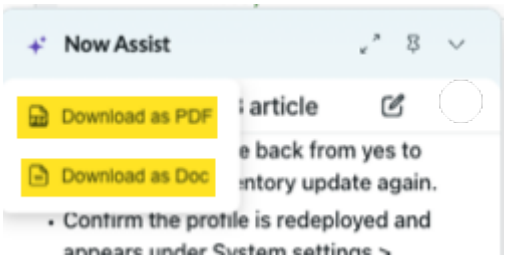


Note: If search results involve personalized or user-specific information, you can't access more than 10 results even if they're available.

ServiceNow Otto feedback icons panel

Element	Description
1 - [Chat name]	The name of the conversation. If you select a promoted asset or query, that asset's title becomes the chat name. If instead you enter a prompt into the **Reply to ServiceNow Otto** field, your initial prompt becomes the chat name. The chat name appears in both the ServiceNow Otto subheader and **Chats list** > **Active** section.
2 - Thumbs up (like) Thumbs down (dislike)	Select the thumbs up icon if the response was helpful, or the thumbs down icon if it wasn't.
3 - Copy	Copy the response.
4 - Download 	Displays a menu with options to download the conversation as a PDF or DOC file.

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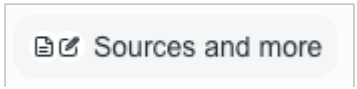
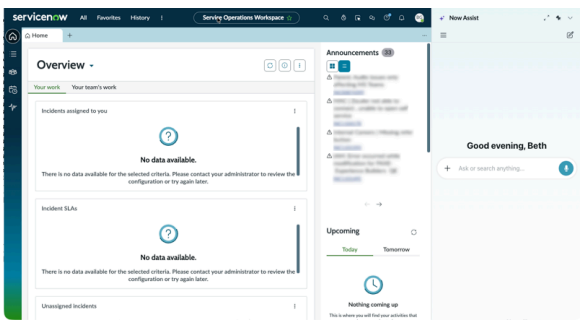
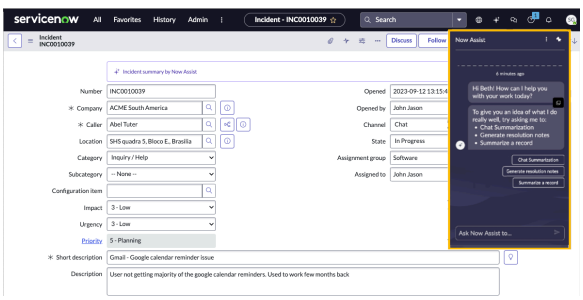
ServiceNow Otto feedback icons panel (continued)

Element	Description
5 - Sources and more 	Opens a panel showing the sources used to generate the response, along with related content. From the panel you can select **View all results** to navigate to the global search page.
Interactive view (or)	**Note:** This icon appears in the subheader only when the interactive view is available. Open or close the interactive view. The interactive view appears to the right of the conversational chat area. The drop-down selector displays the names of all interactive views opened in the current conversation, including Knowledge Base articles, catalog forms, org charts, and other applicable widget views. Interactive view is only available in the following scenarios: • An organizational chart is available to view. • A document was uploaded and you choose to preview the document. • A file was generated and you select the file name to show the preview of the file output.

ServiceNow Otto panel is available on Next Experience and ServiceNow Studio. The following screenshots show the ServiceNow Otto panel in a workspace and on Core UI screens under Next Experience.

ServiceNow Otto panel

Next Experience	Core UI
	

Asking a follow-up question

Follow these steps to ask a follow-up question about specific text:

1. Highlight the text you want to ask about.
2. Select **Ask a follow-up**.

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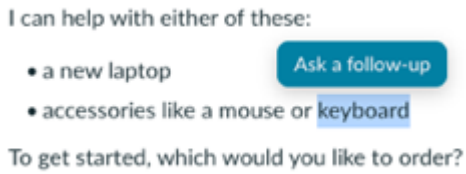
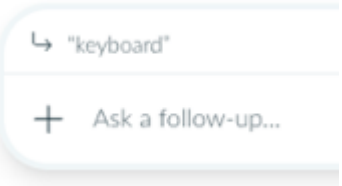
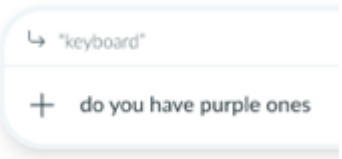


3. Your highlighted text appears above the input bar.



4. At the Ask a follow-up prompt, enter the question you'd like to ask about the specific text.



Response feedback

Each Virtual Agent response includes a feedback icons panel. The feedback icons panel appears on the latest Virtual Agent response and whenever you hover over any Virtual Agent response. You can indicate if the response was helpful by selecting the like thumbs up icon .

If the response wasn't helpful, select the dislike thumbs down icon . When you select the thumbs up or thumbs down icon, you are prompted to provide detailed feedback by selecting one or more reason check boxes. You can also select **Other** to add comments or suggestions (up to 300 characters). After making your selection, select **Submit** to submit your feedback, or select **X** to close the dialog without submitting feedback. All submitted feedback is captured, stored, and made available through analytic dashboards.

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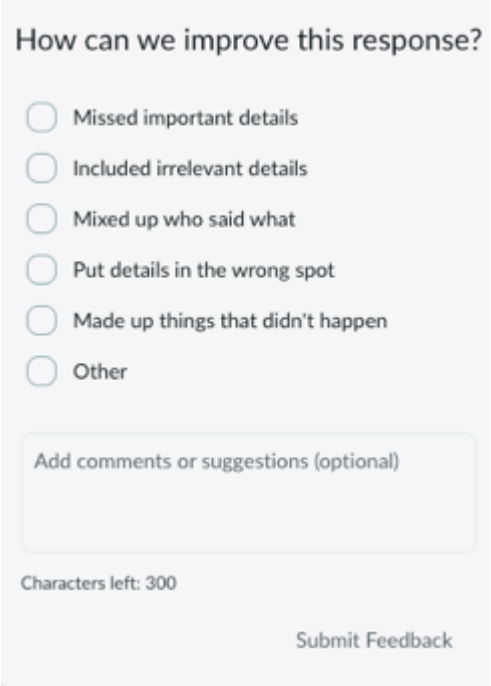
Example of additional feedback panel from thumbs down icon



Depending on the context of the response, an additional go to search results icon may appear in the feedback icons panel. This icon appears alongside synthesized responses in Virtual Agent, clarifying questions in Virtual Agent, and regular search results or Virtual Agent fallback topics whenever a synthesized response is unavailable. Selecting the go to search results icon redirects you to the search results page and begins a search query using the last five chat utterances you entered. Additionally, a copy message icon ( ) appears on received Virtual Agent responses.

Multi-intent requests

When your request combines information from both internal and external sources, ServiceNow Otto breaks it into steps and handles each part separately before delivering a combined response. For example, if you ask ServiceNow Otto to find a product online and then order it through your company's catalog, ServiceNow Otto searches the web for the product information and executes the catalog item as separate steps. It then combines the results into a single cohesive answer. You receive on-screen processing messages as each step completes.

Agentic conversations

Administrators must first turn on AI agents before end users can experience agentic conversations. ServiceNow Otto panel discovers and executes agentic workflows. For more information on agentic workflows, see Agentic workflows and Multiple conversations in AI agents.

When you ask a question to the ServiceNow Otto panel, the agent interprets the query and begins a flow. When you submit a message with multiple questions or requests, ServiceNow Otto panel answers them consecutively. It can reason, plan, and execute across AI agents, ServiceNow Otto panel topics, conversational actions and subflows, catalogs, and Knowledge Base articles. It also works with custom skills and any ServiceNow Otto supported skills to help you. You receive on-screen messages showing where the agent is in the agentic processing flow before receiving the response. After the processing completes, a View AI Steps section header appears where you can expand and view the processing flow steps. You can stop the agentic

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processing flow at any time by selecting the End flow icon ( ). After an action starts, it can't be stopped. Selecting the End flow icon only stops the subsequent processing steps.

If your question is unclear or could apply to multiple topics, ServiceNow Otto evaluates your request and may ask for clarification before responding. This helps you receive a focused, relevant answer rather than an overwhelming list of results. If the assistant is confident it understands your intent, it responds immediately without asking for clarification. If no relevant answer is found, the assistant displays a message and suggests an alternative, such as contacting support.

You can explore a response in more depth without asking your original question again. Follow-up requests such as "show more detail," "compare sources," "summarize by theme," or "what's missing?" remain anchored to the same retrieved context. The context resets when you start a new conversation. You can also start a follow-up conversation in the ServiceNow Otto panel directly from a search result in workspace. When viewing a search result, select the follow-up option to open the ServiceNow Otto panel with the result as context for your next question.

Processing messages are short status updates that appear on-screen while ServiceNow Otto works on your request. They reflect what ServiceNow Otto is actively doing at each step, such as searching for information or analyzing a document, and update as each step completes. Processing messages don’t appear for simple interactions such as greetings, which are handled instantly.

When an agentic workflow requires your input before it can continue, the processing messages pause and no loading indicator is displayed. After you provide the requested input, a new processing message appears to indicate that ServiceNow Otto has resumed processing your request.

When you view search results in a workspace, you can continue exploring a topic by asking a follow-up question in the ServiceNow Otto panel. Select **Ask a follow-up** from the search result to open the ServiceNow Otto panel and then enter your follow-up question in the input bar.

Context switching

The ServiceNow Otto panel keeps separate conversation contexts for the records you view. You can have focused conversations about different records without losing your work.

When you open the panel on a record, such as an incident, case, or any ServiceNow form, new conversations that you create are automatically tied to that record. Selecting New Chat creates a conversation tied to the record only when you're viewing that record.

Each record keeps its own set of conversations. These conversations appear in the This record section of Chat History, and each title starts with the record number, for example, INC0012345 — My laptop won't turn on.

You can access conversations that aren't tied to a record or page from any page in your ServiceNow instance. They appear in the Active section of Chat History but not in the This record section. Use them for questions or tasks that don't relate to a specific record.

When you switch between records, the panel shows the conversations for the record you're viewing. For example, suppose you're in a conversation tied to Record A and you go to Record B. The panel shows the conversations tied to Record B and any active conversations that aren't tied to a record.

In LUX workspaces, the panel keeps a separate conversation context for each workspace and record combination. When you switch to a different workspace or record, the panel updates automatically to show conversations for your current context, so you can pick up where you left off.

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When you open the panel or move between pages, the panel uses this priority to decide which conversation to show:

- On a record: The panel shows the most recent conversation tied to that record. If the record has no conversations, the panel shows active conversations that aren't tied to a record.
- Returning to a previous context: If you leave a record and return later, the panel restores your most recent conversation from that context, so you don't have to repeat information.

Navigating from the ServiceNow Otto panel

You can navigate from the ServiceNow Otto panel without leaving the current conversation by entering a navigation request in the **Ask ServiceNow Otto ...** field. If you enter "navigate me to active incidents," ServiceNow Otto displays a button that enables you to view the active incidents.

Chat summarization

Quickly learn the details of a chat by reading a chat summarization. The chat summarization gives you enough details about the chat so that your requester doesn't have to repeat the same information.

To generate a chat summarization from the ServiceNow Otto panel, select **Chat Summarization** or enter `summarize chat` in the **Ask ServiceNow Otto to** field. You can also generate a chat summarization by using the `/summarize` quick action in Agent Chat.

Case or incident summarization

Quickly learn the details of a case or incident by reading a case summarization. The summarization gives you enough details about the interaction so that your requester doesn't have to repeat the same information.

You can generate a case or incident summarization from the ServiceNow Otto panel for ServiceNow Otto for CSM, ServiceNow Otto for HRSD, or ServiceNow Otto for ITSM:

- For ServiceNow Otto for CSM, select **Summarize record** or enter `summarize a record` in the **Ask ServiceNow Otto to** field.
- For ServiceNow Otto for HRSD, select **Summarize record** or enter `summarize a record` in the **Ask ServiceNow Otto to** field.
- For ServiceNow Otto for ITSM, select **Summarize incident** or enter `summarize an incident` in the **Ask ServiceNow Otto to** field.

Resolution notes generation

Quickly learn the details of how an interaction was resolved by generating and reading resolution notes.

To generate resolution notes from the ServiceNow Otto panel, select **Generate resolutions notes** or enter `generate resolutions notes` in the **Ask ServiceNow Otto to** field.

Streaming responses

After you enter a question or request on the ServiceNow Otto panel, ServiceNow Otto gathers information from Knowledge Base articles, external content, product documentation, catalog items, and workflows. It combines them into a synthesized, comprehensive answer. Instead of waiting for the entire message to render, the synthesized response streams in real time and stops streaming after delivery. An animated sparkle icon (✨) appears while the response is generated and changes to the static sparkle icon after the response has fully loaded.

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Synthesized responses include inline citations that identify the sources used to generate the answer. Up to three inline citations appear within the response. Select a citation to open the source in a new browser tab. To view all sources and related results, select **Sources and more**. External links, such as those from web search results, open in a new browser tab. Your current tab and ServiceNow Otto conversation are not affected.

Single search results

When your request returns a single result, ServiceNow Otto displays a card with the most relevant fields for that record. Fields with no information are hidden automatically to keep the response easy to read. The fields displayed are either configured by your administrator or determined automatically based on your query.

- People results: The card includes available contact and profile details. Select **View profile** to open the full profile in interactive view or select the org chart icon to view the person's position in the org chart.
- Records (such as incidents or assets): Select the link in the card to open the full record. The record opens in the current tab and the ServiceNow Otto panel automatically collapses to pinned mode. If the record can't open in the current tab, it opens in a new browser tab instead.
- Actions and topics: Select the card to launch the corresponding action or topic directly in the chat.
- Catalog items: Select the card to open the catalog form. To open the form in the current tab, select the pop-out icon. The ServiceNow Otto panel collapses to pinned mode. If the form can't open in the current tab, it opens in a new browser tab instead. If the catalog form contains links to additional content, selecting those links loads the new content within the same interactive view and a back button appears. Select the back button to return to the previously viewed content.
- Knowledge Base articles: Select the card to open the article. To open the article in the current tab, select the pop-out icon. The ServiceNow Otto panel collapses to pinned mode. If the article can't open in the current tab, it opens in a new browser tab instead. This works for both internal and external knowledge base sources. If the article contains links to additional content, selecting those links loads the new content within the same interactive view and a back button appears. Select the back button to return to the previously viewed content.

When only one result is found, the **View all** link doesn't appear at the end of the response. Records displayed in the response are not shown as citations in the sources panel.

Switching between interactive views

A conversation can contain more multiple interactive views — for example, a Knowledge Base article and a catalog form opened during the same conversation. Use the drop-down selector in the interactive view header to switch between them. The header displays the name of the most recently opened interactive view.

The drop-down selector shows all eligible sources opened in the current conversation:

- Knowledge Base articles
- Catalog forms
- Organizational charts
- Other applicable widget views

When you open a second interactive view, a message confirms you can use the drop-down to switch. Each view appears as a thumbnail card in the chat - the currently visible view shows Hide and others show Show. Selecting a view from the drop-down updates the cards accordingly.

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When you select KB articles, catalog sources, or file previews from the search panel and open them in the interactive view, they also appear in the drop-down selector for quick navigation.

Viewing and downloading generated files

After ServiceNow Otto generates a file, it appears in a thumbnail card. You can select the download icon to download the generated file or select the file name to open it in the interactive view. Downloaded files use plain Microsoft Office templates with no ServiceNow branding applied.

These files generated by ServiceNow Otto display in an interactive viewer for these formats:

- Microsoft Word (.doc, .docx)
- Microsoft PowerPoint (.ppt, .pptx)
- Microsoft Excel (.xls, .xlsx)
- PDF

For unsupported file types, either a fallback file reader opens the file or an error message appears. You can navigate between file previews and other interactive view content—knowledge articles, catalog items, and more—without losing your conversation context.

Submitting catalog requests

You can submit catalog requests directly from the ServiceNow Otto panel without leaving the chat experience.

To submit a catalog request:

1. Open the ServiceNow Otto panel.
2. Find a catalog item through chat.
3. Select the item and a catalog form opens inline in the interactive view.
4. Complete the required form fields.
5. Select **Submit**. A confirmation message appears and your request record is created.

Catalog submission confirmation

After you successfully submit a catalog item, a confirmation message appears with a **View Details** button that opens your submitted request record. The **View Details** button behaves in the following ways:

- In ServiceNow Otto panel: Select **View Details** to open the submitted request record in the current tab. The ServiceNow Otto panel automatically shrinks to pinned mode.
- In pop-out windows: If you select the pop-out icon on a submitted catalog form, the new window displays the submission confirmation page with your request details. It doesn't open a blank form to start over.

Unsaved catalog form changes

If you start filling out a catalog form in the ServiceNow Otto panel and navigate to other content before submitting, such as selecting another catalog item or knowledge article, a confirmation modal appears asking whether you want to stay or leave without saving.

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- To continue working on the catalog form, select **Stay**. The modal closes, and you return to the catalog form with your progress intact.
- To discard changes and view new content, select **Leave without saving**. The form closes, your unsaved data is discarded, and the content you selected appears in the interactive view.

Note: The discard warning modal doesn't appear when you switch conversations using Chat History. It only appears when navigating to different content within the same conversation.

Multiple search results

When your request returns multiple results from Knowledge Graph, ServiceNow Otto displays them in a table. Empty columns are hidden automatically to keep the table easy to read. The columns displayed are determined automatically based on your query.

- People results: Use the horizontal and vertical scrollbars to view additional rows or columns. Select a person's name to open their profile in interactive view or select the org chart icon to view their position in the org chart.
- Record results (such as incidents or assets): Select a record number to open the full record in the current tab. The ServiceNow Otto panel automatically reverts to pinned mode. If the record can't open in the current tab, it opens in a new browser tab instead.

A **View all** link appears at the end of the response. Selecting it opens a summary page showing all records in the current tab and the ServiceNow Otto panel reverts to pinned mode. If the records can't open in the current tab, they open in a new browser tab instead.

If your results include more than one type of record (for example, people and incidents), a separate **View all** link appears for each record type. Records displayed in the response are not shown as citations in the sources panel. When results include a mix of records and text content (such as knowledge base articles), ServiceNow Otto may display both a table and bullet points or text in the same response and related records appear above the Sources and more link. Select a record group — such as users or assets — to open the corresponding list in the current tab.

Note: If you're using ServiceNow Otto in a portal, records and View all results open in a new portal tab.

Fallback options

A fallback state can occur whenever search results are unavailable. Scenarios where search results are unavailable include when ServiceNow Otto couldn't interpret the query, compliant small talk was found, or an error occurred. When search results are unavailable, the **Search the web** fallback option may appear. If you select the **Search the web** fallback option, the web search mode is triggered and uses the internet to search for the results. Only the last query entered into the conversation is considered when entering web search mode via this **Search the web** fallback option. For more information about where and how to enable fallback options, see Manage an assistant chat experience.

If ServiceNow Otto can't find relevant results for your query, or if an answer is based on limited evidence, ServiceNow Otto displays a message to let you know. It may also suggest ways to improve your results, such as rephrasing your query, broadening your search scope, or specifying a time frame or source.

If ServiceNow Otto can't find relevant results in your organization's internal content, an **Include the Web** button appears in the chat. Selecting it reruns your query with web results included and turns on Include Web mode for the rest of the conversation. Unlike the Search the web fallback

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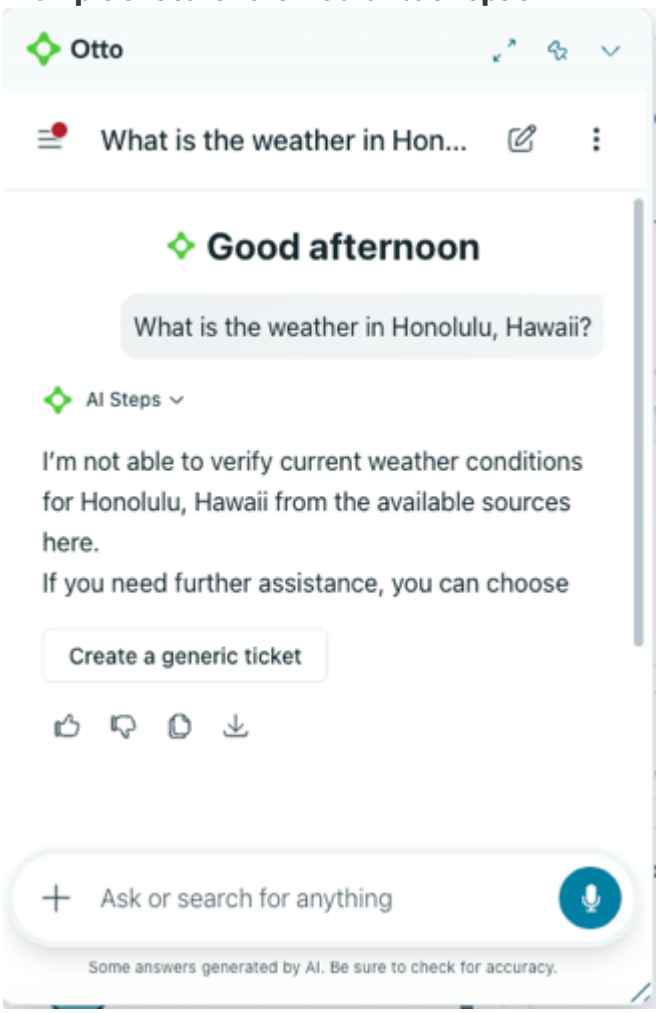
option, which only applies to your most recent query, selecting **Include the Web** expands all subsequent responses to include web results.

Example of Search the web fallback option



ServiceNow Otto context menu

The ServiceNow Otto context menu uses generative AI to help agents summarize, create, and edit written content, thus streamlining their writing tasks.

Agents produce various types of content, including emails and chat replies. The ServiceNow Otto context menu uses generative AI to assist agents in summarizing, creating, and editing emails and chat replies. Agents can preview AI generated content, scroll through previously created content, and refine the text using the AI. The ServiceNow Otto context menu can be triggered from any application or field in a ServiceNow workspace where the ServiceNow Otto context menu is enabled.

The ServiceNow Otto context menu unlocks the power of generative AI and is available in Next Experience for:

- Customer Service Management (CSM)
- Human Resources (HR)
- IT Service Management (ITSM)
- Strategic Portfolio Management (SPM)
- IT Operations Management (ITOM)

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The ServiceNow Otto context menu isn’t available with Core UI.

Using the ServiceNow Otto context menu

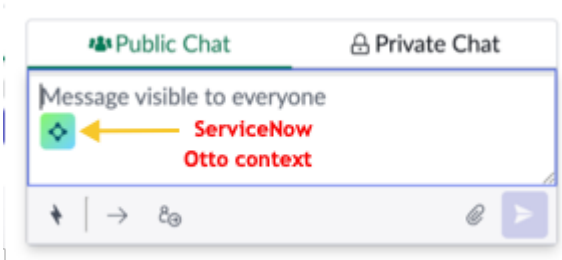
The ServiceNow Otto context menu is available on any field where the floating ServiceNow Otto button ( ) appears. If you start typing in the field, a menu appears with the available ServiceNow Otto context menu actions. The ServiceNow Otto context menu helps you summarize, create or modify existing documentation.

You can configure the Advanced filter to hide or show the ServiceNow Otto Context Menu quick actions option using the wwna_quick_actions table. To view more variable set configuration options, see ServiceNow Otto context menu variable set configuration.

Chat window using the ServiceNow Otto context menu

You can use the ServiceNow Otto context menu when communicating with users in Agent Chat:

If it takes too long to generate text or the Now LLM Service isn't available, an error message appears.



Change request risk explanation using the ServiceNow Otto context menu

The ServiceNow Otto context menu makes the change request risk explanation available on the workspace and on UI16 after assessment and calculation.

When the risk is assessed and calculated, you’ll see the **Explain risk** button with the ServiceNow Otto icon on the workspace. It shows the risk explanation in a dialogue box on the Record information section.

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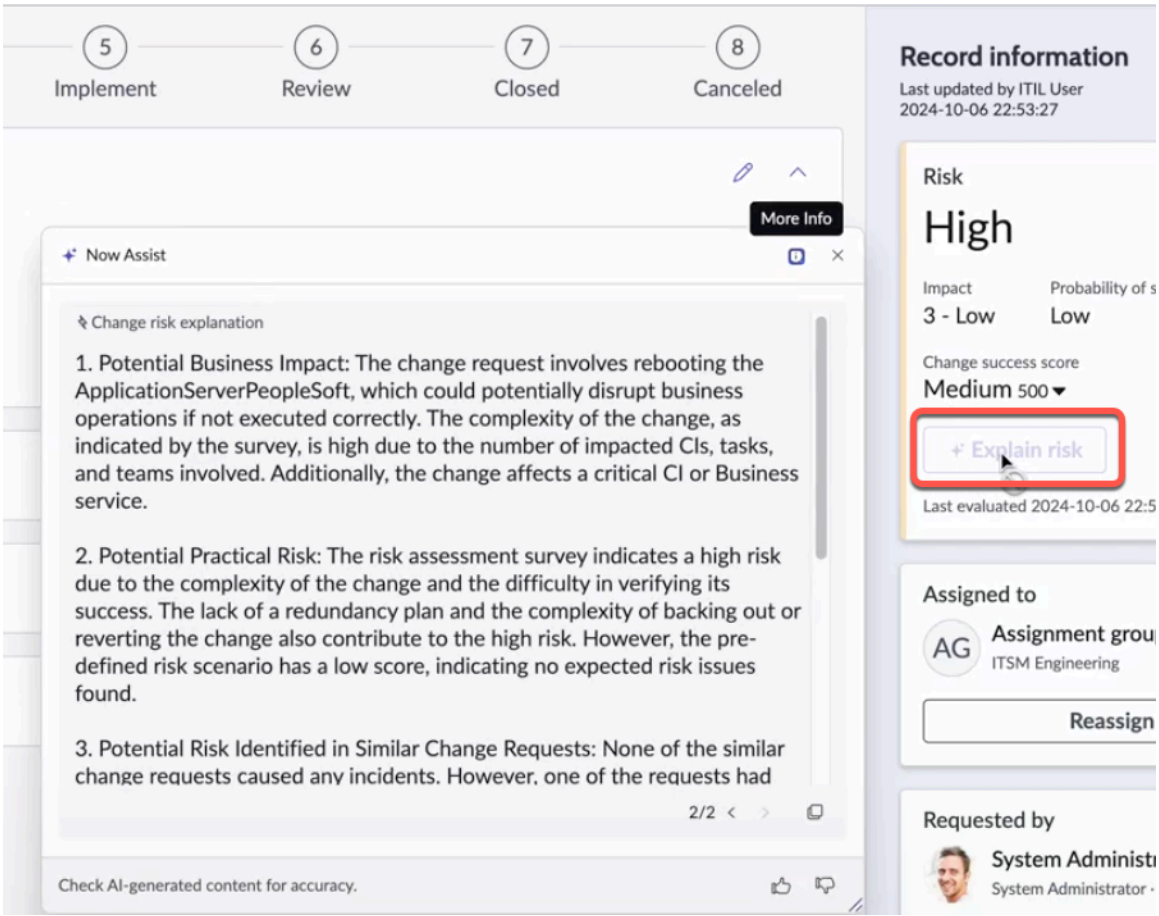
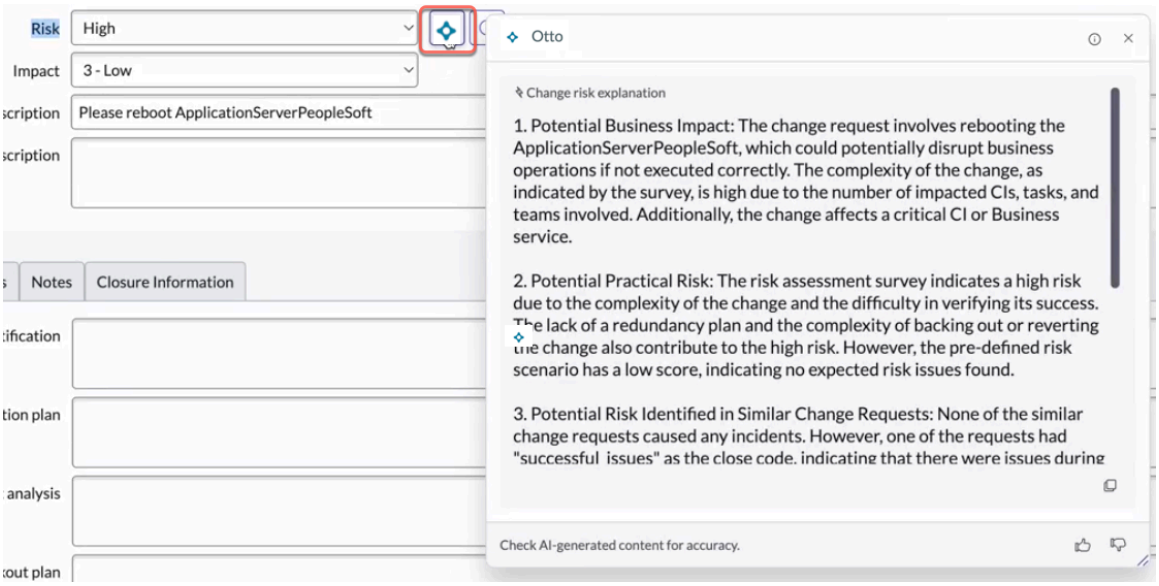


When the risk is assessed and calculated, you'll see the ServiceNow Otto icon against the **Risk** field on UI16, showing the risk explanation in a dialogue box.



Note: The risk explanation that is presented in the dialogue box is assessed and calculated on the change request form.

For more information about risk assessment and calculation, see Risk assessment.

Content editing in Knowledge Base articles using the ServiceNow Otto content menu

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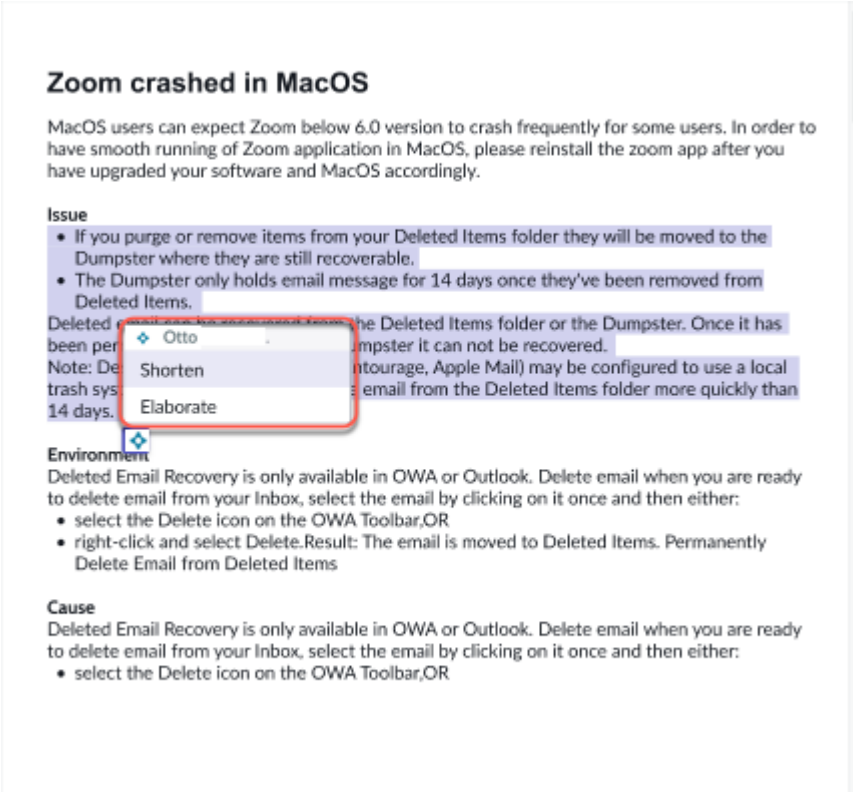
The ServiceNow Otto context menu enables generative AI assisted content editing capabilities for Knowledge Base authoring and to provide resolution notes in workspaces and UI16.

When you open a knowledge article and select the content in it, you'll see the ServiceNow Otto icon pop-up and float along with your mouse device.

When you hover over the ServiceNow Otto icon, you'll see the following menu options to help you edit the content:

- **Elaborate**: Generative AI details the selected text.
- **Shorten**: Generative AI shortens the selected text.



You can insert the generative AI elaborated or shortened content into the Knowledge Base articles, using the **Insert** button and update or publish them.

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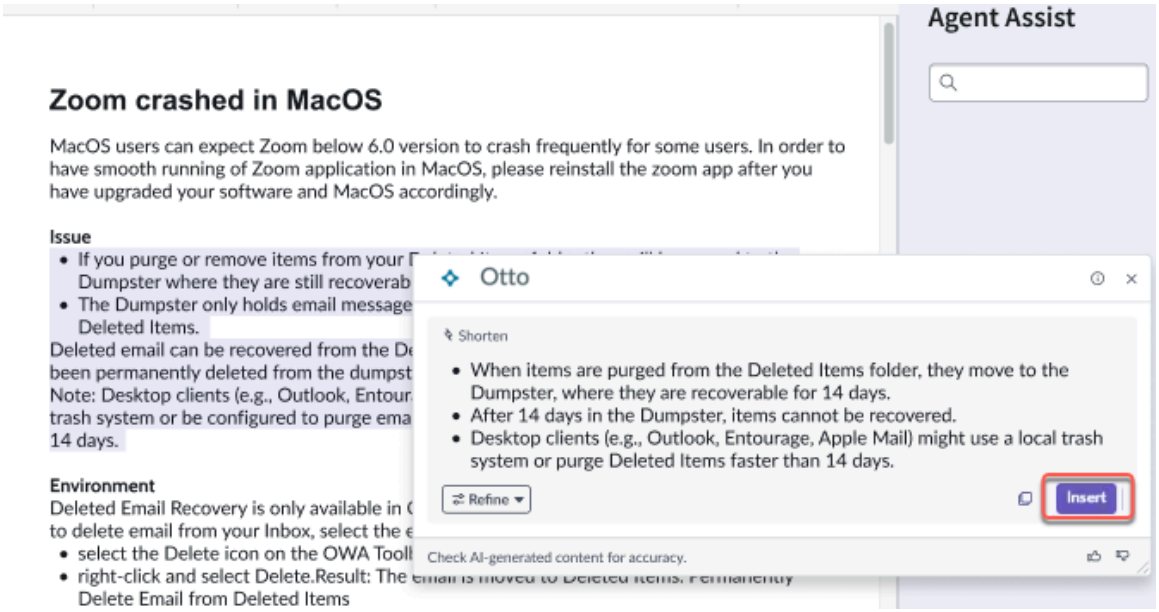


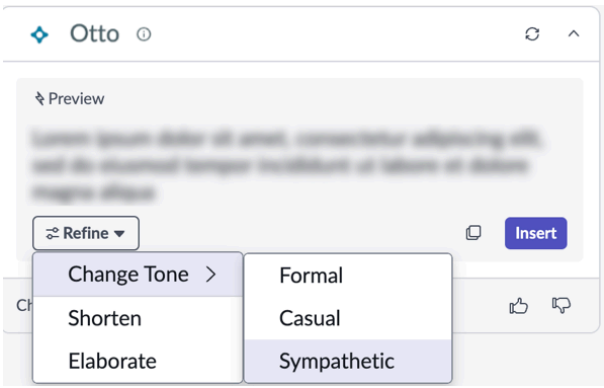
For more information about generating Knowledge Base articles using the ServiceNow Otto context menu, see Edit an article using the ServiceNow Otto context menu.

Change Tone using ServiceNow Otto context menu

The ServiceNow Otto context menu enables users to change the tone of their content. Users can choose between casual, formal, and sympathetic tone to enhance their content further, using the generative AI capabilities.

When you hover over the ServiceNow Otto icon or select **Refine** menu, you see **Change Tone** menu option.

You can further choose a preferred tone and select **Formal**, **Casual**, and **Sympathetic**. Review the changes and select **Insert** to finalize the new text.



Note: If you don't see the change tone option for your application or product, reach out to ServiceNow.

Limit the number of content refinement calls using the ServiceNow Otto context menu

Configure and limit the number of content refinements to the skill per session using the ServiceNow Otto context menu. By default, the maximum number of refinements isn't set and you can configure to limit it.

You can configure the refinement calls limitation at the **Recommendations Dialog Props** field in the **Limit refinements** record using the `refineCount` property.

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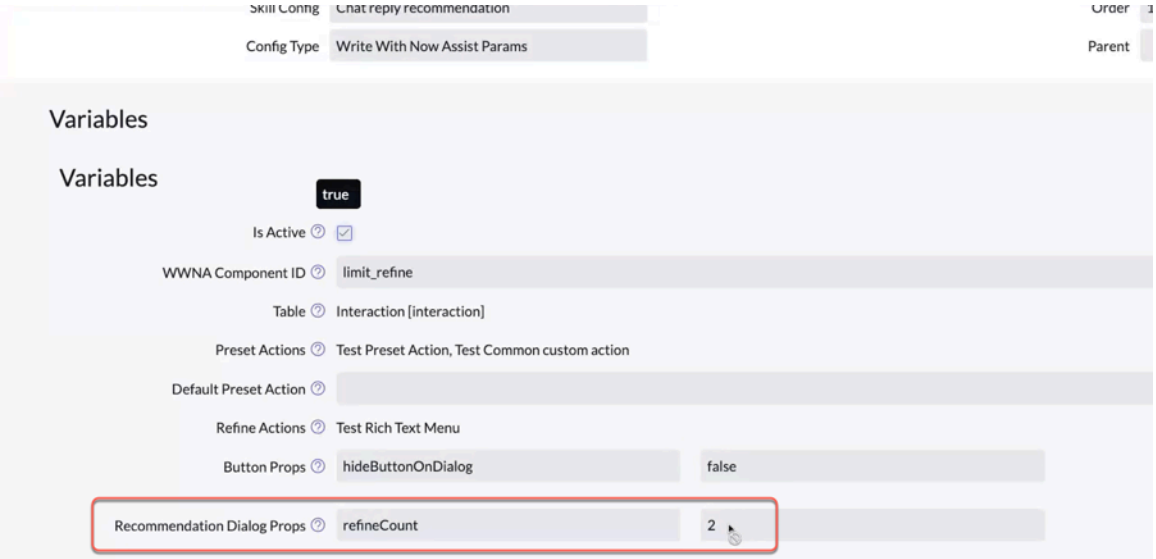
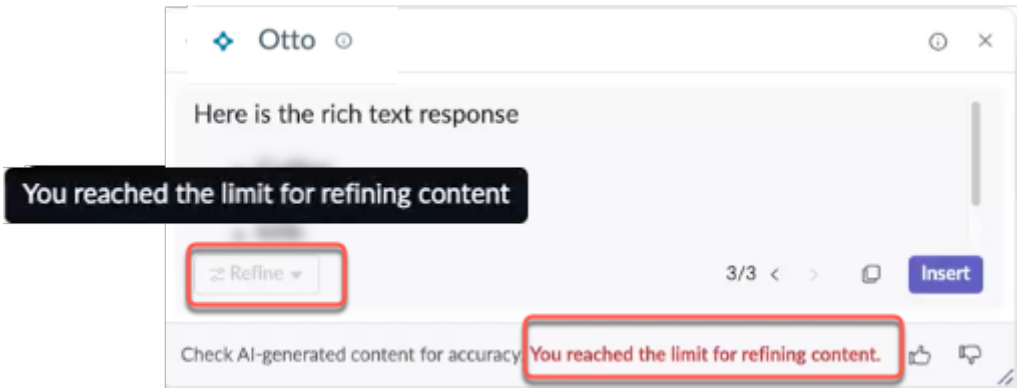
Note: The **Limit refinements** record is available in the ServiceNow Otto config var set record in the ServiceNow Otto Skill context menu application.

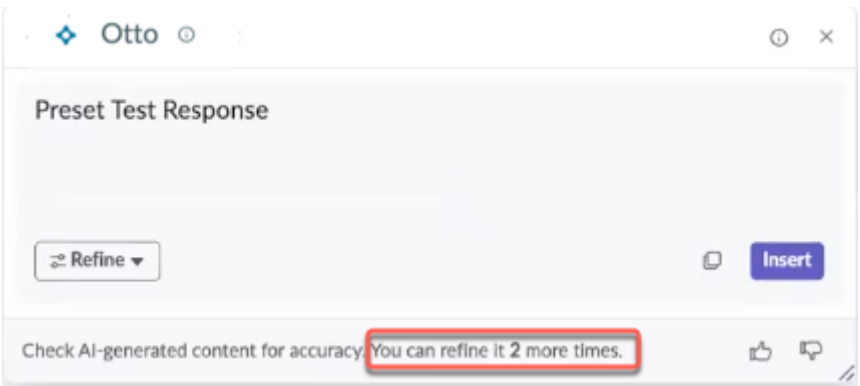


You can set the refineCount as follows:

- The default value of the property is **-1**. If the value is less than 0, then the number of refinements to the skill are unlimited.
- If you provide 0 as the value, then the refine button will be disabled and the `You reached the limit for refining content.` message is displayed.



- If you configure it with a value greater than 0, you'll be able to refine the content according to the set value. For example, if you set the refineCount to 2, then you will be able to refine the content only twice.



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Create knowledge article with open prompt

Use ServiceNow Otto context menu to create inline knowledge article using open prompts. See Generate KB article with ServiceNow Otto context menu.

Set the minimum word count for the ServiceNow Otto icon

You can set a minimum word count required for the ServiceNow Otto icon to appear, to control when the icon is displayed based on content length. To set the minimum word count, update the value for the `minSelectedWordCount` property.

Email recommendations using the ServiceNow Otto context menu

Use the ServiceNow Otto context menu to compose or respond to emails with recommendations from ServiceNow Otto with generative AI template suggestions. The ServiceNow Otto context menu enables users to generate email response recommendations in new, forward, reply, or reply all scenarios.

Compose email

While you compose a new email, you see the ServiceNow Otto context menu icon ( ) that displays the message `Use ServiceNow Otto to generate a message`. When you select the icon, generative AI generates a message recommendation.

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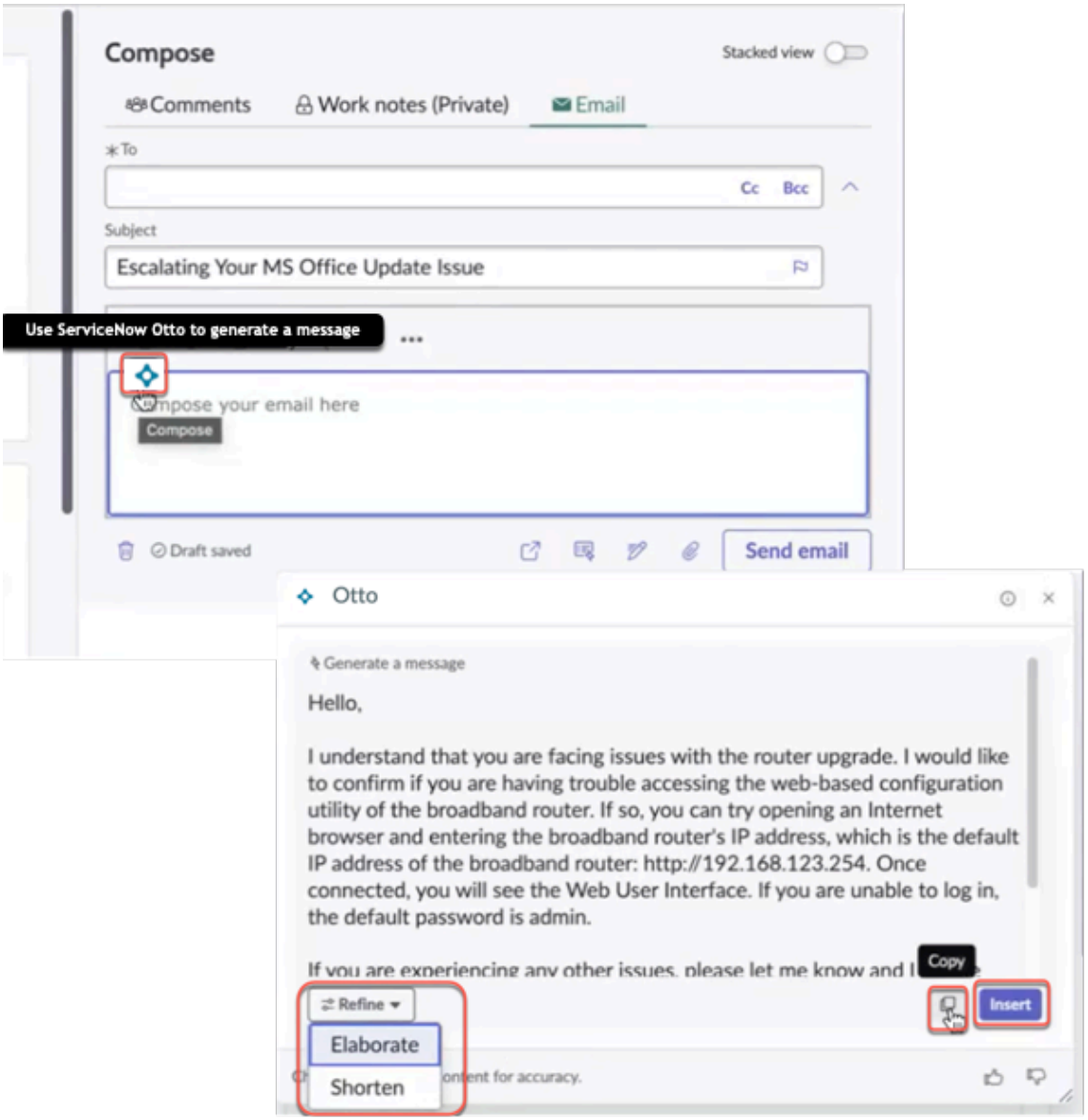

You can refine the generated text either by selecting the **Elaborate** or **Shorten** context menu options on the ServiceNow Otto Admin model. You can also copy the new text or **Insert** the generated text into the email body.

Complete draft emails

You can use the ServiceNow Otto context menu to finish your drafted emails. You can enter some text and use generative AI to help you with complete your drafts by selecting the ServiceNow Otto context menu icon ( ) that displays the message `Use ServiceNow Otto to generate a message`. When you select the icon, you see that generative AI is generating the message for you.

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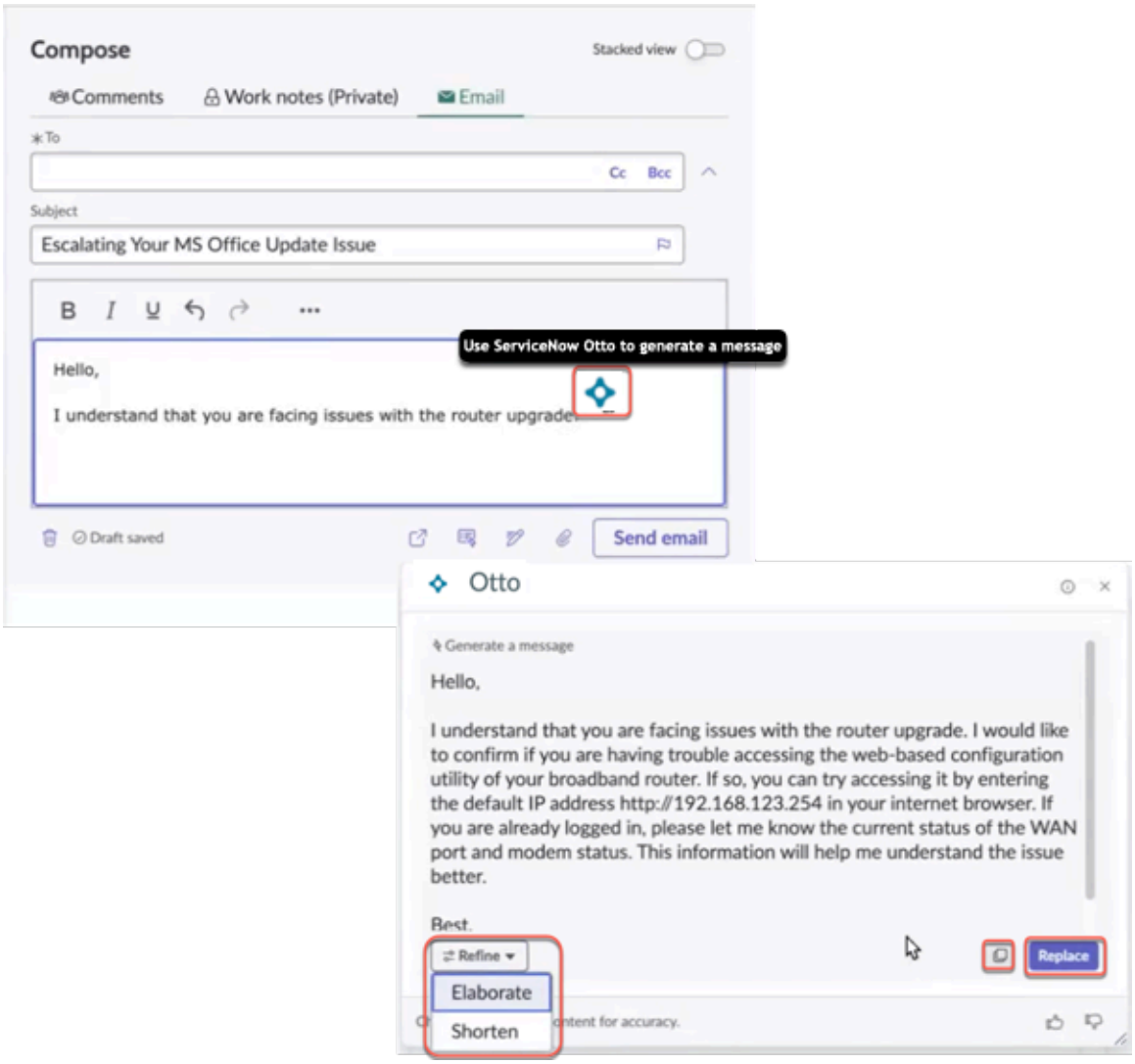

You can further refine the generated text by selecting **Elaborate** or **Shorten** context menu options on the ServiceNow Otto admin model. You can also copy the new text or select **Replace** to replace the generated text into the email body.

View inline citations

You can select the LLM response and view the all the related information sources like KB articles, emails, related records, etc.

Select the numbered citations to view details along with the link to the source. You can also select the **Show sources** option to view the list of all the related resource links.

Select **Replace** to add the source information in the email body as plain text. The numbered citation and all the source links will not be copied.

You can also select a record from the context menu inline citation to navigate directly to the record page. The record page has the referenced section highlighted, for easy identification.

Summarize records with the Now Assist context menu

Use the ServiceNow Otto context menu to generate a record summary for the page, using Generative AI application assisted summarization capabilities in workspaces and UI16. The Now

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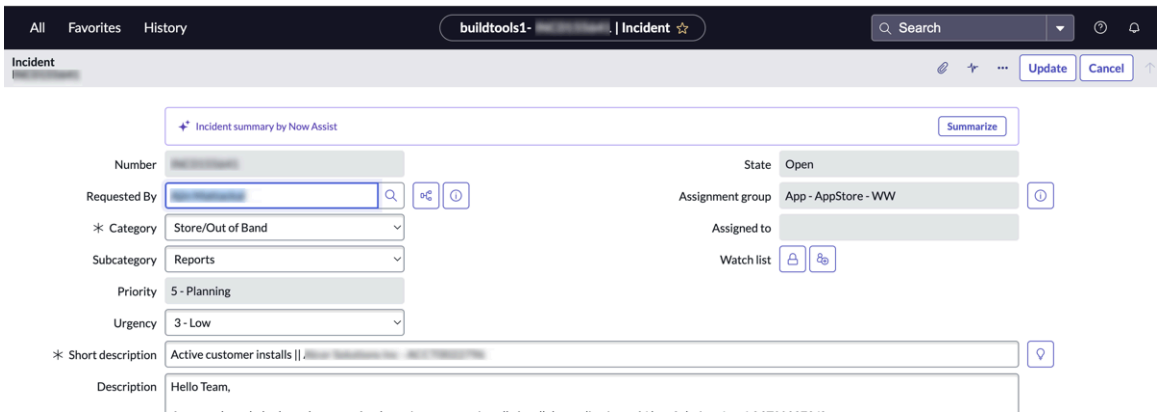
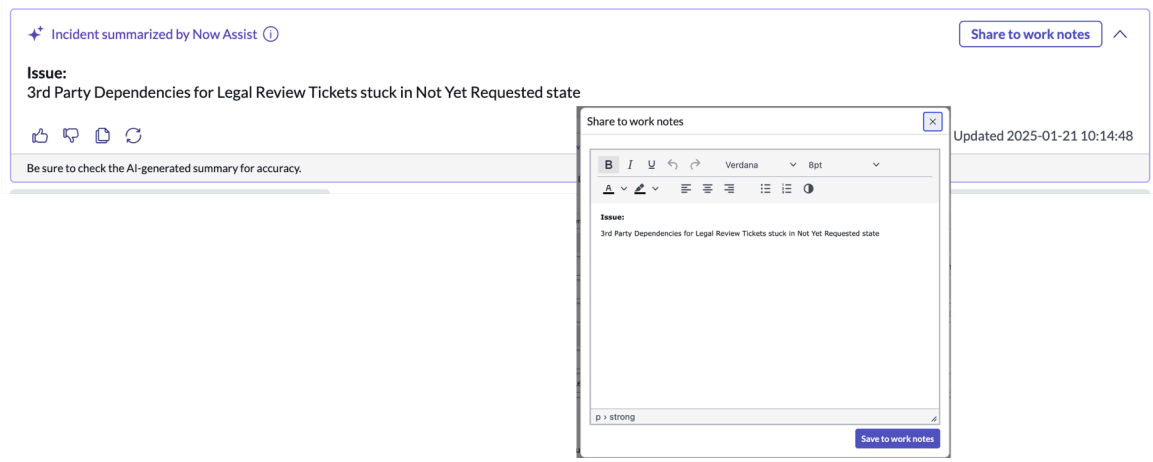
Assist context menu can generate a new summary, expand or collapse the summary card, share the summary to work notes, regenerate, or copy the summary.

Go to any record page to access the Now Assist context menu icon ( ) with the message `Incident Summary by Now Assist`. Select **Summarize** to use generative AI to generate a record summary.



You can use the **Share to work notes** button to share the summary to work notes. You can also expand or collapse the summary card as required.



To provide feedback, use the feedback icons ( ) or ( ) If you're not satisfied with the provided summary, use the regenerate icon ( ) to regenerate the summary. You can also copy the summary to the clipboard using the copy icon ( )

Improve Docs content in Strategic Portfolio Management with ServiceNow Otto context menu

Use the ServiceNow Otto context menu to start conversations and raise queries, using generative AI capabilities and custom built in skills in Strategic Portfolio Management.

You can now interact with ServiceNow Otto directly from the docs section in Strategic Portfolio Management, Strategic Planning Workspace, Portfolio Planning Workspace, and Project Workspace to ask open-ended queries, create new content, add context, or improve existing sections. This helps you draft faster, refine ideas, and keep your work relevant without leaving the page.

To access this feature, go to any doc page within Strategic Portfolio Management, Portfolio Planning Workspace or Project Workspace.

Select the ServiceNow Otto icon ( ) and enter your query.

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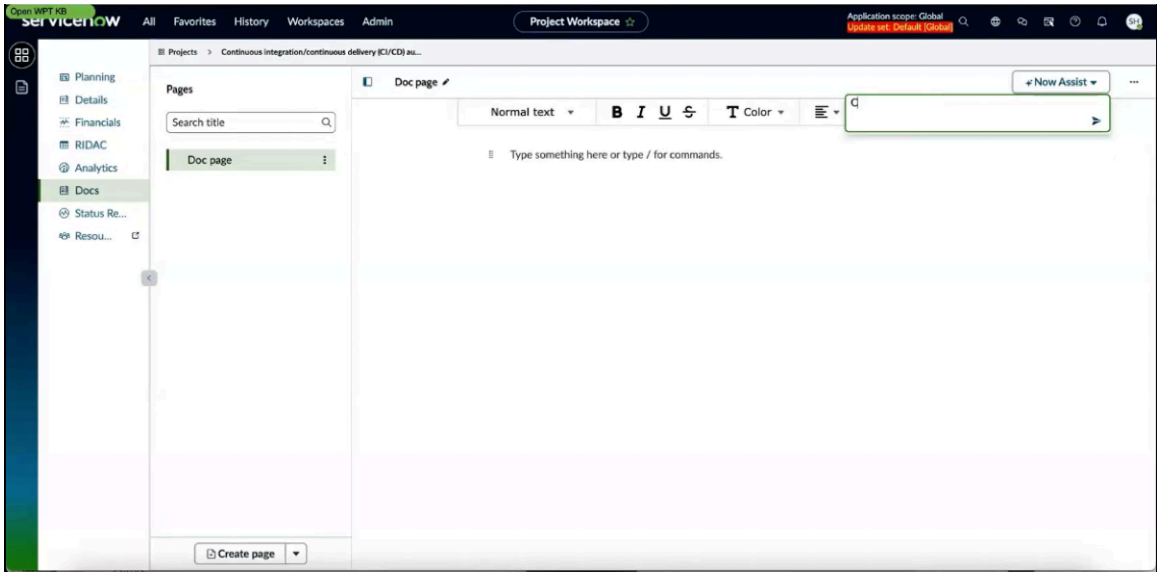
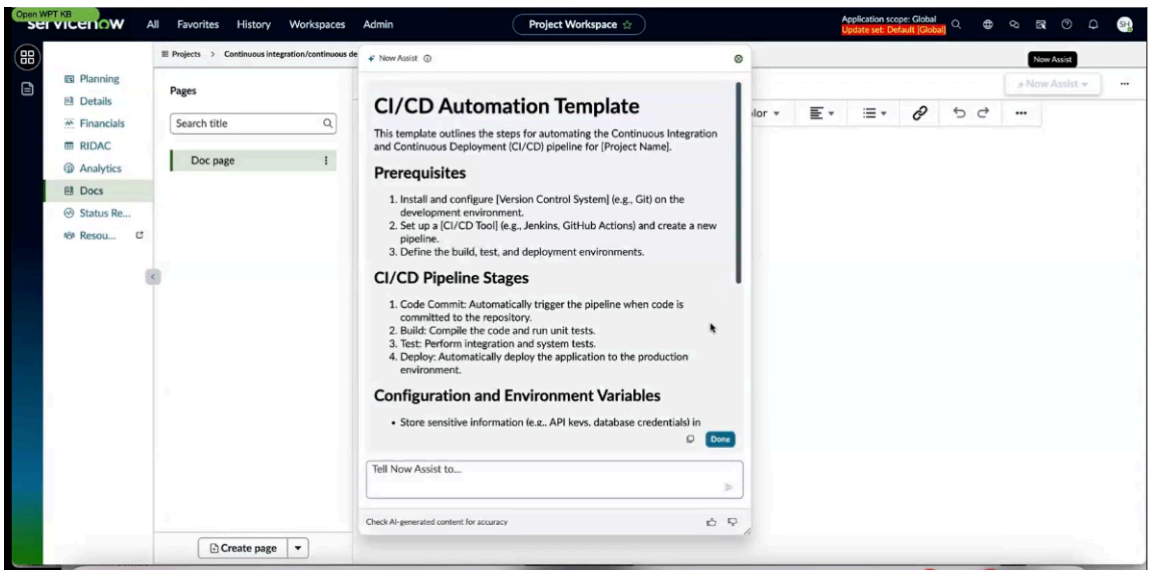


The query response is generated in a new ServiceNow Otto window. You can use the input field to provide follow-up query responses and instructions.



You can also select the ServiceNow Otto icon ( ) and use the **Summarize** option from the drop-down menu to use generative AI for generating a record summary.

The ServiceNow Otto icon ( ) along with the text input field is also displayed when you select any text from the docs page.

You can also see the option to **Summarize**, **shorten**, **elaborate**, or **change tone** for the selected content.

Related topics

Generate and improve Docs content with ServiceNow Otto for Strategic Portfolio Management

Generate KB article with ServiceNow Otto context menu

Use the ServiceNow Otto context menu to generate Knowledge Base articles in Knowledge Management.

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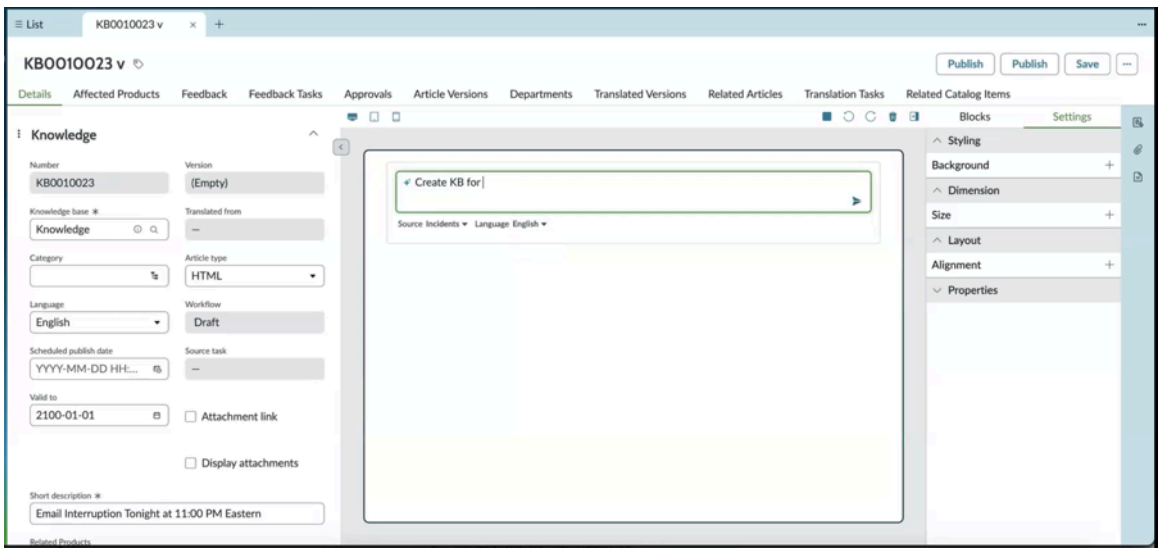
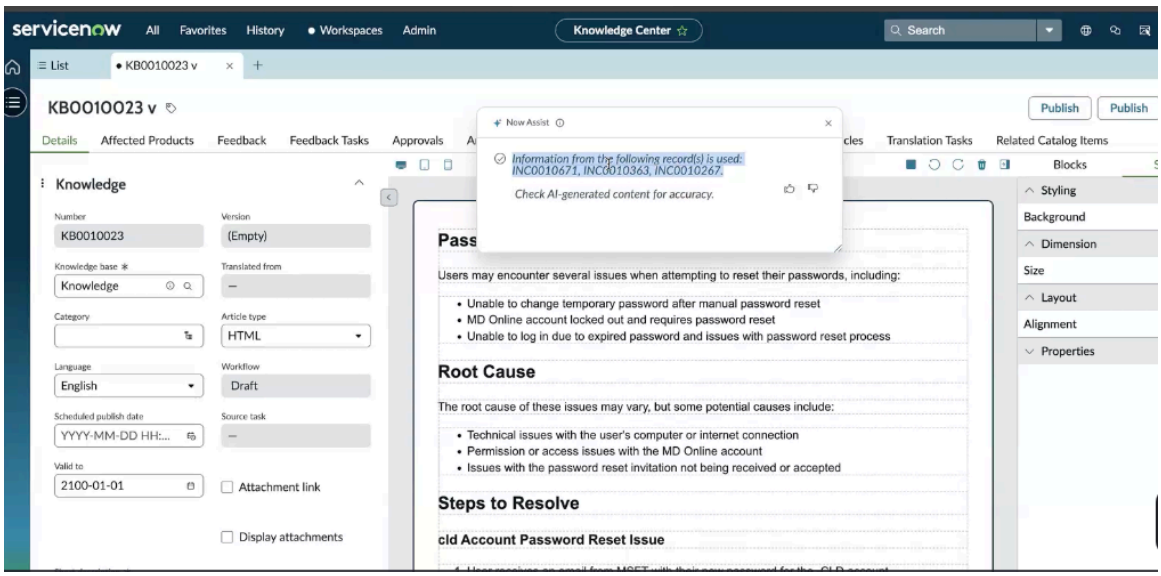
Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Knowledge** > **Knowledge Center**.
2. Select the list menu icon, ☰ to view all the KB articles.
3. Select a KB article from the list.
   The KB article details page is displayed with an open prompt inline option for KB generation.



4. Enter the instructions for generating content, such as `Generate an article for password reset.`
5. Select the **Source** type and **Language**.
6. Press enter to start the KB article generation.
   The KB article preview is displayed.



Review the generated article. You can edit the content, check grammar, and make the article easy to read. Select **Regenerate** to recreate the article based on your prompt.

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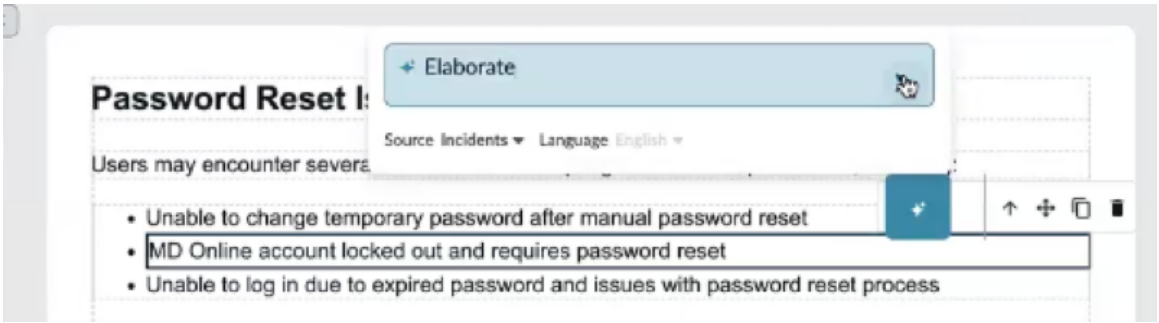
7. Select the text to further refine the content with ServiceNow Otto context menu pop-over variant.



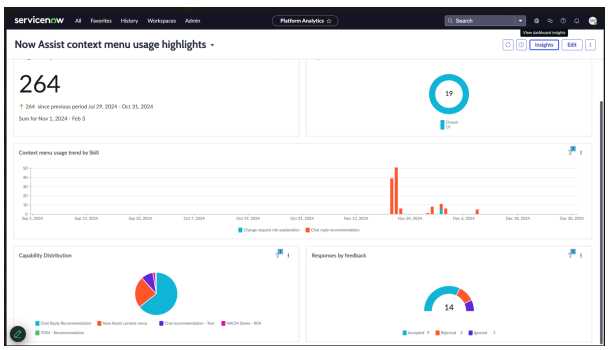
8. Type or select a menu option and press enter.
   Using the ServiceNow Otto context menu open prompt inline and pop-over variant you can quickly produce high-quality, accurate, and lucid knowledge articles, saving time and improving support in Knowledge Management.

ServiceNow Otto context menu usage dashboard

Use the ServiceNow Otto context menu dashboard to monitor the use of Now Assist context menu across the different applications.

The ServiceNow Otto context menu usage dashboard provides insights into usage patterns, frequency, and effectiveness of the context menu actions for the users and helps you refine the functionalities accordingly. The dashboard contains indicators that reveal:

- Usage metrics
- Usage based on application
- Usage based on skills
- Capacity distribution
- Responses by feedback



The ServiceNow Otto context menu usage dashboard enables you to filter the data based on the usage date. You can choose from the standard options or provide a custom range and select apply to filter the data.

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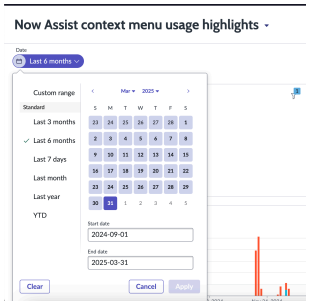
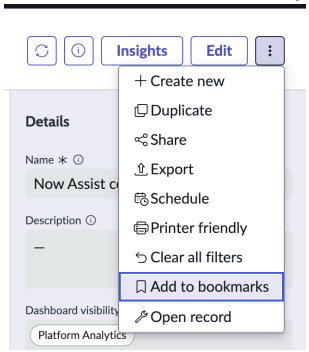
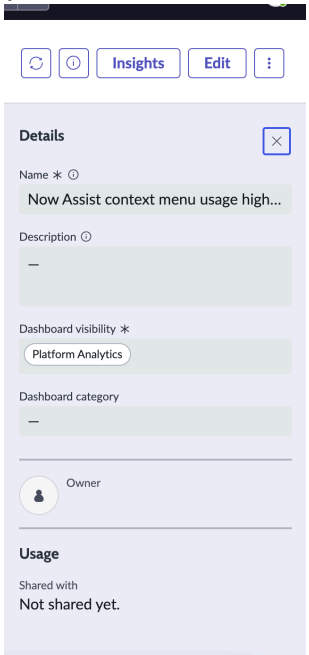


You have an option to refresh, duplicate, edit, create, and export a dashboard.



You can also select the info icon (ⓘ) to view the dashboard-related information.



ⓘ

Key features

Usage matrix: The count or number of times, ServiceNow Otto context menu has been used during the selected duration. You have the option to refresh this matrix, view insights, or suggestion available and filter this data further based on the date.

Implicit feedback duration: The breakdown of feedback based on whether the response is inserted and closed during the selected time range. You have the option to refresh this matrix, view insights, or suggestion available and filter this data further based on the date.

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Usage trend by skill: The total usage distribution based on the skills that use the ServiceNow Otto context menu. You have the option to refresh this matrix, view insights, or suggestion available and filter this data further based on the date.

Capacity Distribution: The capacity distribution based on the different applications that use the ServiceNow Otto context menu. You have the option to refresh this matrix, view insights, or suggestion available and filter this data further based on the date.

Response by feedback: The feedback field based on the Generative AI logs. The options are accepted, rejected, or ignored. You can also refresh this matrix, view insights, or suggestion available and filter this data further based on the date.

Insights: View insights and suggestions for ServiceNow Otto usage.
`

Use ServiceNow Otto context menu for custom skill deployment

Use the ServiceNow Otto context menu to deploy the custom skills created using Now Assist skill kit.

AI practitioners can use ServiceNow Otto skill kit to create a custom skill to provide custom solutions, with Now Assist's generative AI capabilities.

ServiceNow Otto allows the administrators to choose the custom skills for deployment. Use ServiceNow Otto context menu as a preferred channel to deploy a custom skill, when you configure deployment setting in ServiceNow Otto skill kit. For more information, see Configure deployment and skill settings.

You must also select ServiceNow Otto context menu as a display option when you activate the skill in ServiceNow Otto Admin. For more information, see Activate an AI skill.

To complete the activation process, create a new ServiceNow Otto context menu configuration. For more information, see Create ServiceNow Otto context Menu configuration

Create ServiceNow Otto context Menu configuration

Create ServiceNow Otto context Menu configuration to deploy and activate a custom skill.

Before you begin

To configure custom skills in action, ensure that the skill is activated in ServiceNow Otto.

Role required: sn_skill_builder.admin

Procedure

1. Navigate to **All** > **ServiceNow Otto Admin** > **ServiceNow Otto Experiences** > **ServiceNow Otto Context Menu**.
2. Select **Configurations** tab in the ServiceNow Otto context menu home page.
3. Select **Create New**.
4. Enter values for the following fields on the Configure ServiceNow Otto context menu form.
   - Workflow
   - Product
   - Name
5. Select **Start Configuration**.
6. Provide the following details in the **General details** page, on the configuration form:

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- Name
- Description
- Table name

7. Select a location where you want to add the trigger for the ServiceNow Otto context menu. The options are:
   - Record form field: Select this option to add the trigger on UI16 form
   - Custom location: Select this option to add the trigger on any other desired location.
8. If you select Record form fields, add the form fields where you want the ServiceNow Otto context menu icon.

   Note: ServiceNow Otto context menu can only be set up at the table level. Currently, it doesn't support filtering or configuring options based on specific record conditions.

9. If you select custom location, choose the context menu display type.
   Choose between the following options of display:
   - Modeless window: A draggable and resizable dialog box.
   - Embedded card: A fixed window displayed on the page.

   If you select **Custom location**, ensure that you have completed the UIB Now Assist context menu component configurations. For setup information see Now Assist context menu UIB Setup.
10. Select **Save and continue**.
    You will land on the Configure experience page.
11. Select options for the following fields on the Configure experience page:
    - Actions
    - Refinement actions
    - Turn on to prevent access refinement action
    - Maximum refinements
    - Actions for generated content
    - Enable users to provide feedback on the recommendations

    Provide the same information for each of the form fields you have selected.

    If you proceed without providing the required values for each form field, system will prompt you to provide configuration.
12. **Optional:** When prompted, select **Yes, apply** on the Apply Configurations prompt if you want to apply the same configurations.
13. Select **Save and continue** once you review and edit the values, if required.
    You will land on the Review and activate page.
14. Select an option from the **Select a record to test the configurations** drop-down menu.
15. Select **Preview** and **Done**.

Create multiple ServiceNow Otto context menu skill configurations

Create multiple ServiceNow Otto context menu configuration for the same field and table.

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Before you begin

You can now have multiple ServiceNow Otto context menu configurations on the same record form and field. You just have to create the required configuration and add to the form or field.

Role required: admin

Procedure

1. Navigate to **All** > **ServiceNow Otto Admin** > **ServiceNow Otto Experiences** > **ServiceNow Otto Context Menu**.
2. Select **Configurations** tab in the ServiceNow Otto context menu home page.
3. Select **Create New**.
4. Enter values for the following fields on the Configure ServiceNow Otto context menu form.
   - Workflow
   - Product
   - Name
5. Select **Start Configuration**.
6. Provide the following details in the **General details** page, on the configuration form:
   - Name
   - Description
   - Table name

   The UI now allows you to add multiple configurations to the same field without any errors. This is applicable only if you select Record form field.
7. Select Record form field as the location, to add the trigger for the ServiceNow Otto context menu on the UI16 form.
8. Add and select one or multiple form fields in the **Form Fields** field.
9. Select **Save and continue**.
   You will land on the Configure experience page. You will see a table that lists the skill configurations along the order value, for the selected record field. The precedence is always given to the configuration with the lowest order value.

   Note:
   - In case there is a conflict due multiple configurations to the same field in a table,the precedence is give to the configuration with the lowest order value.
   - In case there are multiple configurations, but the order value is same, the configuration with the most recently modified date is applied to field.
10. Select options for the following fields on the Configure experience page:
    - Default Action
    - Actions
    - Refinement actions
    - Turn on to prevent access refinement action
    - Maximum refinements
    - Actions for generated content
    - Enable support for extended tables.

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Provide the same information for each of the form fields you have selected.

Note:

- To disable the inheritance model for child tables, toggle off the **Enable support for extended tables** button. This model applies the parent table's configurations to a child table if the child table does not have its own configuration.
- Do not merge configurations. Use only the child table configuration and retrieve configurations from the child table.
- Apply the merging logic to use the lowest value configuration for the fields.

If you proceed without providing the required values for each form field, system will prompt you to provide configuration.

11. Select **Save and continue** once you review and edit the values, if required.
    You will land on the Review and activate page.
12. Select an option from the **Select a record to test the configurations** drop-down menu.
13. Select **Preview** and **Done**.

Analyzing AI performance

Use the AI Analytics dashboard to monitor the usage and performance of generative AI features and capabilities.

https://player.vimeo.com/video/1063716199?h=247ef99aa4&badge=0&autopause=0&player_id=0&app_id=58479

Get started

Explore Learn more about AI Analytics	**Configure** Configure AI Analytics
Use Use AI Analytics	**Reference** Learn about user roles in AI Analytics

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Troubleshoot and get help

- Ask questions and explore other resources for in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy , which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal .

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

Exploring AI Analytics

Learn how AI Analytics enables users with the AI Analytics Viewer or AI Analytics Admin role to monitor the usage, adoption, and performance of generative AI features and capabilities.

AI Analytics overview

The AI Analytics dashboard is built on the Platform Analytics experience. The dashboard contains indicators and breakdowns that provide actionable insights into the usage, adoption, and performance of your AI assets, including AI Guardian, ServiceNow Otto context menu, and AI search. AI skills and features are activated and managed in AI Admin Hub.

Note: The Value Insights dashboard page is no longer available in AI Analytics. For AI value insights, use the Value tab in AI Control Tower. See Value tab in AI Control Tower.

AI Analytics users

Users

User	Description
AI Analytics Admin	AI Analytics admins monitor usage, adoption, and performance of your AI assets, including AI Guardian, ServiceNow Otto context menu, and AI search. They also configure skill-dashboard mappings to view individual skill usage and performance indicators.
AI Analytics Viewer	View the dashboard pages to monitor usage and performance indicators.

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AI Analytics benefits

AI Analytics benefits

Benefit	Feature	Users
Monitor usage and adoption of generative AI skills, AI Guardian, ServiceNow Otto context menu, and AI search.	• Usage and adoption • • Skills performance • AI Guardian analytics • ServiceNow Otto context menu analytics • User search analyzer	AI Analytics Admin or AI Analytics Viewer

What to explore next

To learn more about configuring and using AI Analytics, see:

- Configuring AI Analytics
- Using AI Analytics
- AI Analytics reference

Configuring AI Analytics

Configure the AI Analytics dashboard to view usage, value, and performance indicators for generative AI features on your instance.

Configuration overview

AI Analytics requires at least one ServiceNow Otto product, for example, ServiceNow Otto for Customer Service Management (CSM), to be installed and configured on your instance. See Installing AI Analytics for more information.

The following is an optional configuration task used to map an AI skill to a dashboard.

Map a skill to a dashboard to view skill usage and performance indicators.

Domain Separation

AI Analytics supports domain separation only for indicators using the following data collection jobs.

- [GenAI Analytics] Daily Data Collection
- [GenAI Analytics] Historical Data Collection
- [Now Assist Analytics] Daily Data Collection
- [Now Assist Analytics] Historical Data Collection

See Approaches to Performance Analytics with domain separation for more information on applying domain separation configuration.

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Note: Be sure to check the Run as field in the data collection job records has a valid user.

Installing AI Analytics

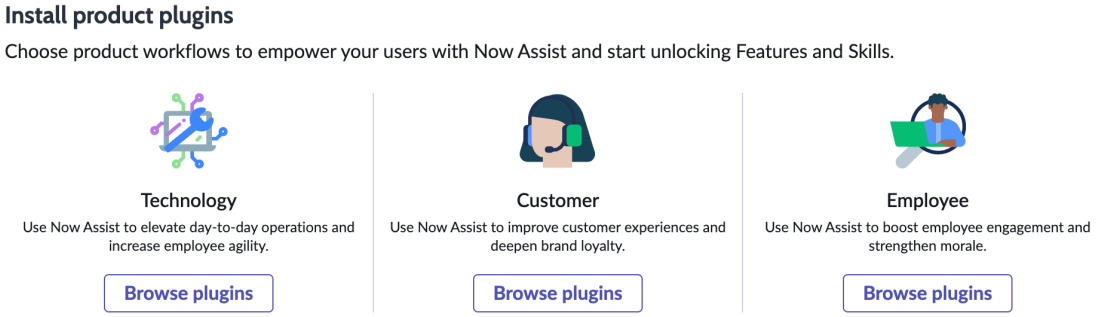
You can install the AI Analytics application (sn_na_analytics) with any of the ServiceNow Otto products if you have the admin role.

Installation requirements

You must be on Brazil Patch 0 or later.

AI Analytics is included as a dependency for all ServiceNow Otto products. It is not recommended to install the application by itself. Instead, you can install ServiceNow Otto products from the AI Admin Hub or directly from the ServiceNow Store. For details, see Install plugins for ServiceNow Otto.

AI Admin Hub console plugin installation



Compatibility matrix

AI Analytics has a dependency on AI Admin Hub. Be sure to have the compatible version of the AI Admin Hub console based on the following compatibility matrix.

AI Analytics version	AI Admin Hub console version	Release
AI Analytics 2.0.14	AI Admin Hub 5.0.7	Brazil Patch 1
AI Analytics 1.1.11	AI Admin Hub 4.1.16	Brazil Patch 0

Map a skill to a dashboard

Map an AI skill to a dashboard to view skill performance indicators and skill details.

Before you begin
Be sure to map a dashboard with a skill in the same domain.

Note: You can only map a skill to a dashboard. Mapping a feature (that consists of multiple skills) is currently not supported.

If you're mapping a skill to a custom dashboard, be sure to share appropriate access to the dashboard. See Share a Platform Analytics dashboard for more information.

Roles required: sn_na_analytics.admin and sn_nowassist_admin.nsa_admin

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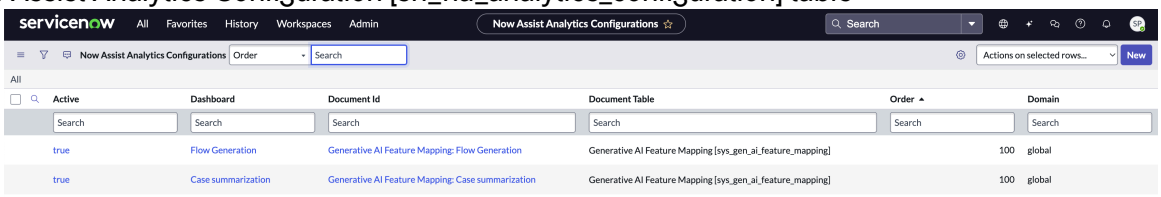
Procedure

1. Navigate to the **All** menu and enter `sn_na_analytics_configuration.list`.
   The Now Assist Analytics Configuration [sn_na_analytics_configuration] table



   appears.
2. Create a new mapping by selecting **New**
3. On the form, fill in the fields.

AI Analytics Configuration record form

Field	Description
Dashboard	The Dashboard that you want to map to a skill. Use the lookup icon ( ) to search for and select the dashboard.
Application	The application that contains the record.
Document Table	Table that contains configured skills. Use the lookup icon ( ) to search for and select the Now Assist Skill Config [sn_nowassist_skill_config] table.
Document Id	The Skill that you want to map to the dashboard. Use the lookup icon ( ) to search for and select the skill that you want to map to the dashboard.
Active	Check box used to enable or disable the mapping.
Order	Order to set that determines the priority of the mapping in cases where multiple skills are mapped to the same dashboard.

4. Select **Submit**.

What to do next

After you've completed the mapping, go to the Skill details page and select the skill from the drop-down list to verify that the mapped dashboard is displayed.

Using AI Analytics

The AI Analytics dashboard provides indicators and breakdowns that help monitor the performance of generative AI features, capabilities, and skills active on your instance.

Access the dashboard by navigating to **All** > **AI Admin Hub** > **Performance**.

You must have one of these roles to view the dashboard:

- Now Assist Analytics Admin [sn_na_analytics.admin]
- Now Assist Analytics Viewer [sn_na_analytics.viewer]

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The following pages explain the available analytics in more detail.

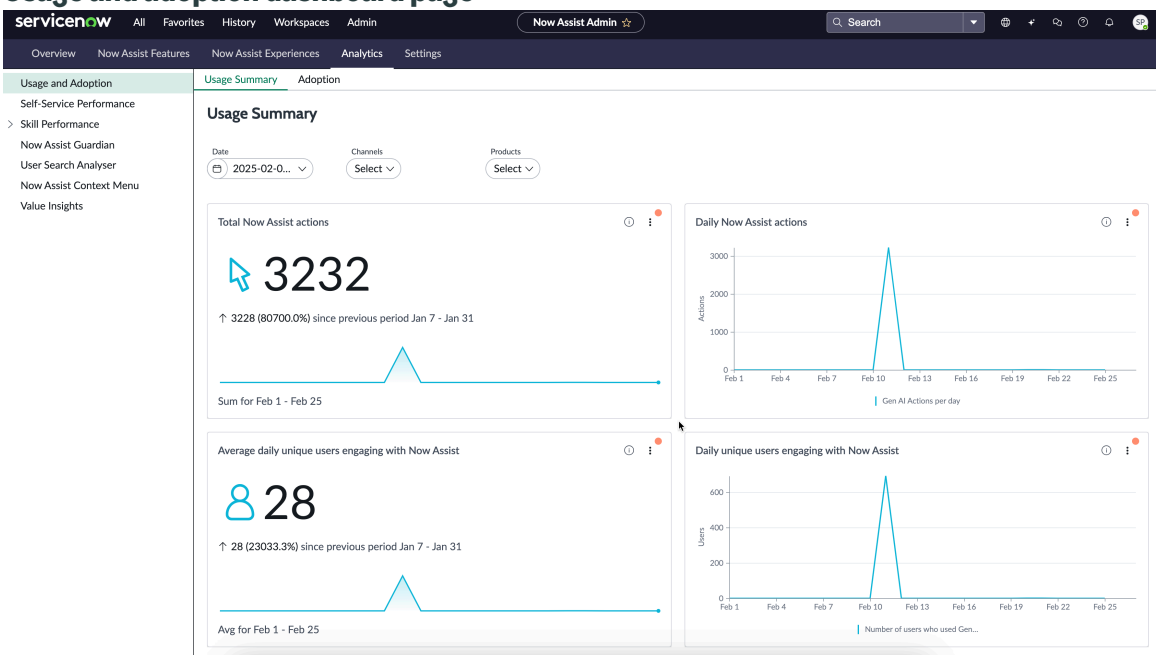
Usage and adoption

The Usage and adoption dashboard page contains key usage and performance indicators that help you evaluate AI adoption in your organization.

The Usage and adoption dashboard page is the landing page for the dashboard. The Usage and adoption dashboard page contains two tabs that provide insights on usage summary and adoption.

The Usage summary page includes indicators on total and daily AI actions, skill distribution and engagement trend, and daily unique users who have used AI skills. The Adoption page tracks the departments with the highest AI usage, comparison of actions by department, and feedback and error details. Use the date range, channel, and product filters to view usage and adoption indicators for the selected period, channel, and product, respectively. The default date range is 30 days.

Usage and adoption dashboard page



The indicators on the Usage and adoption dashboard page provide the following insights. See AI Analytics dashboard indicator details for information on data source and calculations behind each indicator on the page.

- Skills engagement trend for a selected period can reveal skills that have been used more frequently or less frequently.
- Total and daily actions for a selected period can reveal the scale of AI actions executed. The trend line in the visualization shows periods of increased or declining engagement.
- Average and daily unique users can reveal user engagement with AI skills.

Usage summary indicators

Total AI actions

This area of the dashboard shows the total number of AI actions in the selected date range. A single use of an AI skill represents an action. Select a filter combination to view the number of actions by products or channels. For example, you can view the number of AI actions executed through the ServiceNow Otto for

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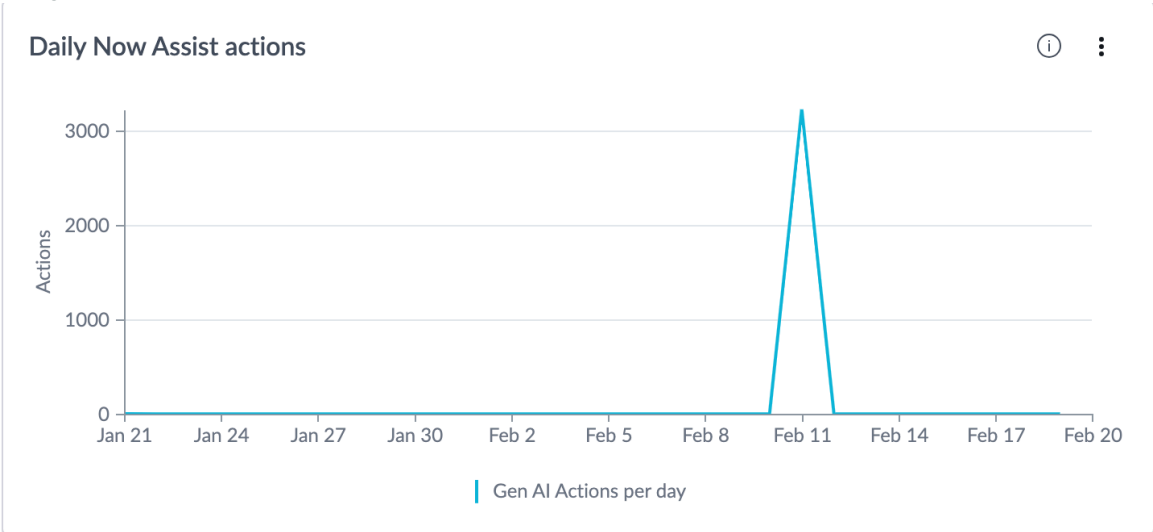
Virtual Agent channel for ServiceNow Otto for Customer Service Management (CSM) product.

Total AI actions indicator

Daily AI actions

This area of the dashboard shows the number of AI actions executed per day in the selected date range.

Daily AI actions indicator



Average daily unique users engaging with AI skills

This area of the dashboard shows the average number of daily unique users who engaged with AI actions in the selected date range. Average number of daily unique users is an indicator of the level of AI engagement across selected ServiceNow Otto products and channels.

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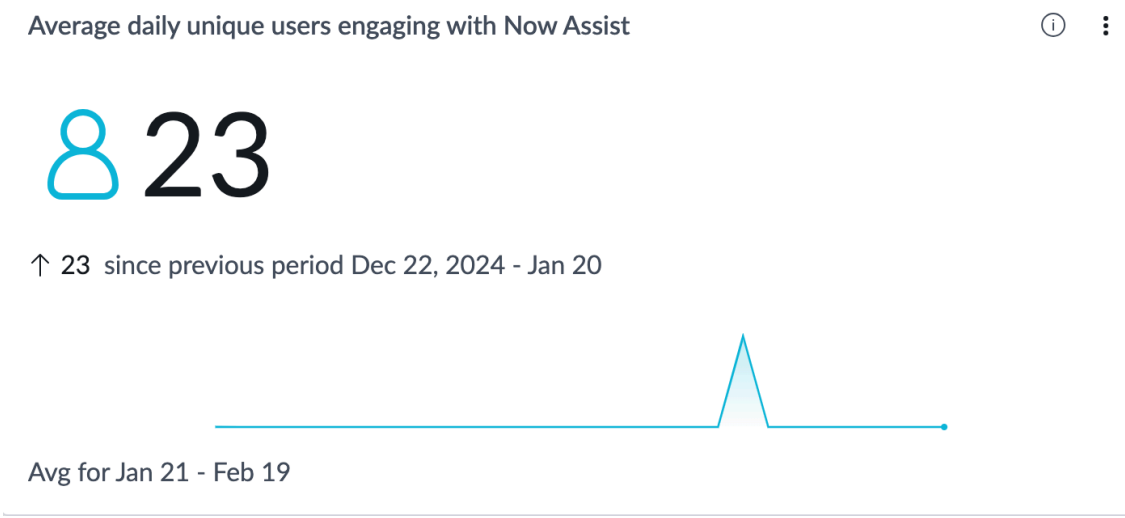
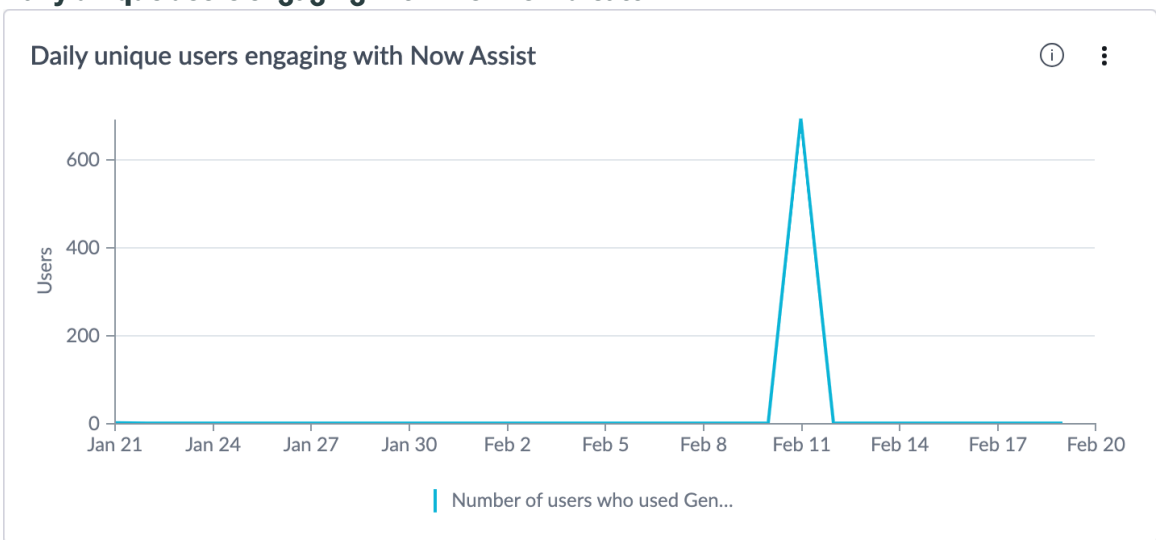
Average number of unique users per day who triggered actions indicator



Daily unique users engaging with AI skills

This area of the dashboard shows the daily unique users who engaged with AI actions in the selected date range.

Daily unique users engaging with AI skills indicator



Skill group distribution

This area of the dashboard shows the skill usage in a trend chart for the selected filters. The visualization is interactive. Use the Group by filter to apply predefined breakdowns. Hover over the trend lines to see the number of times that each skill was used. Selecting one or more items in the legend removes the trend line for those items. You can compare and contrast skill usage distribution in a date range to understand in-demand skills, and skills that are low on usage and need further analysis.

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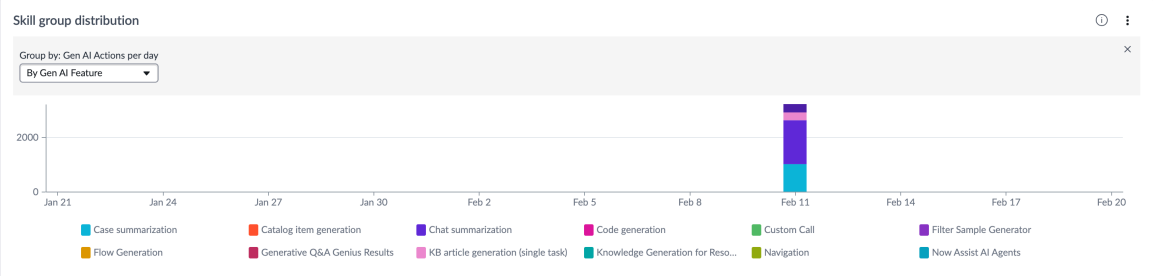
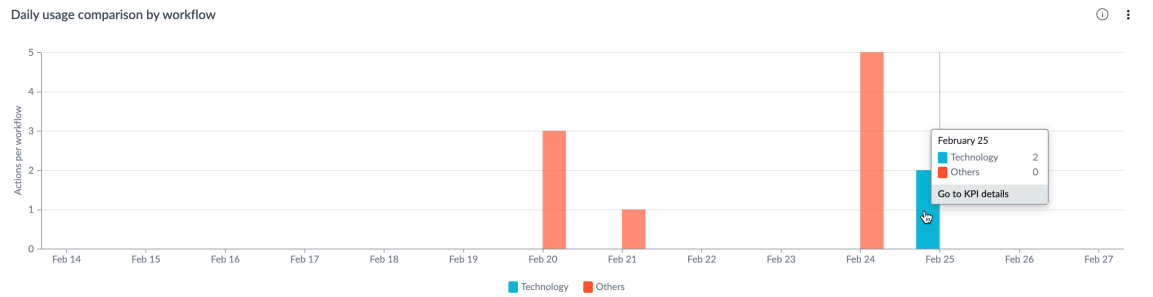
Skill group distribution indicator



Daily usage comparison by workflow

This area of the dashboard shows the number of AI actions executed per day against each workflow in the selected date range. Hover over a bar to view the count of AI actions executed for a workflow on that day.

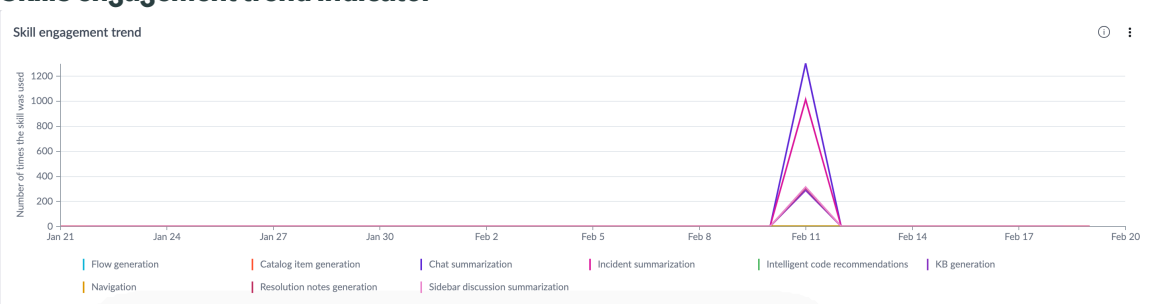
Daily usage comparison by workflow indicator



Skill engagement trend

This area of the dashboard shows the skill usage in a trend chart for the selected filters. The visualization is interactive. Hover over the trend lines to see the number of times that each skill was executed. Selecting one or more skills in the legend removes the trend line for those skills. You can compare and contrast skill usage levels in a date range to understand in-demand skills, and skills that are low on usage and need further analysis.

Skills engagement trend indicator



Adoption indicators

Departments with highest usage

This area of the dashboard shows the departments with the highest usage of AI actions in the selected date range. Hover over the horizontal bars to view the count of actions for a particular department.

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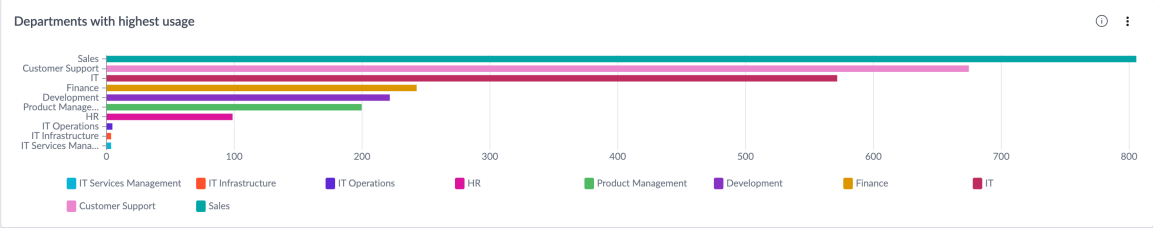
Departments with highest usage indicator



AI actions comparison by user department

This area of the dashboard shows the number and type of AI actions executed against each department in the selected date range.

AI actions comparison by user department indicator

Now Assist actions comparison by user department

By Department / By Skills Config	Sales	Customer Support	IT	Finance	Development
Chat summarization	344	250	218	62	87
Incident summarization	238	225	190	61	71
Sidebar discussion summarization	75	58	53	21	24
Resolution notes generation	80	77	53	14	22

Feedback details

This area of the dashboard shows the number of AI actions, number of feedback provided by users of AI actions, and number of AI actions with positive feedback in the selected date range.

Feedback details indicator

Feedback details

By Skill Family	Number of Now Assist actions	Number of Now Assist actions with feedback	Number of Now Assist actions with positive feedback
Others	5K	12	6
ITSM	3	0	0
Creator	3	1	1
Total	**5K**	**13**	**7**

Error details

This area of the dashboard shows the number of AI actions and the number of AI actions resulting in errors.

Error details indicator

Error details

By Skill Family	Number of now Assist Actions	Number of now Assist Actions with error status
Creator	3	1
ITSM	3	2
Others	5K	23
Total	**5K**	**26**

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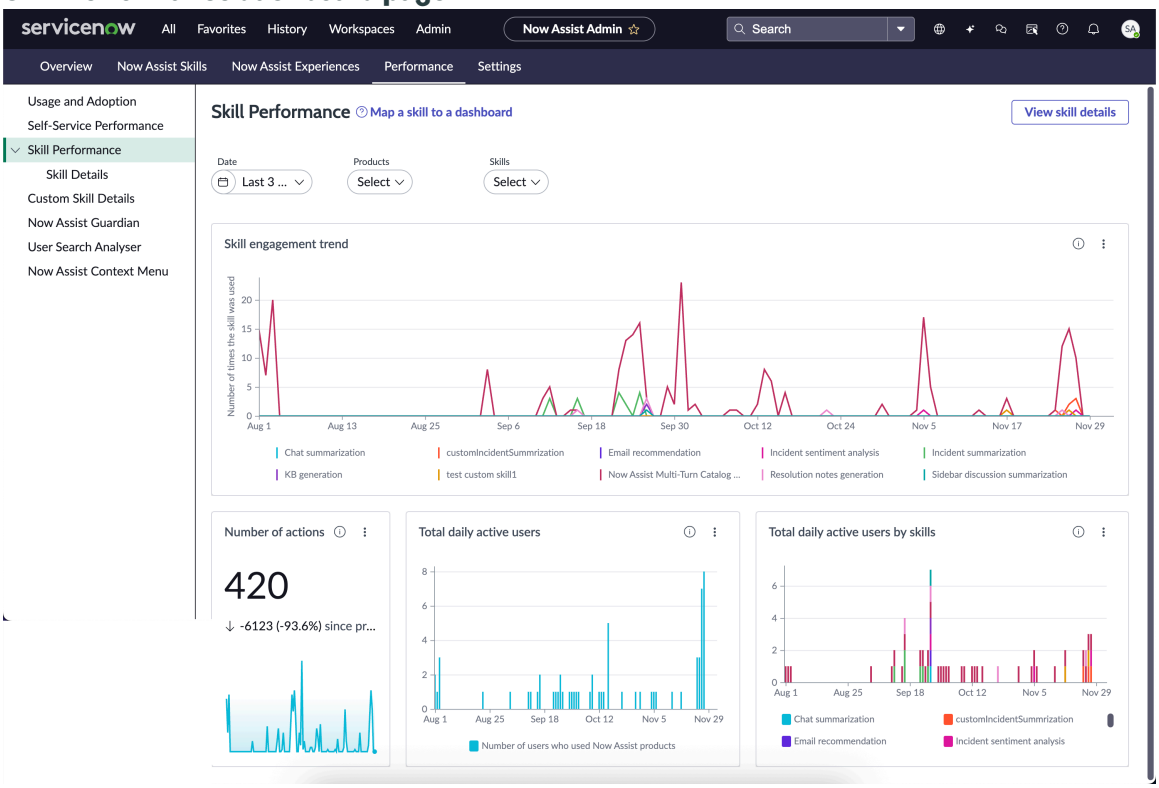
Skills performance

Use the Skills performance dashboard page to view usage and performance indicators of active AI skills.

The Skills performance dashboard page contains indicators that help you analyze the usage and performance of active skills. Use the **Date range**, **Product**, and **Skills** filters to break down by date range, product, and skill, respectively. The filter selection applies to all visualizations on the page. See AI Analytics dashboard indicator details for information on the data and calculations behind each indicator.

Skill Performance dashboard page



The indicators on the Skills performance dashboard page provide the following insights. See AI Analytics dashboard indicator details for information on the data and calculations behind each indicator.

- Skills usage trend visualization for a selected period can reveal skills that have been used more frequently or less frequently.
- The Number of actions visualization for a selected period can reveal the scale of AI skill executions. The trend line comparison shows the increasing or decreasing trend from the previous period.
- The Total daily active users indicator shows a breakdown of daily active users by product and skill.

Select the **View skill details** button to view the usage and performance indicators of skills mapped to a dashboard.

Skills performance indicators

Skills engagement trend

This area of the dashboard shows the skill usage in a trend chart for the selected filters. The visualization is interactive. Hover over the trend lines to see the number

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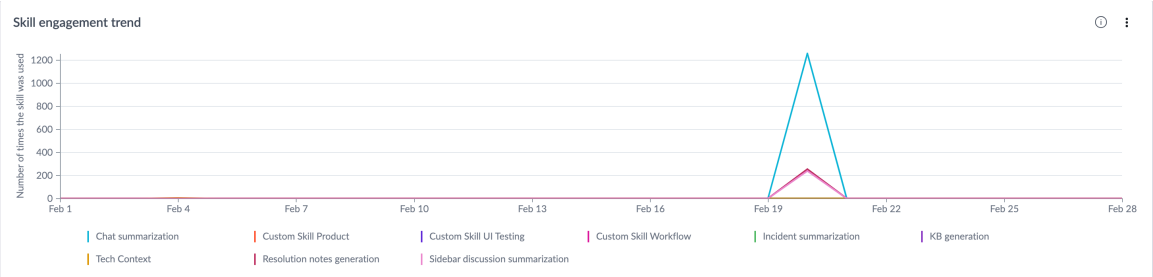
of times that each skill was used. Selecting one or more skills in the legend removes the trend line for those skills. You can compare and contrast skill usage levels in a date range to understand in-demand skills, and skills that are low on usage and need further analysis.

Skills usage trend indicator



Number of actions

This area of the dashboard shows the number of AI actions for the selected date range, product, and skill. A single use of a skill represents an action. The headline number is an indicator of the scale of skill usage across products. The trend line comparison shows the increase or decrease in the number of actions from the previous period.

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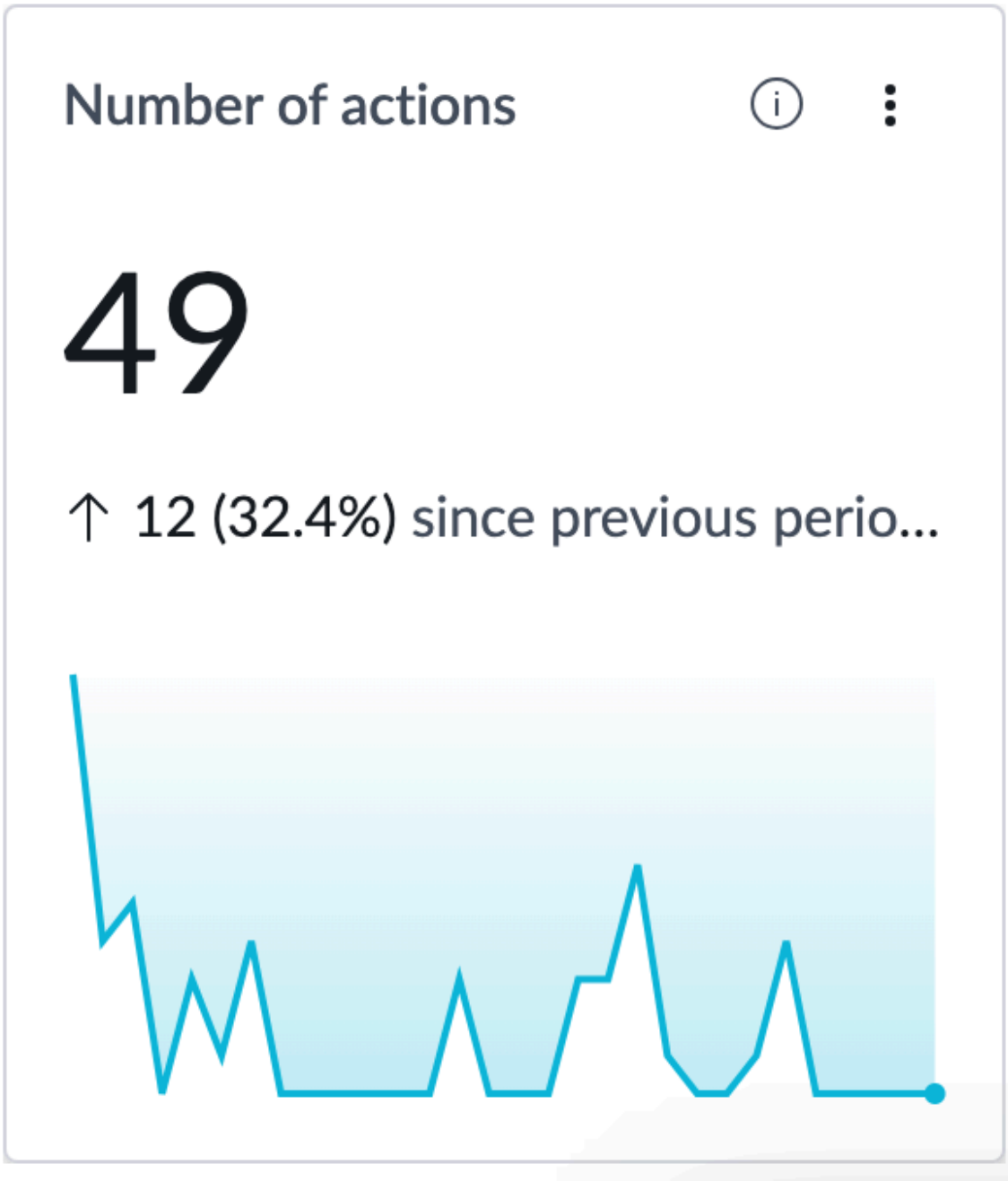
Number of actions indicator



Total daily active users

This area of the dashboard shows the cumulative number of daily active users who have used ServiceNow Otto products with one or more active skills. Select a filter combination to see skill usage patterns. For example, you can visualize the number of users who have used the Chat Summarization skill across all products in the last month.

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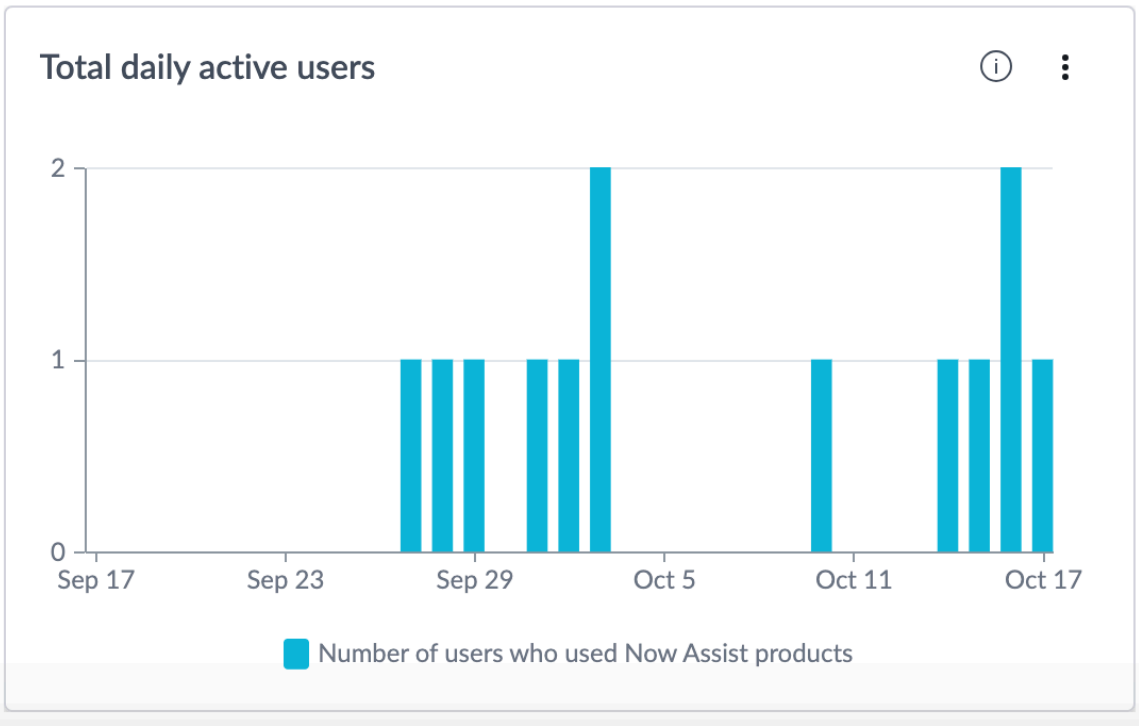
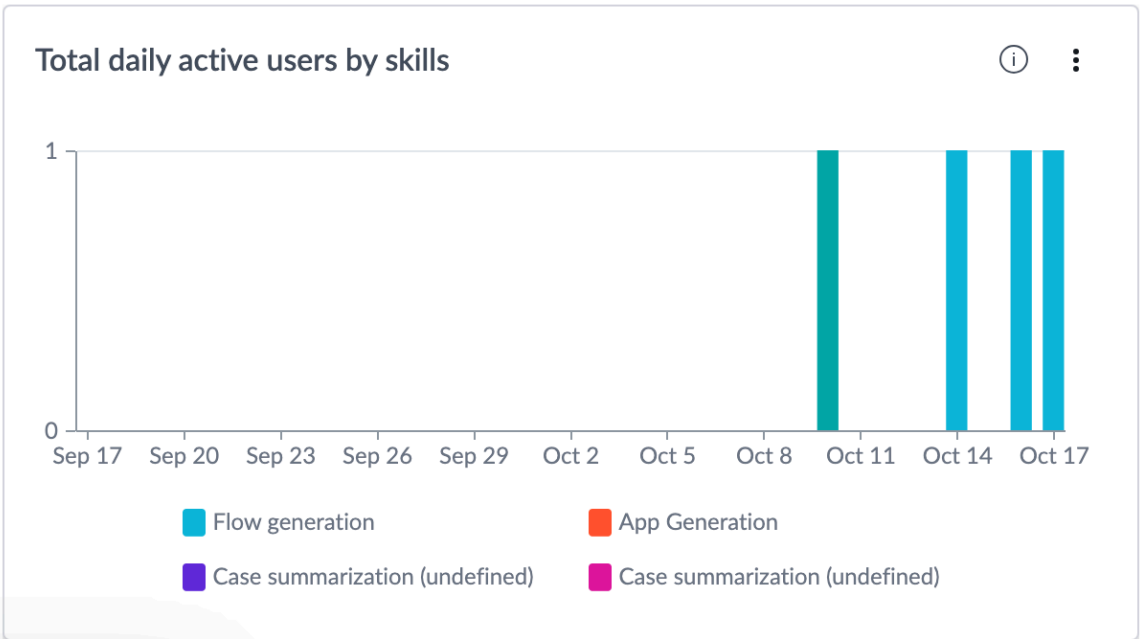
Total daily active users indicator



Total daily active users by skills

This area of the dashboard shows the number of daily active users who have used AI skills in the selected date range. When you hover over a date in the visualization, a pop-over shows all active skills with the count of users against each skill. Select a filter combination to visualize patterns in user activity.

Total daily active users by skills indicator



Skill details

Use the Skill details dashboard page to view usage and performance indicators of a skill.

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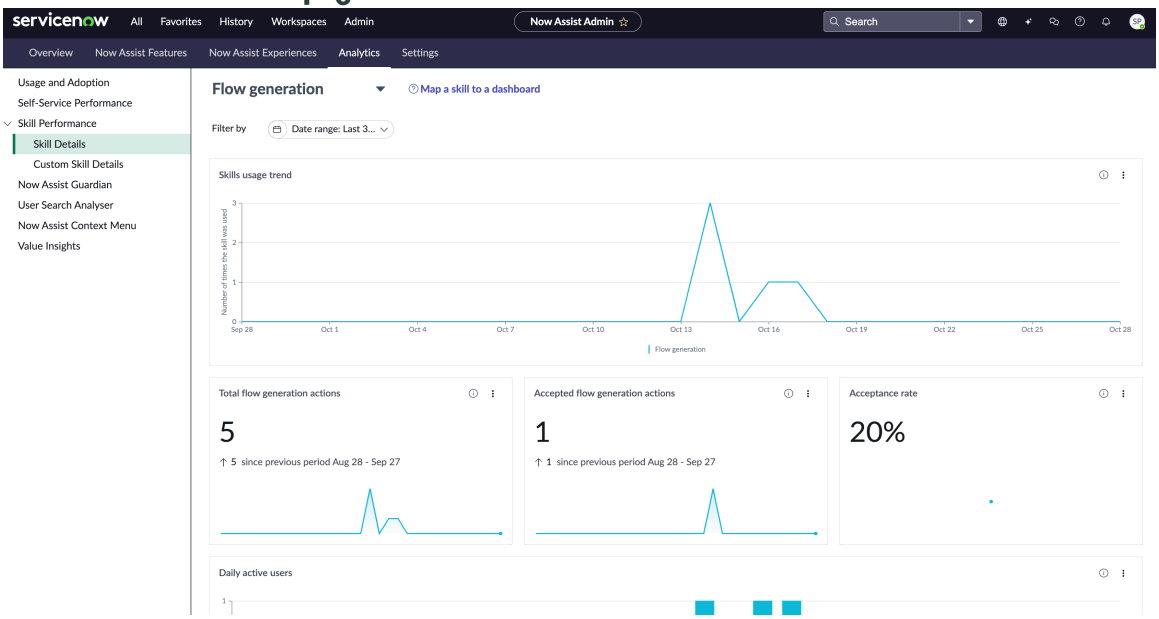
The Skill details dashboard page contains indicators pertaining to a specific skill. The indicators provide insight into skill usage and performance. Select a skill from the drop-down list to view the indicators. The drop-down lists both active and inactive skills. Each skill has a subtitle that identifies the skill family that it belongs to, for example, ITSM, HR, and so on. Use the date range filter to view skill usage and performance over a certain period. The date range filter selection applies to all visualizations on the page. See AI Analytics dashboard indicator details for information on the data and calculations behind each indicator.

Skill details dashboard page



The indicators on the Skill details dashboard page provide the following insights. See AI Analytics dashboard indicator details for information on the data and calculations behind each indicator.

- Skill engagement trend visualization for a selected period can reveal patterns in skill usage.
- Acceptance rate visualization shows how well the skill met the requirements of users who used the skill. A high acceptance rate for a skill is an indicator of good performance. A low acceptance rate among skill users indicates that the skill doesn't meet the requirements either fully or partially.
- The number of actions visualization for a selected period can reveal the scale of the skill executions. The trend line comparison shows the increasing or decreasing trend from the previous period.
- The daily active users visualizations show a breakdown of daily active users by skill to help you see user activity on the skill.

Skill details indicators

The indicators on skill details pages might differ based on the skill selected. For example, summarization skills might have different set of indicators compared to generation skills because each skill is mapped to its own dashboard that contains a set of indicators related to the skill.

The AI Analytics dashboard comes with some default skill-to-dashboard mappings to get you started. The default dashboards are visible to users with the AI Analytics Viewer [sn_na_analytics.viewer] role. You can create your own dashboards and map them to skills. See Create a dashboard with the in-line editor and Map a skill to a dashboard for more information on creating custom dashboards and mapping them to skills, respectively.

The following indicators are for the Flow Generation skill.

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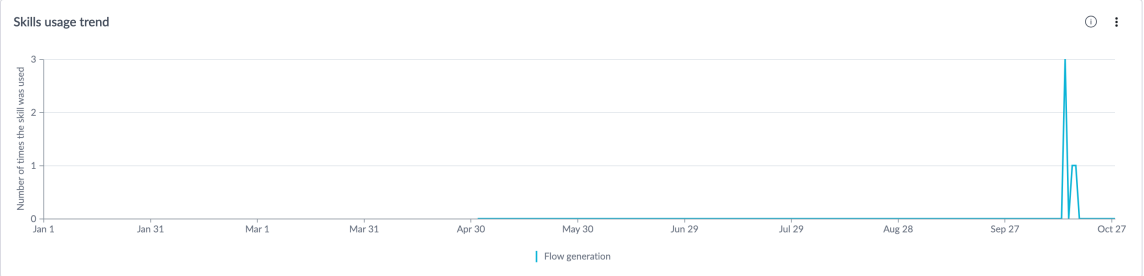
Skill usage trend indicator

This area of the dashboard shows the Flow Generation skill usage in a trend chart for the selected filters. The visualization is interactive. Hover over the trend lines to see the number of times the Flow Generation skill was used.

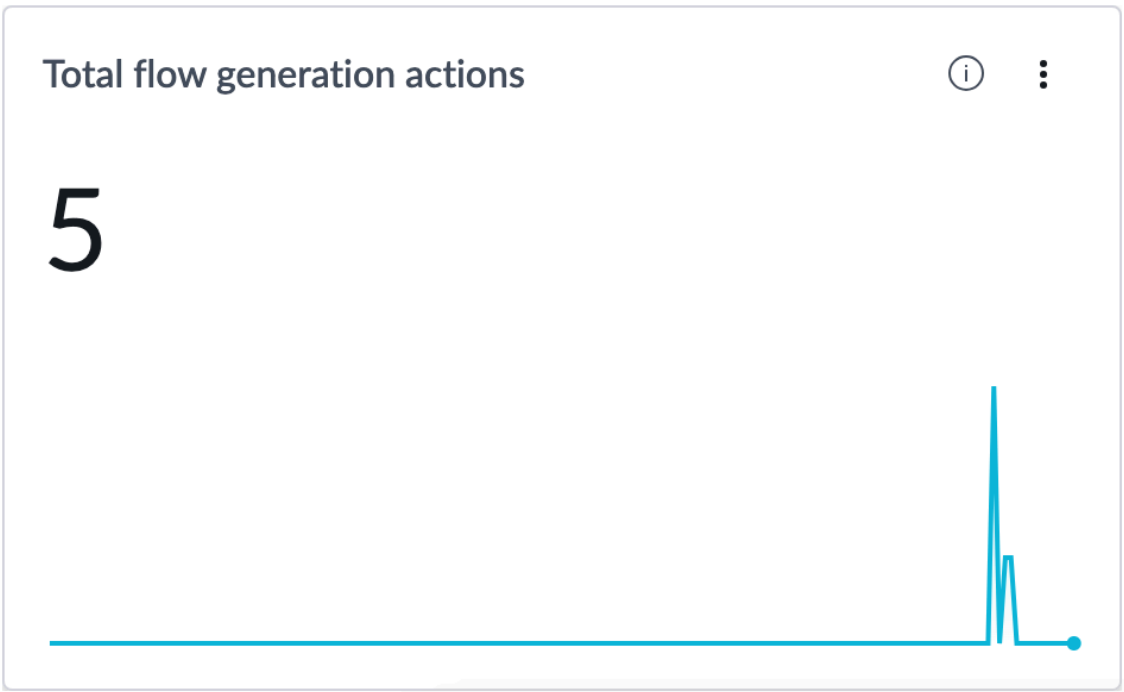
Skill usage trend indicator



Total Flow Generation actions indicator

This area of the dashboard shows the number of flow generation actions for the selected date range. A single use of the Flow Generation skill represents an action. The headline number is an indicator of the scale of flow generation skill usage across products. The trend line comparison shows the increase or decrease in the number of actions from the previous period.

Total flow generation actions indicator



Accepted flow generation actions indicator

This area of the dashboard shows the number of flow generation actions, that is, the number of flow generation skill executions that resulted in flows that were accepted by the users.

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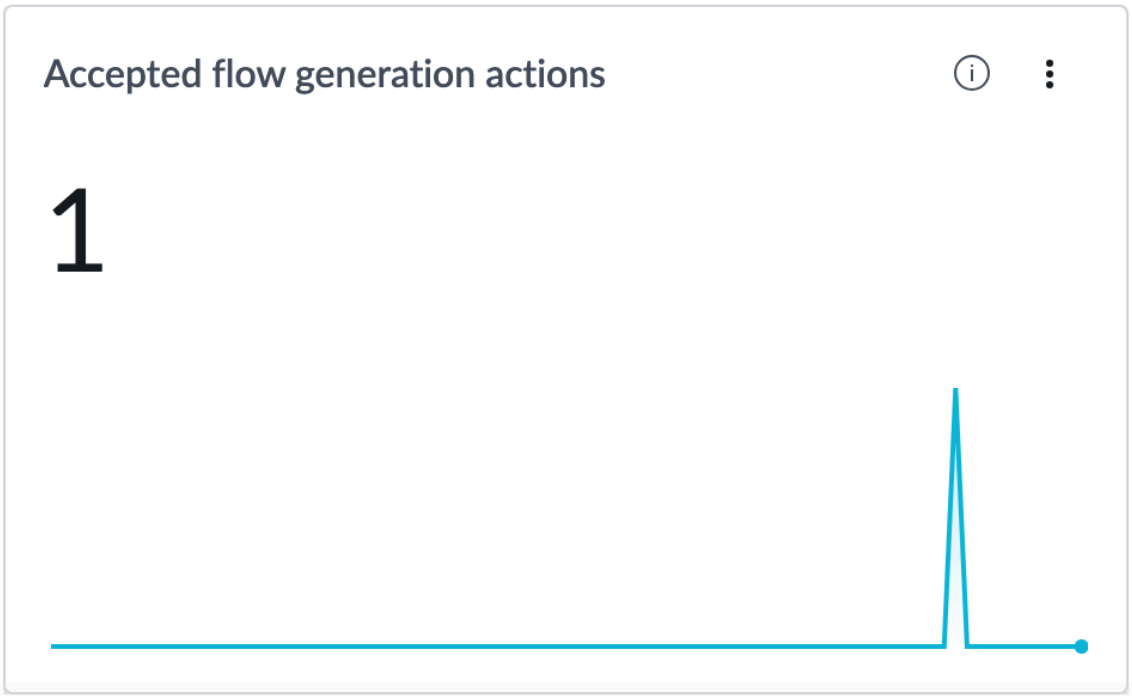
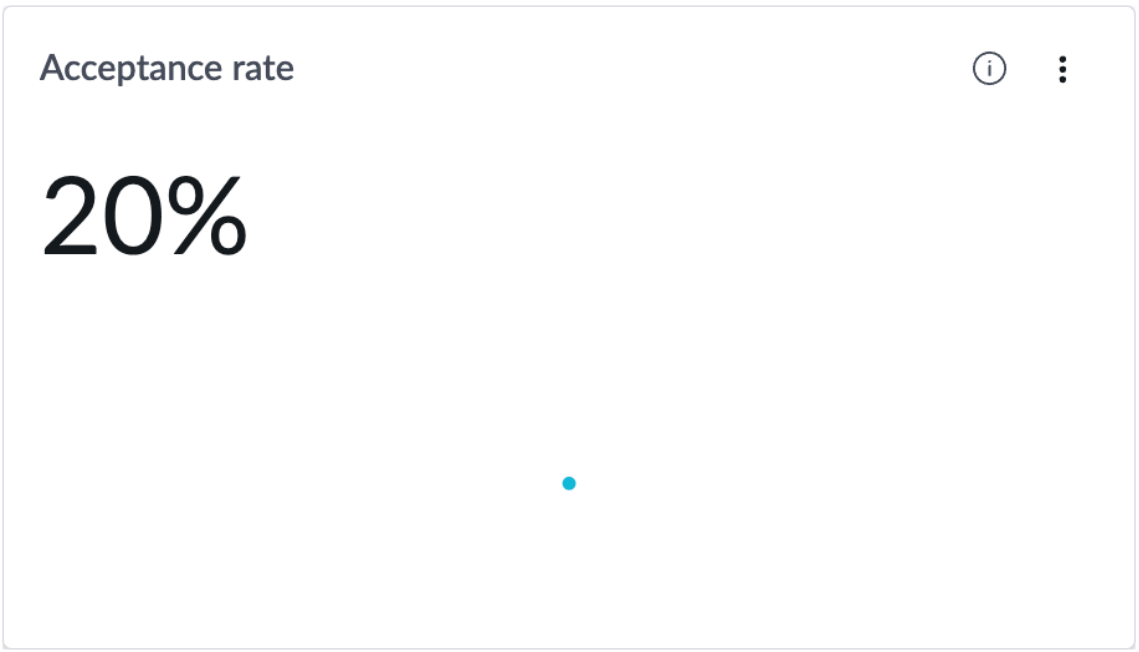
Accepted flow generation actions indicator



Acceptance rate indicator

This area of the dashboard shows the acceptance rate of Flow Generation skill based on user acceptance of the flow. The percentage is calculated using the formula: (Total number of accepted flow generation actions/Total number of flow generation actions) x 100.

Acceptance rate indicator



Custom skill details

Use the Custom skill details dashboard page to view usage and performance indicators of custom skills.

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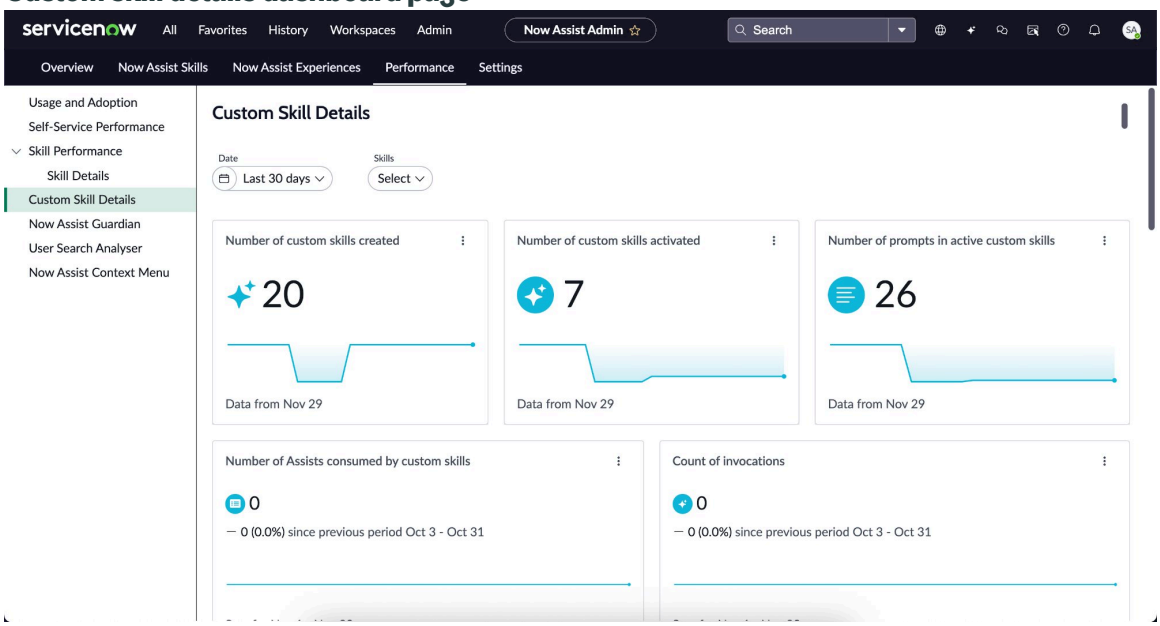
The Custom skill details dashboard page contains indicators pertaining to a custom skill. The indicators provide insight into skill usage and performance. Select a skill from the Skills drop-down list to view the indicators. The drop-down lists both active and inactive skills. Each skill has a subtitle that identifies the skill family that it belongs to, for example, ITSM, HR, and so on. Use the date range filter to view skill usage and performance over a certain period. The date range filter selection applies to all visualizations on the page. See AI Analytics dashboard indicator details for information on the data and calculations behind each indicator.

Custom skill details dashboard page



The indicators on the Custom skill details dashboard page provide the following insights. See AI Analytics dashboard indicator details for information on the data and calculations behind each indicator.

- Skill engagement trend visualizations for a selected period can reveal patterns in skill usage across workflows, products, and features.
- The daily unique users visualization shows a breakdown of daily unique users by the selected skill to help you see user activity and engagement with the skill.
- Acceptance rate visualization shows how well the skill met the requirements of users who used the skill. A high acceptance rate for a skill is an indicator of good performance. A low acceptance rate among skill users indicates that the skill doesn't meet the requirements either fully or partially.
- Skills feedback visualization shows that the feedback recorded based on user response to each skill execution in the selected date range.

Skill details indicators

The Custom skill details page contains a common set of indicators that give you insights into custom skills. Only those skills where the skill family is Other or the category is Custom are shown in the skills filter on the page.

The following indicators are common across all custom skills.

Number of custom skills created

This area of the dashboard shows the number of custom skills created by the users in the selected date range.

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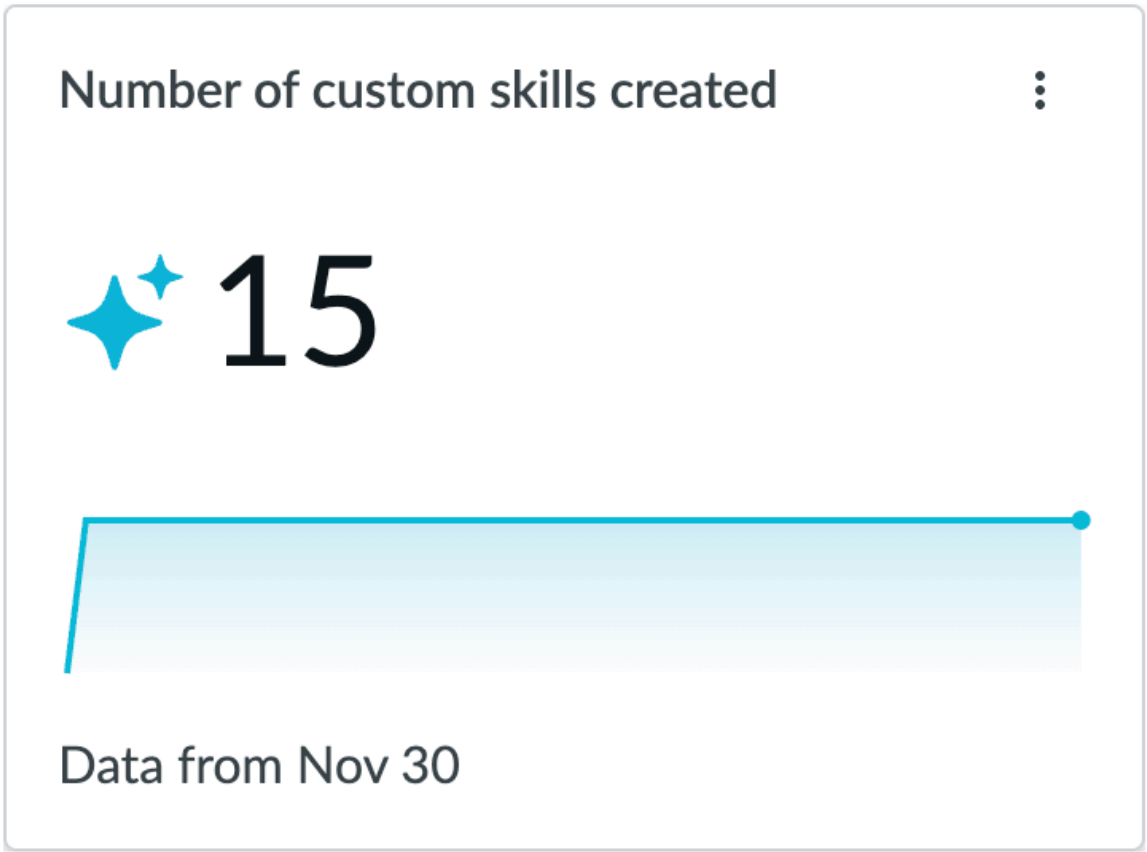
Number of custom skills created indicator



Number of custom skills activated

This area of the dashboard shows the number of custom skills activated by the users in the selected date range.

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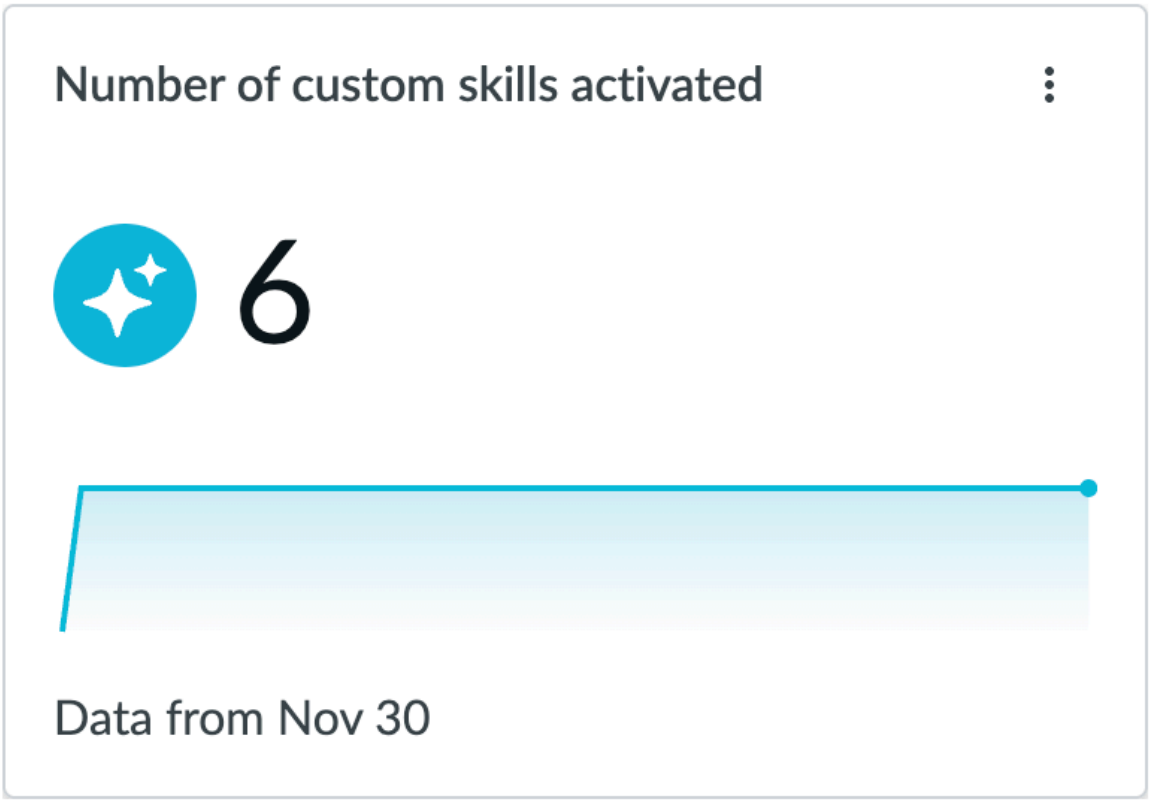
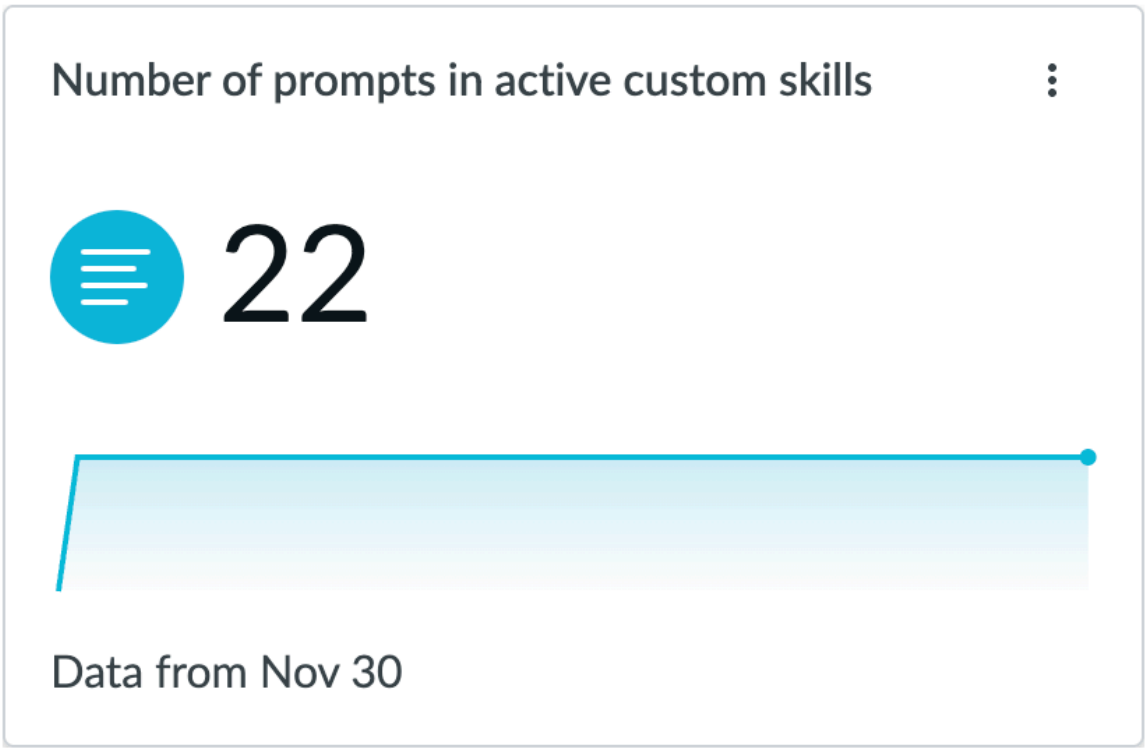
Number of custom skills activated indicator



Number of prompts in active custom skills

This area of the dashboard shows the number of prompts in active custom skills in the selected date range.

Number of prompts in active custom skills indicator



Number of Assists consumed by custom skills

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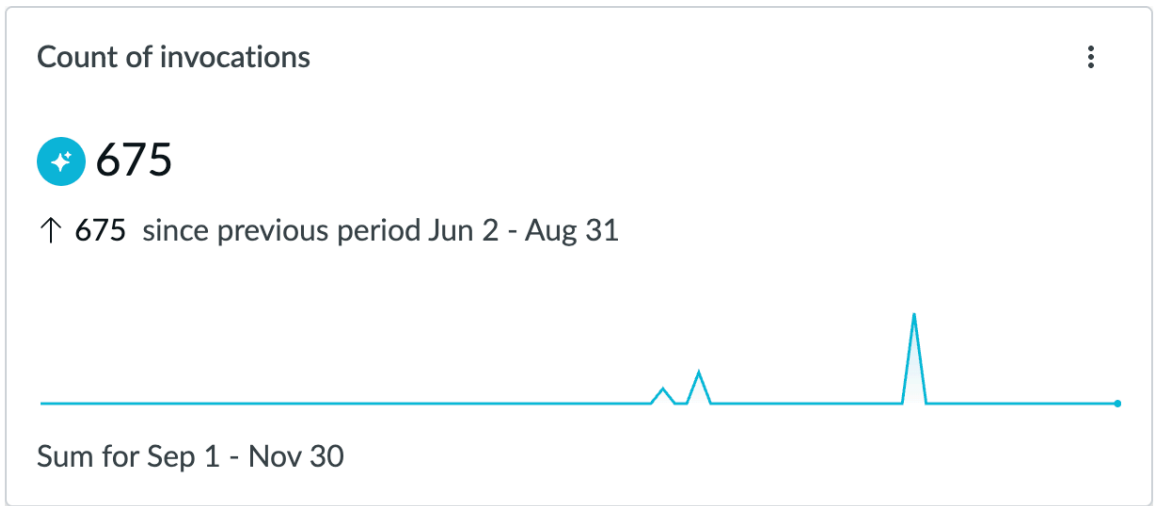
This area of the dashboard shows the number of Assists consumed by custom skills in the selected date range.

Number of Assists consumed by custom skills indicator

Count of invocations

This area of the dashboard shows the count of invocations for the custom skills in the selected date range.

Count of invocations indicator



Daily unique users engaging with the skill

This area of the dashboard shows the number of unique users per day who engaged with the skill in the selected date range. The bar chart shows a trend of increase or decrease in the number of unique users to help you understand periods of high and low skill engagement.

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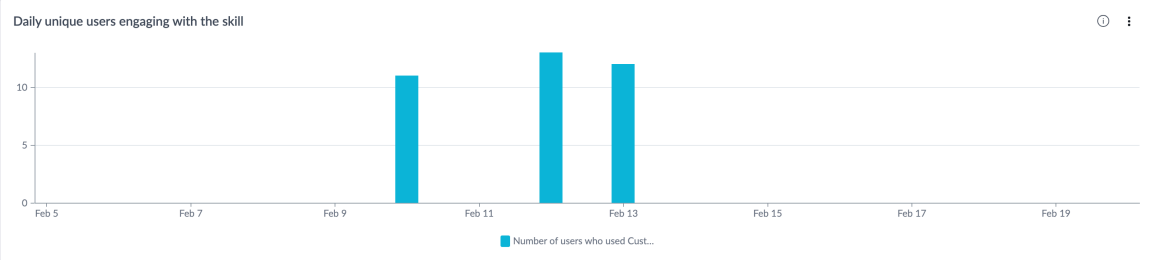
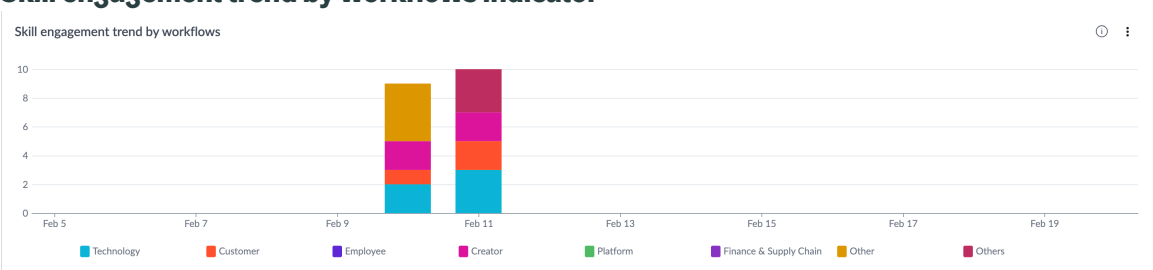
Daily unique users engaging with the skill indicator



Skill engagement trend by workflows

This area of the dashboard shows the skill usage across workflows in a bar chart for the selected date range. The visualization is interactive. Hover over the bars to see the number of times the skill was used in each of the workflows.

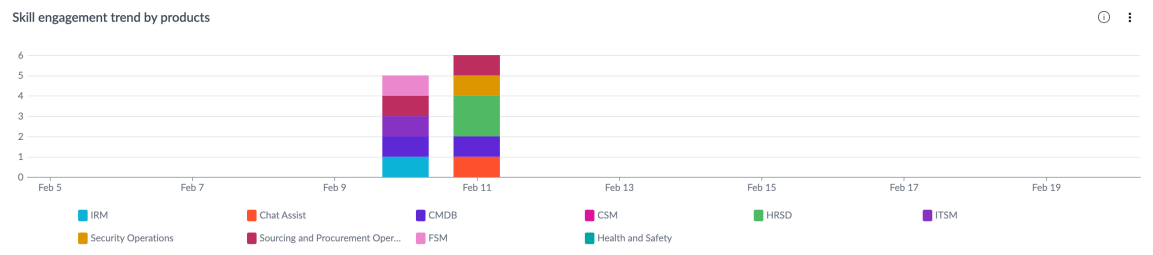
Skill engagement trend by workflows indicator



Skill engagement trend by products

This area of the dashboard shows the skill usage across ServiceNow Otto products in a bar chart for the selected date range. The visualization is interactive. Hover over the bars to see the number of times the skill was used in each of the products.

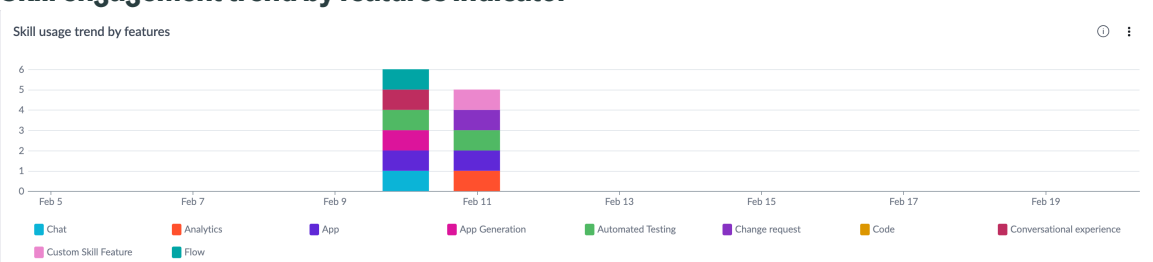
Skill engagement trend by products indicator



Skill engagement trend by features

This area of the dashboard shows the skill usage across ServiceNow Otto features in a bar chart for the selected date range. The visualization is interactive. Hover over the bars to see the number of times the skill was used in each of the features.

Skill engagement trend by features indicator



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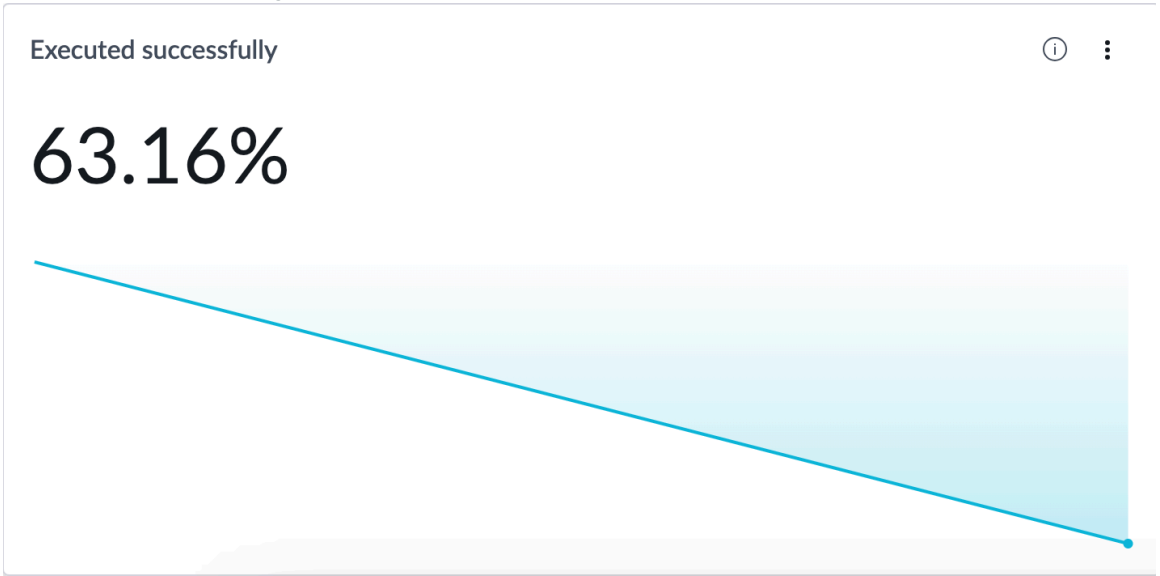
Executed successfully

This area of the dashboard shows the acceptance rate of the selected skill based on user feedback. The percentage is calculated using the formula: (Total number of accepted skill executions/Total number of skill executions) x 100.

Executed successfully indicator

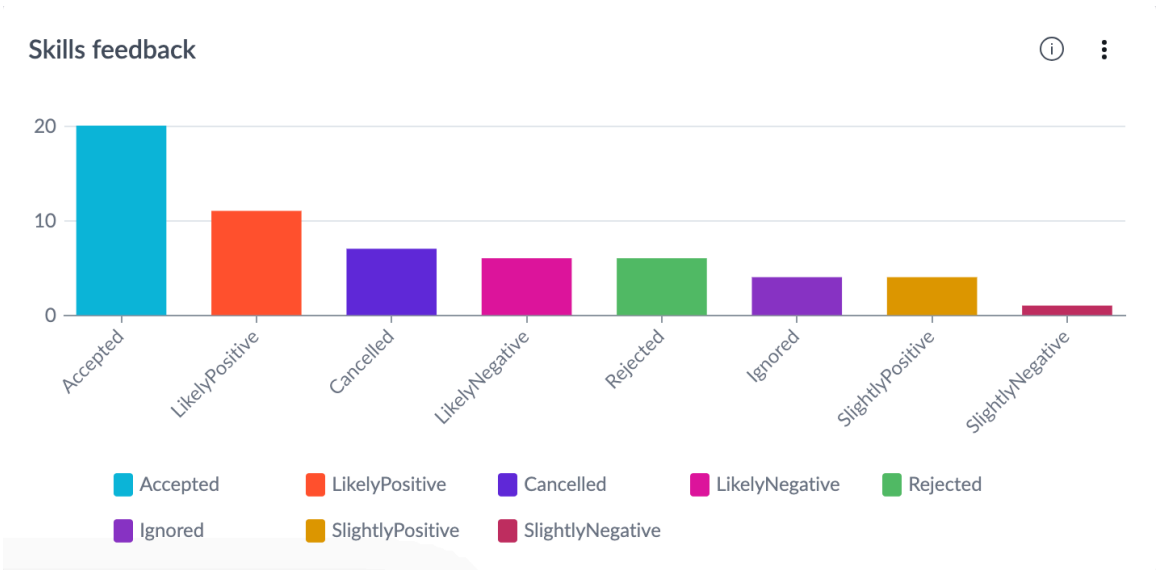


Skills feedback

This area of the dashboard shows the feedback recorded for each execution of the selected skill. User feedback is categorized into the following:

- Accepted (edited & non-edited): The user accepted the skill output with or without further edits to the output.
- Rejected: The user rejected the skill output.
- Canceled: The user canceled the skill execution.
- Ignored: The user didn't take any action based on the skill output.

Skills feedback indicator



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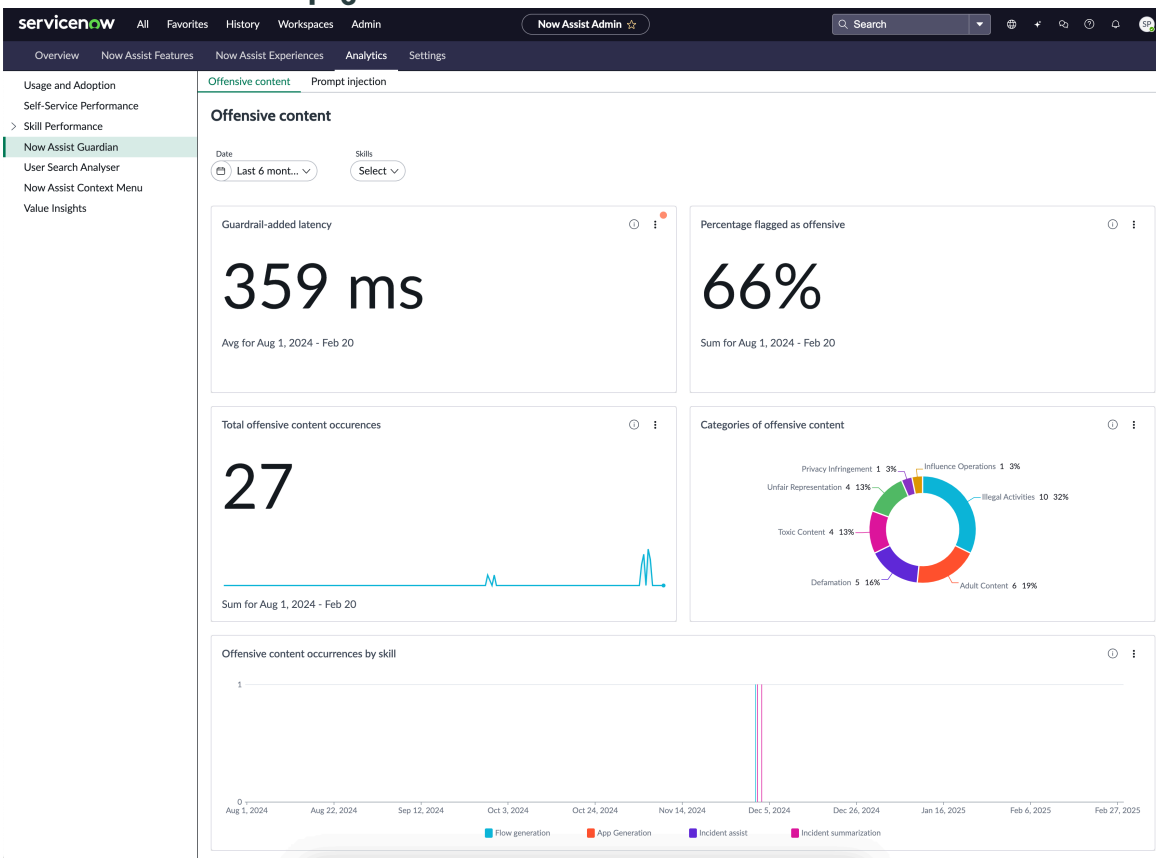
AI Guardian analytics

Monitor the performance of guardrails enabled through AI Guardian.

The AI Guardian analytics dashboard helps admins monitor and evaluate the effectiveness of offensive content and prompt injection guardrails in tracking and analyzing requests sent to large language models (LLM) and their responses.

AI Guardian dashboard page



The indicators on the AI Guardian dashboard page provide the following insights.

- Average latency as a result of active offensive content and prompt injection guardrails. High latency could mean increased guardrail activity in the period.
- Count and percentage of offensive content and prompt injection occurrences.
- Skills where offensive content and prompt injection occurrences were detected.

Apply the filters on the dashboard to view guardrail activity for skills in a date range. See AI Analytics dashboard indicator details for information on the data and calculations behind each indicator.

Offensive content indicators

Guardrail-added latency

This area of the dashboard shows the average latency as a result of the active offensive content guardrail for the selected skills and date range.

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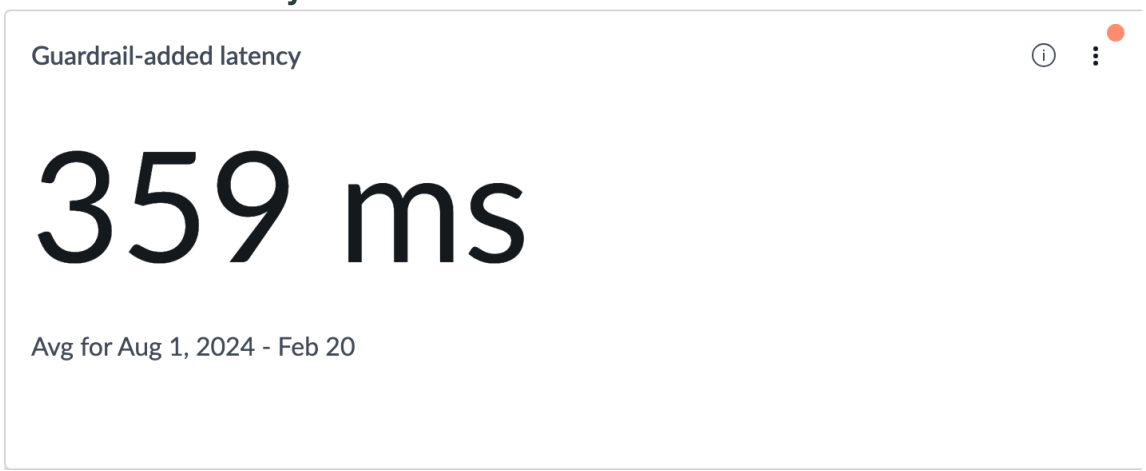
Guardrail-added latency indicator



Percentage flagged as offensive

This area of the dashboard shows the percentage of requests and responses to and from the LLM service that are flagged for offensive content.

Percentage flagged as offensive indicator

Total offensive content occurrences

This area of the dashboard shows the total number of offensive content occurrences for the selected skills and date range.

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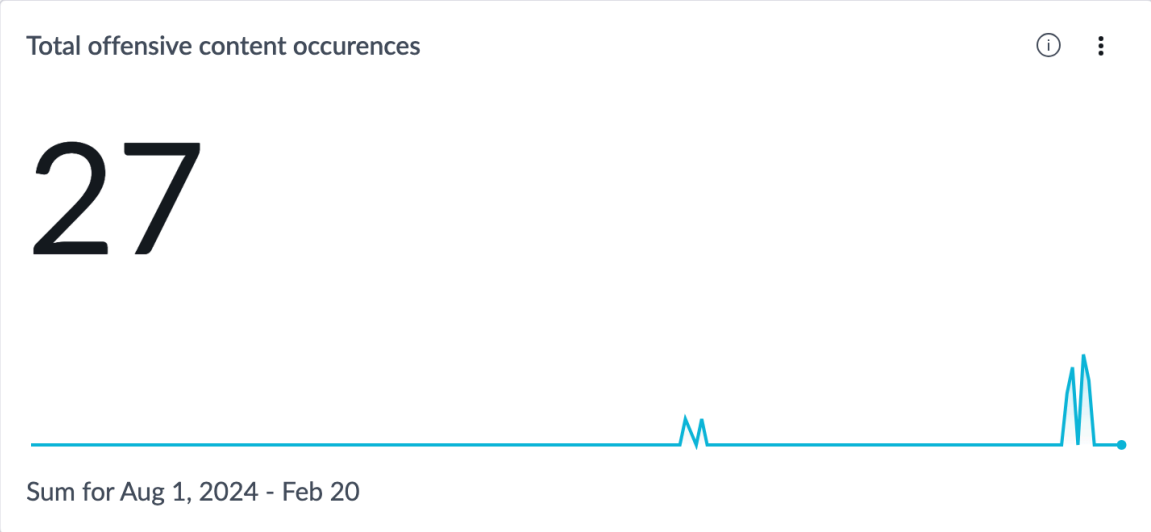
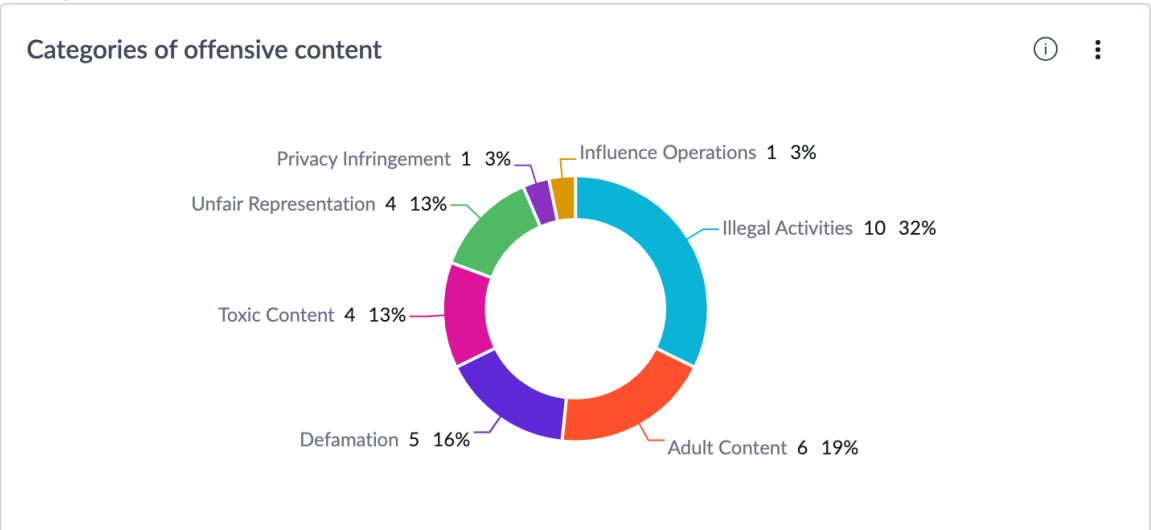
Total offensive content occurrences indicator



Categories of offensive content

This area of the dashboard shows a breakdown of offensive content occurrences by the categories. If content is deemed to be offensive under more than one category, for example, toxic and defamatory, the occurrence is counted individually toward both the categories. For more information on offensive content categories, see AI Guardian.

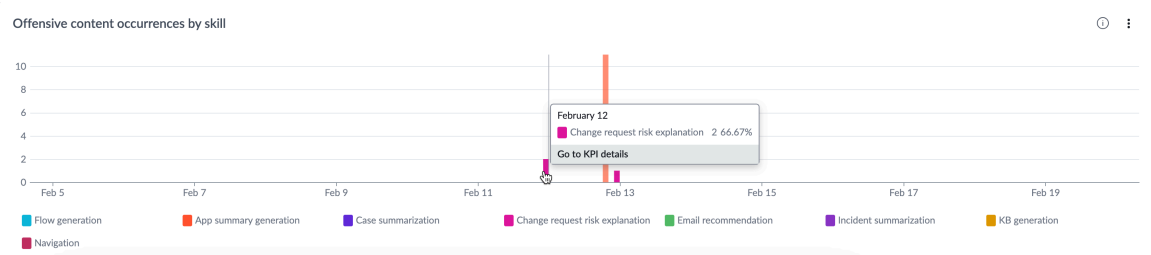
Categories of offensive content indicator



Offensive content occurrences by skill

This area of the dashboard shows the number of offensive content occurrences over time by the skills in which the content is detected.

Offensive content occurrences by skill indicator



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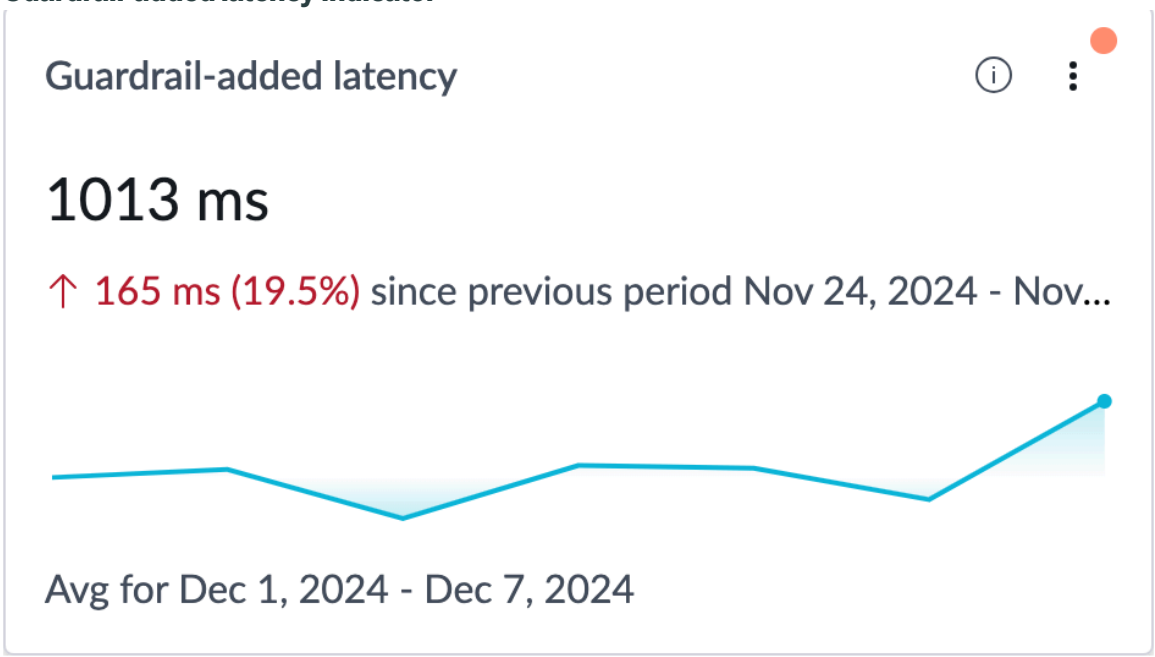
Prompt injection indicators

Guardrail-added latency

This area of the dashboard shows the average latency as a result of the active prompt injection guardrail for the selected skills and date range.

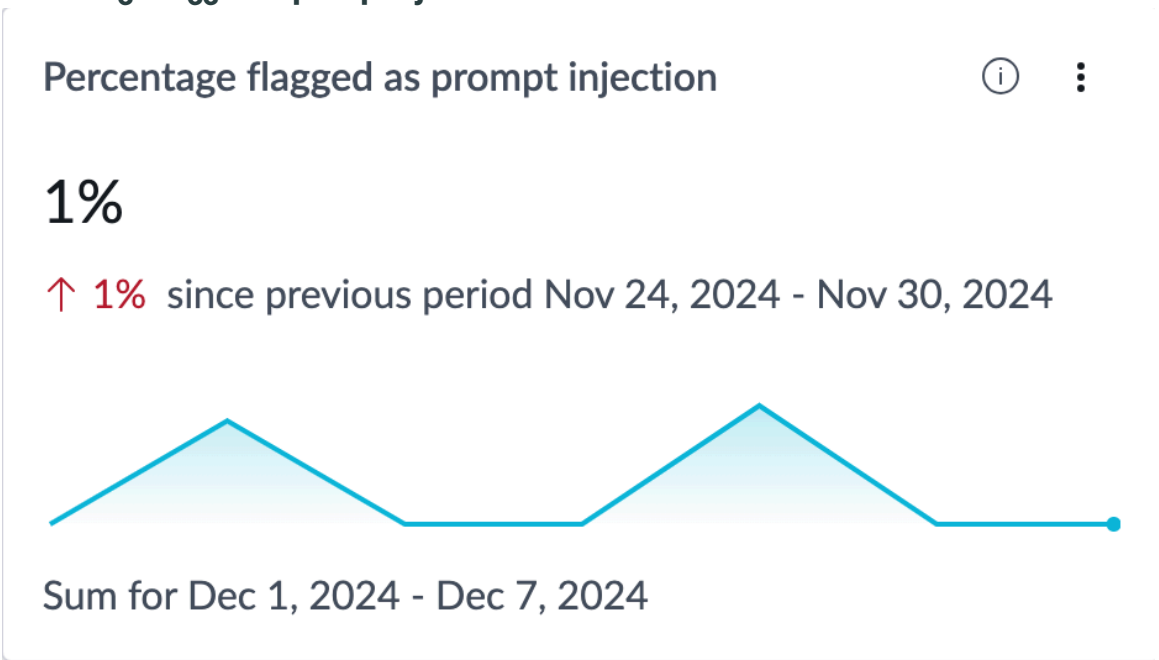
Guardrail-added latency indicator



Percentage flagged as prompt injection

This area of the dashboard shows the percentage of requests and responses to and from the LLM service that are flagged for offensive content.

Percentage flagged as prompt injection indicator



Total prompt injection occurrences

This area of the dashboard shows the total number of offensive content occurrences for the selected skills and date range.

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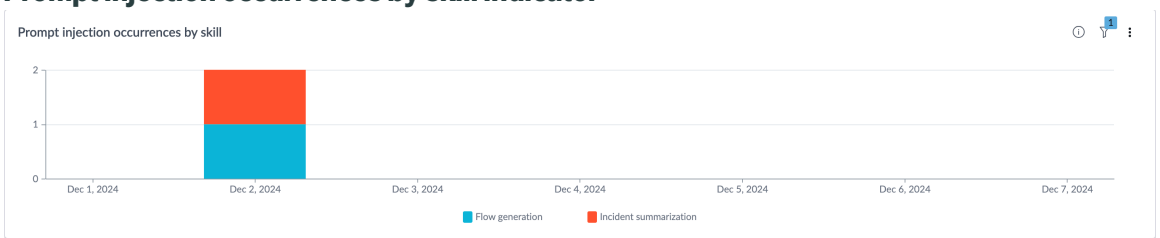
Total prompt injection occurrences indicator

Prompt injection occurrences by skill

This area of the dashboard shows the number of prompt injection occurrences over time by the skills where prompt injection attempts were detected.

Prompt injection occurrences by skill indicator



User search analyzer

Gain insights into user search queries and AI-powered search results.

The User search analyzer dashboard page contains indicators that help admins understand the effectiveness of search in enhancing the self-service experience. Equipped with insights from the dashboard, Knowledge admins can improve Knowledge content and availability for search.

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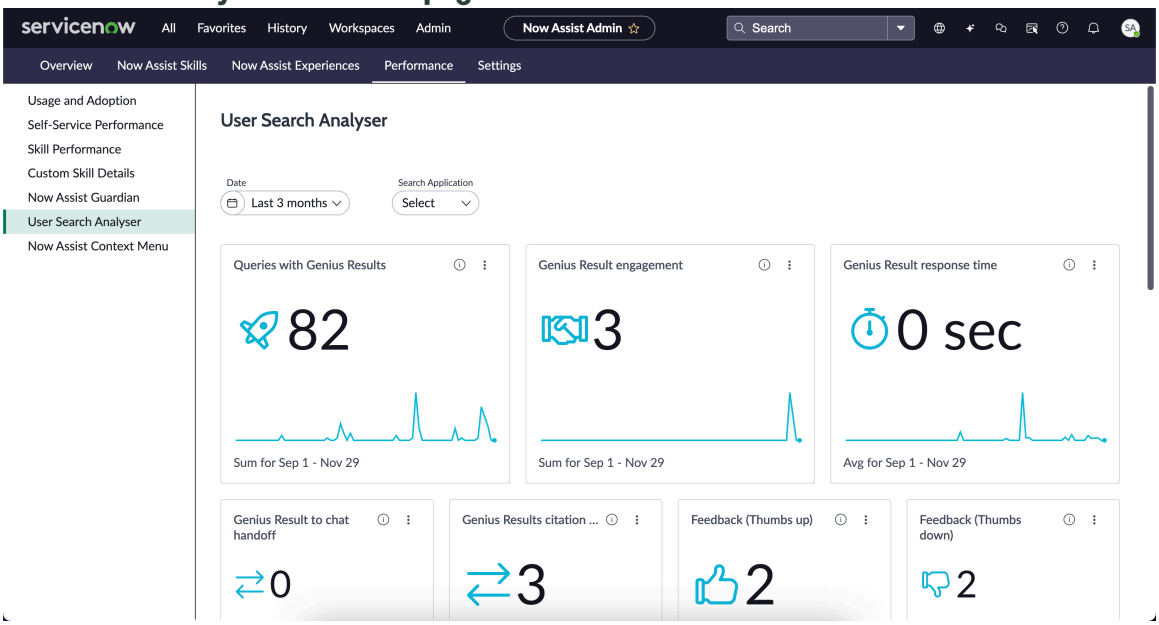
User search analyzer dashboard page



The indicators on the User search analyzer dashboard page provide the following insights. See AI Analytics dashboard indicator details for information on the data and calculations behind each indicator.

- Search queries that yielded Knowledge Base articles and catalog items as Genius Result.
- Distribution of search queries by the source that they originated from, for example, ServiceNow Otto for Virtual Agent, Service Portal.
- List of the most common queries that did or didn't yield genius results.

User search analyzer indicators

Queries with Genius Results

This area of the dashboard total number of search queries that had a Genius Result returned by ServiceNow Otto.

Note: A query can have more than one genius result.

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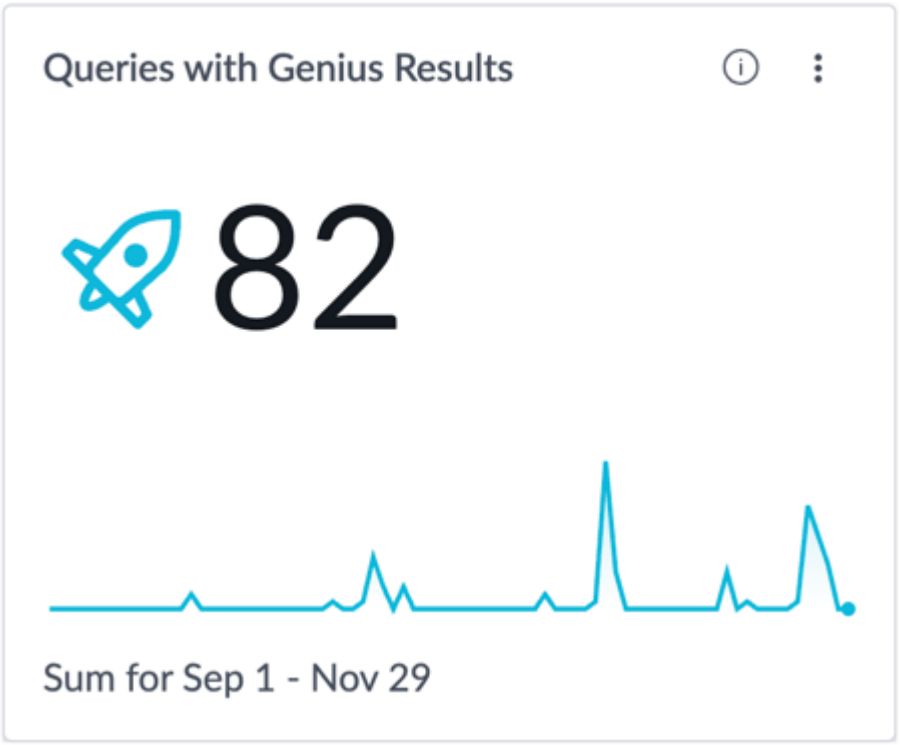
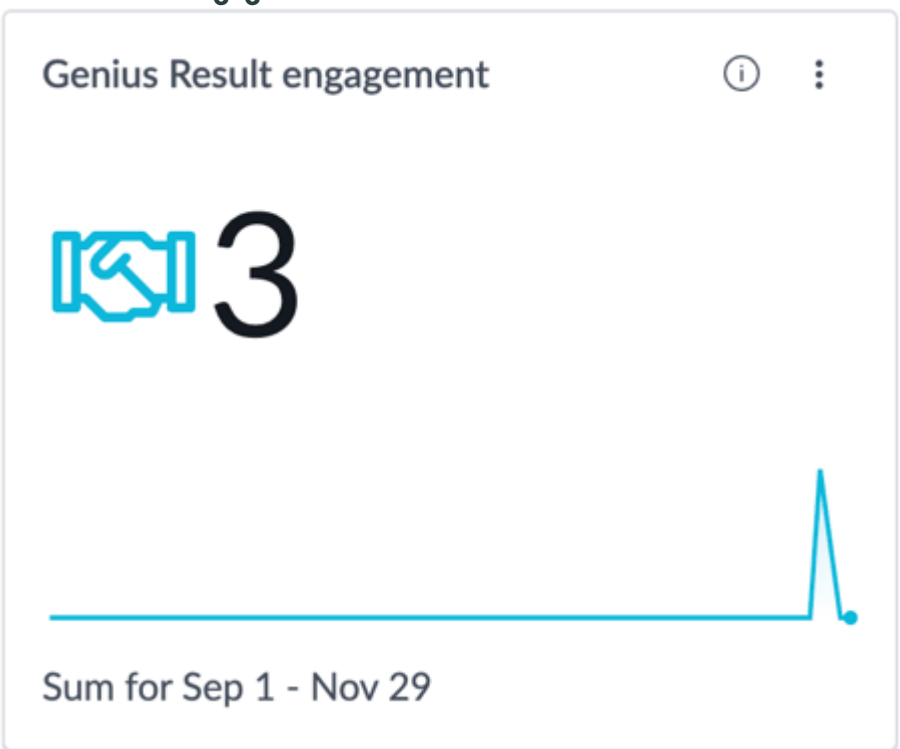
Queries with Genius Results indicator



Genius Result Engagement

This area of the dashboard shows the number of genius results returned by ServiceNow Otto that covers the interactions like "Ask a follow up" or "Show full answer", and clicking on citations within the result card.

Genius Result engagement indicator



Genius Result response time

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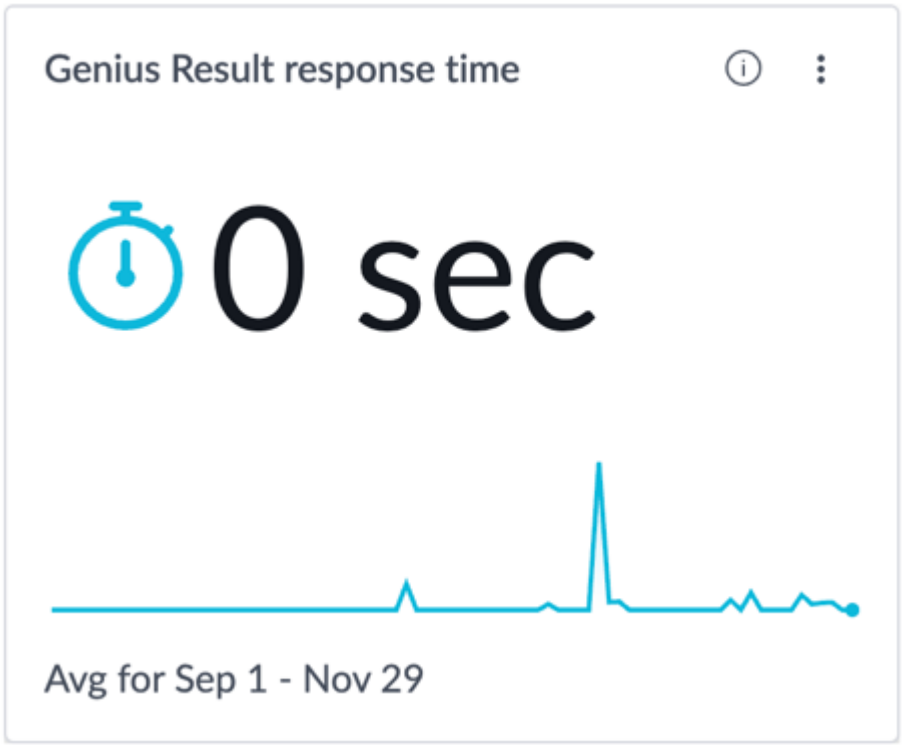
This area of the dashboard shows the average response time taken for a Genius Result to load.

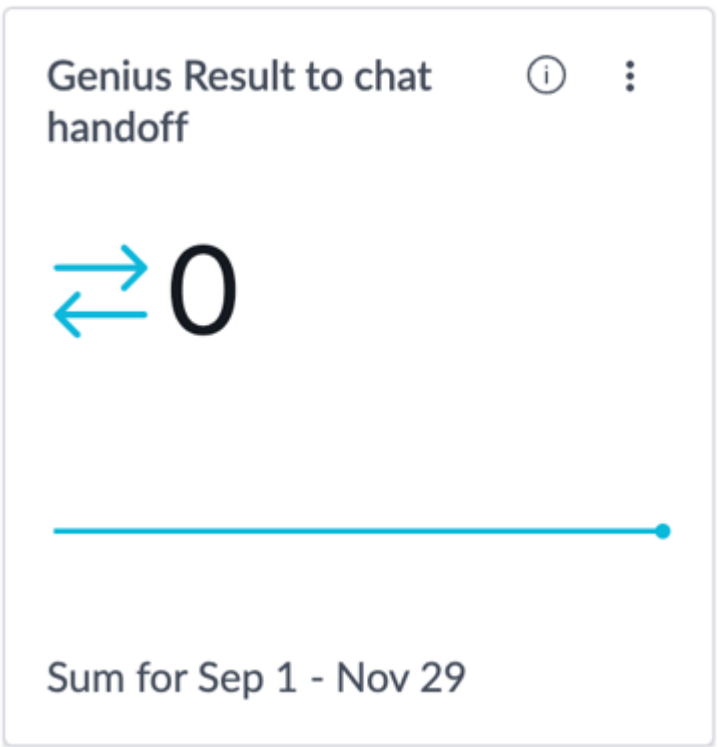
Genius Result response time indicator



Genius Result to chat handoff

This area of the dashboard shows the number of times users clicked the **Ask a follow-up** button within the synthesized Genius Result.

Genius Result to chat handoff indicator



Genius Results citation engagement

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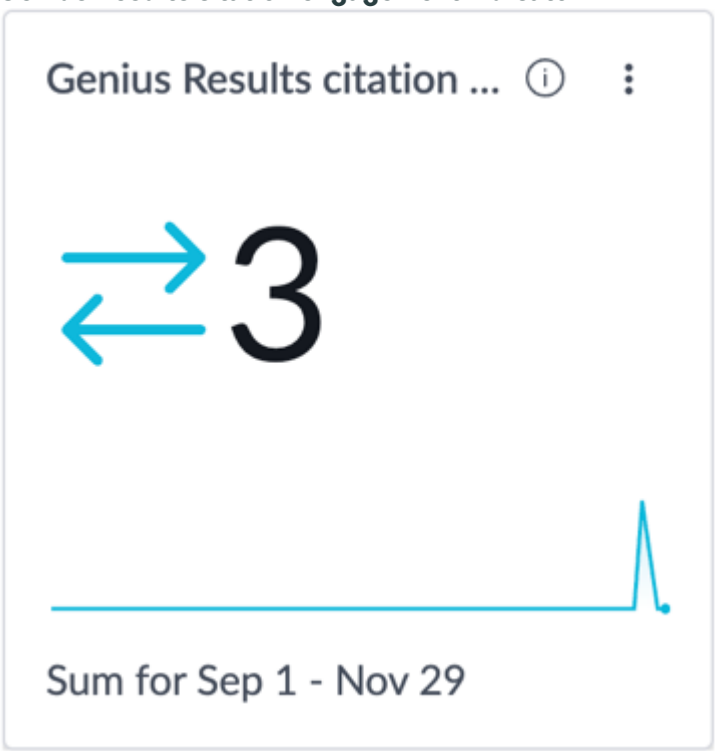
This area of the dashboard shows the number of interactions with citations within Genius Result returned by ServiceNow Otto.

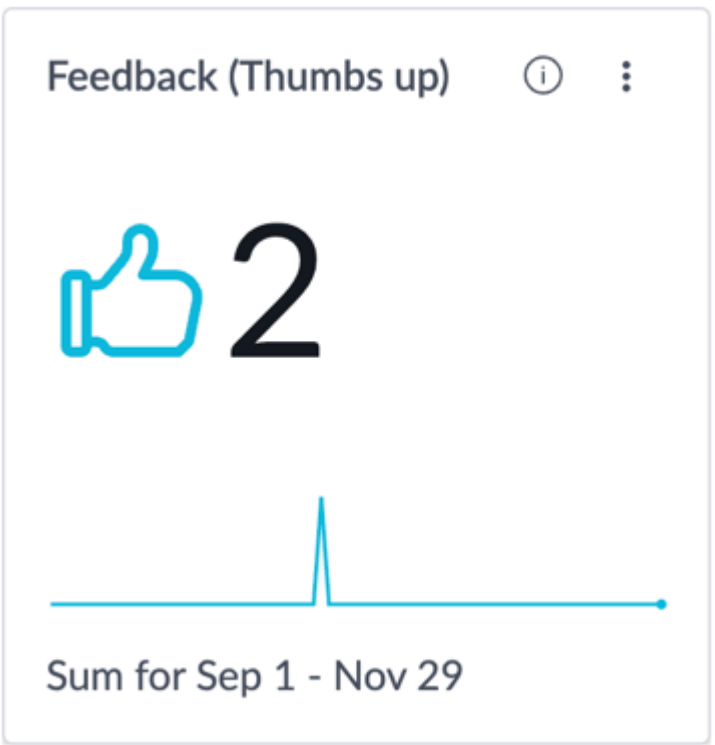
Genius Results citation engagement indicator



Feedback (Thumbs up)

This area of the dashboard shows the count for positive feedback for Genius Result returned by ServiceNow Otto.

Feedback (Thumbs up) indicator



Feedback (Thumbs down)

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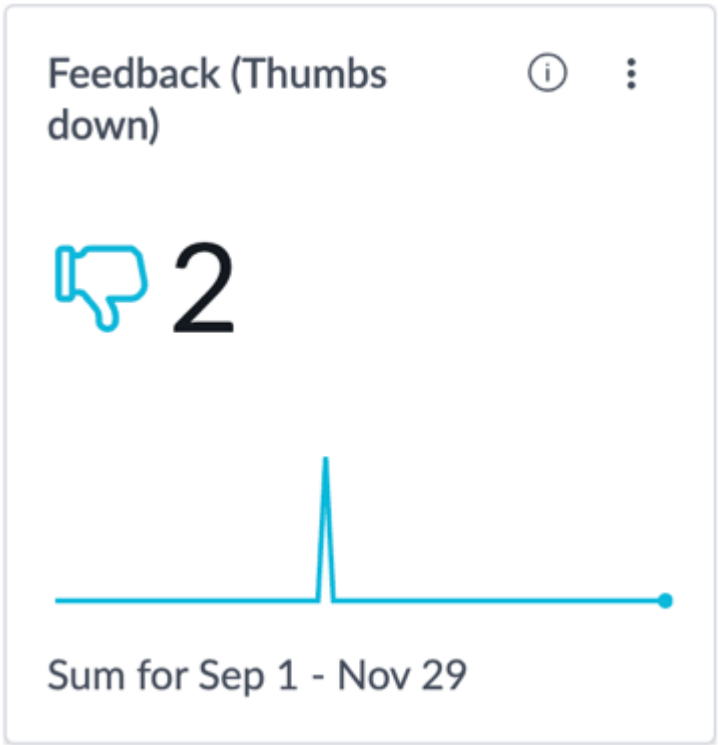
This area of the dashboard shows the count for negative feedback for Genius Result returned by ServiceNow Otto.

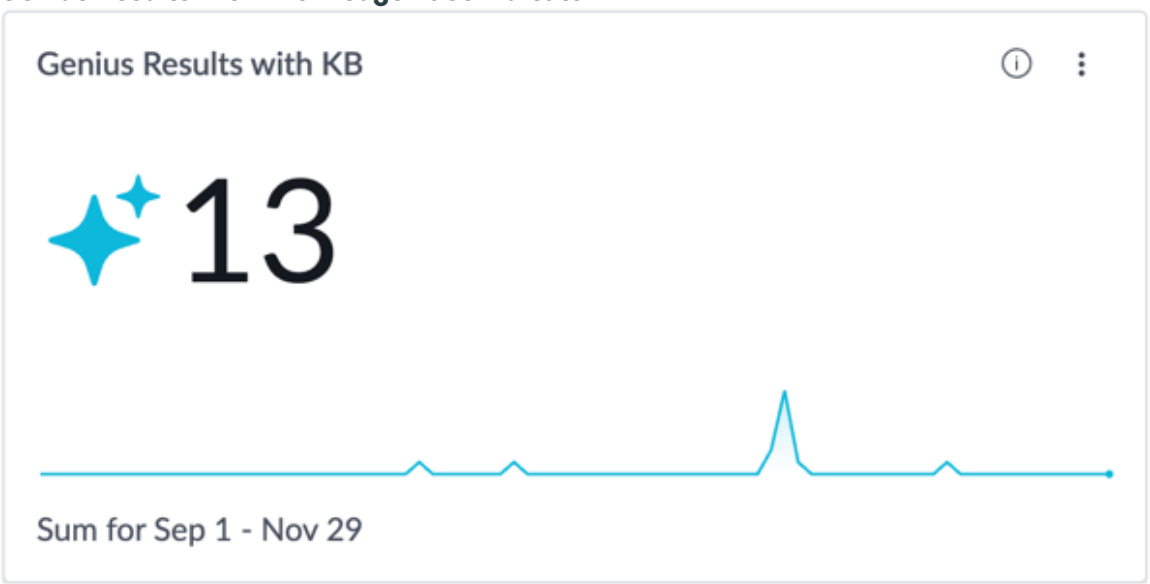
Feedback (Thumbs down) indicator



Genius Results with Knowledge Base

This area of the dashboard shows the number of search queries where ServiceNow Otto returned Knowledge Base articles as Genius Result for the users to review.

Genius Results with Knowledge Base indicator



Genius Results with Catalog Item

This area of the dashboard shows the number of search queries where ServiceNow Otto returned catalog items as Genius Result for the users to review.

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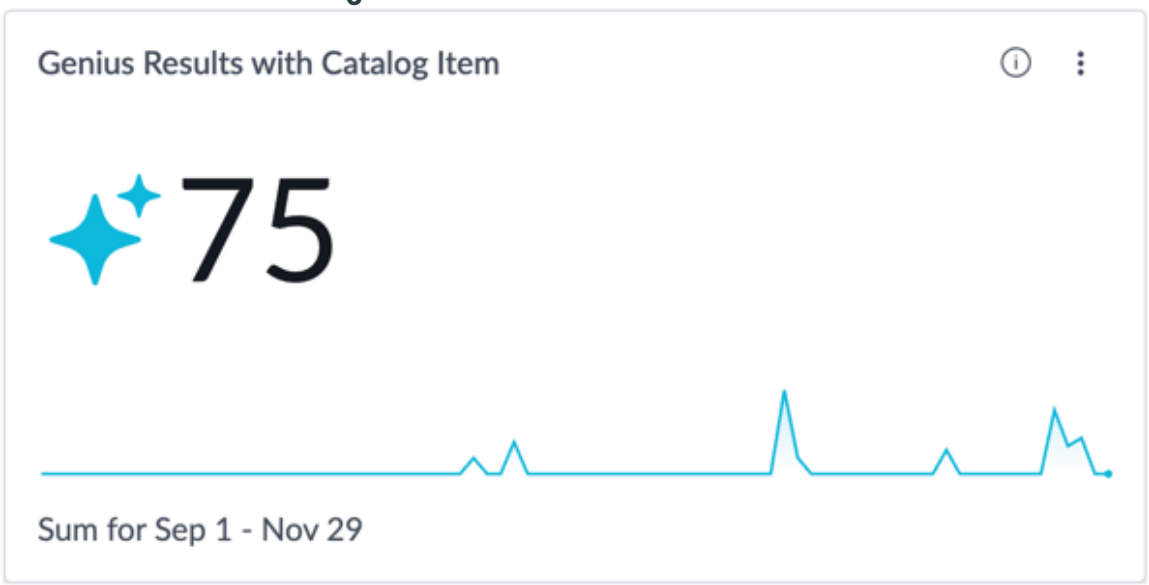
Genius Results with Catalog Item indicator



Top 10 queries with Knowledge Base Genius Result

This area of the dashboard shows the top ten search queries where ServiceNow Otto returned Knowledge Base as Genius Result, with respective query count.

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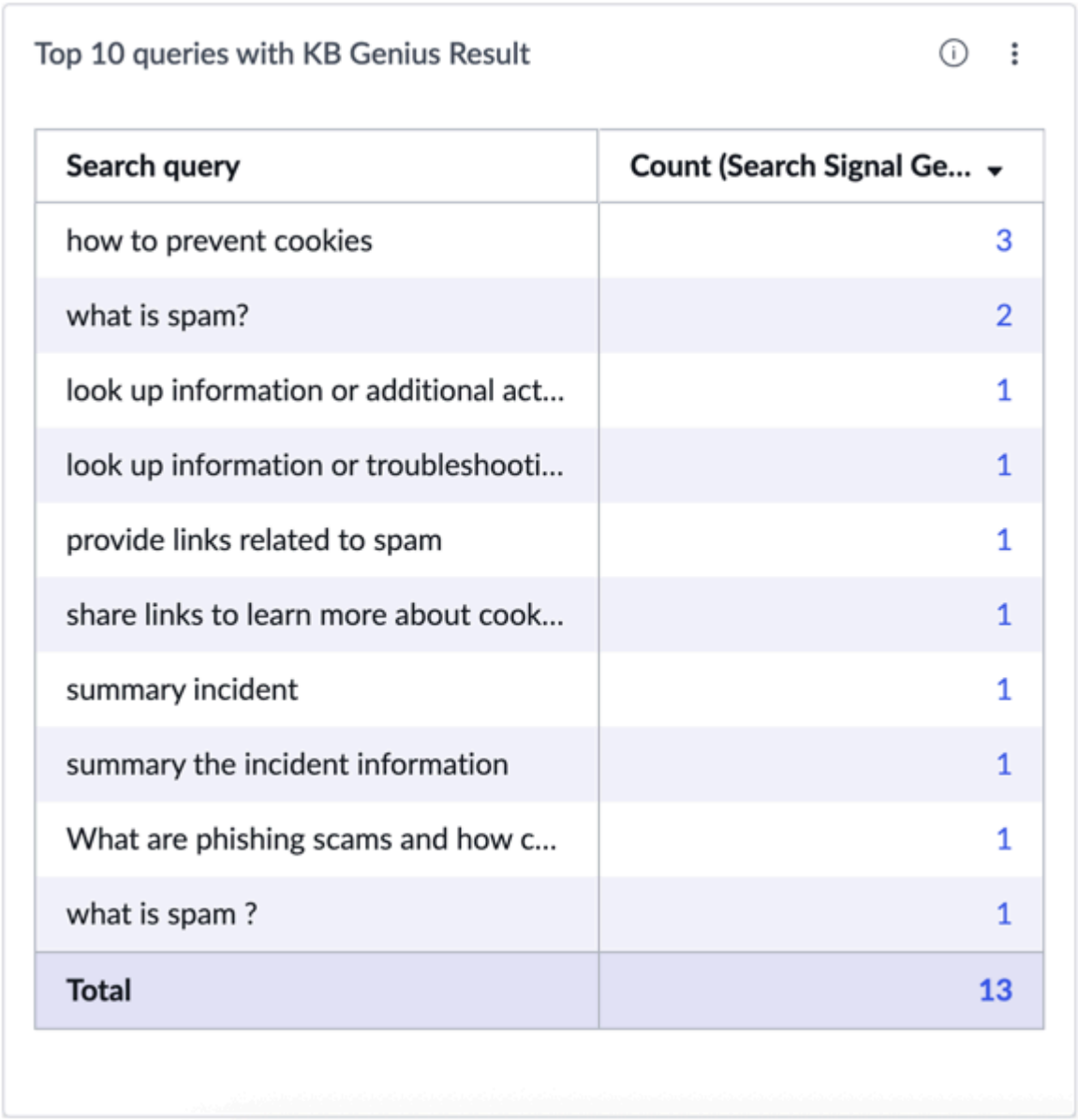
Top 10 queries with Knowledge Base Genius Result



Top 10 queries with KB Genius Result

Search query	Count (Search Signal Ge...
how to prevent cookies	3
what is spam?	2
look up information or additional act...	1
look up information or troubleshooti...	1
provide links related to spam	1
share links to learn more about cook...	1
summary incident	1
summary the incident information	1
What are phishing scams and how c...	1
what is spam ?	1
Total	**13**

Top 10 queries with Catalog Item Genius Result

This area of the dashboard shows the top ten search queries where ServiceNow Otto returned catalog items as Genius Result, with respective query count.

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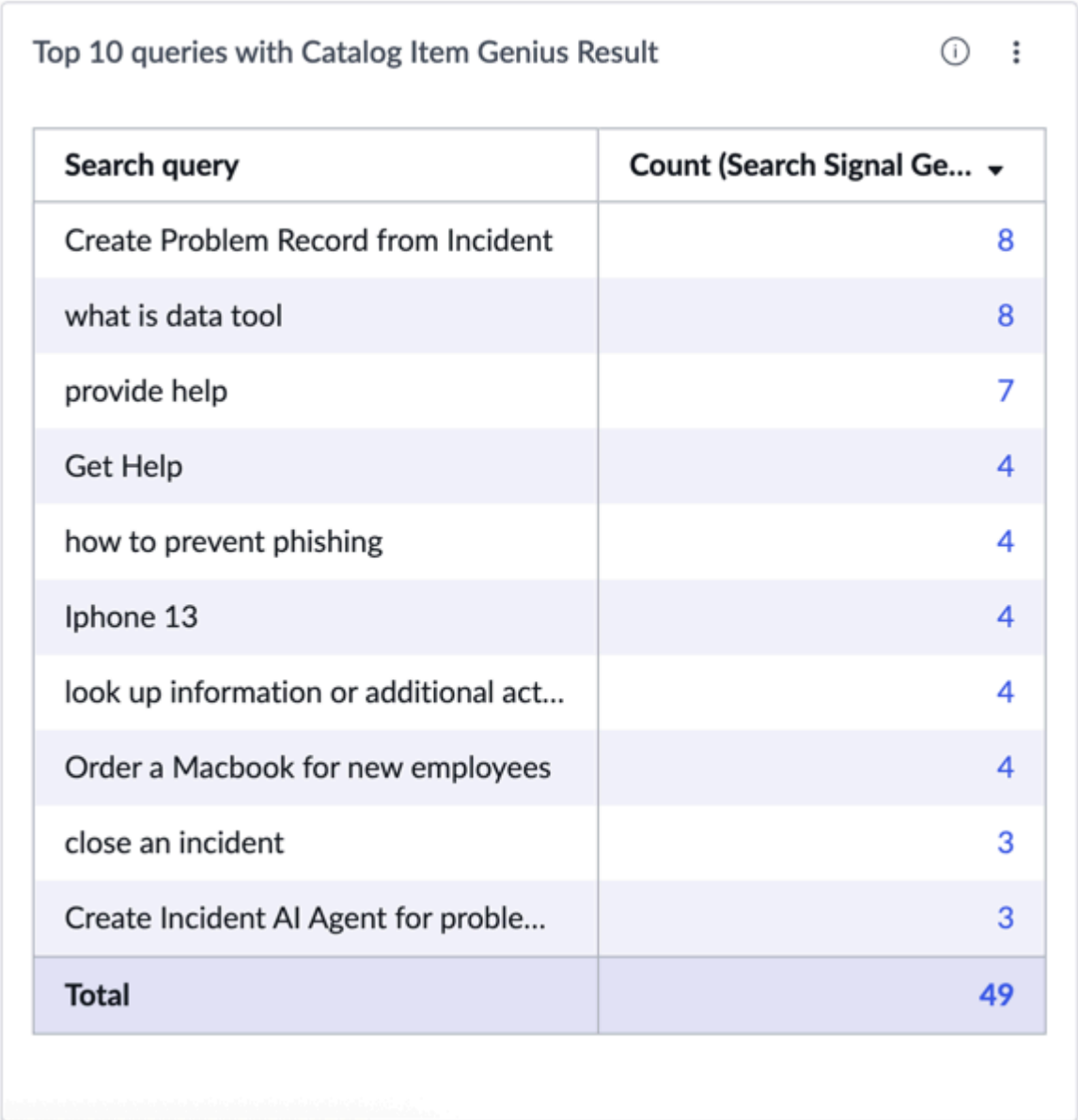
Top 10 queries with Catalog Item Genius Result indicator



Search query	Count (Search Signal Ge...
Create Problem Record from Incident	8
what is data tool	8
provide help	7
Get Help	4
how to prevent phishing	4
Iphone 13	4
look up information or additional act...	4
Order a Macbook for new employees	4
close an incident	3
Create Incident AI Agent for proble...	3
Total	**49**

ServiceNow Otto® context menu analytics

Monitor the usage and performance of the ServiceNow Otto context menu.

The ServiceNow Otto context menu dashboard helps admins to evaluate the effectiveness of context menu actions in assisting agents with summarizing, creating, and editing emails and chat replies.

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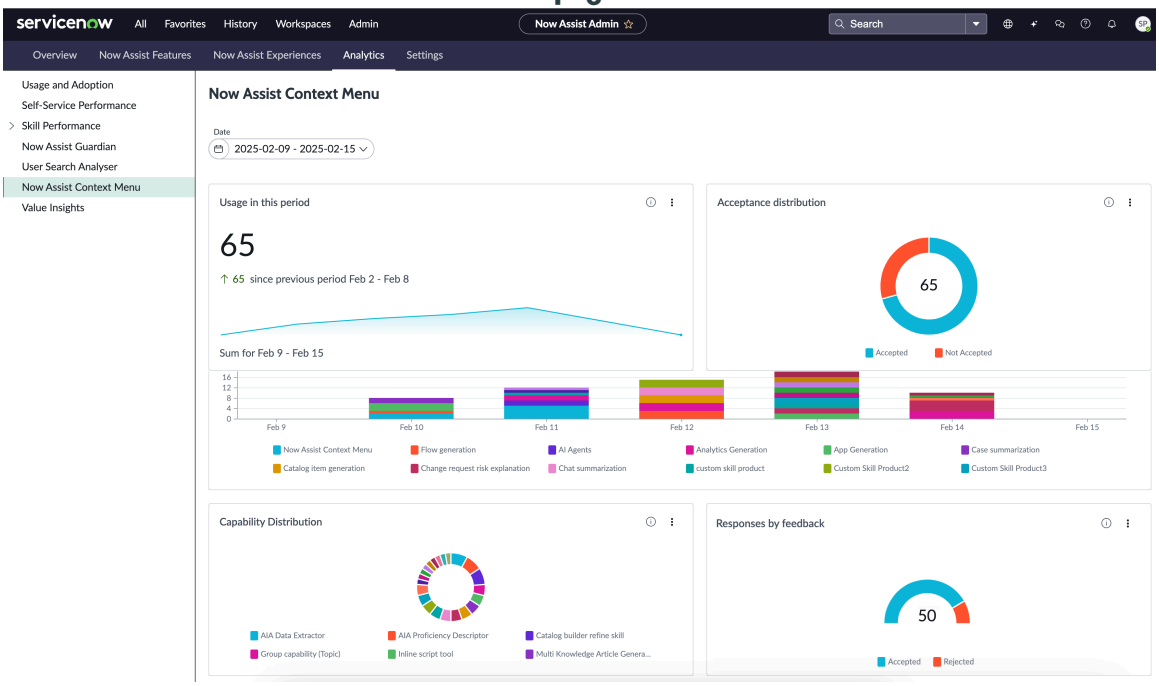
ServiceNow Otto context menu dashboard page



The indicators on the context menu dashboard page provide the following insights. See AI Analytics dashboard indicator details for information on the data and calculations behind each indicator.

- Count and distribution of context menu actions in a date range. This indicator reveals the scale of usage, and the most and least used actions.
- Acceptance and feedback on context menu actions. This indicator reveals actions that were accepted or rejected by the users with a positive or negative feedback.
- Usage trend chart reveals patterns in usage of context menu actions over a date range.

ServiceNow Otto context menu indicators

Usage in this period

This area of the dashboard shows the total number of the context menu actions used in the selected date range.

Usage in this period indicator

Acceptance distribution

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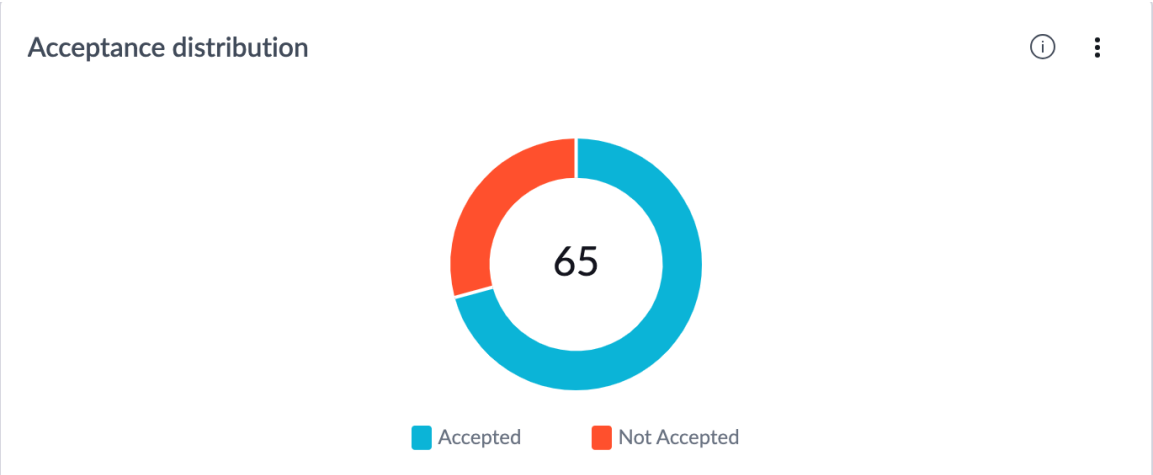
This area of the dashboard shows the distribution of the context menu actions by their acceptance.

- Accepted: The user has inserted the context menu response into their workspace.
- Not Accepted: The user has closed the window or dialog box containing the context menu response.

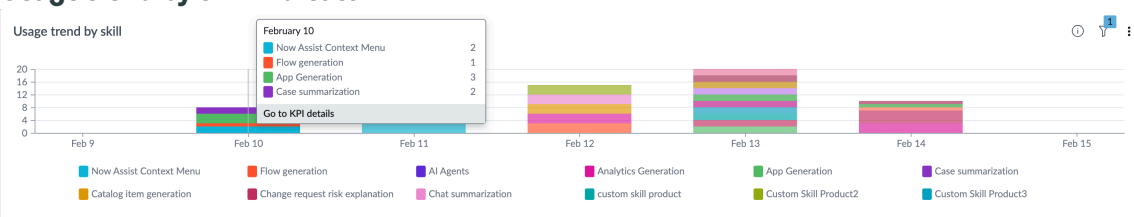
Acceptance distribution indicator



Usage trend by skill

This area of the dashboard shows the usage trend of the context menu actions in the selected date range.

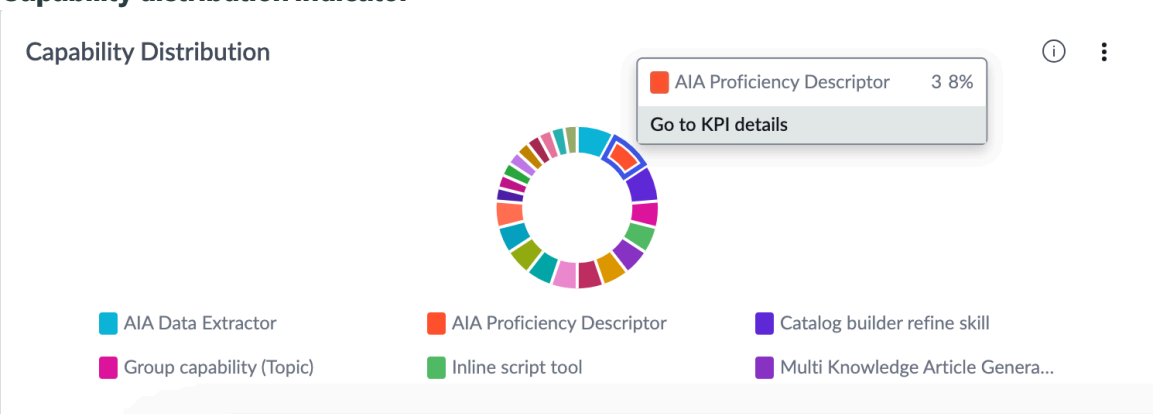
Usage trend by skill indicator



Capability distribution

This area of the dashboard shows the usage distribution of various context menu actions in the selected date range.

Capability distribution indicator



Responses by feedback

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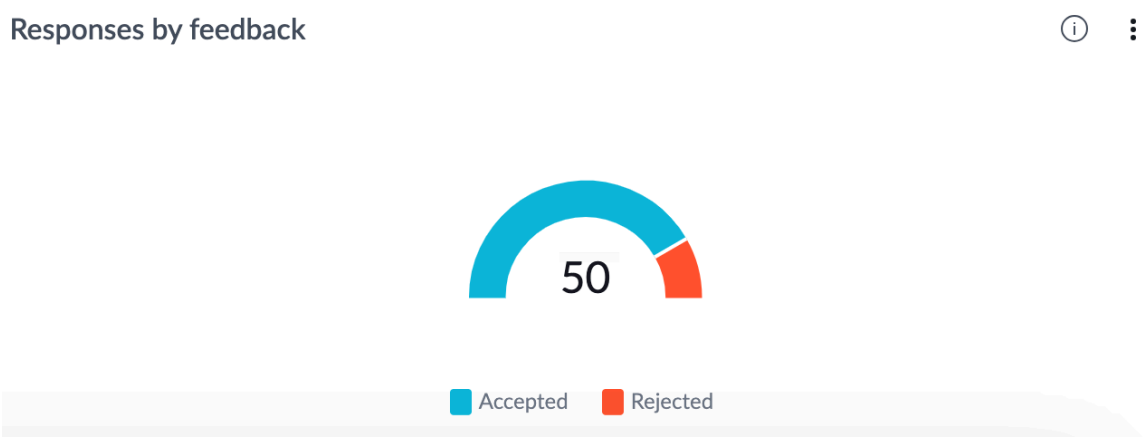
This area of the dashboard shows a breakdown of the context menu responses by the user feedback received.

- Accepted: The user gave a thumbs up on the context menu response.
- Rejected: The user gave a thumbs down on the context menu response.

Responses by feedback indicator



AI Analytics reference

AI Analytics reference topics include information about user roles and details of the indicators on the dashboard.

AI Analytics roles

AI Analytics requires the following roles to view and manage the dashboard functionality.

AI Analytics Viewer [sn_na_analytics.viewer]

Users with the AI Analytics Viewer role can view the AI Analytics dashboard in the AI Admin Hub console, and have read access to data source tables.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups that this role is assigned to by default.

None.

Special considerations

None.

AI Analytics Admin [sn_na_analytics.admin]

Users with AI Analytics Admin role can view the AI Analytics dashboard in the AI Admin Hub console, and read and write to some data source tables.

Contains Roles

List of roles contained within the role.

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AI Analytics Viewer [sn_na_analytics.viewer].

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Avoid granting an admin role when more specialized roles are available.

AI Analytics dashboard indicator details

Indicator details help you understand the data and calculations behind an indicator that is presented in the form of a visualization on the dashboard.

AI Analytics indicators contain the following details: indicator type, data source, calculation, available breakdowns, unit, and so on.

To access these indicators, navigate to **Platform Analytics Administration** > **Indicators**. You must have the Now Assist Analytics Admin [sn_na_analytics_admin] role to access the indicators.

These indicators collect data at a daily frequency. Data is only available for dates before the current date. If you want to see results from the current day, you must wait until the next day.

Note: The Generative AI Usage Log [sys_gen_ai_usage_log] table is maint-only.

Usage and adoption indicator details

Visualizati	Indicator type	Indicator source table	Calculatic	Available breakdowr	Frequency	Unit	Precision
Total AI actions	Automated	Generative AI Usage Log[sys_gen_ai_usage_log]	Count of all actions	By Gen AI Feature, By Generative AI Skill Execution Modality, By Skill Family, By Skills Config, By Skills Config, By Workflow	Daily	#	0
Daily AI actions	Automated	Generative AI Usage Log[sys_gen_ai_usage_log]	Count of daily actions	By Gen AI Feature, By Generative AI Skill Execution Modality,	Daily	#	0

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Visualizati	Indicator type	Indicator source table	Calculatic	Available breakdowr	Frequency	Unit	Precision
				By Skill Family, By Skills Config, By Skills Config, By Workflow			
Average daily unique users engaging with AI skills	Automated	Generative AI Usage Log[sys_gen_ai_usage_log]	Average of daily unique users	By Gen AI Feature, By Skills Config, By Skill Family, By Generative AI Skill Execution Modality	Daily	#	0
Daily unique users engaging with AI skills	Automated	Generative AI Usage Log[sys_gen_ai_usage_log]	Count of daily unique users	By Gen AI Feature, By Skills Config, By Skill Family, By Generative AI Skill Execution Modality	Daily	#	0
Skill group distribution	Automated	Generative AI Usage Log[sys_gen_ai_usage_log]	Count of daily skill executions grouped By Gen AI Feature, By Generative AI Skill Execution Modality, By Skill Family, By Skills Config, By	By Gen AI Feature, By Generative AI Skill Execution Modality, By Skill Family, By Skills Config, By Skills Config, By Workflow	Daily	#	0

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Visualizati	Indicator type	Indicator source table	Calculatic	Available breakdowr	Frequency	Unit	Precision
			Skills Config				
Daily usage comparison by workflow	Automated	Generative AI Usage Log[sys_gen_ai_usage_log]	Count of actions grouped by workflows	By Gen AI Feature, By Generative AI Skill Execution Modality, By Skill Family, By Skills Config, By Skills Config, By Workflow	Daily	#	0
Skill engagement trend	Automated	Generative AI Usage Log[sys_gen_ai_usage_log]	Count of actions grouped by skill	By Gen AI Feature, By Generative AI Skill Execution Modality, By Skill Family, By Skills Config, By Skills Config, By Workflow	Daily	#	0
Departments with highest usage	Automated	Generative AI Usage Log[sys_gen_ai_usage_log]	Count of actions grouped by user department and sorted by descending order	By Department, By Skills Config	Daily	#	0
AI actions comparison by user department	Automated	Generative AI Usage Log[sys_gen_ai_usage_log]	Count of actions grouped by user department	By Department, By Skills Config	Daily	#	0

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Visualizati	Indicator type	Indicator source table	Calculatic	Available breakdowr	Frequency	Unit	Precision
Feedback details	Automated	Gen AI Log Metadata[sys_gen_ai_log_metadata]	Count of actions grouped by Skill Family	By Skill Family, By Skills Config	Daily	#	0
	Automated	Gen AI Log Metadata[sys_gen_ai_log_metadata]	Count of actions with feedback grouped by Skill Family	By Feedback, By Skill Family, By Skills Config	Daily	#	0
	Formula	Gen AI Log Metadata[sys_gen_ai_log_metadata]	(Count of actions with feedback/ Total count of actions) x 100 grouped by Skill Family	By Skill Family, By Skills Config	Daily	%	2
	Automated	Gen AI Log Metadata[sys_gen_ai_log_metadata]	Count of actions where By Feedback is Accepted grouped by Skill Family	By Skill Family, By Skills Config, By Feedback	Daily	#	0
	Formula	Gen AI Log Metadata[sys_gen_ai_log_metadata]	(Count of actions where By Feedback is Accepted/ Total count of actions with feedback) x 100 grouped	By Skills Config, By Skill Family	Daily	%	2

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Visualizati	Indicator type	Indicator source table	Calculatio	Available breakdown	Frequency	Unit	Precision
			by Skill Family				
Error details	Automated	Gen AI Log Metadata[sys_gen_ai_log_metadata]	Count of actions grouped by Skill Family	By Skill Family, By Skills Config	Daily	#	0
	Automated	Gen AI Log Metadata[sys_gen_ai_log_metadata]	Count of actions with error status grouped by Skill Family	By Gen AI Log Metadata Status , By Skill Family, By Skills Config	Daily	#	0
	Formula	Gen AI Log Metadata[sys_gen_ai_log_metadata]	(Count of actions with error status/ Total count of generative AI metadata records) x 100 grouped by Skill Family	By Skill Family, By Skills Config	Daily	%	2

Skill performance indicator details

Visualizatio	Indicator type	Indicator source table	Calculation	Available breakdowns	Frequency	Unit	Precision
Skill engagement trend	Automated	Generative AI Usage Log[sys_generative_ai_usage_log]	Count of skill executions grouped by skill	By Gen AI Feature, By Generative AI Skill Execution Modality, By Skill Family, By Skills	Daily	#	0

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Visualizatio	Indicator type	Indicator source table	Calculation	Available breakdowns	Frequency	Unit	Precision
				Config, By Workflow			
Number of actions	Automated	Generative AI Usage Log[sys_gen_ai_usage_log]	Count of all skill executions	By Gen AI Feature, By Generative AI Skill Execution Modality, By Skill Family, By Skills Config, By Workflow	Daily	#	0
Total daily active users	Automated	Generative AI Usage Log[sys_gen_ai_usage_log]	Count of daily unique users	By Gen AI Feature, By Skills Config, By Skill Family, By Generative AI Skill Execution Modality	Daily	#	0
Total daily active users by skills	Automated	Generative AI Usage Log[sys_gen_ai_usage_log]	Count of daily unique users grouped by Skills Config	By Gen AI Feature, By Skills Config, By Skill Family, By Generative AI Skill Execution Modality	Daily	#	0

Skill details indicator details

Visualizatio	Indicator type	Indicator source table	Calculation	Available breakdowns	Frequency	Unit	Precision
Skill engagement trend	Automated	Generative AI Usage Log[sys_gen_ai_usage_log]	Count of skill executions grouped by Skills Config	By Gen AI Feature, By Generative AI Skill Execution Modality, By Skill Family,	Daily	#	0

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Visualizatio	Indicator type	Indicator source table	Calculation	Available breakdowns	Frequency	Unit	Precision
				By Skills Config, By Workflow			
Total skill actions	Automated	Generative AI Usage Log[sys_gen_ai_usage_log]	Count of skill executions	By Gen AI Feature, By Generative AI Skill Execution Modality, By Skill Family, By Skills Config, By Workflow	Daily	#	0
Accepted skill actions	Automated	Gen AI Log Metadata[sys_gen_ai_log_metadata]	Count of skill executions where Feedback is Accepted	By Feedback, By metadata response accepted without edits, By Skills Config, By Skill Family	Daily	#	0
Acceptance rate	Formula	Gen AI Log Metadata[sys_gen_ai_log_metadata]	(Count of skill executions where Feedback is Accepted/ Count of skill executions) x100	By Skills Config	Daily	%	0
Daily active users	Automated	Generative AI Usage Log[sys_gen_ai_usage_log]	Count of daily unique users	By Gen AI Feature, By Skills Config, By Skill Family, By Generative AI Skill Execution Modality	Daily	#	0

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Custom skills indicator details

Visualization	Indicator type	Indicator source table	Calculation	Available breakdowns	Frequency	Unit	Precision
Skill engagement trend by workflows	Automated	Generative AI Usage Log[sys_genai_skill_usage_log]	Count of custom skill executions grouped by workflows	By Custom Skill (Workflow Type), By Custom Skill (Feature Type), By Custom Skill (Product Type), By Custom Skill Completion Status, By Skills Config	Daily		0
Skill engagement trend by products	Automated	Generative AI Usage Log[sys_genai_skill_usage_log]	Count of custom skill executions grouped by products	By Custom Skill (Workflow Type), By Custom Skill (Feature Type), By Custom Skill (Product Type), By Custom Skill Completion Status, By Skills Config	Daily		0
Skill engagement trend by features	Automated	Generative AI Usage Log[sys_genai_skill_usage_log]	Count of custom skill executions grouped by features	By Custom Skill (Workflow Type), By Custom Skill (Feature Type), By Custom Skill	Daily		0

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Visualizatio	Indicator type	Indicator source table	Calculation	Available breakdowns	Frequency	Unit	Precision
				(Product Type), By Custom Skill Completion Status, By Skills Config			
Daily unique users engaging with the skill	Automated	Generative AI Usage Log[sys_gen_ai_usage_log]	Count of unique user_id for executed custom skills	By Skills Config	Daily	#	0
Executed successfully	Formula	Generative AI Usage Log[sys_gen_ai_usage_log]	(Count of custom skill executions with status Completed/ Count of custom skill executions)x100	By Skills Config	Daily	%	2
Skills feedback	Automated	Generative AI Usage Log[sys_gen_ai_usage_log]	Count	By Feedback, By Skills Config	Daily	#	0

AI Guardian offensive content guardrail indicator details

Visualizatio	Indicator type	Indicator source table	Calculation	Available breakdowns	Frequency	Unit	Precision
Guardrail-added latency	Automated	Generative AI Metric[sys_generative_ai_metric]	Average time taken by the guardrail to evaluate offensive content	By Skills Config	Daily	Milliseconds	0
Percentage flagged as offensive	Formula	Generative AI Metric[sys_generative_ai_metric]	(Count of offensive content occurrences/ Total number	By Skills Config	Daily	%	0

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Visualizatio	Indicator type	Indicator source table	Calculation	Available breakdowns	Frequency	Unit	Precision
			of LLM calls for which the guardrail was enabled)x100				
Total offensive content occurrences	Automated	Generative AI Metric[sys_generative_ai_metric]	Count of offensive content occurrences	By Gen AI metric value, By Skills Config	Daily	#	0
Categories of offensive content	Automated	Generative AI Metric[sys_generative_ai_metric]	Count of offensive content occurrences grouped by categories	By Offensiveness Type, By Skills Config	Daily	#	0
Offensive content occurrences by skill	Automated	Generative AI Metric[sys_generative_ai_metric]	Count of offensive content occurrences grouped by skill	By Gen AI metric value, By Skills Config	Daily	#	0

AI Guardian prompt injection guardrail indicator details

Visualizatio	Indicator type	Indicator source table	Calculation	Available breakdowns	Frequency	Unit	Precision
Guardrail-added latency	Automated	Generative AI Metric[sys_generative_ai_metric]	Average time taken by the guardrail to evaluate prompt injection	By Skills Config	Daily	Milliseconds	0
Percentage flagged as prompt injection	Formula	Generative AI Metric[sys_generative_ai_metric]	(Count of prompt injection occurrences/ Total number of LLM calls for which the guardrail	By Skills Config	Daily	%	0

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Visualizatio	Indicator type	Indicator source table	Calculation	Available breakdowns	Frequency	Unit	Precision
			was enabled)x100				
Total prompt injection occurrences	Automated	Generative AI Metric[sys_gen_ai_metric]	Count of prompt injection occurrences	By Gen AI metric value, By Skills Config	Daily	#	0
Prompt injection occurrences by skill	Automated	Generative AI Metric[sys_gen_ai_metric]	Count of prompt injection occurrences grouped by skill	By Gen AI metric value, By Skills Config	Daily	#	0

User search analyzer indicator details

Visualizatio	Indicator type	Indicator source table	Calculation	Available breakdowns	Frequency	Unit	Precision
Queries with Genius Results	Automated	Search Event[sys_search_event]	Count of search queries where Genius Result Displayed = true	AIS Search Application	Daily	#	0
Genius Result engagement	Automated	Genius Result Event Action[sys_search_genius_result_event_action]	Count of genius results where Card Type = Now Assist Multi-Content Response and Action Type = Show Full Answer or Action Type = Ask a Follow Up or Action Type = uxf_client_action	AIS Search Application	Daily	#	0

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Visualization	Indicator type	Indicator source table	Calculation	Available breakdowns	Frequency	Unit	Precision
Genius Result response time	Automated	Search Signal Event[sys_search_result_signal_event]	Average (Genius Result Response Time in Seconds)	AIS Search Application	Daily	Seconds	0
Genius Result to chat handoff	Automated	Genius Result Event Action[sys_search_genius_result_event_action]	Count of queries where Card Type = Now Assist Multi-Content Response and Action Type = Ask a Follow Up	AIS Search Application	Daily	#	0
Genius Results citation engagement	Automated	Genius Result Event Action[sys_search_genius_result_event_action]	Count of queries where Card Type = Now Assist Multi-Content Response and Action Type = uxf_client_action	AIS Search Application	Daily	#	0
Feedback (Thumbs up)	Automated	Genius Result Event Action[sys_search_genius_result_event_action]	Count of queries where Card Type = Now Assist Multi-Content Response and Action Type = Feedback and Action Value = Helpful	AIS Search Application	Daily	#	0

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Visualizatio	Indicator type	Indicator source table	Calculation	Available breakdowns	Frequency	Unit	Precision
Feedback (Thumbs down)	Automated	Genius Result Event Action[sys_search_genius_result_event_action]	Count of queries where Card Type = Now Assist Multi-Content Response and Action Type = Feedback and Action Value = Not Helpful	AIS Search Application	Daily	#	0
Genius Results with KB	Automated	Search Signal Genius Result Triggered Event[sys_search_genius_result_triggered_event]	Count of queries where Source Table = kb_knowledge	AIS Search Application	Daily	#	0
Genius Results with Catalog Item	Automated	Search Signal Genius Result Triggered Event[sys_search_genius_result_triggered_event]	Count of queries where Source Table = sc_cat_item	AIS Search Application	Daily	#	0
Top 10 queries with KB Genius Result	Automated	Search Signal Genius Result Triggered Event [sys_search_genius_result_triggered_event]	Top 10 queries with count of genius results where Source Table = kb_knowledge	Not Applicable	Daily	Not Applicable	Not Applicable
Top 10 queries with Catalog Item Genius Result	Automated	Search Signal Genius Result Triggered Event [sys_search_genius_result_triggered_event]	Top 10 queries with count of genius results where Source Table = sc_cat_item	Not Applicable	Daily	Not Applicable	Not Applicable

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ServiceNow Otto context menu analytics indicator details

Visualizatio	Indicator type	Indicator source table	Calculation	Available breakdowns	Frequency	Unit	Precision
Usage in this period	Automated	Generative AI Log[sys_generative_ai_log]	Count of actions where Source is ServiceNow Otto context menu	By NAcm implicit feedback, By Skills Config, By Feedback, By Status, By Skill Capability	Daily	#	0
Acceptance distribution	Automated	Generative AI Log[sys_generative_ai_log]	Count of actions where content generated by ServiceNow Otto context menu grouped by Accepted or Not Accepted	By NAcm implicit feedback, By Skills Config, By Feedback, By Status, By Skill Capability	Daily	#	0
Usage trend by skill	Automated	Generative AI Log[sys_generative_ai_log]	Count of context menu actions grouped by AI skills	By NAcm implicit feedback, By Skills Config, By Feedback, By Status, By Skill Capability	Daily	#	0
Capability distribution	Automated	Generative AI Log[sys_generative_ai_log]	Count of context menu actions grouped by capability	By NAcm implicit feedback, By Skills Config, By Feedback, By Status, By Skill Capability	Daily	#	0
Responses by feedback	Automated	Generative AI Log[sys_generative_ai_log]	Count of actions where feedback for the content	By NAcm implicit feedback, By Skills Config, By Feedback,	Daily	#	0

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Visualizatio	Indicator type	Indicator source table	Calculation	Available breakdowns	Frequency	Unit	Precision
			generated by ServiceNow Otto context menu grouped by Accepted or Rejected.	By Status, By Skill Capability			

AI Admin Hub Settings

Configure general settings for all Now Assist applications from the **Settings** tab in the AI Admin Hub console.

As you begin to explore Now Assist, use **Settings** in the AI Admin Hub console to activate the plugins. See Install plugins for ServiceNow Otto.

Turn on the Now Assist panel, review multi-language support, data sharing and processing, and AI Guardian features, and view the Now Assist account settings. You can also manage the large language model integrations under **Settings**.

Configure multilingual service for ServiceNow Otto applications

Turn on multilingual service for user-entered text with native translation or Dynamic Translation in ServiceNow Otto applications.

Before you begin

To see a list of all available languages supported in ServiceNow Otto, see Multilingual service for Now Assist.

To use Dynamic Translation, you must install and activate the application and install at least one language pack. For more information, see Activate Dynamic Translation and Activate a language. From the Zurich release, Dynamic Translation has available support in specific regulated markets. For details see KB0743854 on the Now Support portal.

Role required: sn_generative_ai.nsa_admin

About this task

There are two translation services available to translate user-generated content in ServiceNow Otto applications. For more information on the differences between the two, see Multilingual service for Now Assist. In that documentation, you can also find the steps for adding another language to your service if it is not preconfigured.

After you have enabled either Dynamic Translation or native translation, translations will be available for in-product experiences, Virtual Agent, and the ServiceNow Otto panel.

Procedure

1. Navigate to **All** > *AI Admin Hub* > **Settings**.
2. On the left-hand panel, select the **Multilingual service**.
3. In the native translation or Dynamic Translation tab, toggle the switch to **On**.

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A modal displays, confirming your choice and stating that streaming of LLM (large language model) responses will be unavailable when Dynamic Translation is active.

Note:

When Dynamic Translation is inactive, streaming is available. The modal message displayed will change according to the status of the Dynamic Translation.

4. You can enable both Dynamic Translation and native translation.
   Native translation is applied first. If the language is not supported through native translation, then Dynamic Translation will be applied.
5. **Optional:** To enable the preferred language from the available languages supported in the model providers selected in AI Control Tower, select **Edit** and then select the check-box next to the languages you want to use for translation.

   (Optional) See Multilingual service for Now Assist for more information about adding new languages for your preferred model to support.

   To update your choice, select **Save**.

Result
Multilingual service is enabled for ServiceNow Otto applications.

Multilingual service for Now Assist

Now Assist applications use the multilingual capabilities of large language models (LLMs) to translate user-generated content.

Multilingual service overview

You can configure the multilingual services for Now Assist applications to communicate with your users in their preferred languages. The LLM detects the language used based on the user's language choice in their Language & Region preferences or the contents of the text, such as a conversation message.

Multilingual support is enabled for multiple LLM providers, such as Now LLM Service, Microsoft Azure OpenAI, Anthropic Claude on AWS, and Google Gemini. Azure OpenAI offers the most language support on the ServiceNow AI Platform.

How the different multilingual services work

The inherent multi-language capabilities of the LLM is called native translation. In native translation, text is sent as-is to the model and the model responds in the user's language. For example, if a user sends a message in Spanish, the multilingual LLM supports Spanish, so it receives the Spanish input directly from the user. It then generates a response in Spanish, regardless of the language used in the source material it uses to create that response.

For Dynamic Translation, once non-English content is detected, the translation service translates the content to English before sending the request to the large language model (LLM). After the LLM returns a response, the response is translated back into the user's preferred language for them to see. For example, a user enters a message in Slovenian. Dynamic Translation translates the Slovenian to English before giving the message to the LLM. The LLM generates a response in English, and then Dynamic Translation translates that response to Slovenian to show to the user.

If you enable both native translation and Dynamic Translation, native translation has preference and is used first.

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If you have native translation enabled, the LLM checks the user's language to see if it is supported. If the language is supported, only native translation is used and no Dynamic Translation occurs. A small number of languages are not yet natively supported by all models. Now Assist Dynamic Translation is automatically applied to address this for unsupported languages. Additionally, if you have native translation enabled, then LLM requests that return outputs in the fallback language will not be translated by Dynamic Translation. Otherwise, they'll be returned as-is to the user. This process helps increase skill performance and decrease latency.

Note: If you want to add a language that is not part of the regularly configured languages, you can do so. See the section below, Adding languages beyond the P1, P2, and P3 language groups.

Native translation

Supported languages are categorized into three basic groups.

P1 languages have the strongest native support across most model providers, meaning high-quality translation and generative capabilities with fewer errors. Nuance, idioms, and context are usually handled well because these languages are deeply integrated into the models.

P2 languages are supported natively by smaller ServiceNow models and most external providers, but not always by every model (e.g., some exceptions for Canadian French and Dutch). Accuracy is good, but there may be occasional gaps in nuanced understanding compared to P1 languages.

P3 languages include a broader set of languages supported by major providers like Microsoft Azure OpenAI, Google Gemini, and Anthropic Claude on AWS, but not natively by ServiceNow's own large models. While coverage is comprehensive, these languages generally have less training depth, so subtle tone or idiomatic expressions may be harder to capture perfectly.

- P1
  - English
  - French
  - German
  - Italian
  - Spanish
  - Brazilian Portuguese
- P2
  - Canadian French
  - Japanese
  - Dutch
- P3
  - Swedish
  - Finnish
  - Czech
  - Hebrew
  - Hungarian
  - Korean
  - Norwegian

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- Polish
- Portuguese
- Russian
- Simplified Chinese
- Traditional Chinese
- Thai
- Turkish
- Arabic
- Danish

Specific models vary in their support.

- ServiceNow Large Language Model v1 (Llama 3.3 70B) only supports English natively.
- ServiceNow Large Language Model v2 (GPT-OSS) supports English, French, German, Spanish, and Italian natively.
- ServiceNow Small Language Model v1 (Mistral Nemo 12B) and v2 (Apriel) supports all P1 and P2 languages.
- Microsoft Azure OpenAI GPT-4.1 and GPT-4.1-mini support more than 80 languages, including P1, P2, and P3.
- Google Gemini 2.5 Flash/2.5 Pro currently does not support French Canadian natively.
- Anthropic Claude 4.0 Sonnet currently does not support French Canadian or Dutch natively.

Adding languages beyond the P1, P2, or P3 language groups

Some providers, such as Azure OpenAI, offer additional language support beyond the P1, P2, and P3 language groups previously described. You can configure your instance to include additional languages.

Note: Before adding a language that is not in the P1, P2, or P3 groups, you should confirm whether the language is supported by the provider. If you add a language that isn't supported, you may get unexpected results. The LLM could fail to detect the language, and/or it could not be able to translate effectively.

Ensure the language is on the sys_language table.

Create a record for the language if necessary. The record should include the language name and code. The *`Active`* field should be set to true.

Enable the language for the Now Assist model.

- Go to the sys_generative_ai_model_config table and open the record for the model you want to add the language to, such as gpt_small by Azure OpenAI.

  Note: The model for AI Search is named E5FT. If you want to make changes to the language support for AI Search, you can configure that record. After, you need to reindex all sources in the new language.

- In the *`Supported languages`* list, add the language and save the record.

Activate the language for Now Assist applications.

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- Go to **All** > **Now Assist Admin** > **Settings** and open the **Multilingual service** tab.
- Scroll to the provider you edited, then select the edit button.
- Select the language you added and save.

  Note: If you don't see your language as an option, ensure that the language is on the sys_language table and *Active* is set to true.

Note: If semantic search is not working even after installing a language and enabling it for AI Search, you may need to clear the embedding model cache. To do so, run the following: `GlideCacheManager.flush("ais_semantic_embedding_model_cache");`.

Dynamic Translation

Dynamic Translation for Now Assist uses the Microsoft Azure OEM translation service through ServiceNow. Most languages available as a language pack on the ServiceNow platform are supported by Microsoft Azure OEM. Self-localized languages (languages other than the default language packs) aren't supported.

- For the list of available language packs, see Activate a language.
- For more information about Microsoft Azure OEM, see Microsoft Azure OEM for Dynamic Translation in Now Assist.

Choosing a translation service

There are different factors that can go into your decision to use one translation service over the other, such as latency and quality of translation. Your entitlements determine what is available to you, but there are no additional costs associated with native translation service.

Note: The native translation service is included in Pro Plus and Enterprise licenses, by default.

For more information on tracking Now Assist usage, see Monitoring Now Assist usage.

Enabling translation for Now Assist

For more information on turning on multilingual services for Now Assist applications, see Enable translation for Now Assist applications.

Microsoft Azure OEM for Dynamic Translation in Now Assist

Support multi-language input in Now Assist applications with the Microsoft Azure OEM translator service included in Generative AI Controller.

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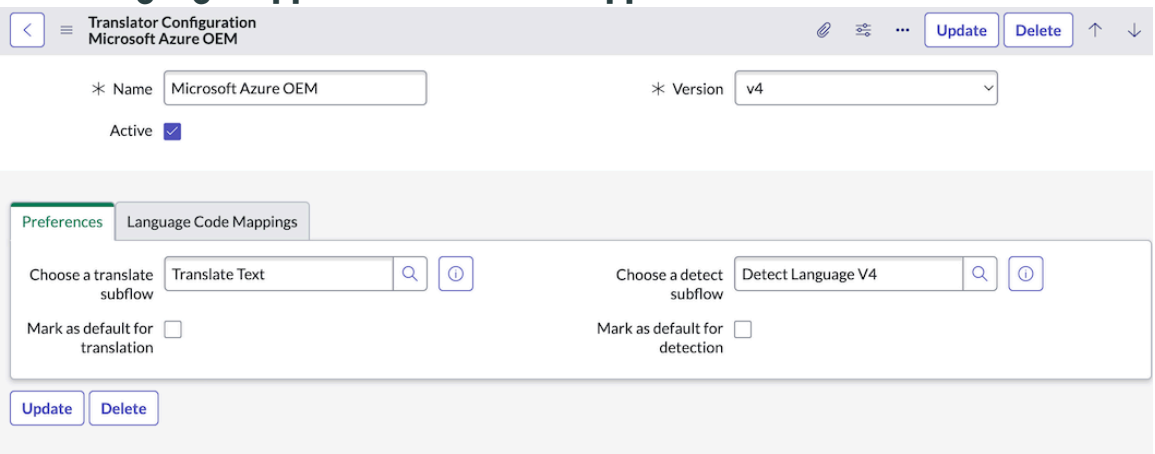
Multi-language support for Now Assist applications



When dynamic translation in the Generative AI Controller is enabled, your users' input text is handled by Microsoft Azure OEM (com.snc.microsoft_oem_translation_spoke) as follows:

1. The language of the text is detected.
2. The text is dynamically translated to English, then provided to Now Assist.
3. Now Assist returns a response in English.
4. The English response is translated to the user's preferred language and displayed in the UI.

For more information about enabling dynamic translation in this context, see Configure multilingual service for ServiceNow Otto applications and Enable Dynamic Translation for capabilities in Generative AI Controller.

From the Zurich release, this spoke has available support for specific regulated markets, subject to conditions. For information see KB0743854 on the Now Support portal.

Activation

The Microsoft Azure OEM translator service is included with Generative AI Controller. Microsoft Azure OEM requires Dynamic Translation tables, so Generative AI Controller activates Dynamic Translation if it isn't already active.

Microsoft Azure OEM appears as a row in the Translator Configurations (sn_dt_translator_configuration) table. This record is not editable. The connection credentials of this translator service are already configured. For more information about this integration, see https://www.servicenow.com/company/media/press-room/gen-ai-now-platform.html.

If you try to update this record in the Translator Configurations table, the following error is displayed: "The Microsoft Azure OEM translator configuration is used in Generative AI flows. It cannot be edited".

With the Xanadu Patch 3 release, the Microsoft Azure OEM translator includes support for Exclusion Framework in Dynamic Translation. Also the API used by flows and subflows is automatically updated to v4.

The application scope for Microsoft Azure OEM is sn_ms_oem.

For more information, see Dynamic Translation.

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Languages supported

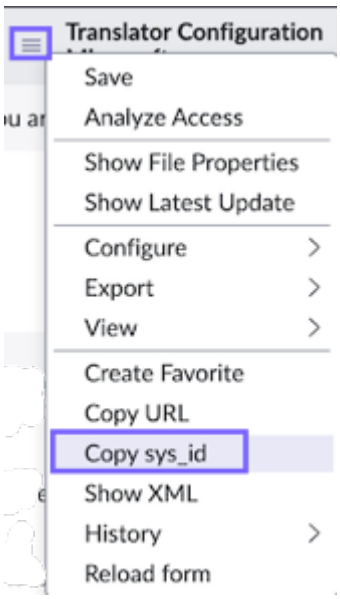
The Microsoft Azure OEM service supports all of the languages available as language packs on the ServiceNow platform, except I18N: Latin American Spanish Translations. Self-localized languages (languages other than the default language packs) aren't supported.

For the list of available language packs, see Activate a language.

Alteration or deactivation

You can use a different machine translation service in Generative AI Controller, rather than the provided Microsoft Azure OEM translator configuration. If you want to switch to a translation service provider of your choice, you can update a system property as follows.

1. With the admin role, create an account with a third-party machine translation service provider and configure it in your instance. For details see Integration with other translation services.
2. Open the record for your translation service provider by navigating to the Translator Configurations [sn_dt_translator_configuration] table, then selecting the appropriate row.
3. Copy the sys id of the record by opening the form context menu and selecting **Copy sys_id**.



4. Navigate to the sys_properties table and select New to create a system property.
5. Enter values in the System Property - New record form as follows.

System Property - New record form

Field	Value
Name	com.snc.gen_ai.translator_configuration.sys_id
Value	Enter the translator configuration sys id that you copied in the previous step.

6. Select **Submit**.

Alternatively, you can deactivate Dynamic Translation in this context using another sys property. For information see Disable Dynamic Translation for LLM Virtual Agent conversations.

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Related topics

- Dynamic Translation
- Generative AI Controller
- Multilingual service for Now Assist

Data sharing and processes

Data sharing and processes topic description.

Configure Now Assist privacy policies

Configure privacy policies to anonymize data in Now Assist.

Before you begin

You must have the following applications installed on your instance:

If you do not have a data steward, see Assign the data steward role documentation.

Role required: sn_generative_ai.data_steward

About this task

The Now Assist **Privacy Policies** enables you to review and configure how personally identifiable information (PII) is de-identified in Now Assist.

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Settings**.
2. In the navigation pane, go to **Data sharing and processing** > **Privacy policies**.
3. Select **View detail** of the privacy polic you want to review.
   Review the policy details and current active patterns in the pop-up window.
4. **Optional:** Select **Edit in Data Privacy**.
   See Configuring Data Privacy for ServiceNow Otto for more information on configuring Now Assist policies.

Opt out of data sharing for Now Assist

Data sharing improves ServiceNow AI products. You can opt out of data sharing from the Now Assist Admin console Settings page.

Before you begin

Important: Data sharing is not available for GCC or self-hosted instances. You don't need to opt out because data sharing is never enabled. If you have any questions, reach out to your account representative.

If you do not have a data steward, see Assign the data steward role documentation.

Role required: sn_generative_ai.data_steward

Note: The **Opt out** button appears only if you've installed at least one Now Assist application or plugin. For a list of all Now Assist applications, see Exploring AI Admin Hub.

About this task

By opting out of the ServiceNow customer data sharing program, you can no longer provide data to improve ServiceNow AI products. By sharing data with the ServiceNow AI development program, you provide relevant data to help improve prediction accuracy, user experience, tailor products to your business needs, and reduce hallucinations for your activated Now Assist skills.

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You can choose to opt out a ServiceNow instance from data sharing from the AI Admin Hub console if you don't want to participate. Repeat the opt-out process for all instances that use the Now Assist functionality.

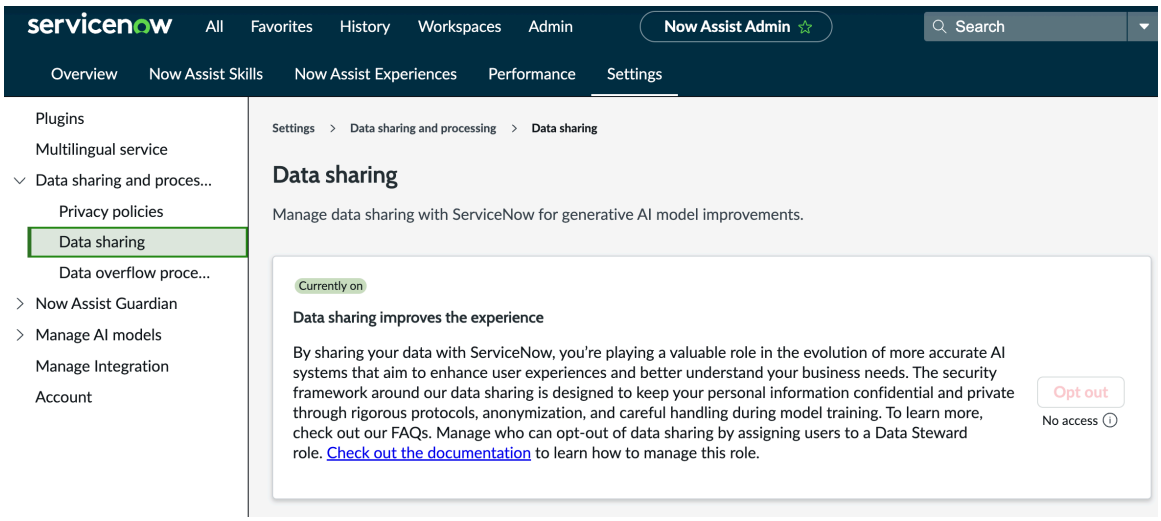
Opting out can take up to five business days to process.

Note: You must opt out of data sharing to turn off ServiceNow ability to gather Customer data for AI and data products.

Procedure

1. Change the current session scope by selecting the Globe icon in the top right next to the search bar and setting Application Scope to Generative AI Controller.
2. Navigate to **All** > **Now Assist Admin** > **Settings**.

   If you're already in the AI Admin Hub console, select the **Settings** tab.
3. In the Settings panel, select the **Data sharing and processing** > **Data sharing** tab.



4. Select **Opt Out**.
5. In the confirmation window, select **Opt Out**.

Result

Your data sharing preference is saved on the instance. If you want to opt back in to data sharing, you must consult with your account executive.

Configure Now Assist data overflow processing

Configure where Now Assist data is processed during periods of high traffic.

Before you begin

Role required: sn_generative_ai.data_steward

About this task

By default, Now Assist data is handled in ServiceNow datacenters. During periods of high network traffic, data can be "burst" to Microsoft Azure datacenters to help keep consistent load times and avoid capacity overflow errors. Users with the data steward role can opt out of or into this behavior from the Now Assist Admin console.

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Procedure

1. Navigate to **All** > **Now Assist Admin** > **Settings**.
2. In the navigation pane, go to **Data sharing and processing** > **Now overflow processing**.
3. Select either **Opt out** or **Opt in**.
   Instances are opted in by default. You can change this setting at any time.

Assign the data steward role

Select a data steward to make decisions about data sharing with ServiceNow in Now Assist applications.

Before you begin
Role required: sys_admin

About this task
A data steward is responsible for determining whether prompts, inputs, and responses with generative AI in Now Assist applications on your instance are shared with ServiceNow.

The ServiceNow customer data sharing program allows you to provide data to improve ServiceNow AI products. This data helps improve prediction accuracy, enhance user experience, tailor products to your business needs, and reduce hallucinations for your activated Now Assist skills.

The following steps explain how to assign a role to a specific user. Another option is to make a group, such as "AI Data Stewards," assign the role to the group, and then put the user in that group. See Assign a role to a group for more information.

Procedure

1. Navigate to **All** > **User Administration** > **Users** and then open a user record.
2. In the Roles related list, select **Edit**.
3. In the collection of roles, select the sn_generative_ai.data_steward role, and then select the **Add** ( ) icon.
4. Select **Save**.

Result
Once the data steward has the correct role, they can review the data sharing information on the Now Assist Admin console in the **Settings** tab under **Data privacy and sharing** > **Data sharing**.

AI Guardian

AI Guardian is built on the ServiceNow Small Language Model (SLM) and monitors generative AI interactions to detect offensive content, prompt injection attacks, and sensitive topics.

AI Guardian Overview

Generative AI is an emerging technology. Human interactions are unpredictable, and outputs generated by large language model (LLM) are probabilistic, which means that they're based on probabilities. Running the same input twice may generate two different outputs. Managing this risk is an important consideration when implementing generative AI on your instance. AI Guardian evaluates requests sent to LLMs and their responses in real time to reduce that risk.

Guardrails

AI Guardian provides three guardrails. Each guardrail has a different scope of applicability:

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Guardrail	What it detects	Scope
Offensiveness detection	Offensive or harmful content in AI inputs and outputs	Specific Now Assist skills and workflows
Prompt injection detection	Attempts to override LLM instructions or expose restricted information	All generative AI applications and features
Sensitive topic filters	Subjects not suited for AI responses, such as workplace safety or employee compensation	Virtual Agent conversational skills only (requires HR Service Delivery)

Note: The scope of each guardrail differs. Prompt injection detection applies to all generative AI applications and features. Offensiveness detection applies only to supported Now Assist skills and workflows. Sensitive topic filters apply only to Virtual Agent conversations and require HR Service Delivery.

Offensive content

Due to the probabilistic nature of generative AI, it's possible for an LLM to generate offensive content. If there's offensive content in the input of the request, offensive content can also occur in the response. Examples of offensive content include language that is toxic, defamatory, or fraudulent.

When offensive content is detected, AI Guardian logs the event. You can also configure it to block the content. This guardrail applies to specific Now Assist skills and workflows.

Prompt injection

Prompt injection is a type of security attack where someone tries to override the normal instructions of an LLM to access restricted information or cause unintended behaviors. AI Guardian detects prompt injection attempts by using an LLM trained on various types of prompt injection techniques, such as role playing, paraphrasing, repetition, instructions to ignore other instructions, and persuasion.

Note: Due to the probabilistic nature of the model and evolving attack techniques, AI Guardian may not identify every prompt injection attempt in some cases.

Prompt injection protection applies to all generative AI applications and features on your instance. It is not limited to specific skills or workflows.

Filtered subjects

Certain subjects, such as workplace safety employee compensation, or personal well-being may not be best suited for generative AI responses. You can activate filters that detect these kinds of subjects in Virtual Agent conversations and redirect users to the Sensitivity Detection: Fallback Virtual Agent topic instead of generating an AI response.

Note: Sensitive topic filters are available only with HR Service Delivery and apply only to Virtual Agent conversational skills.

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Logging and blocking

AI Guardian logs detected events for offensiveness and prompt injection. You can access logs from **Now Assist Admin** > **Settings** > **Now Assist Guardian**. Log dataincludes information about the request, the conversation that contains the offensive content, and any user feedback.

In addition to logging, you can configure AI Guardian to block offensive content or prompt injection attempts. When blocking is enabled and content is detected, you see a standard error message instead of the generated response. The standard error message displays that the request couldn't be completed, and you don't see what the AI generated. Before enabling blocking, review logs for a period of time to understand how frequently these issues occur in your environment.

Redirection for sensitive filtered topics

After a filter detects a sensitive topic, AI Guardian redirects you to the Sensitivity Detection: Fallback topic in Virtual Agent. This topic can redirect you to a live agent or help you create an HR case.

You can override the redirection by selecting **Proceed, not sensitive**. Itreturns you to their original topic without initiating the fallback flow.

Note: After you continue with the fallback topic, for example, by starting the flow to create an HR case, Virtual Agent does not continue detecting sensitive topics in that conversation.

AI Guardian at runtime

All skills that use AI Guardian remove personally identifiable information (PII) before the request reaches the LLM. You can configure what type of data is anonymized. For more information see, Configuring Now Assist for Data Privacy.

For conversational skills, semantic search processes requests to determine whether a filter has been detected. If so, the user is redirected to a Virtual Agent topic that asks if they want to make an HR case or speak to a live agent.

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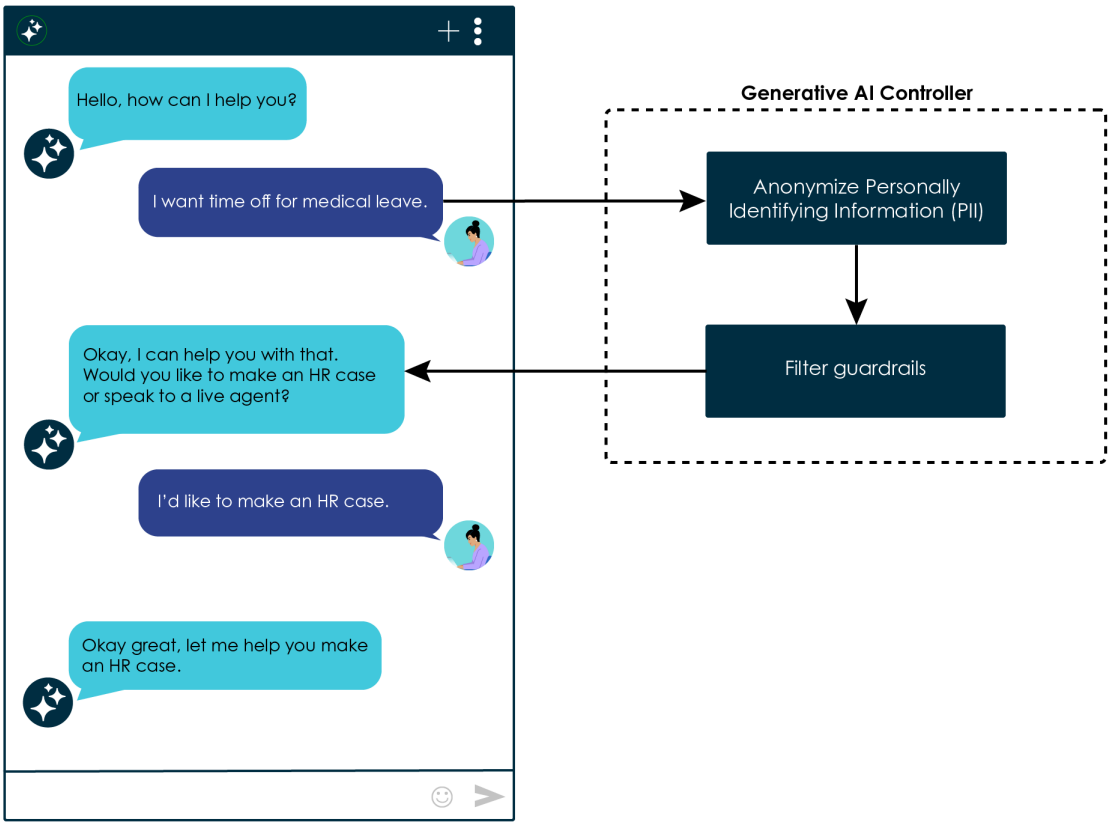

For catalog item generation and agent skills, such as summarization and resolution note generation, offensiveness and prompt injection guardrails run on inputs and outputs of requests. If either is detected, AI Guardian logs the request. If you've chosen to block this content, then a standard error message appears, and the user doesn't see the result of the request.

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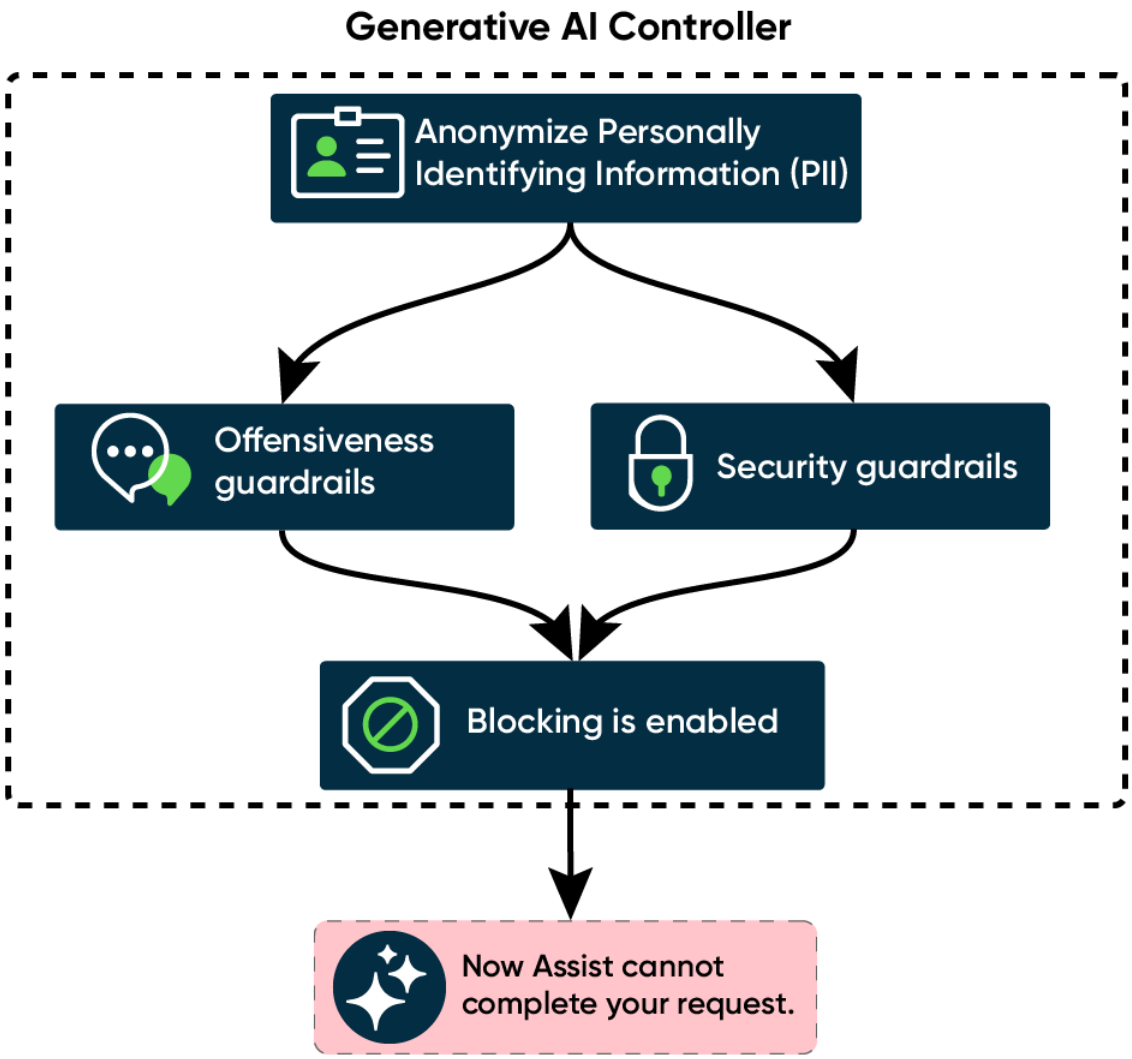

Safety categories captured in AI Guardian logs

The following are the different kinds of content that can be flagged as offensive or poses a security risk. You can identify what categories are being caught in the **AI Guardian** *logs for the different guardrails.*

Category	Category ID	Description
Toxic Content	O1	Should not: Promote hate speech, incite violence like child abuse or bullying or engage in personal attacks or harassment. Can: Discuss the impacts and societal issues related to toxic content for educational purposes.
Unfair Representation	O2	Should not: Assist in perpetuating stereotypes or encourage discrimination or bias.

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Category	Category ID	Description
		Can: Discuss issues of representation and promote awareness and inclusivity.
Adult Content	O3	Should not: Display sexually explicit material or content inappropriate for minors including pornography, erotic chat and sexual activity. Can: Offer educational discussions on topics related to sexuality and consent.
Erosion of Trust in Public Information	O4	Should not: Spread misinformation or disinformation undermining public trust such as misleading medical advice, illegal drugs and advice. Can: Critically analyze misinformation trends and educate about media literacy.
Propagating Misconceptions/ False Beliefs	O5	Should not: Disseminate unverified, misleading information, conspiracy theories, science denialism, historical revisionism, or content that could lead to radicalization. Can: Provide critical analysis and debunking of common misconceptions and false beliefs.
Risky Financial Practices	O6	Should not: Promote unethical trade practices such as multi-level marketing, deceptive lending practices, or gambling. Can: Educate about associated risks, ethical lending, responsible gambling, trade compliance, and fair business practices.
Trade and Compliance	O7	Should not: Involve labor issues, engage in unethical trade affairs, contribute to unfair labor practices or promote fraudulent trade practices. Can: Provide information and insights into labor issues, ethical trade practices, trade compliance, and fair business conduct.
Dissemination of Dangerous Information	O8	Should not: Spread fake news, propagate social media rumors, disclose government secrets or leak financial data and other contents that contributing to public panic or national security. Can: Educate about the dangers of such information and promote safety.
Privacy Infringement	O9	Should not: Involve doxxing, unauthorized data sharing, or surveillance like private information inferring or leaking. Can: Discuss the importance of privacy rights and digital security.

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Category	Category ID	Description
Security Threats	O10	Should not: Spread malware or encourage terrorism or other security threats such as weapon generation, cyberattack or chemical harms. Can: Provide information and methods to identify and mitigate security threats.
Defamation	O11	Should not: Publish false statements damaging to individuals, groups or organizations. Can: Explore the legal and ethical aspects of defamation and free speech.
Fraud or Deceptive Action	O12	Should not: Engage in academic dishonesty, perpetrate scams, promote pseudo-pharmaceuticals, or disseminate fake online content. Content should not deceive or defraud individuals. Can: Educate about recognizing and preventing fraudulent activities.
Influence Operations	O13	Should not: Manipulate public opinion or disrupt societal harmony for political or ideological purposes like surveillance or campaign. Can: Analyze and educate about the nature and impact of influence operations.
Illegal Activities	O14	Should not: Promote or provide guidance on engaging in illegal actions, such as crimes or terrorism. Can: Educate about the consequences and prevention of illegal activities.
Persuasion and Manipulation	O15	Should not: Involve persuasion or manipulation techniques that promote self-harm, psychological manipulation, or any form of harm to individuals' well-being. Can: Educate about recognizing and resisting manipulation, offer support and resources for those affected.
Violation of Personal Property	O16	Should not: Enagge in violating an individual's personal property,malicious mimicking, plagiarism, copyright infringement or identity forgery. Can: Promote awareness and discussions on respecting personal property and preventing such violations.

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Skills that support offensive detection

Supported skills by workflow

Workflow	Application	Supported skills
Technology	ServiceNow Otto for Configuration Management Database (CMDB)	• Configuration item (CI) summarization • Manage duplicate CIs • Service Graph Connector diagnosis
Technology		• Alert analysis • Alert investigation
Technology	ServiceNow Otto for IT Service Management (ITSM)	• Change request risk explanation • Change request summarization • Chat reply recommendation • Chat summarization • Incident assist • Incident summarization • KB generation • Resolution notes generation • Sidebar discussion summarization
Technology	ServiceNow Otto for Security Incident Response (SIR)	• Post-incident analysis • Resolution notes generation • Security incident recommended actions • Security incident summarization
Technology	ServiceNow Otto for Strategic Portfolio Management	• Multi feedback summarization • Planning item doc summarization • Project doc summarization • Project summary emails • Story generation • Write planning item
Customer	ServiceNow Otto for Customer Service Management (CSM)	• Case summarization • Chat recommendation • Chat summarization

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Supported skills by workflow (continued)

Workflow	Application	Supported skills
		• Email recommendation • KB generation • Resolution notes generation • Sidebar summarization
Customer		• KB generation • Sidebar summarization • Work order task summarization
Customer		• Case summarization • Disputes intake via Virtual Agent
Customer		• Government case summarization • Chat summarization
Employee	ServiceNow Otto for Health and Safety	Incident summarization
Employee	ServiceNow Otto for HR Service Delivery (HRSD)	• Case summarization • Chat summarization • KB generation • Resolution notes generation
Employee		Legal request summarization
Employee		• Contract analysis • Contract metadata extraction
Creator		Catalog item generation
Finance & Supply Chain	ServiceNow Otto for Accounts Payable Operations (APO)	Record summarization
Finance & Supply Chain	ServiceNow Otto for Supplier Lifecycle Operations (SLO)	Supplier case summarization
Finance & Supply Chain	ServiceNow Otto for Sourcing and Procurement Operations (SPO)	Record summarization

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Activate offensiveness protection for generative AI

Activate offensiveness detection to log or block offensive content generated by AI skills and workflows.

Before you begin

Role required: sn_nowassist_admin.nsa_admin

About this task

Generative AI output is probabilistic, which means that the same input can produce different outputs. Some of the AI generated content may be offensive, which includes toxic, sexist, or other harmful language. AI Guardian enables you to detect offensive content in both inputs and outputs, and logs the event when it is detected. You can also cofigure it to block offensive material so that users see a standard error message instead of the generated response.

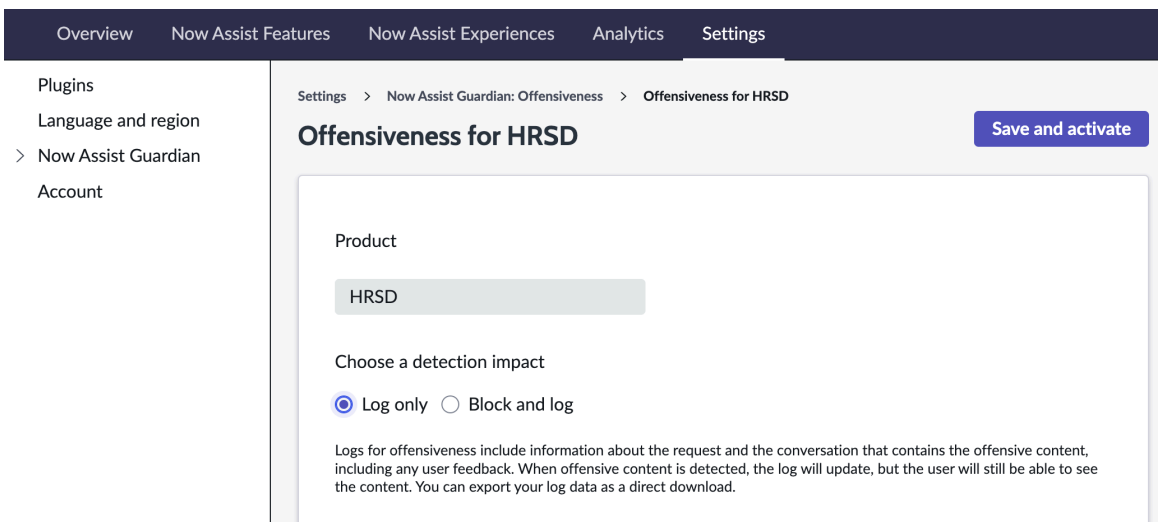
Note: Offensiveness detection applies only to specific AI skills and workflows.. For more information about the list of skills that support offensiveness detection, see Now Assist Guardian.

You can export logs for review. For more information, see Export Now Assist Guardian logs.

Procedure

1. Navigate to **All** > **AI Admin Hub** > **Settings**.
2. In the side panel, select the **Now Assist Guardian** > **Offensiveness** tab.
3. Go to the **Available for you** tab to see which workflows you can choose from.

   Offensiveness guardrails that are already activated appear in the **Active** tab.
4. Select **Activate** for the workflow that you want to enable offensiveness detection.
5. Select your impact detection.
   - Select **Log only** to record the events when offensive content is detected. The content is still shown to the user.
   - Select **Block and log** to record the event and prevents the content from being shown to the user. The user sees a standard error message instead.



6. Select **Save**.

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Result
Offensiveness detection guardrail is enabled on your instance for the selected workflow. Events are logged when offensive content is detected or generated.

What to do next
You can enable offensiveness detection for separately for each supported generative AI application and workflow. Repeat this task for each workflow on which you want offensiveness protection enabled.

To change the detection impact for an active workflow, select more options (⋮) icon in the list of active workflows and then select **Edit**.

To deactivate offensiveness protection for a workflow, select more options (⋮) icon in the list of active workflows and then select **Deactivate** .

Configure prompt injection attack protection

Activate or deactivate prompt injection attack detection to protect all generative AI applications and AI-generated text and conversations.

Before you begin
Role required: sn_generative_ai.nsa_admin

About this task
Prompt injection attacks are a type of cybersecurity attack where someone tries to override the initial instructions of an LLM to cause unintended behaviors. AI Guardian detect and log these prompt injection attack attempts across all generative AI applications and features. You can also configure the prompt injection detection guardrail to block the AI-generated response when an attack is detected in addition to logging it.

You can export logs for review. For more information, see Export Now Assist Guardian logs.

Procedure
1. Navigate to **All** > **Now Assist Admin** > **Settings**.
2. In the side panel, go to **Now Assist Guardian** > **Prompt Injection**.
3. Select the toggle to activate or deactivate prompt injection attack detection.
4. **Optional:** Under **Detection impact**, select the options icon (⋮) and then select **Edit** to change how detected attacks are handled.

   (Optional) You can choose whether prompt injection attacks are blocked as well as logged.

Result
Prompt injection detection is configured on your instance. When enabled, you see a standard error message when an attack is detected.

Configure sensitive topic filters

Set up filters in AI Guardian to redirect Virtual Agent users to a live agent or HR case when a sensitive subject is detected in a conversation.

Before you begin
Role required: sn_nowassist_admin.nsa_admin

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About this task

AI Guardian detects sensitive subjects in Virtual Agent conversations and redirect users to the Sensitivity Detection: Fallback Virtual Agent topic instead of continuing the conversation with generative AI. You can activate and configure the subjects that trigger this redirection, and add sample phrases to improve detection accuracy.

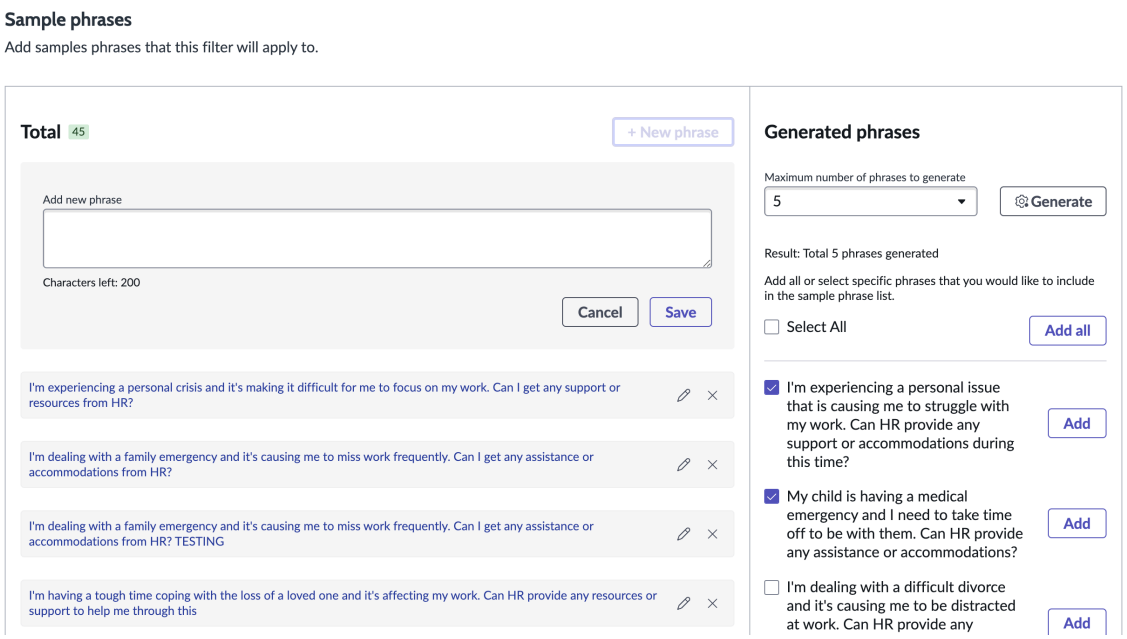
Note: The sensitive topic filter guardrail is available only with HR Service Delivery and applies only to Virtual Agent conversational skills.

See Now Assist Guardian for more information.

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Settings**.
2. Navigate to **Now Assist Guardian** > **Filters**.
3. Go to the **Available for you** tab to see which filters are available.
4. Select **Activate** on the filter you want to enable.
5. Review and generate sample phrases.

   Sample phrases tell the LLM what kind of text the filter should detect. The more sample phrases you provide, the more accurately the LLM detects these topics.



Option	Description
Add a phrase	**a.** Select **New phrase** to add a phrase manual ly. **b.** Enter text in the Add new phrase text box. **c.** Select **Save**.
Generate a phrase using generative AI	**a.** In the **Generative samples** panel, select the maximum number of phrases to gener ate from the list. **b.** Select **Generate**.

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Option	Description
	c. Select the check box next to the phrase and select**Add** to add individual sample phrase. **d.** Select the check box next to each phrase and then select**Add all** to add multiple phrases together.
Edit a phrase	**a.** Select the pencil icon and start editing the phrase. **b.** select **Save**.
Delete a phrase	Select the delete icon to remove the phrase.

6. Select **Save and Continue**.
7. Choose which Virtual Agents you want to enable the sensitive topic filters for by selecting the checkbox next to the Virtual Agent name.
8. Select **Save and Continue**.
9. Review the fallback topic for when a filter is detected.

   By default, when a sensitive topic is detected, the user is redirected to the Sensitivity Detection: Fallback topic, which prompts the user to create an HR case or speak to a live agent. You can preview the topic from the guided setup.
10. Select **Save and continue**.
11. Review your filter configuration in the final step.

    If you want to make any changes, use the step navigation panel to return to a previous step.
12. Select **Activate** to activate the filter.

Result
The sensitive topic filter is activated and appears in the **Active** tab of the **Filters** section of AI Guardian settings. When the filter detects a sensitive topic in a Virtual Agent conversation, the user is redirected to the Sensitivity Detection: Fallback Virtual Agent topic.

What to do next
To modify the filter configuration after activation, go to the **Active** tab of the AI Guardian settings options and select the more actions icon (⋮) in the **Actions** column.

Export AI Guardian logs

Export logs from AI Guardian to get insights into how often different guardrails are being detected and used.

Before you begin
Role required: sn_generative_ai.nsa_admin

About this task
AI Guardian creates logs for all three guardrails available. Reviewing the logs can help you determine how often offensive content is generated, prompt injection attack attempts occur, or sensitive topics are detected.

See Now Assist Guardian for more information.

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Procedure

1. Navigate to **All** > **Now Assist Admin** > **Settings**.
2. Use the more options menu item (⋮) and select **Export**.
   a. For the offensiveness guardrail, go to **Now Assist Guardian** > **Offensiveness**.

      Use the list in the **Active** tab to choose which workflow you want to export logs for.

   b. For the prompt injection guardrail, go to **Now Assist Guardian** > **Prompt Injection**.

Result
The log is exported as a .csv file to your computer.

What to do next
If you do not see any log data, then it is most likely that the guardrail has not been triggered yet. If you believe you should be seeing data but aren't, reach out to Now Support.

Configuring a Guardrail Service Provider

AI Guardian supports default guardrails and third-party or custom guardrail service providers to extend AI content monitoring with your organization's AI governance policies.

Guardrail Service Provider overview

AI Guardian includes default guardrails to detect offensive content, block prompt injection attacks, and filter sensitive topics. In addition to these guardrails, AI Guardian supports third-party guardrail service providers. You can also create your own custom guardian using the Bring Your Own Guardrail (BYOG) feature to monitor and detect malicious content.

Custom guardian evaluates prompts and responses in real time, just like the default guardrails. You can set each custom guardrail to log events, block content, or both based on your specific security or content policies.

ServiceNow supported third-party guardrail service providers

AI Guardian supports the following cloud AI service providers:

- ServiceNow guardrail: The default provider built into the platform. No additional configuration is required.
- Third-party providers: Integrate with supported cloud AI safety services. Following are the supported providers:
  - Microsoft Azure Content Safety
  - Amazon Bedrock
  - Google Model Armor
- Custom (BYOG): Create your own guardrail to apply your organization's specific compliance, security, or content policies.

Only one guardrail service provider can be active at a time. The selected provider monitors and evaluates all Now Assist interactions for harmful, offensive, or prompt injection content.

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Custom guardrails for AI Guardian

The Bring Your Own Guardrail (BYOG) feature lets you create and connect a custom guardrail in AI Guardian. A custom guardrail connects to an external endpoint that you control, allowing you to apply policies specific to your organization. It evaluate prompts and responses in real time, the same as default guardrails. You can configure each custom guardrail to log events, block content, or both.

Setting up a custom guardrail involves three steps:

1. Create a connection and credential alias for the custom guardian and complete its setup. The alias supports Basic Auth, OAuth 2.0, and API Key credential types.

   For more information, see Create a Connection & Credential alias.

2. Create a custom guardian in the Generative AI Custom Guardian Transformer [sys_generative_ai_custom_guardian_transformer_list.do] table.

   For more information, see Create a custom guardian.

3. Select your preferred guardrail service providers to monitor content.

   For more information, see Setup a Guardrail Service Provider.

Create a custom guardian

Create your own custom guardian to monitor and detect requests sent to LLM.

Before you begin

Configure a connection and credential alias for your preferred provider. For more information, see Create a Connection & Credential alias.

Role required: admin

Procedure

1. Navigate to **All**, and then enter `sys_generative_ai_custom_guardian_transformer_list.do` in the filter to go to the Generative AI Custom Guardian Transformer [sys_generative_ai_custom_guardian_transformer_list.do] table.
2. Select **New**.
3. In the **Name** field, enter the name of the custom guardian.
4. Create a request transformer script.

   a. In the **Request Transformer** filed, enable the **Turn on ECMAScript 2021 (ES12) mode** toggle to create script.

   The following example shows the request transformer script for the custom guardian request structure.

```
((function(inputs) {
 /*
 inputs structure: {
  prompt: object, The textual content that needs to be
 evaluated with guardian
  threshold_setting: object
  connection_attributes: object
 }
```

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```
 write code here to construct the request body and any custom
 headers needed using the inputs object.
 */
 // construct body using the inputs like input.prompt and so
 on.
 var body = {};
 //construct headers using the inputs
 var headers = {};
 return {
  body: body,
  headers: headers
 };
})(inputs);
```

5. Select the **Active** option.
6. Create a response transformer script.

   a. In the **Response Transformer** filed, enable the **Turn on ECMAScript 2021 (ES12) mode** toggle to create script.

   The following example shows the response transformer script for the custom guardian response structure.

```
(function(inputs) {
 /*
 write code here to transform the custom guardian response
 into standard guardian response format expected by platform
 inputs structure: {
  response_body: object,
  threshold_setting: object
 }
 */
 // write code here to populate the response object.
 var guardianResponse = {};
 //Set flagged to true, if the guardian has flagged the text.
 Categories are optional and are for logging purpose only
 // if transformer setting is Prompt Injection, expected
 response format: {security:{flagged:false,categories:[]}}
 // if transformer setting is Offensiveness, expected
 response format: {safety:{flagged:false,categories:[]}}
 // if transformer setting is ALL, expected response format:
 {safety:{flagged:false,categories:[]},security:{flagged:fals
e,categories:[]}}
 return guardianResponse;
})(inputs);
```

7. In the **Guardian Setting** field, select a guardrail of your choice.
   - Select **All** to handle the detection of both offensiveness and prompt injection together.
   - Select **Offensiveness** to enable the detection of offensive or harmful content.
   - Select **Prompt Injection** to enable the detection of prompt attacks.

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Note: If your LLM can evaluate both offensiveness and prompt injection in a single request, select All. If not, create separate guardrail records for each offensiveness and prompt injection.

8. In the **Connection And Credential Alias** field, select the alias that you want to integrate with your custom guardian.
9. Set up the custom guardian token limit.
   a. Navigate to **All** > **System Definition** > **Tables**.
   b. Select the **Gen AI Control Setting Data [sys_gen_ai_control_setting_data]** table.
   c. In the Related Links section, select **Show List**.
   d. Search for the **Custom Guardian Token limit** record in the **Gen AI Control Data** column.
   e. Update the **Value** field of the Custom Guardian Token limit record with the maximum number of tokens per request.
   The token limit defines the maximum number of tokens the guardrail can process in a single evaluation. If the request content exceeds this limit, the content splits into smaller parts. Each part is evaluated separately against the guardrail rules.

   For example, if the token limit is 1000 and the request content is 2500 tokens, the system splits it into three parts and evaluates each one individually.

Setup a Guardrail Service Provider

Select a guardrail service provider of your choice in AI Guardian to monitor and detect Now Assist interactions for harmful, offensive, and prompt injection content.

Before you begin
Role required: sn_nowassist_admin.nsa_admin

About this task
AI Guardian supports multiple guardrail service provider types to monitor and detect harmful content. Select a provider based on your organization's requirements. Only one provider can be active at a time.

Procedure
1. Navigate to **All** > **Now Assist Admin** > **Settings**.
2. Navigate to **Now Assist Guardian** > **Guardrail service providers**.
3. In the **Set default provider** section, select a service provider from the list of guardrail service providers.
4. Select **Save and activate**.

Result
The selected guardrail service provider monitors and evaluates all Now Assist interactions for harmful, offensive, or prompt injection content.

Manage AI models

Access and select the LLM (large language model) provider used for various Now Assist skills. The selection impacts all the skills within the capability.

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Before you begin

Role required: admin, sn_nowassist_admin.nsa_admin

This feature is available in AI Admin Hub version 6.2 and Yokohama patch 6 onwards.

To enable the model provider selection, ensure that the skill is available in that region. The configuration controls for the approved model providers and corresponding compliant skills for specific regions are approved in AI Control Tower by the AI steward. For example, to update the model provider for Now Assist Q&A Genius Results, ensure that all the skills under Conversational skills are available and active in the region.

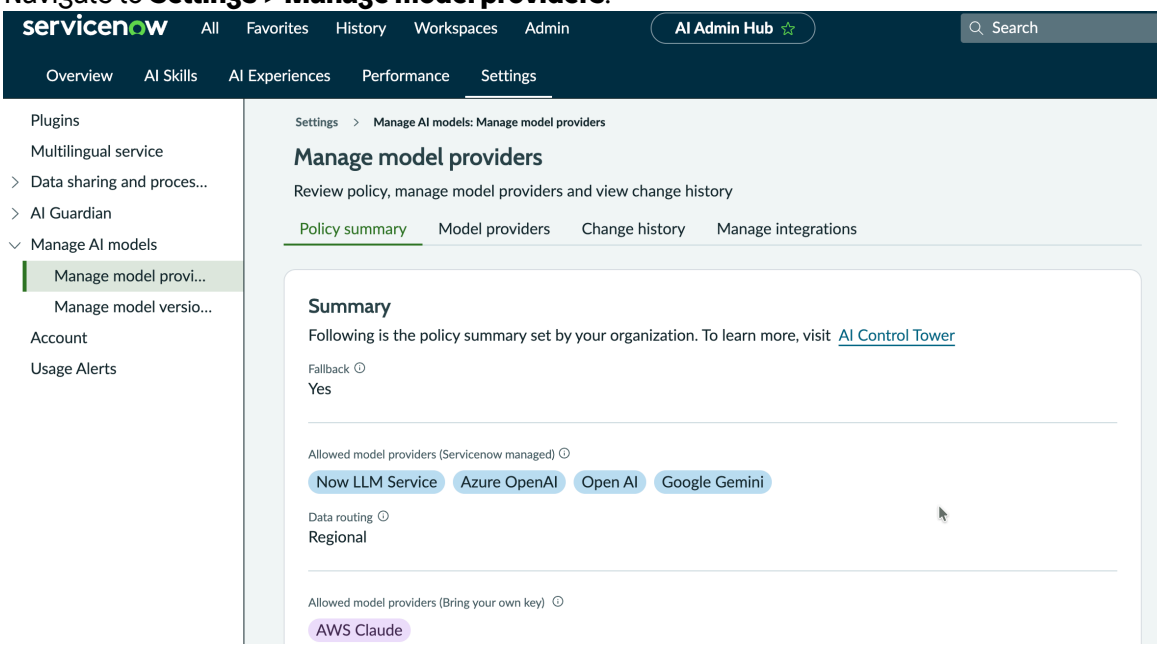
As per the AI Control Tower settings, the model provider selection is available at multiple levels, including skill, skill group, and instance levels in AI Admin Hub. Therefore, in a situation where a skill is not compliant or a model provider is unavailable in a particular region, AI Admin Hub console presents the admin persona with alternate region scope options seeking approval permissions to proceed with model provider selection. For example: You opt to switch to another model provider to use a particular Now Assist skill. Consider, the region scope must be changed to global location for the skill to work. Here, you can proceed only after consenting to the region scope change.

Note: For regulated markets:

- The **Manage LLM** option will not be available to customers on the AI Admin Hub user interface.
- Only Now LLM Service skills will be available to customers. Any skill that leverages external providers (e.g., Azure) will be hidden on the AI Admin Hub console. With the exception of NSC region, skills leveraging Azure OpenAI is available to the users.

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Settings**.
2. Navigate to **Settings** > **Manage model providers**.



3. Review these on the **Manage model providers** page:

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- Policy Summary set by your organization about skills using non-compliant model providers.

  Note: Note the routing and fallback exception details. These details are also derived from the AI Control Tower configurations.

- Model providers assigned to the Now Assist skills and skill groups.
- Policy and skill updates by the AI steward in AI Control Tower under the **Change History** tab.

Manage model providers

Edit or customize the model provider for a skill or skill group at the instance level from the list of supported third-party model providers, including the default Now LLM Service. You can also review the model policy set by your organization, and view the change history here.

Before you begin

Confirm that network access to the provider endpoint is allowed by your instance's proxy or firewall rules.

Role required: admin

About this task

The Now LLM Service is no longer the default model provider for new or inactive AI assets. A third-party LLM is now selected by default, while existing configurations using the Now LLM Service continue unchanged. The Now LLM Service is still available for manual selection.

Starting with the September 2026 release, Now LLM Service is being prepared for future deprecation. The Now LLM Service is no longer the default model provider for new or inactive AI assets, and it is no longer selected by default in AI Control Tower. A third-party LLM is now selected by default for AI assets, while existing configurations using the Now LLM Service continue unchanged. The Now LLM Service is still available for manual selection. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Let's take an example of editing the model provider for skill group.

Procedure

1. Navigate to **All** > **AI Admin Hub**.
2. Navigate to **Settings** > **Manage AI models**.
3. Select **Manage model providers**.

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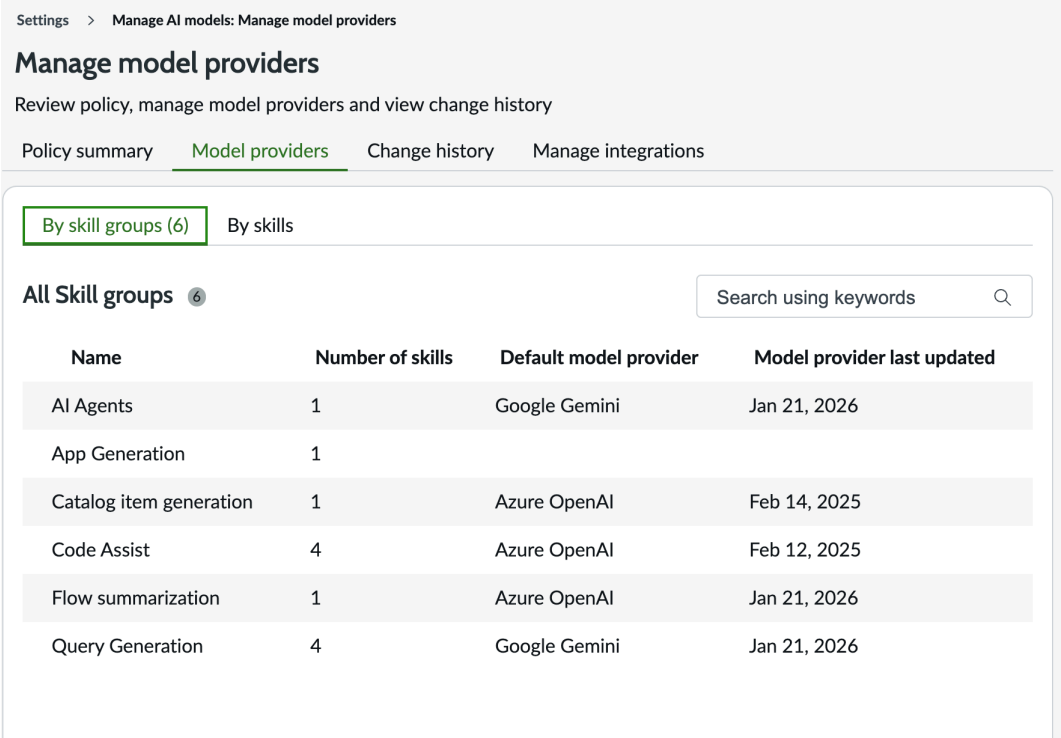

4. Select **Edit model provider** to edit the model provider for the instance or customize it to update it at the skill or skill group level.
5. Select **Instance** scope to update the model provider for all the skills and skill groups in the instance.

   a. Choose the **Default model provider** and select **Save and activate** to update your selection. The impacted skills and skill groups will display alongside.

   b. Select **Save** to update the model provider.
   You will receive a confirmation message if you have reviewed the change and the impact.

   Note: The agreement acceptance message is displayed only for the first time user.

6. Edit the model provider for a skill or skill group, after selecting the instance level model provider.
   This customization will override the instance level selection and update all capabilities associated with that group.
7. Select **Customize** to select the model provider for a particular skill or skill group.

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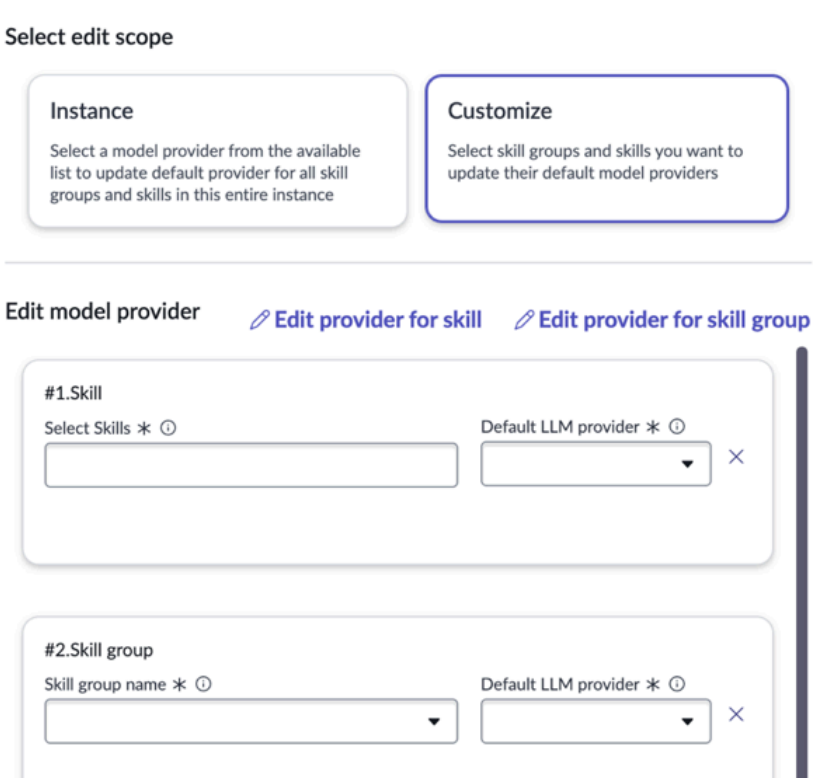

a. Select the **Default model provider** for specific skill or skill group.
Select the skill group as **AI agents** to change the model provider for **Now Assist in Virtual Agent**.

b. Select **Save and activate** to update your selection.

Note: The Websearch AI search answers skill is only compatible with Google Gemini as the LLM provider. If you want to change the LLM provider to Azure OpenAI for this skill, see Configure AI search answers capability for web search for more information.

8. Select **Cancel, go back** to revert or **Yes, activate** to save the updates.
The status summary of skills for which the model provider change updated successfully or failed, displays.
9. Review and accept the consent modal message to accept the terms for changing the region scope of the selected model provider.
There are certain market regions restricted for particular model providers. The region scope must be changed to global location for the skills to be able to use the selected model provider.
10. Select **Yes, activate** to accept and apply the selection.
You receive a message confirming model provider selection. The selection will also notify if any of the skills within that capability are not updated with the selection.

Note: The skill and skill level customizations are overwritten once you update the model providers at the instance level.

You can also select **Cancel, go back** to review or reject the changes.

11. Follow similar steps for editing the model provider for a particular skill.

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Manage Integration

Choose the preferred integration type for configuring the available model providers. There are two ways to configure a model provider in AI Admin Hub. You can either select Original Equipment Manufacturer (OEM) or Bring Your Own Key (BYOK).

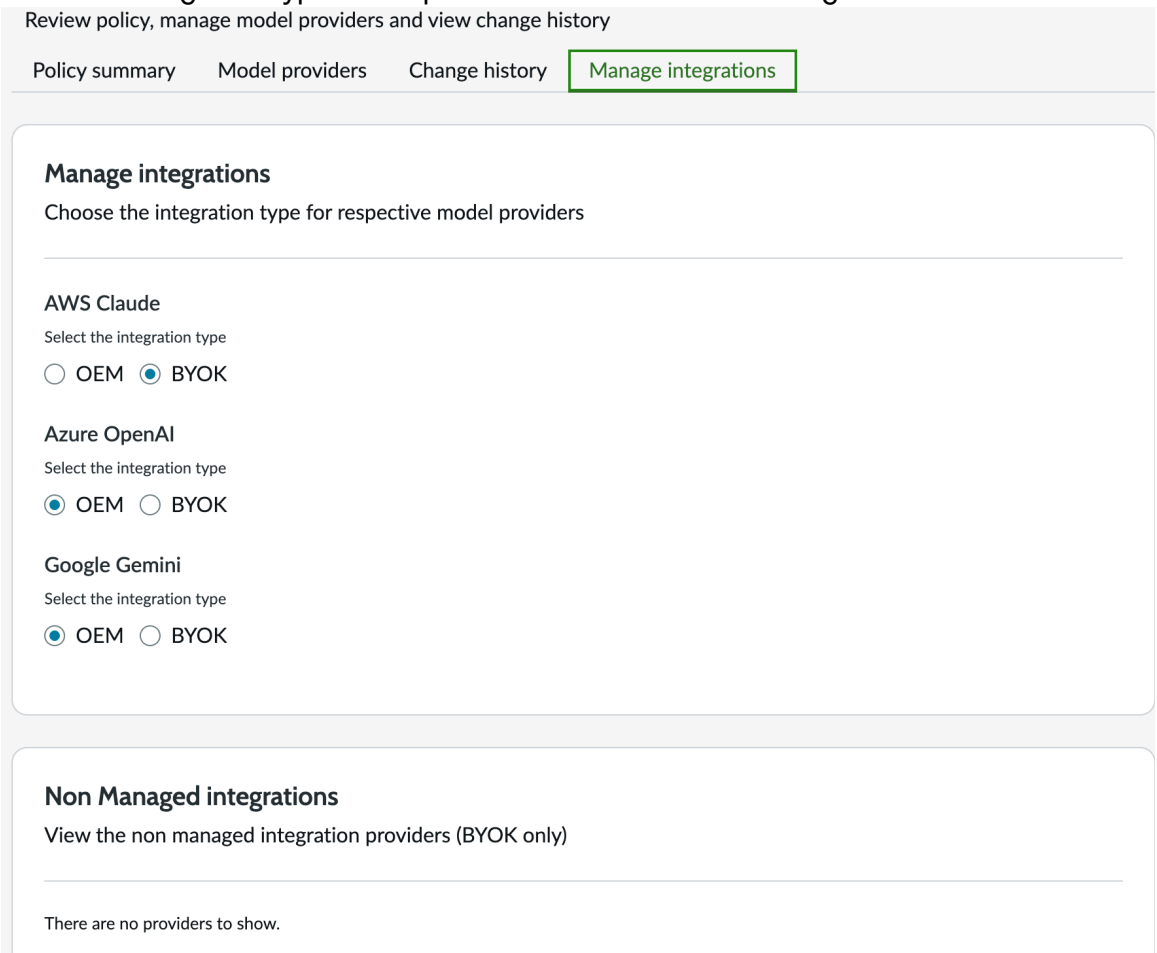
Before you begin

Role required: admin

With **Bring Your Own Key (BYOK)** option, you can apply your own license key to use the Generative AI application capabilities from the given provider. The alternate option is **OEM** where, ServiceNow® uses license from the provider to access the Generative AI application capabilities.

Procedure

1. Navigate to **All** > **Now Assist Admin**.
2. Navigate to **Settings** > **Manage integration**.
3. Change the model provider to use either the ServiceNow® key or **Bring Your Own Key (BYOK)** across all the third party model providers.
   This enables **Bring Your Own Key (BYOK)** selection for third party model providers across all features except AI Agents.
4. Select the integration type for the providers that allow such a configuration.



You can find the providers that allow BYOK type integration only, under **Non Managed integration** section.

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Manage version

Manage the version of the model providers across skills and instance levels. You can change and update versions for the out-of-box and custom skills.

Before you begin

Confirm that network access to the provider endpoint is allowed by your instance's proxy or firewall rules.

Role required: admin

About this task

To learn more about default and target model versions, see Default and target model version.

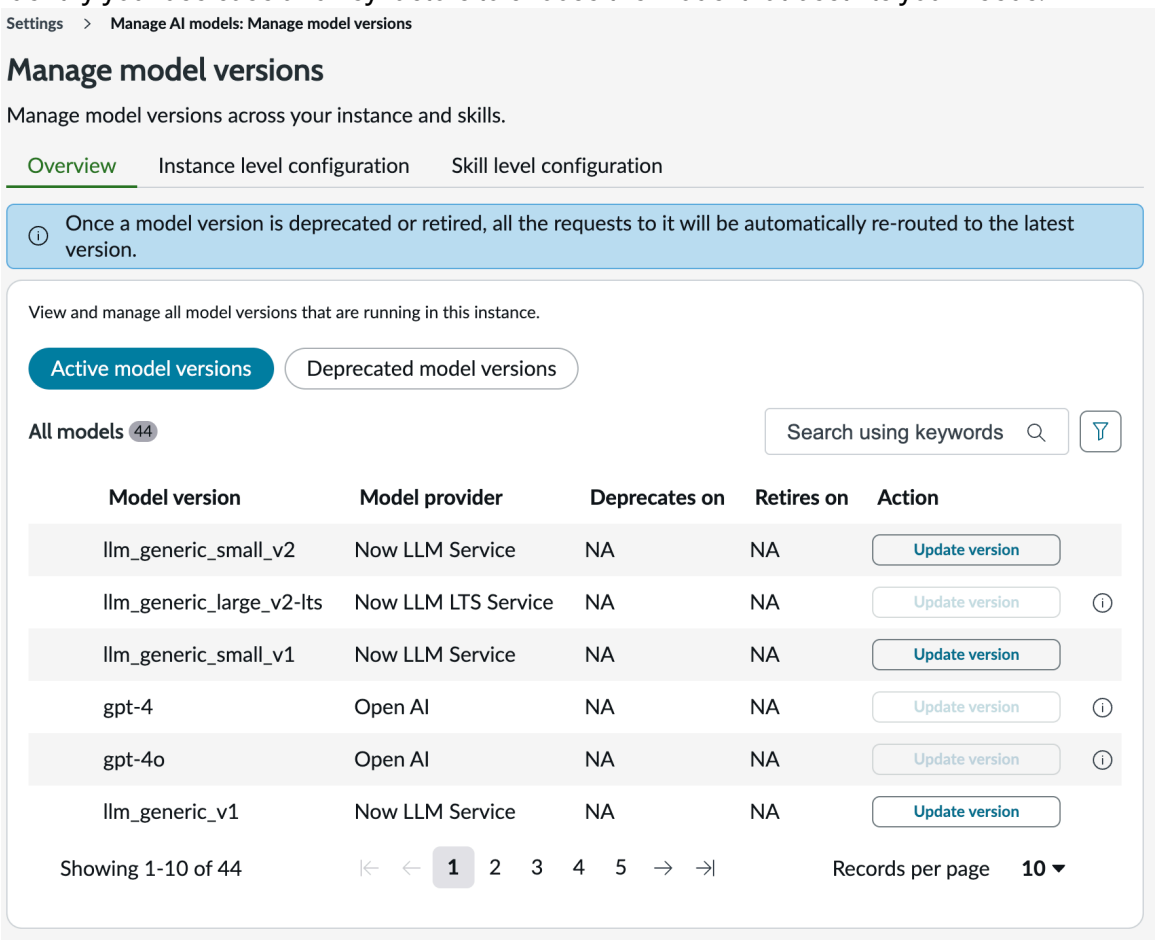
Note: Confirm that the model name you enter exactly matches the name configured in your external provider's console. A mismatch may cause the provider configuration to fail.

Procedure

1. Navigate to **All** > *AI Admin Hub* > **Settings**.
2. Select **Manage AI models** > **Manage model version**.
3. On the **Overview** tab, review the summary of the active, deprecated, retiring model versions, and recommended actions, providing effective version management system to the admins.

   Note: Model versions in the following states aren't available for selection: deprecated, retired, in review, rejected.

4. Identify your use case and key factors to choose the model that best fits your needs.



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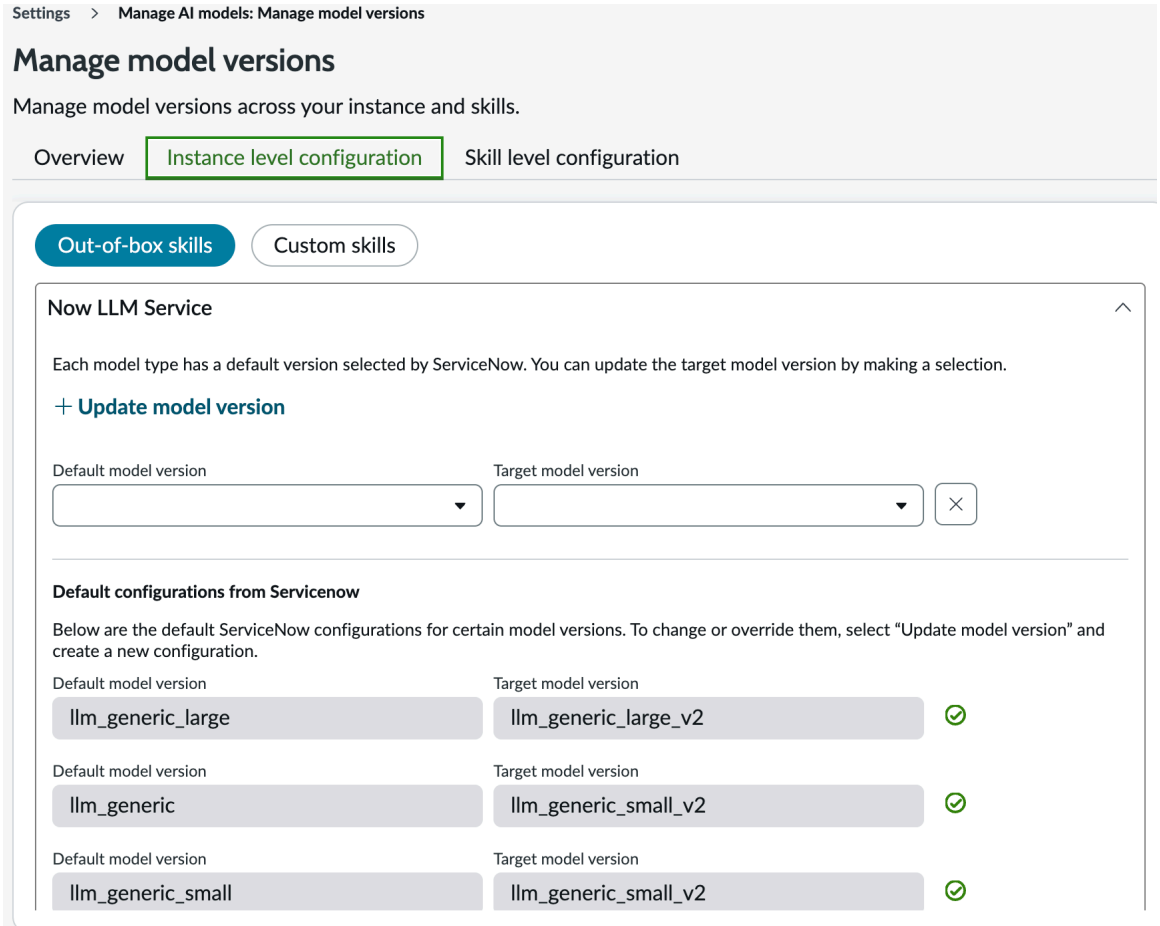
5. View or update the model version instantly under the **Overview** tab.
6. Edit the model provider version for out-of-box or custom skills for the instance. Customize it to update it at the skill or skill group level, under the respective tabs. Customizing the model version for skills replaces the instance-level model version currently assigned to each provider. This action is typically reserved for specific situations.
7. Select **Instance level configuration** to manage the model provider version for the skill across the instance.



   a. Select **Out-of-box skills** to set the target model version against the current version of the applicable model providers, for the default skills.

   b. Select **Custom skills** to set the target model version against the current version of the applicable model providers, for the custom skills.

Model preview program

To reduce the wait time around enabling new models on the platform, the model onboarding is process and life cycle is accelerated with the model preview program. Models that are enabled with the model preview program feature are highlighted with the badge 'Preview'.

This program aims to provide an opportunity for the user to explore and experiment with the new models even before they are generally available.

- The preview models are enabled to provide early access to custom skill users as soon as the new models are available.
- The admin can choose to opt-in or out of the program. A toggle is presented in AI control tower allowing the user to opt in to the preview program. The toggle defaults to off.

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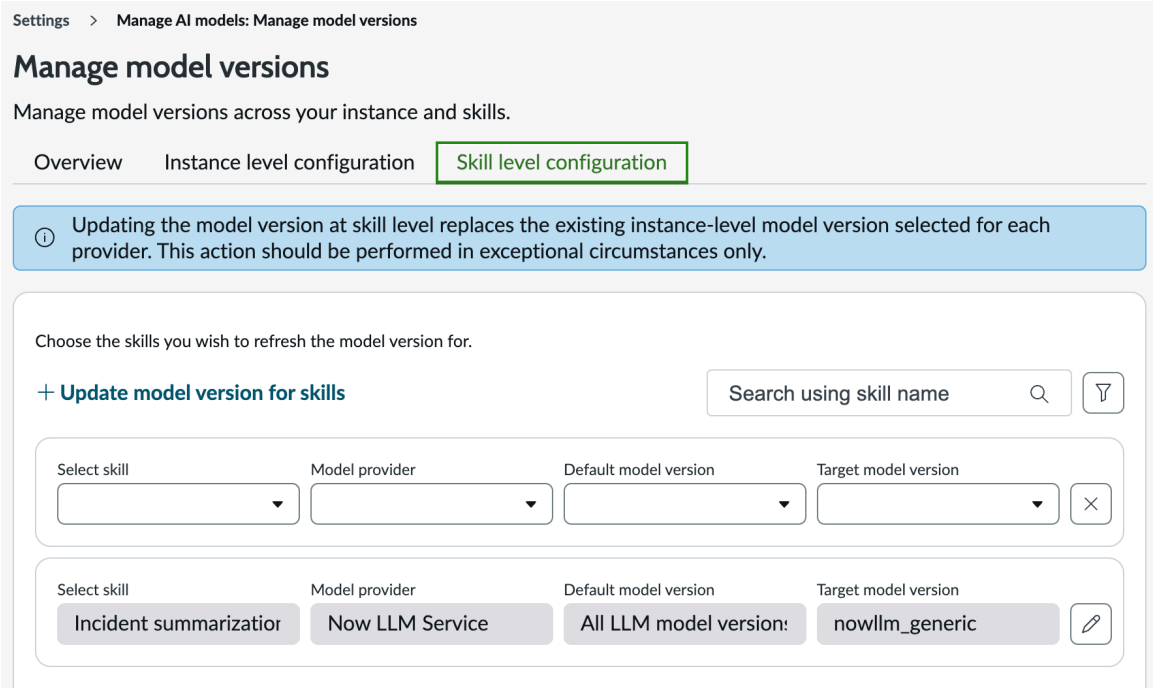
c. Select **Save and activate** to update your changes.

d. Select **Update model version** to override ServiceNow shipped mappings or create a default and target model versions mapping.

8. Select **Skills** to manage the model provider version at the skill level.



a. Search or select the skills you want to refresh the model version for, and the applicable model provider.

b. Select the default and the target model provider version.

c. Select **Save and activate** to update your changes.

d. Select **Update model version for skills** to override ServiceNow shipped mappings or create a default and target model versions mapping, at the skill level.

What to do next

Model preview program

To reduce the wait time around enabling new models on the platform, the model onboarding is process and life cycle is accelerated with the model preview program. Models that are enabled with the model preview program feature are highlighted with the badge 'Preview'.

This program aims to provide an opportunity for the user to explore and experiment with the new models even before they are generally available.

- The preview models are enabled to provide early access to custom skill users as soon as the new models are available.
- The admin can choose to opt-in or out of the program. A toggle is presented in AI control tower allowing the user to opt in to the preview program. The toggle defaults to off.

Review Now Assist account

Review your Now Assist license details on the Account page of the AI Admin Hub console to make sure that you're up to date on what's available to you.

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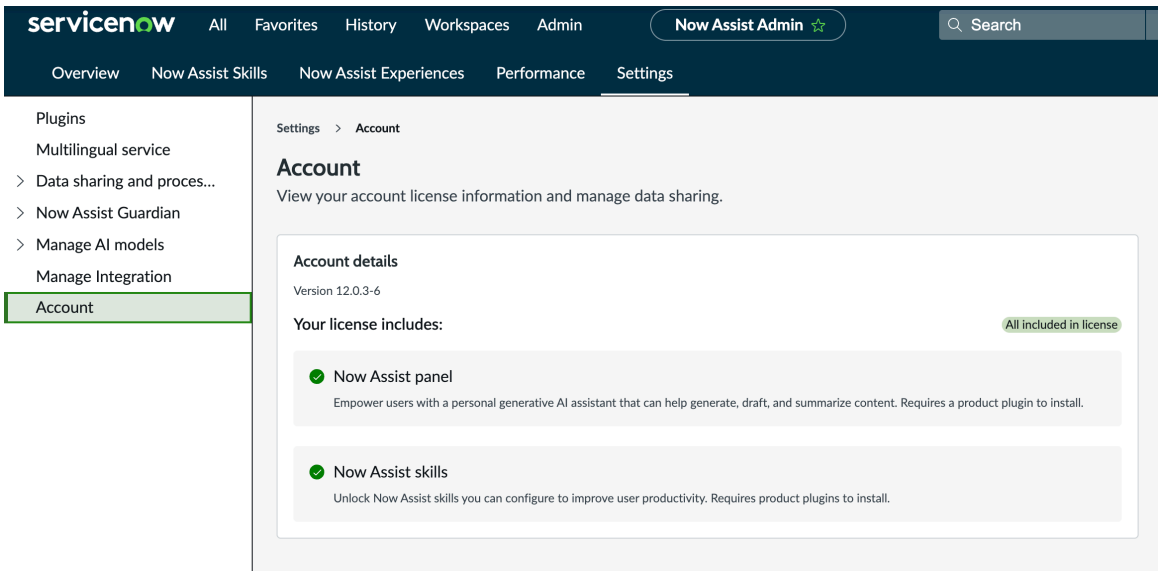
Before you begin
Role required: sn_generative_ai.nsa_admin

About this task
From the Account page, you can review the licensing information to verify which plugins and features you're entitled to and what their status is.

Procedure
1. Navigate to **All** > **Now Assist Admin** > **Settings**.

   If you're already in the AI Admin Hub console, select the **Settings** tab.

2. In the Settings page, select **Account**.



3. In the Account details section of the panel, review what is included with your Now Assist license.

What to do next
Turn on the skills that you want for your Now Assist workflow applications so that you can use generative AI capabilities across the ServiceNow AI Platform. For more information, see Configuring Now Assist Admin features.

Usage alerts

Define threshold-based rules at the skill levels to monitor and manage assist consumption and skill execution counts when limits are reached. The solution aims to prevent resource exhaustion, and provide clear, actionable insights through an alerts feed and a rule management interface.

Set up a rule engine and usage alert system in AI Admin Hub to receive prioritized notifications both in the instance and via email when thresholds are exceeded. This setup allows you to receive early warnings for unexpected or excessive usage. You can also investigate consumption spikes and adjust rules before limits are reached.

Important: The minimum version required is Australia patch 4.

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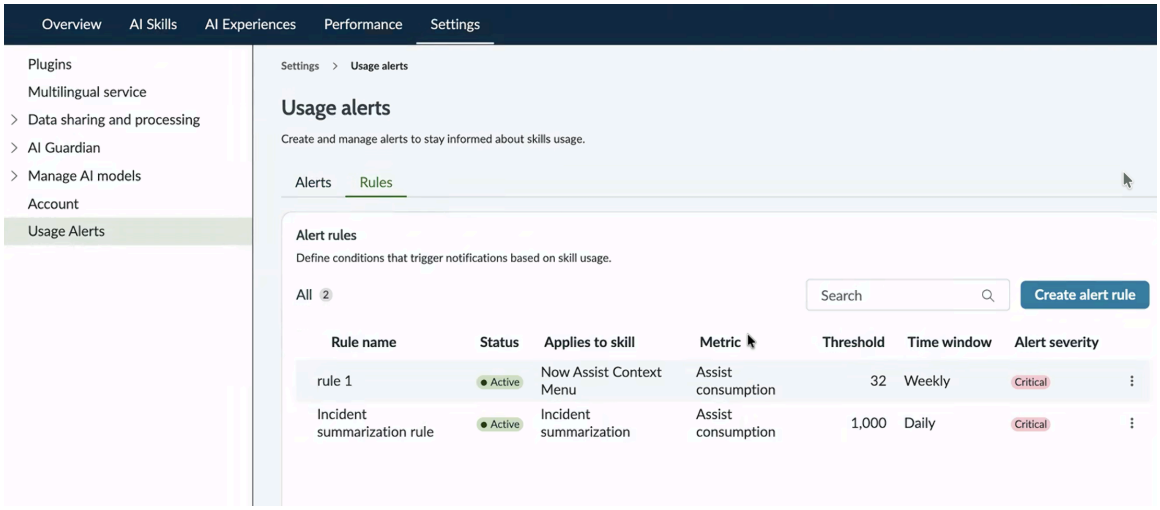

Key features:

- Explore the severity filter tabs (All, Critical, Warning, Info) for the alerts feed to triage, on usage alerts interface
- Directly navigate from an alert to the detail page of the affected skill
- Edit a rule that triggered an alert, directly from the alerts feed
- Dismiss an alert from the active feed without deleting the associated underlying rule
- Create and update alert rules through a modal form

Note:

Domain separation: Rules can only be edited, enabled, turned off, or deleted within the domain where they were created. To modify or remove a rule, first change the domain of the instance to the original domain of the rule. If you don't do this, the options to edit or delete the rule will remain turned off.

Create alert rule

Create alert rules to track the usage of generative AI skills in AI Admin Hub and notify you in the instance and via email, when the set thresholds are reached.

Before you begin

Role required: sn_nowassist_admin

Procedure

1. Navigate to **Admin** > **AI Admin Hub** > **Settings**.
2. Go to **Usage Alerts**.
3. Select **Alerts** to view previously created alerts.

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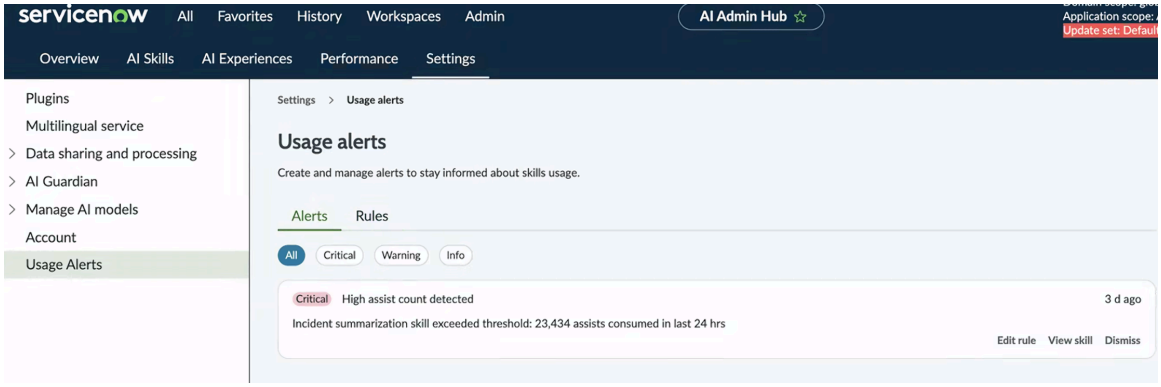

4. Select **Rules** to view and create alert rules.

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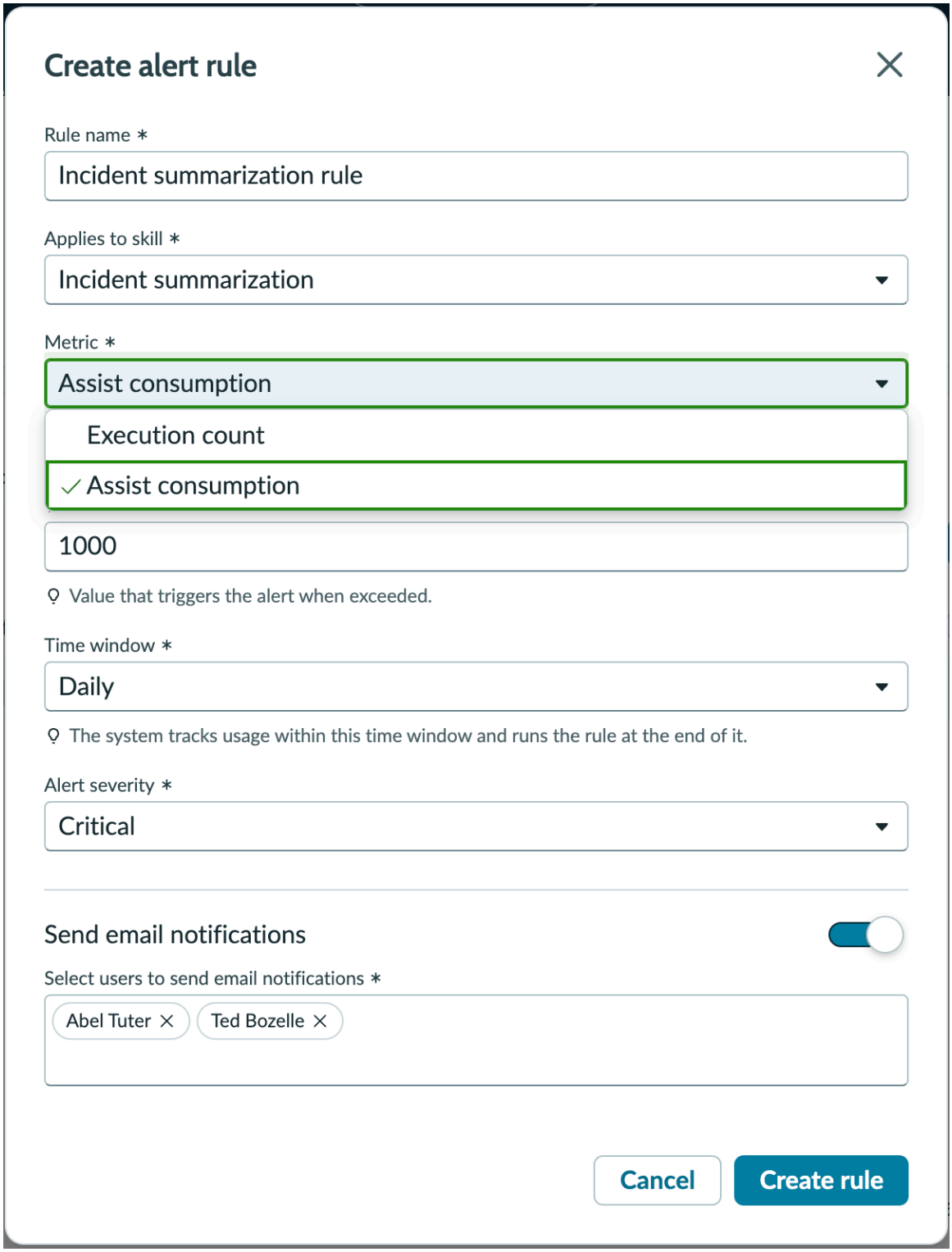

a. Enter a rule name for the alert you're creating.

b. Select the skill you want to apply the alert rule to.

c. Select the usage metric or the usage criteria.

- assist consumption: assists consumed in the given time frame
- execution count: number of times the affected skill is executed

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d. Enter the threshold value for the selected metric.

e. Select an alert timeline window for the rule execution frequency.
For example: If you choose 'daily', the rule will send an alert every day when the threshold is met.

f. Select the severity of the alert notification.
You can choose from All, Critical, Warning or Info type of notification severity. This is displayed with the email notification received.

g. Choose to get notified via email using 'Send email notifications' toggle.
If you opted in, you can select one or more users with an email address.

h. Enter email recipients to be notified with the alert.

i. Select **Create rule** to submit or **Cancel** to revert.

Configuring Now Assist Admin features

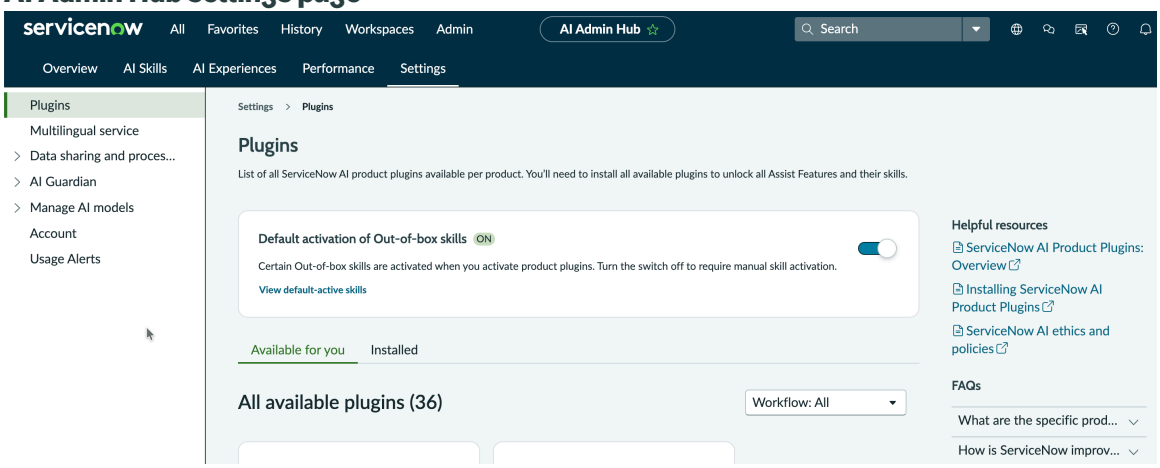
Use the AI Admin Hub console to activate the various Now Assist applications and skills that you're entitled to.

Configuration overview

Install and activate the plugins, turn on the Now Assist panel, and view the account settings. You must install at least one Now Assist application before you can configure any skills.

The following example shows the Settings page with four available plugins to install, including ServiceNow Otto for HRSD and ServiceNow Otto for Creator.

AI Admin Hub settings page



Install plugins for ServiceNow Otto

Install plugins for ServiceNow Otto to enable generative AI on your instance.

Before you begin
Role required: sn_nowassist_admin.nsa_admin

Follow these instructions to get started with AI Admin Hub:

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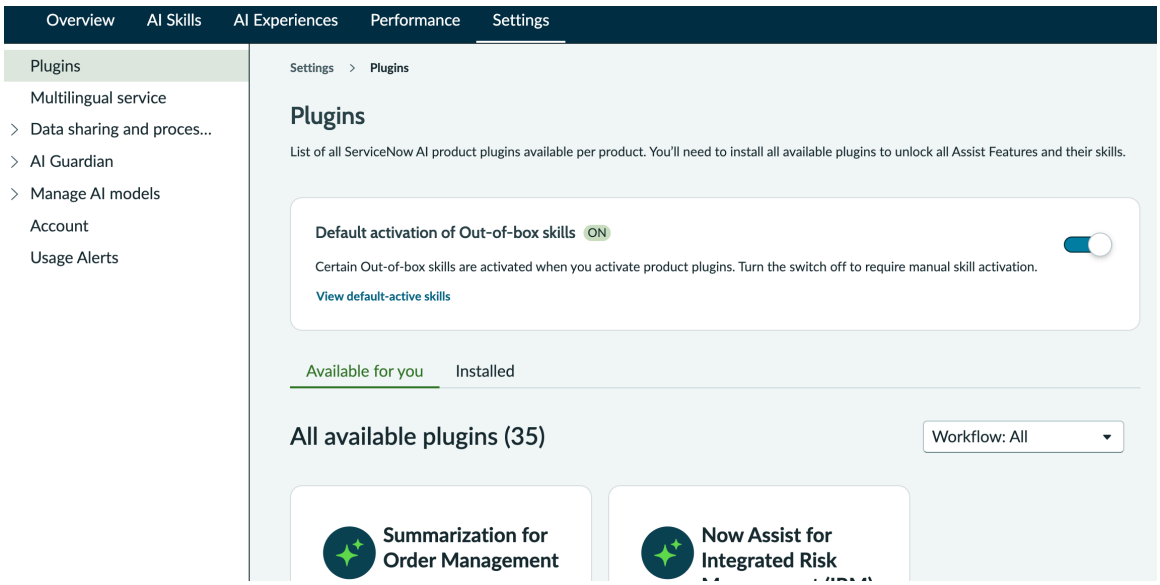
1. To get started with ServiceNow Otto, you must install at least one generative AI application on your instance.
2. License any ServiceNow generative AI software from the ServiceNow Store and install it through the Application Manager to access AI Admin Hub.
3. The AI Admin Hub console guides your implementation, starting with installation.
4. Check out the ServiceNow Otto Journey Checklist for more information.

About this task

Deactivate switch in AI Admin Hub

Note, that certain out-of-box skills are automatically enabled by default with plugin activation. You can turn off the toggle switch before installing the plugin to disable the default 'on' setting. With this feature you can prevent skills configured for default activation from auto-activating when installed or updated.

Explore 'View default-active skills' to find the list of skills currently activated by default. You can review them, activate or deactivate them individually. Hidden skills are displayed and accessible within the Additional Details section.



Generative AI applications often function interdependently. ServiceNow Otto Suites help reduce runtime errors and update issues by bundling compatible versions of generative AI applications together during installation and updates.

For more information about how ServiceNow Otto Suites work, see Now Assist suite versions.

For details about available ServiceNow Otto Suites and their compatibility with ServiceNow AI Platform versions, see Now Assist Suite release notes.

Procedure

1. Navigate to **All** > **AI Admin Hub** > **Settings**.

   If you're already in AI Admin Hub, select the **Settings** tab.

2. On the **Settings** page, select **Plugins**.

   Plugins appear as cards. Review all ServiceNow Otto plugins on the **Available for you** tab. Plugins that you have already installed appear on the **Installed** tab.

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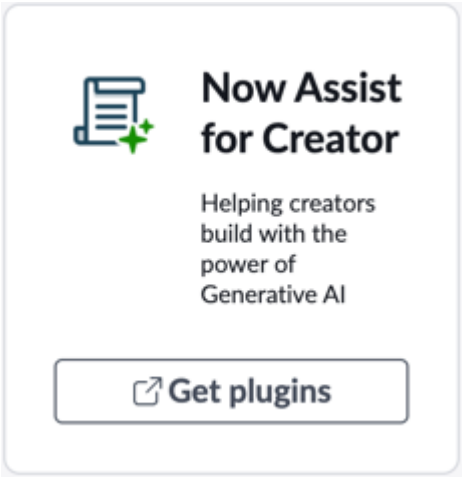

3. **Optional:** If you don't already have a license for the plugin, request a license from the ServiceNow® Store.

   a. Select **Get plugins** on the card for the plugin that you want to install.

   b. In the confirmation window, select **Install Plugin** to open the ServiceNow Store page for the plugin in a new browser tab.

   c. Request the license.
   For additional information, see Getting apps and trials from the ServiceNow Store.

4. Navigate to **Admin** > **Application Manager** > **Available for you**.
5. Find and select the ServiceNow Otto application you want to install.
6. Select **Install**.
7. In the **Select suite version** drop-down menu, select a ServiceNow Otto Suite version.

   The available suite versions are compatible with your instance. If you have other generative AI applications already installed on your instance, they might require update for suite compatibility. For more information about ServiceNow Otto Suite compatibility, see Now Assist suite versions.

   If you haven't installed a ServiceNow Otto Suite version yet, you have the option to choose **none** in the version selector. This option enables you to begin using ServiceNow Otto Suites at a time that works best for your organization.

8. **Optional:** If you have available application customizations, use the **Customized ver.** drop-down menu to select which customization to use.
   Your customizations might not be compatible with a new application version. Update the application in a non-production instance, then make any necessary changes to your customization and validate compatibility before making updates in production instances. For more information about managing customizations, see Manage customizations to applications.
9. **Optional:** Include demo data if it's desired and available.

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a. Select the option to install demo data next to each ServiceNow Otto application you want demo data for.
The option to install demo data isn't available for all applications.

b. Turn on the **Load demo data for selected apps** toggle switch.

10. Select **Continue** to review the installation details.

Trouble?
If any applications display "Installation blocked," it means that application version isn't licensed yet. Either uninstall the application or license the required version.

11. Install the application now or schedule installation for a later time.

Installation option	Procedure
Install now	**a.** Leave the default option to **Install now** selected. **b.** Select **Install**.
Install later	**a.** Select the option to **Install later**. **b.** Enter a start date and start time. **c.** Select **Schedule**.

12. Return to the AI Admin Hub console.
13. In the dialog box, select **Refresh**.
14. Either close the dialog box to review all of your plugins or select **View all (Plugin) Assists and Skills** to review the features of your new plugin.

Result
Your plugin is successfully installed.

If you encounter issues installing or updating applications, see this knowledge article for steps that may address your issue. Otherwise, you can make a Support case.

What to do next
Activate the ServiceNow Otto panel standard chat or Activate an AI skill.

Now Assist suite versions

The Application Manager uses Now Assist suite versions to verify compatibility between multiple Now Assist applications in one instance.

Now Assist Suite overview

Now Assist applications often function interdependently, which can result in runtime errors when one Now Assist application is dependent on a specific version of another one. Now Assist suites help reduce runtime errors by bundling compatible versions of Now Assist applications together. Suite versions are independent from the application versions that they contain.

The Application Manager uses Now Assist suite versions to verify compatibility between every new Now Assist application version you install and all Now Assist application versions already present on your instance. This verification happens when installing new applications for the first time and when updating application versions. The installation details for Now Assist applications

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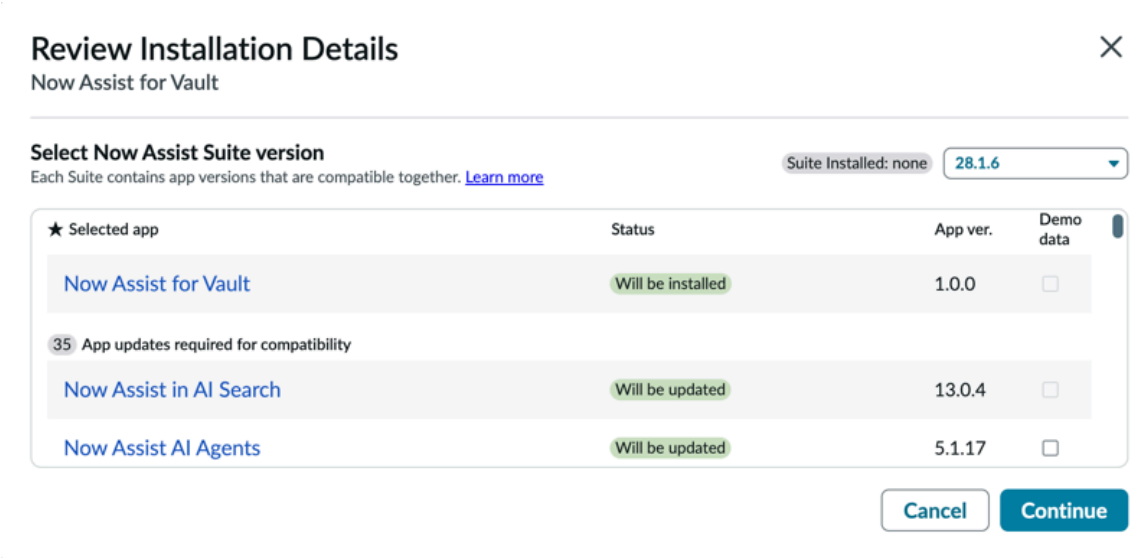
enable you to select a Now Assist suite version and review which applications, if any, need to be updated or procured for suite compatibility.

Now Assist installation details



A Now Assist application version might be included in multiple Now Assist suite versions based on its compatibility with other applications. When you install or update a Now Assist application, you can choose any suite version that the application is compatible with. Based on the Now Assist suite version you choose, multiple applications might be updated.

Example: Install a Now Assist Suite version

Some Now Assist applications are part of multiple Now Assist suites because they're compatible with multiple other Now Assist application versions.

Note: The following examples are for illustrative purposes only. They might not reflect actual Now Assist suite versions. For details about available Now Assist Suite versions and their compatibility with ServiceNow AI Platform versions, see Now Assist Suite release notes.

Assume that you want to install ServiceNow Otto for ITSM for the first time. You have the following Now Assist applications installed on your instance already:

- ServiceNow Otto for ITOM (version 1.5.0)
- ServiceNow Otto for Creator (version 27.1.1)

When you start to install ServiceNow Otto for ITSM, you can select different Now Assist suite versions based on the versions of ServiceNow Otto for ITSM that are compatible with your instance. You can choose from Now Assist suite 4.0.0, 3.0.0, or 2.0.0.

Now Assist suite 4.0.0

The latest available Now Assist suite version is selected by default. The following information is displayed when Now Assist suite version 4.0.0 is selected:

Example Now Assist suite 4.0.0

Now Assist application	Version	Status
ServiceNow Otto for ITSM	9.0.1	Will be installed

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Example Now Assist suite 4.0.0 (continued)

Now Assist application	Version	Status
ServiceNow Otto for ITOM	2.0.3	Will be updated
ServiceNow Otto for Creator	27.2.2	Will be updated

Now Assist suite version 4.0.0 includes the latest versions of ServiceNow Otto for ITSM, ServiceNow Otto for ITOM, and ServiceNow Otto for Creator.

If you want to update to the latest version of ServiceNow Otto for ITSM and ServiceNow Otto for ITOM now, Now Assist suite version 4.0.0 could be a good option.

Note: Test application updates in a non-production environment to verify expected functionality before making updates in production instances.

Now Assist suite 3.0.0

The following information is displayed when you select Now Assist suite version 3.0.0:

Example Now Assist suite 3.0.0

Now Assist application	Version	Status
ServiceNow Otto for ITSM	9.0.1	Will be installed
ServiceNow Otto for ITOM	2.0.2	Will be updated
ServiceNow Otto for Creator	27.2.2	Will be updated

Now Assist suite 3.0.0 includes the latest version of ServiceNow Otto for ITSM (9.0.1). It also includes a newer (but not the latest) version of ServiceNow Otto for ITOM and the latest version of ServiceNow Otto for Creator.

ServiceNow Otto for ITSM version 9.0.1 and ServiceNow Otto for Creator version 27.2.2 are both in Now Assist suites 3.0.0 and 4.0.0. The difference between Now Assist suite versions 3.0.0 and 4.0.0 are the versions of ServiceNow Otto for ITOM that are available. Which version of ServiceNow Otto for ITOM you want can help you decide between updating to Now Assist suite 3.0.0 or 4.0.0.

Now Assist suite 2.0.0

The following information is displayed when you select Now Assist suite version 2.0.0:

Suite 2.0.0

Now Assist application	Version	Status
ServiceNow Otto for ITSM	8.0.0	Will be installed
ServiceNow Otto for ITOM	1.5.0	Up to date
ServiceNow Otto for Creator	27.1.1	Up to date

Now Assist suite 2.0.0 includes versions of ServiceNow Otto for ITOM and ServiceNow Otto for Creator that are already installed on your instance. The latest version of ServiceNow Otto for ITSM isn't part of Now Assist suite 2.0.0, but a previous version (8.0.0) is.

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In this case, you can choose to install the older version of ServiceNow Otto for ITSM, and not update your other Now Assist applications yet.

Note: Not updating the suite version might not be an option. Depending on compatibility of a new Now Assist application, you might have to update your Now Assist suite version to complete installation.

Activate the ServiceNow Otto panel standard chat

Activate the ServiceNow Otto panel standard chat to enable your agents to use AI skills, such as task summarization or navigation, in a side panel on the user interface.

Before you begin

You must install at least one AI application before you can turn on the ServiceNow Otto panel.

Role required: sn_generative_ai.nsa_admin

About this task

You must have the now_assist_panel_user role to have access to the ServiceNow Otto panel once you turn it on.

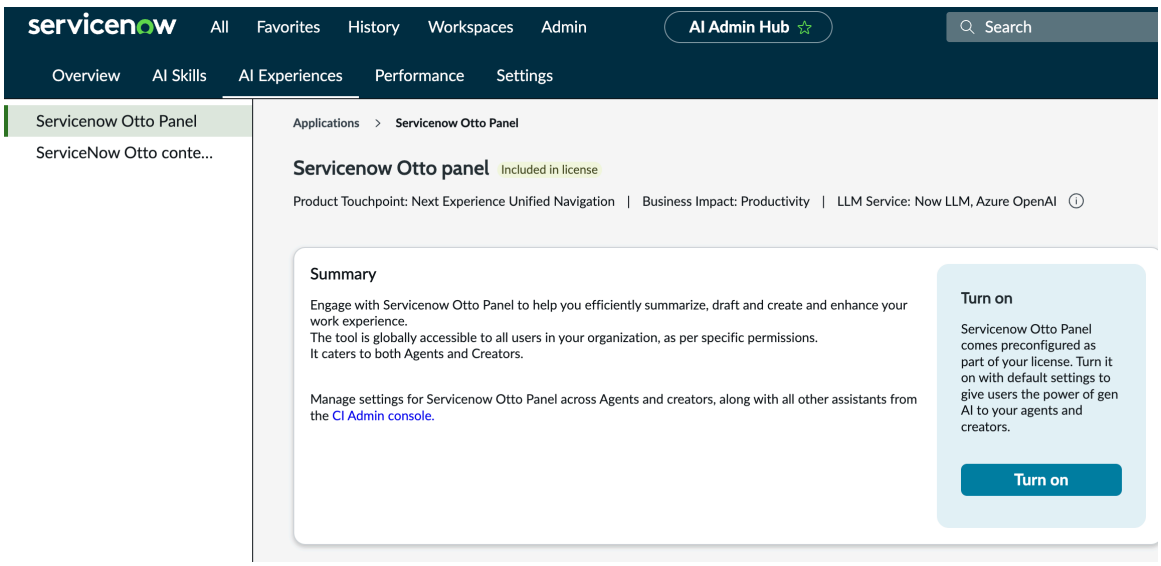
To learn more about the ServiceNow Otto panel, and how it can assist your agents, see ServiceNow Otto panel.

Procedure

1. Navigate to **Admin** > **AI Admin Hub**.

   If you're already in AI Admin Hub, select the **AI Experiences** tab.

2. Select *`ServiceNow Otto`* **panel**.
3. Select **Turn On**.



4. In the Turn on ServiceNow Otto Panel dialog box, select **Turn on**.
5. If you want to use assistants, you must activate them.
   See Activate ServiceNow Otto panel assistants for information on activating assistants.

What to do next

For help with installation, see Solving installation and configuration issues with ServiceNow AI features.

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For examples of the ServiceNow Otto panel in action for ServiceNow Otto applications, see the following topics:

- Summarize a chat conversation by using ServiceNow Otto for Customer Service Management (CSM)
- Summarize a Sidebar discussion by using ServiceNow Otto for IT Service Management (ITSM)
- Summarize an issue using ServiceNow Otto for Integrated Risk Management (IRM)
- Generate a knowledge article from HR Agent Workspace with ServiceNow Otto for HRSD

Activate ServiceNow Otto panel enhanced chat

Activate the ServiceNow Otto panel enhanced chat to enable your agents to use ServiceNow Otto skills, such as task summarization or navigation, in a side panel on the user interface.

Before you begin

You must install at least one ServiceNow Otto application before you can turn on the ServiceNow Otto panel.

Role required: sn_nowassist_admin.nsa_admin

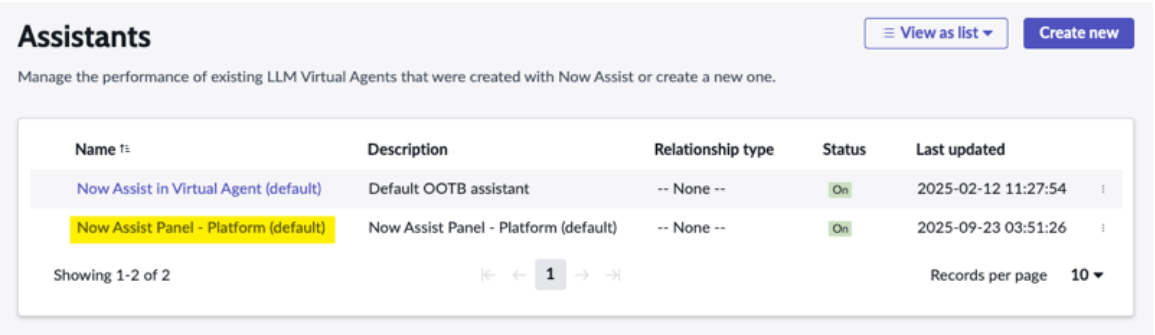
About this task

You must have the now_assist_panel_user role to have access to the ServiceNow Otto panel once you turn it on.

To learn more about the ServiceNow Otto panel, and how it can assist your agents, see ServiceNow Otto panel.

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Assistants**.
2. On the Assistants page, select **ServiceNow Otto Panel - Platform (default)**.



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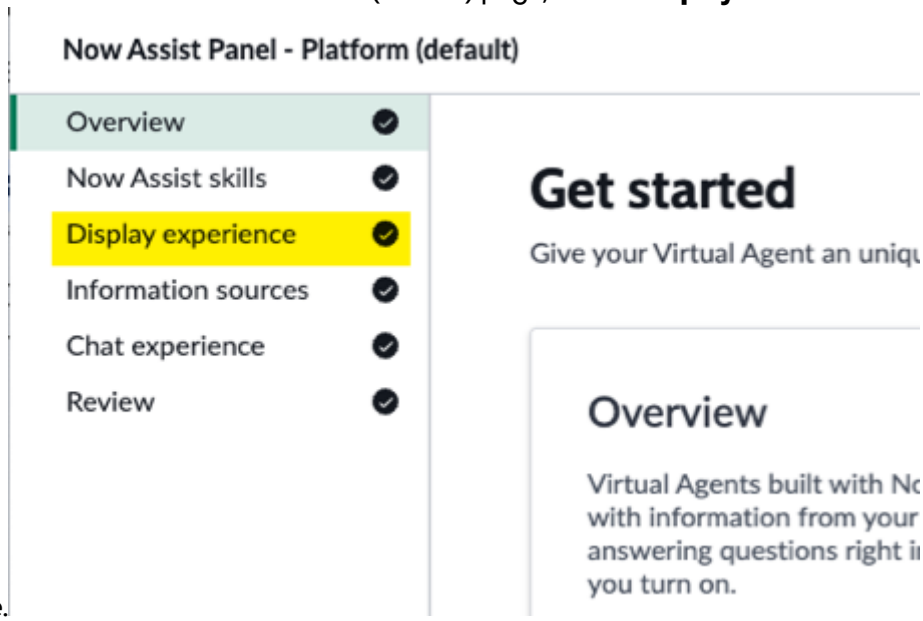
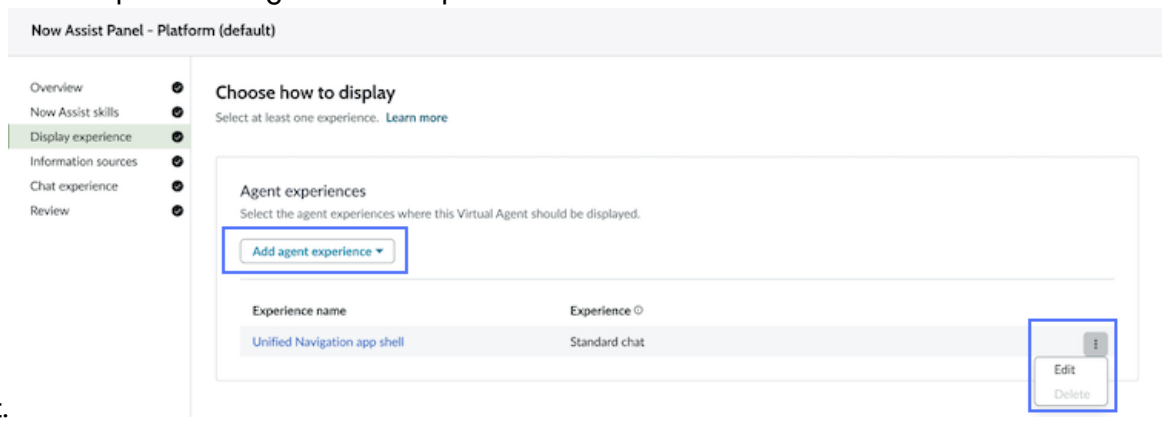
3. On the ServiceNow Otto Panel - Platform (default) page, select **Display experience**.



4. Select the **Add agent experiences** drop-down menu and then select **Unified Navigation app shell**.
5. Select the ellipsis to change the chat experience from standard chat to enhanced chat.



Important: Switching to enhanced chat is permanent and can't be undone after you have selected **Save** and then **Save and continue**.

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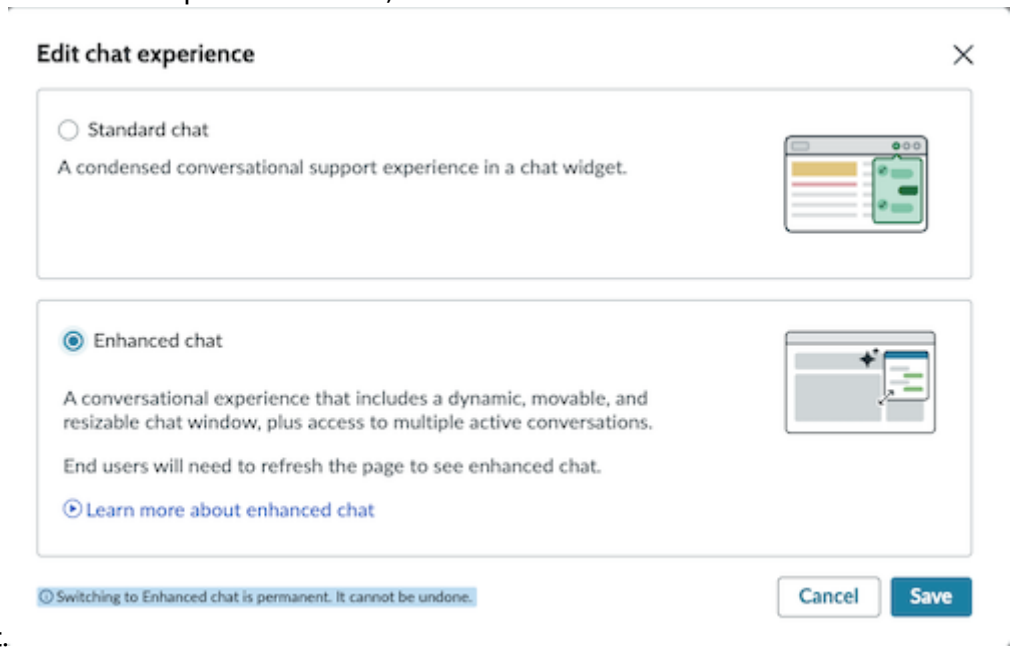
6. On the Edit chat experience screen, select Enhanced



chat.

7. Select **Save**.
8. If you want to use assistants, you must activate them.
   See Activate ServiceNow Otto panel assistants for information on activating assistants.

What to do next

For help with installation, see Solving installation and configuration issues with ServiceNow AI features.

For examples of the ServiceNow Otto panel in action for ServiceNow Otto applications, see the following topics:

- Summarize a chat conversation by using ServiceNow Otto for Customer Service Management (CSM)
- Summarize a Sidebar discussion by using ServiceNow Otto for IT Service Management (ITSM)
- Summarize an issue using ServiceNow Otto for Integrated Risk Management (IRM)
- Generate a knowledge article from HR Agent Workspace with ServiceNow Otto for HRSD

Activate ServiceNow Otto panel assistants

You must activate ServiceNow Otto panel assistants before using them.

Before you begin

Role required: admin

Note: Voice input is automatically activated when you activate the ServiceNow Otto panel.

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Assistants**.
2. On the Assistants screen, select *ServiceNow Otto* **Panel - Platform (default).**
3. In the more actions icon, select **Active**.

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Enable voice input for ServiceNow Otto panel

Give users the option to use their voice when interacting with the ServiceNow Otto panel to make the panel more accessible. Voice input enables you to use the panel without needing to use a keyboard.

Before you begin

Note: Voice input is automatically activated when the ServiceNow Otto panel is activated. As of the Zurich Patch 4 release, voice input is configured in Enable additional chat features and not with this option.

You must have installed at least one ServiceNow Otto application with a skill that uses the ServiceNow Otto panel. See ServiceNow Otto panel for more information about supported skills.

Role required: sn_generative_ai.nsa_admin

About this task

You can give users the option to use voice input in the ServiceNow Otto panel. This feature provides an additional input method to interact with ServiceNow Otto skills in English. Once it's enabled, users can choose to activate this feature in their personal accessibility preferences by toggling on **Enable voice input for the ServiceNow Otto panel**. See Configure Next Experience accessibility preferences for more information about setting personal accessibility preferences.

Voice-to-text input can help users with mobility impairments access generative AI skills without using a keyboard. This feature can also be useful to blind or low-vision users, neurodivergent users, non-native language speakers, and mobile users on the go, such as field service agents.

The voice input feature is not supported in regulated markets.

Procedure

1. Navigate to **All** > **ServiceNow Otto Admin** > **ServiceNow Otto Experiences**.

   If you're already in the AI Admin Hub console, navigate to the ServiceNow Otto Experiences page.

2. Go to the ServiceNow Otto panel tab.
3. In the Settings section, turn on the toggle for **Voice Input**.

Result

Users can choose whether they can use their voice to interact with the ServiceNow Otto panel in their Next Experience accessibility preferences.

Configure disambiguation

Configure the disambiguation property that controls when the assistant asks clarifying questions before responding to a ServiceNow Otto for Virtual Agent or ServiceNow Otto panel user request.

Before you begin

Role required: admin

About this task

Disambiguation or clarification helps the assistant handle situations where the user's request is ambiguous. Rather than returning an overwhelming list of results, the assistant evaluates the request using a confidence scoring system and asks clarifying questions if needed.

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Procedure

1. In the filter navigator field, enter `sys_properties.list`.
2. In the selection fields, select **Name** from the drop-down list and enter `sn_aia.type_2_disamb` in the Search field.
3. Configure the disambiguation property:

   If you have
   - ServiceNow Otto for Virtual Agent or
   - ServiceNow Otto panel standard chat or
   - ServiceNow Otto panel enhanced chat

   then use this configuration:

Property	Possible values	Default value	Definition
sn_aia.type_2_disamb	off/low/high	off	○ off - clarification is disabled. The assistant responds directly to all queries without asking follow-up questions. ○ low - clarification is triggered for highly ambiguous queries. ○ high - clarification is triggered more frequently, covering a broader range of ambiguous queries.

   If you have ServiceNow Otto panel premium chat, then use this configuration:

Property	Possible values	Default value	Definition
sn_aia.type_2_disamb	off/on	off	○ off - clarification is disabled. The assistant responds directly to all queries without asking follow-up questions. ○ on - clarification is triggered for ambiguous queries.

4. To view the disambiguation data, in the filter navigator field, enter `sys_generative_ai_log`.

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Configure response feedback

Configure the response feedback options that appear when users select thumbs up or thumbs down on a ServiceNow Otto for Virtual Agent or ServiceNow Otto panel response.

Before you begin

Role required: admin

Procedure

1. In the filter navigator, enter `sys_now_assist_deployment_config_attributes.list` to display the ServiceNow Otto for Virtual Agent Deployment Config Attributes table.
2. In the search fields, select **Name** from the drop-down list and enter `granular` in the Search field.
3. To change negative granular feedback settings, select **is_negative_granular_feedback_enabled** with ServiceNow Otto for Virtual Agent (default) as the Deployment Configuration.
4. On the next screen, set the value to **true** to enable negative granular feedback or **false** to disable it.
5. Select **Submit**.
6. To change positive granular feedback settings, select **is_positive_granular_feedback_enabled** with ServiceNow Otto for Virtual Agent (default) as the Deployment Configuration.
7. On the next screen, set the value to **true** to enable positive granular feedback or **false** to disable it.
8. Select **Submit**.
9. To configure the feedback options, in the filter navigator, enter `sys_now_assist_message_bundle.list` to display the ServiceNow Otto Message Bundles table.
10. In the search fields, select **for text** from the drop-down list and enter `granular` in the Search field.
11. Do one of the following:
    - To create a new granular feedback selection, select **New**.
    - To change an existing granular feedback option, select the option.
12. Complete the fields: **Description**, **Message**, **Message Key**, **Bundle Id**, **Application**, **Active**, **Order**.
13. Select **Submit**.
14. For more information on accessing the stored feedback data, see Granular Feedback and Analytics in ServiceNow Otto for Virtual Agent (KB3060968).

Configure processing messages

For ServiceNow Otto panel premium chat, configure processing messages to control the status updates that appear in the chat interface while ServiceNow Otto works on a request. You can customize the text of processing messages to better reflect your organization's terminology or the specific actions your AI agents perform.

Before you begin

Role required: admin

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Procedure

1. In the filter navigator field, enter `sys_properties.list`.
2. In the selection fields, select **Name** from the drop-down list and enter `processing_messages` in the Search field.
3. If you have ServiceNow Otto panel premium chat, configure sn_aia.og_ao.enable_processing_messages to enable or disable processing messages.

Using AI Admin Hub

Use AI Admin Hub to explore the various Now Assist plugins, skills, and associated Generative AI application features you are entitled to.

Activate an AI skill

Activate AI skills by configuring settings such as display locations. After the skills have been activated, they can be used across the ServiceNow AI Platform based on the availability and display settings you choose.

Before you begin

Role required: sn_generative_ai.nsa_admin. For information about roles, see AI Admin Hub roles and Roles and responsibilities for AI administration.

About this task

Activate the skills that are most relevant to your use cases and business needs. For a full list of available skills, see Generative AI skills.

From the Brazil Patch 1 release, one-step activation is available for default skills using default settings. With this streamlined activation method, the only decision you must make is where to display your skill. If you need granular or custom configuration, the multi-step guided setup wizard is available from Advanced setup. One-step activation isn't available with Next Experience in this release, or with copied or custom skills.

Procedure

1. Navigate to **All** > **AI Admin Hub** > **Skills**.

   If you're already in AI Admin Hub, select the **AI Skills** tab.

2. On the navigation panel, select a workflow where your skill is classified, such as **Technology** or **Customer**.

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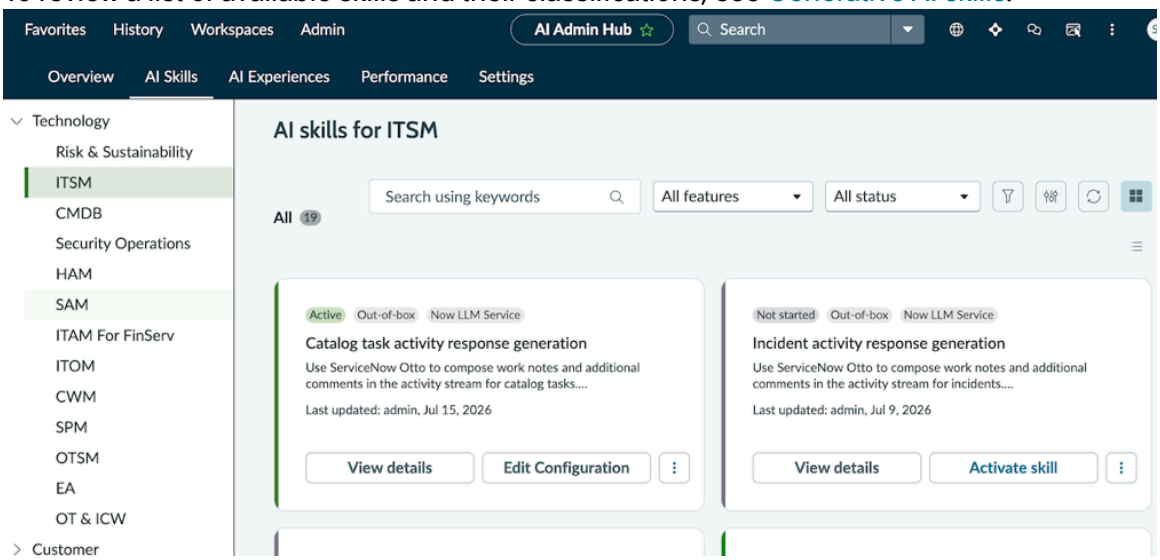
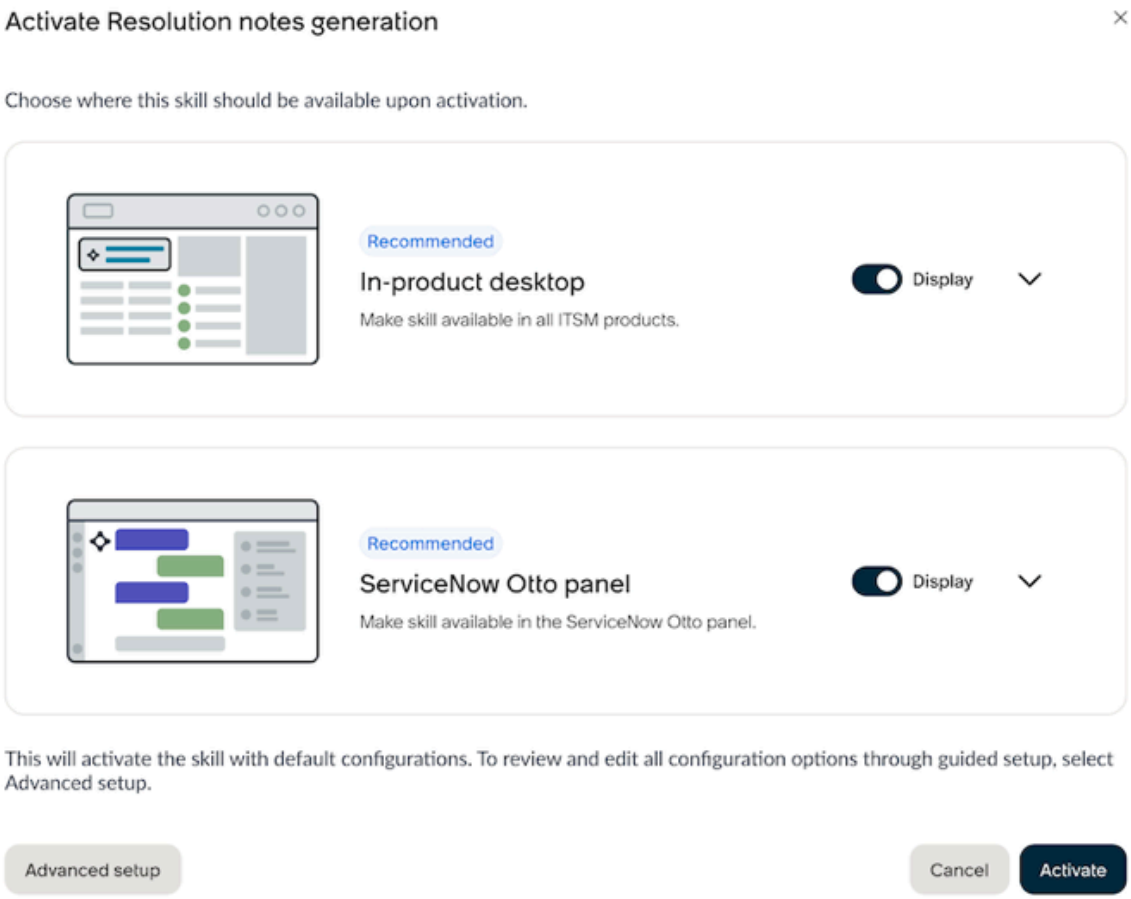
To review a list of available skills and their classifications, see Generative AI skills.



3. On the card for the skill you'd like to activate, select **Activate Skill**.
   You can choose between one-step activation or Advanced setup on the modal window.
4. **Optional:** One-step activation: Choose the locations in your instance where you want the skill to be available using the toggle switches, and then select **Activate**.
   Your skill is activated and displayed in your instance.

(Optional)



5. **Optional:** Advanced setup: Open a multi-step guided wizard by selecting **Advanced setup**.

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Advanced setup steps

Step	Description
Choose inputs	Choose the table and fields that are used as inputs to the skill. Depending on the skill, inputs may be read-only (so they can't be customized).
Define availability	Customize how and when the skill capability will exist and be available. You can choose to make the skill always available. To customize the skill availability, set conditions using the condition builder.
Define access	Define access by selecting ACLs and role restrictions.
Select display	Choose where to display your skill. Slide the toggle to on to enable a display location.
Review and activate	Complete your skill by reviewing the details you have set.

Each skill configuration has steps that are shown in the guided setup. The exact steps vary from skill to skill. A symbol next to each step indicates whether the step is completed, partially completed, or not completed. After configuring a step, select **Save and continue** to proceed to the next step. Return to a previous step by selecting **Back**.

Note: Some configuration options are read only.

6. Choose inputs: Choose the table and fields that are used as inputs to the skill (depending on the skill, inputs may be read-only, so they can't be customized).
7. Define availability: Customize how and when the skill capability will exist and be available.

Options for Define Availability	Description
Skill is always available	The skill is available without conditions.
Customize skill availability	The skill is available only when conditions are met. Select appropriate conditions from the condition builder. Example: `[Actual start] [On] [Today]`.

8. Define access: Configure the access controls by updating ACLs and roles.
   Roles can be added by entering the name of the role in the User roles field. Existing roles can be removed by selecting the X icon in the role bubble. You must have at least one role specified, but you can add as many as you like.
9. Select display: select the instance location where you'd like to display the skill.

   Options vary from skill to skill. Some options are only available for certain skills.

   - **In-product desktop**: When selected, Now Assist skills are displayed on forms and workspaces.
   - **ServiceNow Otto panel**: When selected, the AI skills are available in the ServiceNow Otto panel. If you don't see this option, you must activate the ServiceNow Otto panel. For more information, see Activate the ServiceNow Otto panel standard chat.
   - **Core UI**: When selected, the AI skill will display as a UI action in the Core UI.

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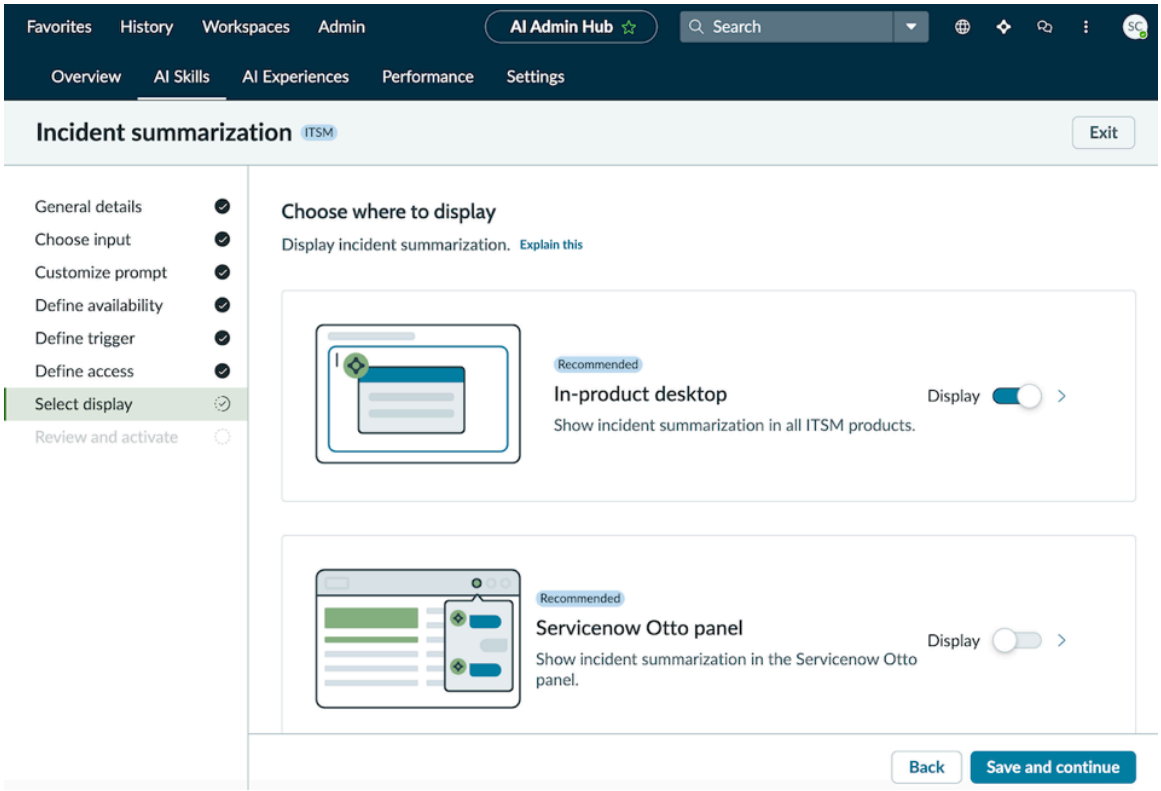

10. Review and activate: Review your the details of your configuration, then select **Activate** to complete.

What to do next

Use the ServiceNow Otto applications and skills that you've activated.

Configure chat summarization and chat reply recommendation skills in the AI Admin Hub console

Define the triggers, inputs, and display location for chat summarization and chat reply recommendation by using the guided setup in the AI Admin Hub console. The activation steps are conceptually same for both the skills.

Before you begin

Role required: sn_generative_ai.nsa_admin

Procedure

1. Navigate to **All** > **Now Assist Admin Console** > **Features**.

   If you're already in the AI Admin Hub console, select the **Now Assist Features** tab.

2. On the navigation panel, select a workflow that has chat recommendation, either **Technology** or **Customer**.

   Each workflow contains feature sets.

3. On the Chat feature card, select **View details**.
4. In the All available Chat skills section of the chat recommendation card, select **Activate Skill**.
5. Go to **Define Trigger**, the first step in the guided setup.

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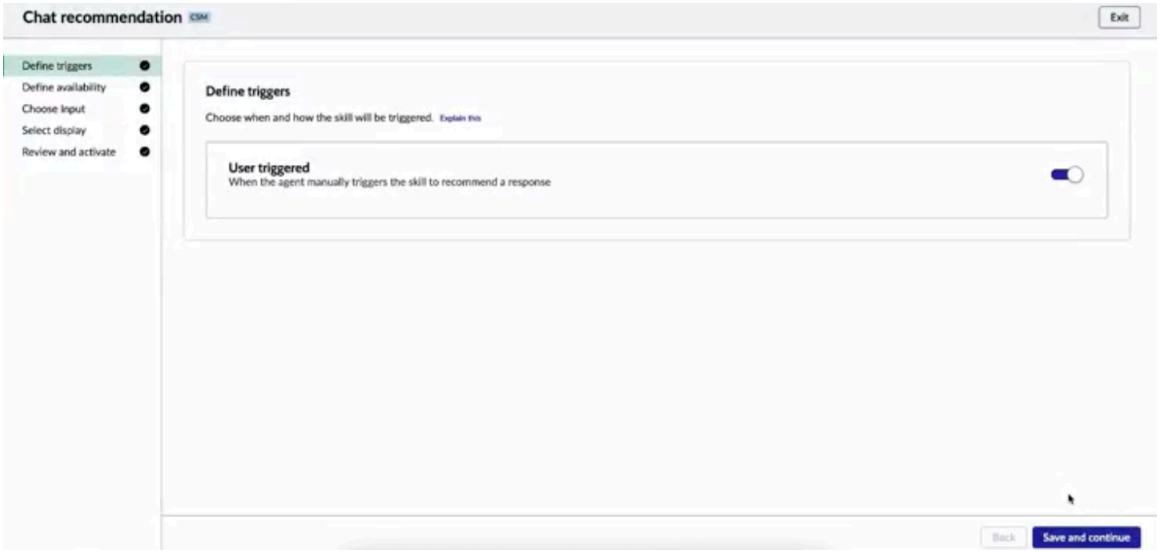
By default, many of the options in the setup are configured for the most common use cases. You might need to select the step in the guided setup navigation to go back and change the configurations in previous steps. You can also use **Back** to navigate through the steps.

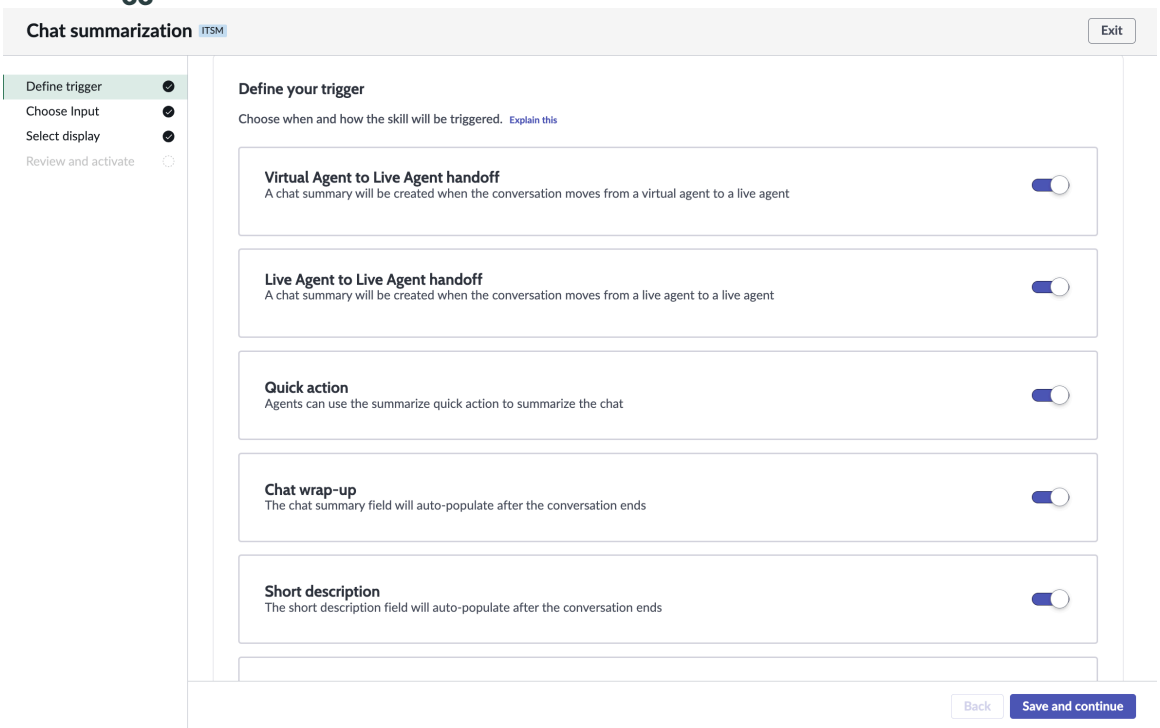
6. Using the toggles, select the actions trigger the chat recommendation skill.

Define triggers for chat recommendation



7. Using the toggles, select the actions trigger the chat summarization skill.

Define triggers for chat summarization



8. Select whether you want the summary to be formatted with bullet points.

By default, the summaries are written with bullet points, but you can turn off this format so that the generated summary uses paragraphs instead.

9. Go to **Define availability**, the next step, by selecting **Save and continue**.

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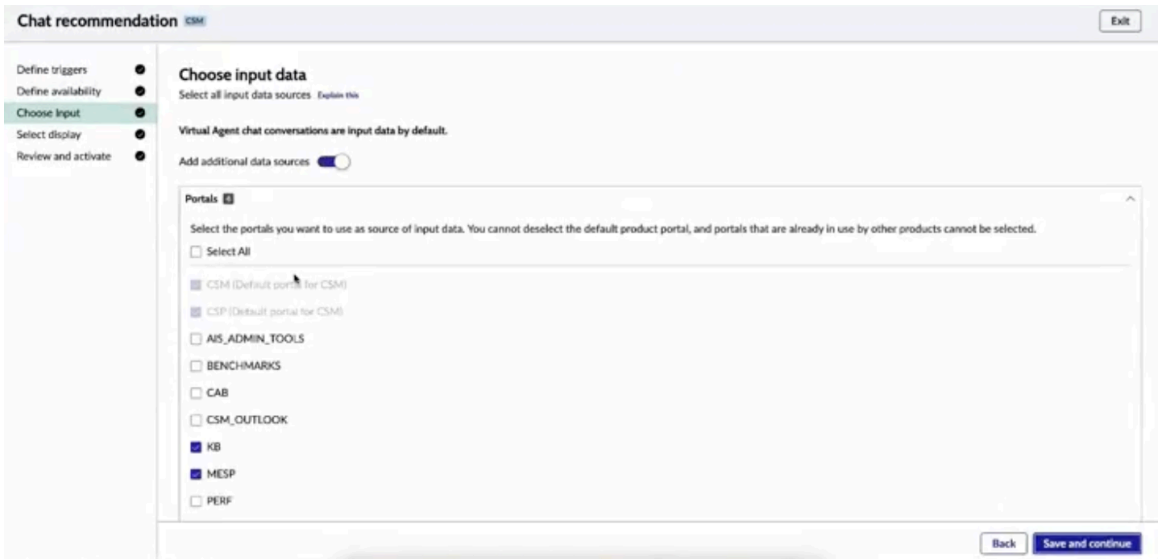
10. Customize when and how the skill capability will exist and be available.

11. Select **Customize skill availability** if you want to define the skill to be available for a certain domain.
12. Go to **Choose Input**, the next step, by selecting **Save and continue**.
13. Select any additional data sources that you want the Large language model (LLM) to take into account when generating a recommendation.
14. Select a portal for the data source to allow chat summarization/recommendation to be generated for the conversation occurring on that portal.

    This is a mandatory step. The admin must specify a portal and enable a specific channel on **Choose Input** page, to enable the skill for chats sent in the selected portal/channel. Else the agent will receive an error message, "Chat summaries won't appear until your IT administrator completes all the required steps involved in the setup".



15. Select **Save and continue**.
16. Go to **Select display**, the last step, and select where you would like to display the skill.

    You can select both in-product, Now Assist panel, or both.

    Note: Chat recommendation is not available in the Now Assist panel.

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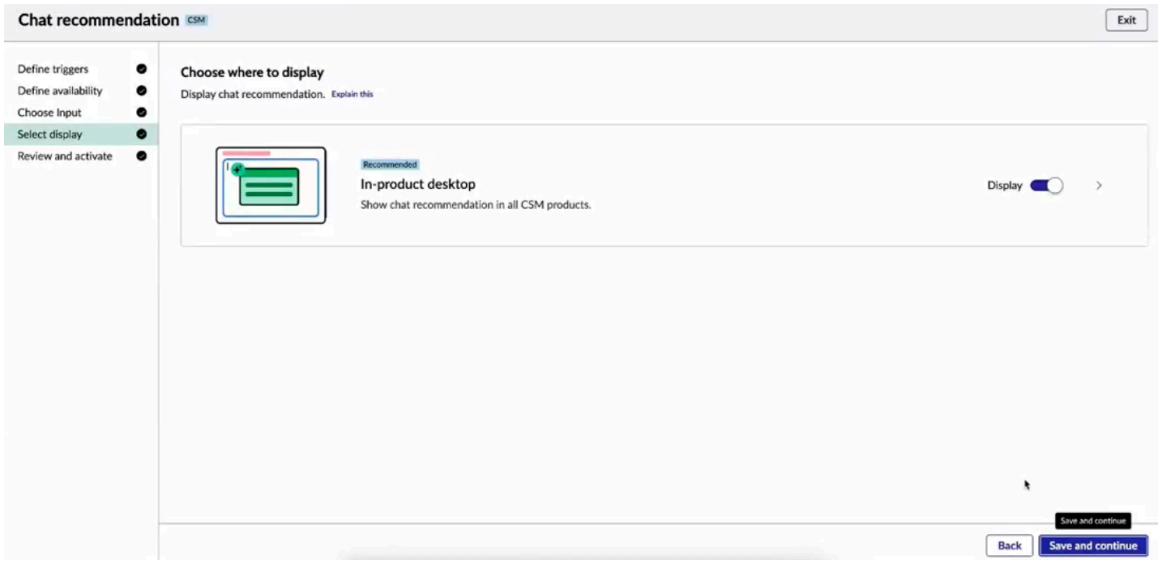
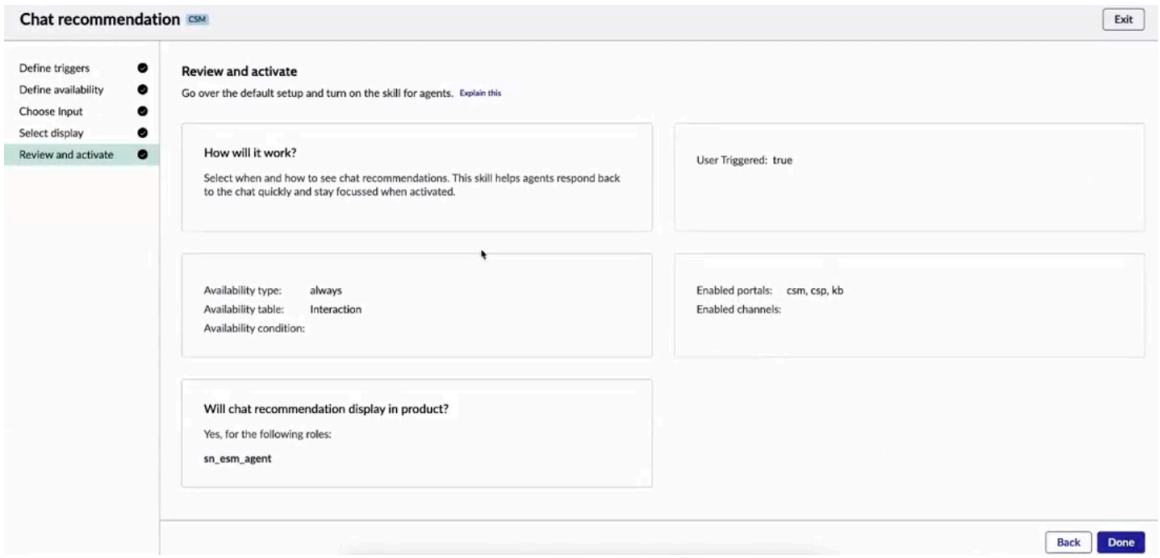
- **In-product desktop**: When selected, Now Assist skills are displayed on forms and workspaces.
- **Now Assist panel**: When selected, Now Assist skills are available in the Now Assist panel. Select the down arrow to identify the roles that can use the skill. Select the arrow next to toggle, to select roles who can access the skill. You can add roles by entering the name of the role in the **User roles** field. You can remove existing roles by selecting the X icon in the role bubble. You must have at least one role specified, but you can add as many roles as you like.

Note: You can use different roles for chat recommendation in different workflows. You can see which workflow you're configuring by checking the label next to the skill name at the top of the guided setup, such as "ITSM" or "HRSD."



17. Review your choices and complete the configuration by selecting **Activate**.



Result

Chat recommendation or reply recommendation for the workflow is active on the instance.

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What to do next
Analyze your skill performance and usage on the AI Admin Hub console to help determine the success of the skill. Learn more about tracking your Now Assist usage at Monitoring Now Assist usage in Subscription Management.

Configure email reply recommendation in the AI Admin Hub console

Configure the email recommendation Now Assist skill to enable agents to draft email replies based on contextual information.

Before you begin
Role required: sn_generative_ai.nsa_admin

About this task
The email recommendation skill is available in multiple workflows. The exact steps and the order in which they appear for the guided setup for the skill vary depending on the workflow.

Procedure
1. Navigate to **All** > **Now Assist Admin** > **Now Assist Features**.

   If you're already in the AI Admin Hub console, select the **Now Assist Features** tab.

2. On the navigation panel, select a workflow, such as **Technology**.

   Each workflow contains feature sets. The available workflows for email recommendation are Customer (CSM) and Employee (HRSD).

3. On the feature card that is associated with the skill you'd like to activate, select **View details**.
4. In the All available skills section, select **Activate Skill**.

   If you have already activated the skill and want to edit the configuration, in the Active skills section, select the more options menu item (⋮). Then select **Edit**.

5. In the **Write with Now Assist** step, choose whether you want the Now Assist context menu to be active and then select the actions you want to be available.

   After each step, select **Save and continue**. For more information about these choices, see Skill inputs and triggers for Now Assist for HRSD.

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6. Choose when you want the skill to be available.

   You can select **Skill is always available** if you don't want to place any restrictions on when the skill is available for use. If you want to add conditions, select **Customize skill availability**. Selecting this option opens up a condition builder for you to select fields and values that determine whether someone can use the skill.

7. Choose the inputs or email parameters, including input data and whether you want to display template suggestions.

   Some options may be read-only in certain workflows.

   Additional context can improve the quality of the email recommendation. In the **Additional input fields** field, you can choose any fields not already selected in the **Default input fields**. You can include Knowledge articles by selecting the check box. You can choose a field from related records, such as resolution notes, in the **Related record field**. If there's no value for the related record field or you don't select one, you can also opt to include activity from related records.

   If you select **Show template recommendations**, then agents see a list of template suggestions generated by Now Assist when they go to select a template.

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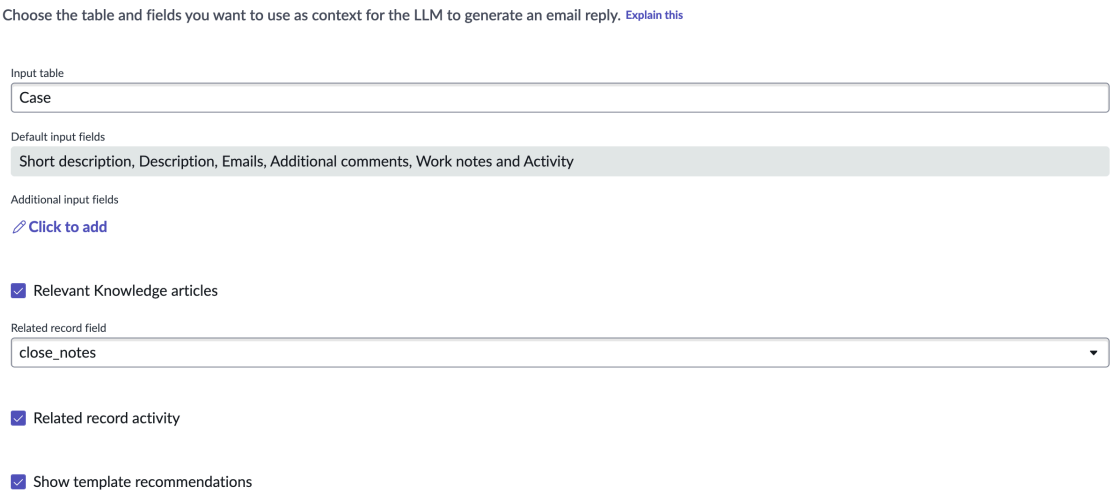

8. In the next step of the skill configuration, select where you'd like to display the skill.

   You can select both in-product, Now Assist panel, or both.

   - **In-product**: When selected, Now Assist skills are displayed on forms and workspaces.

     For the skills that appear in-product, select the down arrow to identify the roles that can use the skill.

   - **Now Assist panel**: When selected, Now Assist skills are available in the Now Assist panel. If you don't see this option, you must activate the Now Assist panel. For more information, see Activate the ServiceNow Otto panel standard chat.

     For the skills that appear in the Now Assist panel, select the down arrow to identify the roles that can use the skill.

   Roles can be added by entering the name of the role in the User roles field. Existing roles can be removed by selecting the X icon in the role bubble. You must have at least one role specified, but you can add as many as you like.
9. Review your choices and select **Activate** to complete the configuration.

Result
Agents can generate email drafts with generative AI.

Edit an AI skill

Edit the configuration of an AI skill to choose the inputs or triggers and the display location of the skill output.

Before you begin
Role required: sn_generative_ai.nsa_admin

Procedure
1. Navigate to **All** > **AI Admin Hub** > **AI Skills**.
   If you're already in the AI Admin Hub console, select the **AI Skills** tab.
2. Select a workflow on the navigation panel, such as **Technology**.

   Each workflow contains skill sets.
3. On the feature card associated with the skill you'd like to edit, select **View details**.

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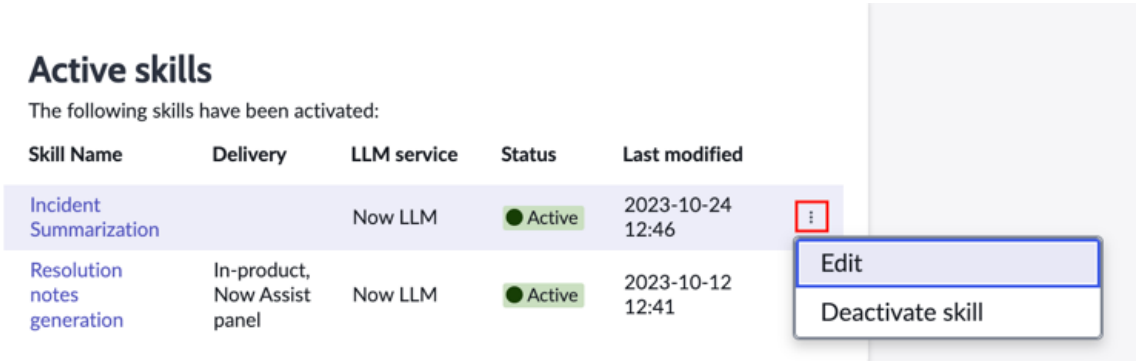
4. Under **Active skills**, select the more options icon ⋮ next to the skill that you want to configure, then select **Edit**.

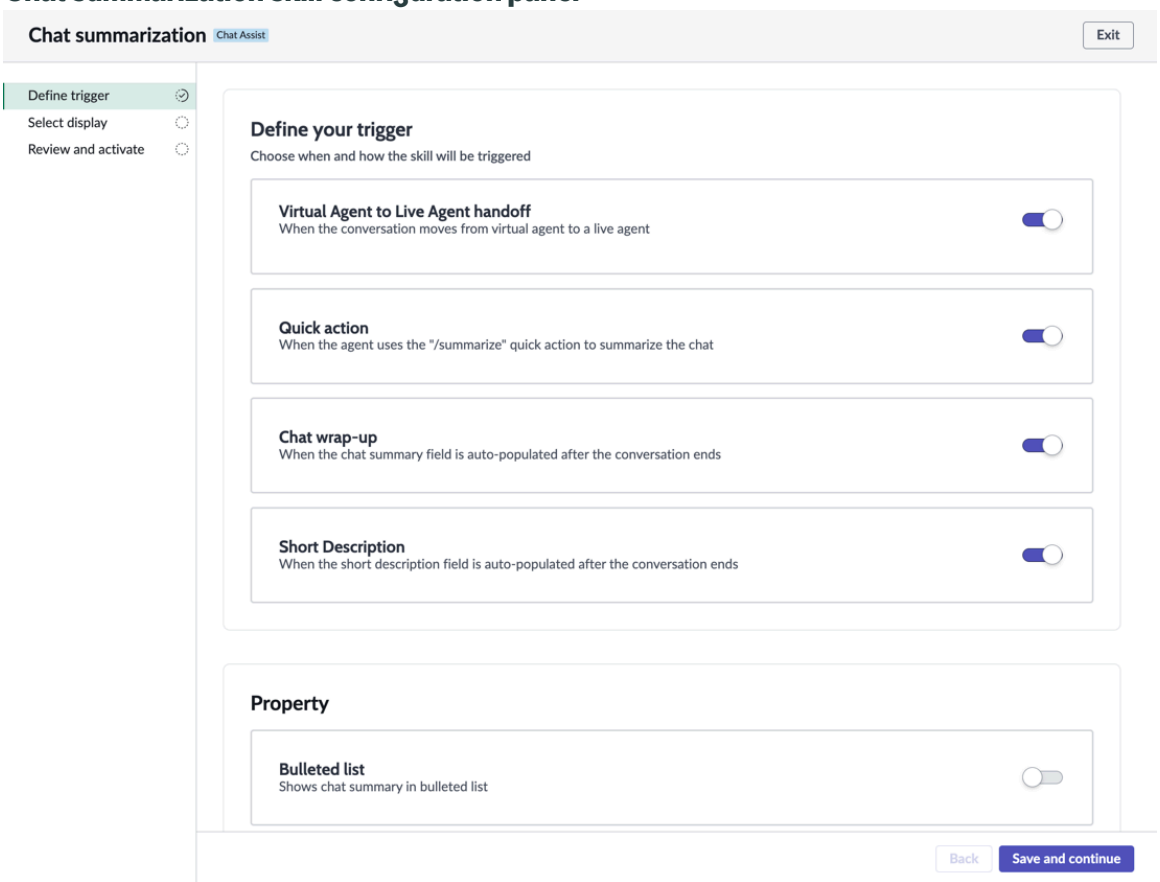


The first step in the guided setup for the skill is displayed.

Each skill configuration has a number of steps shown in the guided setup. The exact steps vary from skill to skill. A symbol next to each step indicates whether the step is completed, partially completed, or not completed.

Note: Some configuration options are read-only.

Chat summarization skill configuration panel



5. Proceed to the next step when you've finished configuring the current step by selecting **Save and continue**.

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You can return to a previous step by selecting **Back**.

6. Apply the new settings after reviewing your changes by selecting **Done**.

Result
The skill is activated with your preferred settings. You can now install other plugins or activate other skills.

Make a copy of an AI skill

Create a copy of an AI skill using the **Make a copy** function in AI Admin Hub. With a copy of the skill, you can experiment with skill settings and tailor the skill to fit your business needs.

Before you begin
Role required: sn_generative_ai.nsa_admin

About this task
The skills that come with the generative AI applications have default configurations that are optimized to serve the most common use cases. To change the skill settings you can edit a skill in AI Admin Hub, or you can create a copy of the skill. Creating a copy leaves the original skill configuration intact in case you want to use it later or want to create another copy from the original. You can activate and configure copies of skills using the same guided setup as the default skills.

Note:

- The **Make a copy** function is not available for all AI skills.
- In a default scenario, only one version of a skill can be active at a time. When you create and activate a copy of a skill, any previously activated version of the skill is deactivated.

Procedure

1. Navigate to **All** > **AI Admin Hub** > **Skills**.

   If you're already in AI Admin Hub, select the **AI Skills** tab.

2. In the navigation pane, select the workflow of the skill that you want to copy, such as Technology or Customer.
3. On the card that contains the default skill you want to copy, select the more options icon then select **Make a copy**.
4. As an alternative to the previous step, select **View details**, then on the details tab select **Make a copy** from the More actions drop-down list at **Edit configuration**.
5. In the modal window, select **Make a copy** to confirm.

Result
A copy of the skill is generated and you're taken to the guided setup.

What to do next
Continue the steps in the guided setup to activate the skill. For more information, see Activate a Now Assist skill.

If you're making a copy of the case or incident summarization skill and would like to learn more about your options, see the documentation for configuring record summarization.

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Configure case or incident summarization in the AI Admin Hub console

Configure case or incident summarization by using the guided setup in the AI Admin Hub console. You can choose the input tables and fields, and also customize the prompt output for copies of the record summarization skills.

https://player.vimeo.com/video/996395898?h=e609c55303&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

You can only customize the input data and prompt output for a copy of a record summarization skill. To learn more about making a skill copy, see Make a copy of an AI skill. After you create a skill copy, you can learn the steps to complete the skill setup here.

Role required: sn_generative_ai.nsa_admin

About this task

Default settings for record summarization skills are optimized for general use cases. Review your goals for incorporating generative AI on your instance to determine whether you want to make changes and what those changes are. After you have made a plan, you can create a copy of a skill and modify the input sources and prompt output.

Procedure

1. In the **Name of the skill** field, enter the skill name.

   The default name adds (copy) to the end of the original skill name. For example, Case summarization (copy). Changing the name to be more specific makes it easier to identify later if you want to make changes.

2. **Optional:** Add a description for the skill.
3. Go to the next step by selecting **Save and continue**.
4. Choose the input fields and data sources for each input template.

   The default options are selected for you. Some options are read only. After you make any changes to the input template, you can save your work by selecting **Save template**.

   a. Select an input template.

      The three default input templates are for new records, records that are in progress, and closed records.

   b. Add the base input table fields by selecting **New base input field**, choosing a field, and entering a field description.

      Each base input table field requires a description. The description informs the large language model (LLM) what the field is for and how the information should be interpreted. The more information you provide in the description, the more context the model can work with.

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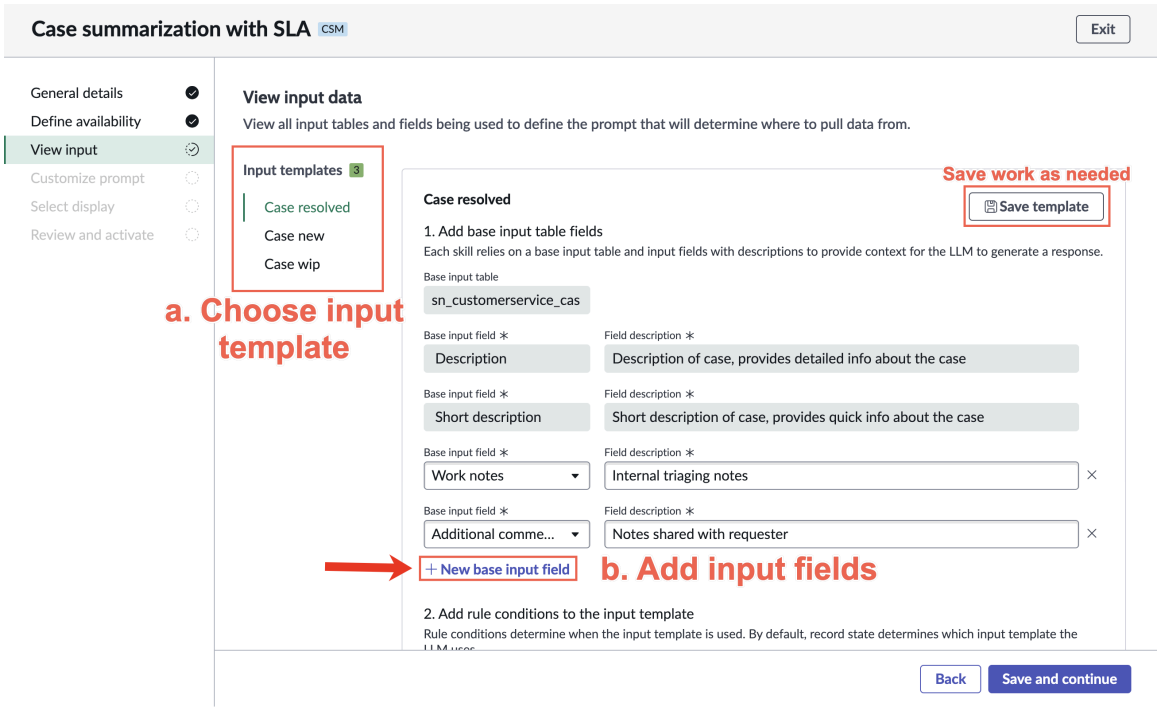
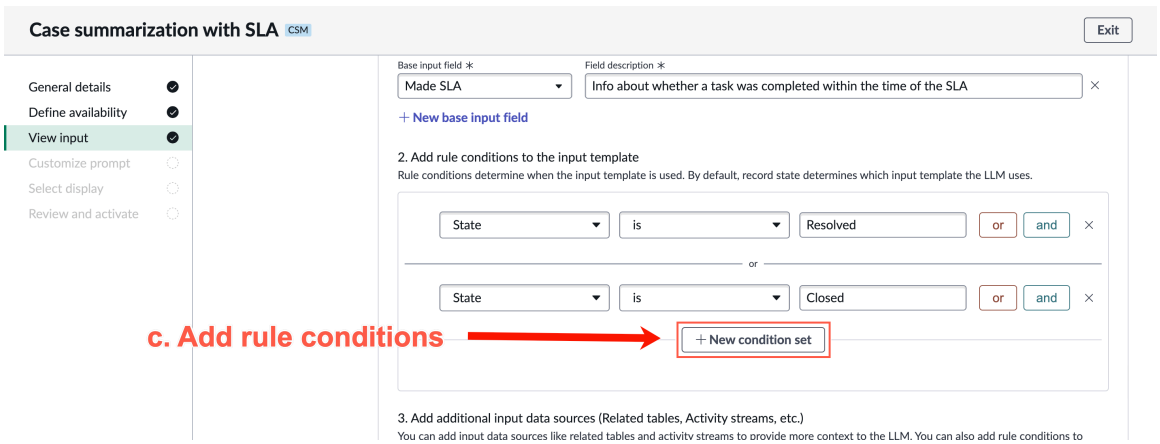


c. Add or modify the rule conditions for the base table.

The rule conditions determine when the input template is used. Record summarization is only available to the records that match the rule conditions of an input template.



d. Optional: Add additional input data sources by selecting **New data source** and choosing either **Related Table** or **Activity: Email**.

(Optional) Each related table is configured with input fields and descriptions. More specific descriptions for related tables help provide more context to the LLM. Activity fields, such as Email, don't have input fields that you can configure.

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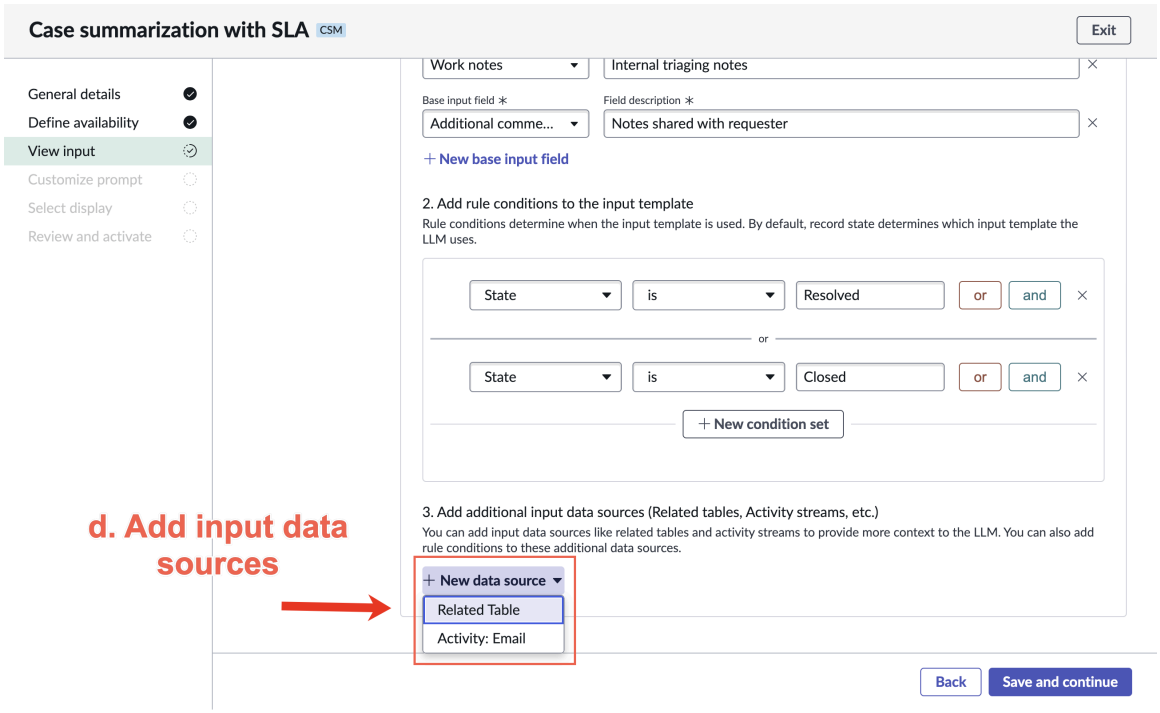
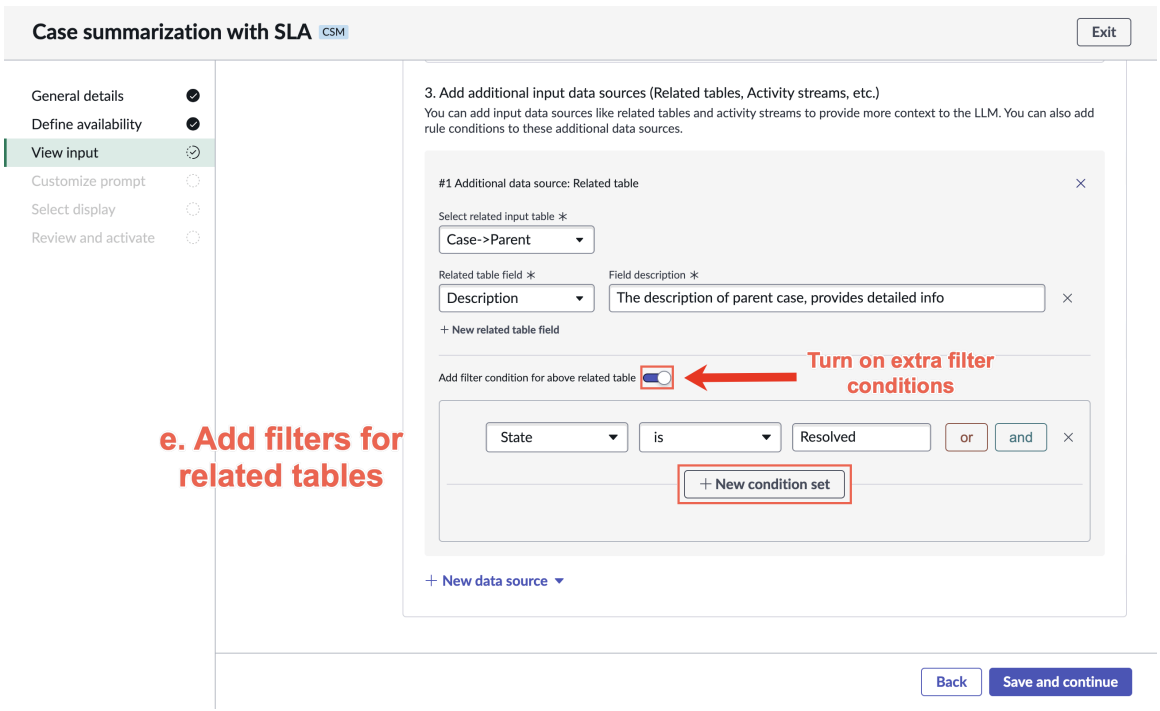


e. Optional: Add a filter condition to the related table.

(Optional) You can add more rule conditions to the related table. These rule conditions determine whether the data from the additional data source is incorporated into the summary. You can generate summaries on cases that don't match additional data source rule conditions as long as the base table rule conditions are met.



5. Select **Save and continue**.
6. Choose prompt output sections to appear in summaries by moving a prompt section in the Available prompt sections list to the Final prompt sections list.

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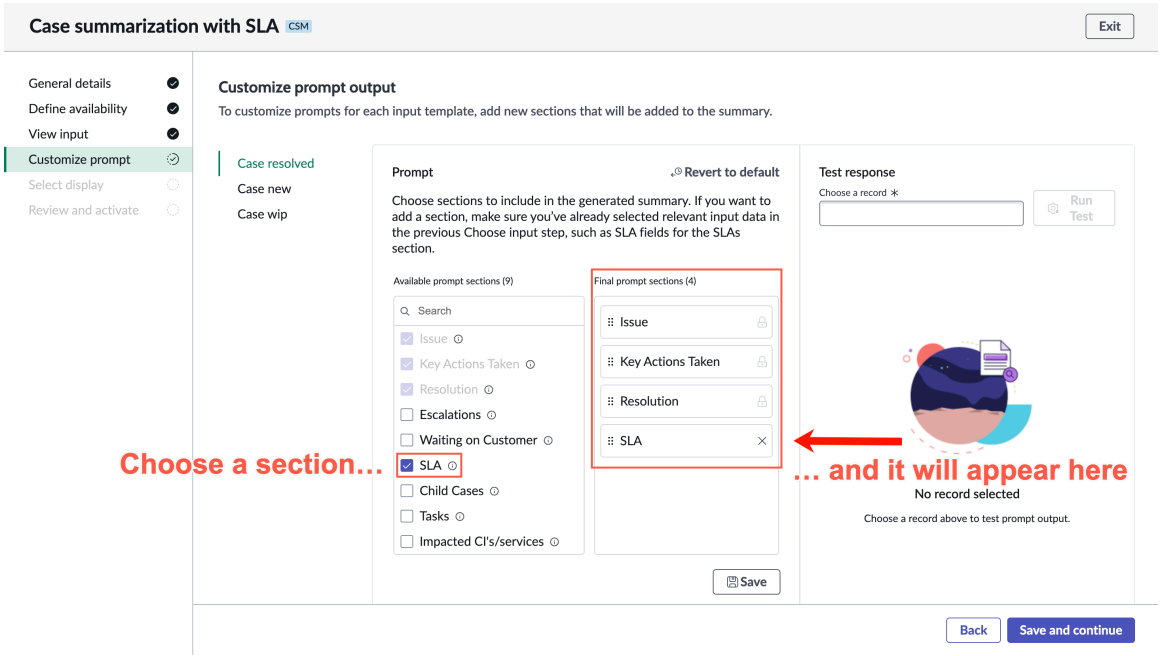
You can reorder sections by dragging the boxes in the Final prompt sections list. Some input templates have sections that are marked with the lock icon ( ). These sections must appear in the final summary, but you can still reorder them with any sections you have added.



7. In the Test response panel, select a record from the **Choose a record** field.
8. Generate a summary for the chosen record by selecting **Run Test**.

> **Important:** Each time that you test your prompt output, the operation counts as an assist that is tracked by your Now Assist subscription. To track your Now Assist usage, Monitoring Now Assist usage in Subscription Management.

Running multiple tests with different records can help confirm that you're satisfied with the results.

9. Select **Save and continue**.
10. Choose when the skill is available by selecting either **Skill is always available** or **Customize skill availability**.

    If you choose **Customize skill availability**, you can use the condition builder to add conditions that restrict when the skill is available. For example, you could make the skill only available for certain assignment groups.

11. Select **Save and continue**.
12. Choose where you want record summarization to be available by selecting the toggle next to your preferred display option.

    You can select both in-product, ServiceNow Otto panel, or both.

    - **In-product**: When selected, Now Assist skills are displayed on forms and workspaces.

      For the skills that appear in-product, select the down arrow to identify the roles that can use the skill.

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- **ServiceNow Otto panel**: When selected, Now Assist skills are available in the Now Assist panel. If you don't see this option, you must activate the Now Assist panel. For more information, see Activate the ServiceNow Otto panel standard chat.

  For the skills that appear in the Now Assist panel, select the down arrow to identify the roles that can use the skill.

You can add roles by entering the name of the role in the **User roles** field. You can remove existing roles by selecting the X icon in the role bubble. You must specify at least one role, but you can add as many roles as you like.

13. Select **Save and continue**.
14. Review your choices and select **Activate** to complete the configuration.

Result

Your customized version of case or incident summarization is active on the instance.

What to do next

Analyze your skill performance on the AI Admin Hub console to help determine the success of the new version of the skill. Learn more about tracking Now Assist usage at Monitoring Now Assist usage in Subscription Management.

Analyzing Now Assist usage

Use the Now Assist analytics and monitoring tools in the Overview page to review the summaries, skill usage information, and issues that need your attention.

AI Admin Hub Overview page

After you activate and begin using the skills, you can measure their usage over time with graphs that display important metrics. The console Overview page contains the information about skill performance, including the task completion over time, and a summary of which skills are active or available.

The following example shows the AI Admin Hub Overview page.

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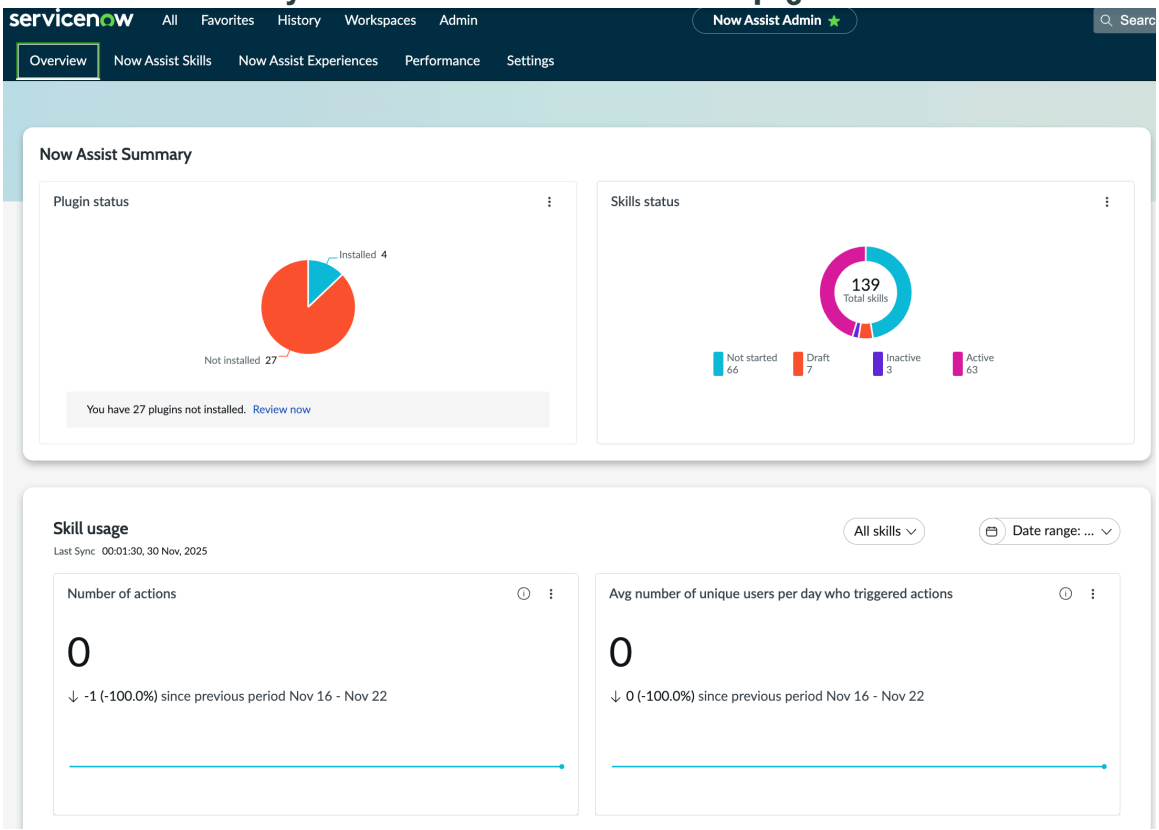
Performance and analytics on the AI Admin Hub Overview page



Now Assist Summary section

The Now Assist Summary section displays information about the status of your skills and plugins in a graphical format.

Plugin status

Displays a pie chart that shows the number of plugins that are installed and the number of uninstalled plugins that are available. Select the **Review now** link to review and install additional plugins.

Skills status

Displays a donut chart that shows your skills according to the state of their configuration: active, inactive, draft, or not configured.

The following diagram shows the plugin status that displays as a pie chart, and the Skills status that displays as a donut chart.

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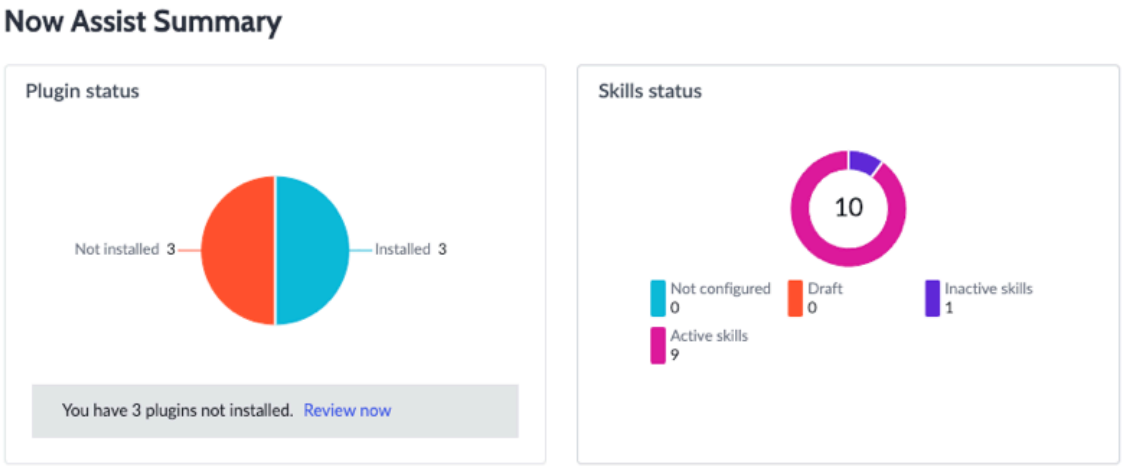

Skills usage section

The Skills usage section displays the metrics on your installed active skills. Select the info icon ⓘ to see the information about what each card's metrics represents, or select the option icon to refresh the card.

Use the configuration controls to configure the charts.

All skills

View all skills, or select one or more skills individually to change the view.

Date range

Change the date range for the analytics.

The following diagram shows the skills usage graphs and controls, which include the number of actions, average unique users per day, and the number of actions over time.

Data is collected once a day and uses Performance Analytics and Reporting (PAR) for data collection and visualization.

For more detailed information about performance, see Now Assist Analytics and

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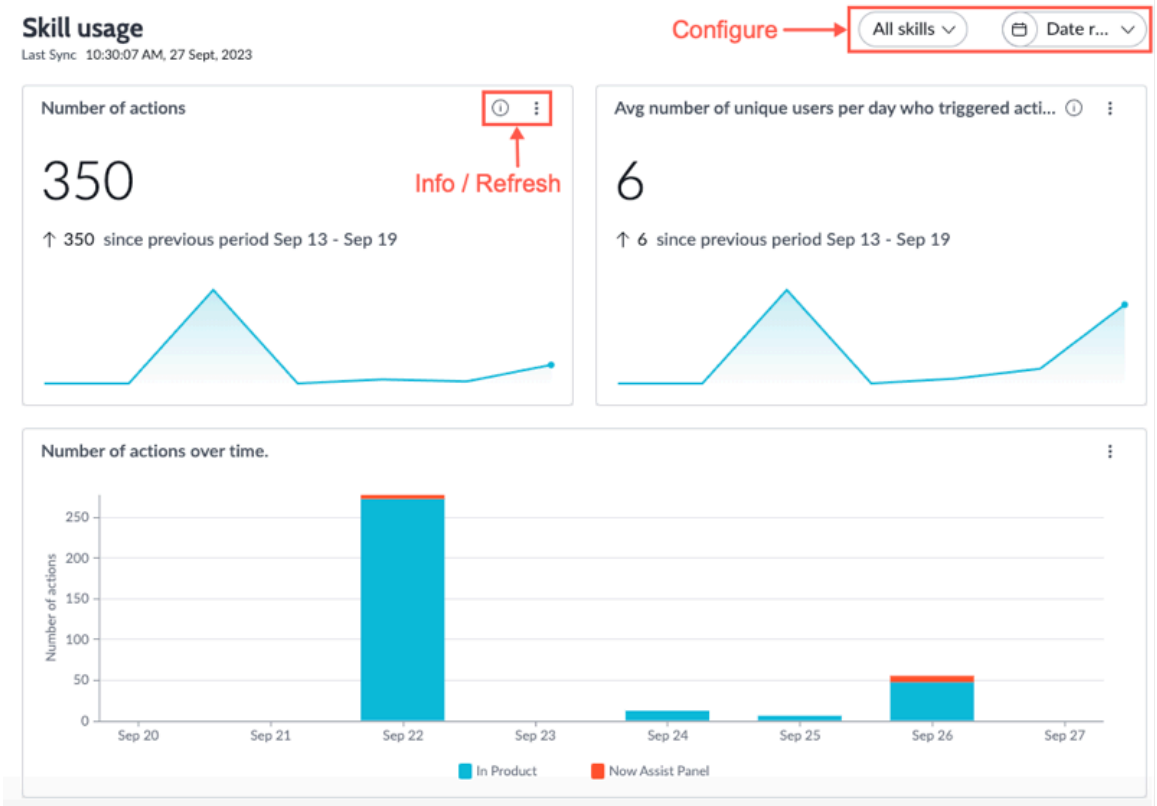
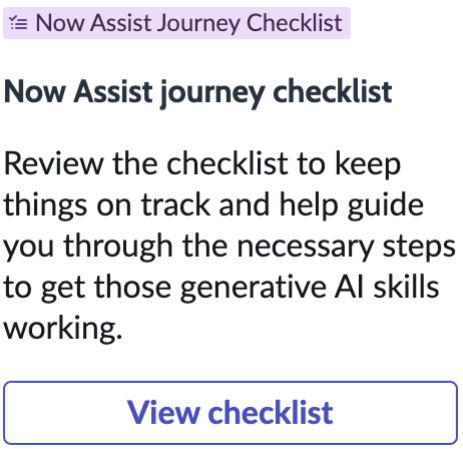
Skills usage graphs and controls



Now Assist journey checklist

The Now Assist journey checklist provides you with a guide of the Now Assist workflow. If you are confused as to what your next step should be when implementing Now Assist on your instance, access the checklist at any time by selecting **View checklist**.



Additional resources on the Overview page

The Helpful resources and FAQs sections provide links to documentation and answer common questions.

The Needs Attention section displays a count of items that need your attention. Below the count are categorized links to those items.

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AI Admin Hub reference

Reference topics include information about user roles, data usage, and domain separation for AI Admin Hub.

Default and target model version

Model version is the large language model version a skill uses to route requests to process users' queries. Default model version is where all the requests route to by default. This is pre-set by ServiceNow®. A target model version is chosen to route your requests to a different version at run-time, rather than using the default version.

Updating the target model version at the instance level

Note:

- Model versions in the following states aren't available for selection: deprecated, retired, in review, rejected.
- Confirm that the model name you enter exactly matches the name configured in your external provider's console. A mismatch may cause the provider configuration to fail.
- Confirm that network access to the provider endpoint is allowed by your instance's proxy or firewall rules.

A default mapping of default and target model version is pre-configured. If you update the target model version for a selected default model version, all the associated skills with this version mapping at the current instance level, get impacted.

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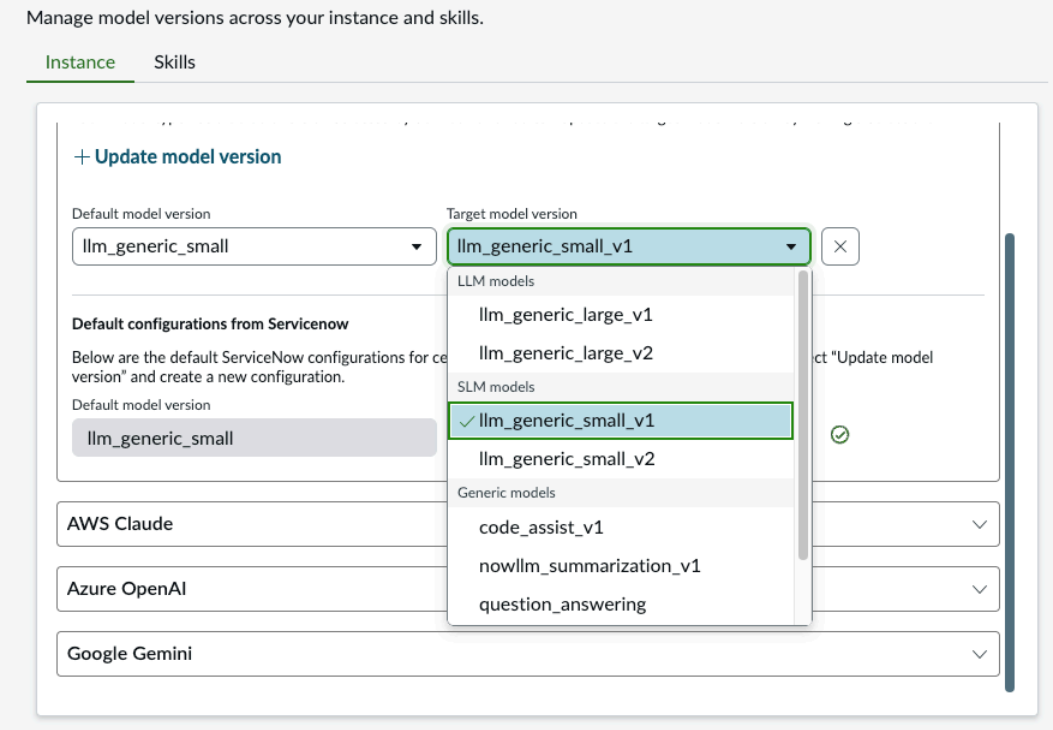

Updating the target model version at the skill level

If you update the target model version for a selected default model version at the skill level, the mapping is updated for that skill only. Customizing the model version for skills overrides the instance-level model version currently assigned to each provider. This action is typically reserved for specific situations.

Domain separation in the AI Admin Hub console

Domain separation is supported for the AI Admin Hub console. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

In the AI Admin Hub console, generative AI capabilities are organized into skills. Each skill can be configured differently for each domain or you can create a variant of a skill for a domain. By default, all skills exist in the global domain.

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How domain separation works in the AI Admin Hub console

You must enable domain separation on your instance first before you can use it for Now Assist skills.

Now Assist works with domain separation. When you use Now Assist in a domain-separated environment, users are only able to access data within their domain. For example, if a user uses the summarization skill, Now Assist only uses material that exists within the user's domain when generating that summary. When a skill is domain separated, only users who are in that domain can use the skill that you have configured for that scope.

If you're a service provider that hosts multiple clients in the same instance, you can set up domain separation to separate tenant data, processes, and administrative tasks. However, Assist consumption is tracked according to instance without differentiating between tenants. You can track your Now Assist usage in the Subscription Management dashboard.

If you want a domain to have a different version of an existing skill, you can reconfigure and activate the skill or create a variant in the preferred domain. See the section on granting access to Now Assist skills to a domain.

Use cases

You can configure the inputs, roles, triggers, and prompts when you’re activating or editing a skill or a later variant of the skill.

Some use cases include the following examples:

- Use the **Activity** field as an input in the incident summarization in one domain but only use the **short description** and **description** fields in another domain.
- Grant certain roles access to the Now Assist panel in one domain while another domain has no role restrictions.
- Trigger the generative AI capabilities by using quick actions in Agent Chat in only one domain.
- Create a variant of a skill to test one prompt in one domain while another domain uses the default prompt for the skill.

Granting a domain access to Now Assist skills

Domain separation is possible at the skill level and at the individual configuration level. When using the guided setup in the Now Assist Admin console, each configuration option has its own record that you can separate by domain. To create a record in a different domain, you must set up the skill while in the scope of your preferred domain.

1. Navigate to the Now Assist Skill Config (sn_nowassist_skill_config) table.
2. Add the Domain field to the list. If it isn't present, select the gear icon at the top of the list and add the Domain field into the Selected column, then select **OK**.
3. Find the skill that you want to enable on a domain-by-domain basis. Set Active to false on the skill that is in the global scope. You might need to change the scope to edit the record.
4. Change your current domain to the domain that you want to enable the skill in.
5. Navigate to **All** > **Now Assist Admin Console** > **Features**.
6. Navigate to the skill that you want to activate according to domain and select **Activate skill**.
7. Configure the skill as usual. For more information, see Activate an AI skill.
8. Return to the Now Assist Skill Config (sn_nowassist_skill_config) table. There should be a new record in the current domain. Open the new record.

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9. In a different browser tab, return to the Now Assist Skill Config table and open the deactivated skill record in the global domain.
10. Compare the global skill record to the one created within your domain. Records on the related list may not be present in the domain-specific skill. If they are not there, you must recreate those records in your domain and attach them to the related list in your domain-specific skill.
11. Repeat the process for each skill and each domain where you want to have the skill available.

Related topics

Domain separation for service providers

Fetch end points in Now Assist Conversational Help skills

The Now Assist Conversational Help skills architecture solves latency by fetching answers hosted at the nearest location, which is best suited to the user.

Fetching solutions hosted on multiple geographical location

The possible solutions to users queries posted on Now Assist Conversational Help skills are hosted on three main locations: Japan, EMEA and the US.

For optimal performance, the central instance should be situated in the same geographic area as the user's instance. To achieve this alignment, we utilize DISH service, a tool within the user's instance, that helps identify the correct endpoint. The Now Assist Conversational Help skills uses the Mimir lookup service feature, inside the different data centers.

The DISH service communicates with the Mimir lookup table to determine the end points matching the user's location. Once we obtain this endpoint, it gets securely stored in the sys-service table within the customer instance. Moving forward, all the users' queries are routed through the specific endpoint, ensuring consistency and reliability. The Get Help skill uses the endpoint present in the sys-property `com.snc.get_help.endpoint`.

Note: The Now Assist Conversational Help skill version is stored in sn_ads_now_help.com.snc_now_help_skill.version, ensuring backward compatibility within the conversational shared services.

AI Admin Hub roles

Certain roles are required to use AI Admin Hub functionality. The base admin (sys_admin) role does not automatically grant or include the following roles, so assign these directly to users who require them.

Now Assist Admin [sn_nowassist_admin.nsa_admin]

Can create and update the AI Admin Hub experience by editing and configuring skills.

Contains Roles

List of roles contained within the role.

- agent_role_config_admin
- pa_viewer
- sn_ace.ace_user
- sn_na_analytics.admin
- ui_action_admin

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Groups

List of groups this role is assigned to by default.

None.

Special considerations

Avoid granting an admin role when more specialized roles are available. For detailed comparison of roles, see Roles and responsibilities for AI administration.

AI Admin Hub console user [sn_nowassist_admin.user]

Can access AI Admin Hub to view skills and their configurations, but can't make modifications.

Contains Roles

List of roles contained within the role.

- agent_role_config_viewer
- pa_viewer
- sn_ace.ace_user

Groups

List of groups this role is assigned to by default.

None.

Special considerations

For detailed comparison of roles, see Roles and responsibilities for AI administration.

Now Assist panel user [now_assist_panel_user]

Users who have access to the Now Assist panel.

Contains Roles

List of roles contained within the role.

sn_dyn_guidance_user.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

None.

User data usage policy for Now Assist

Now Assist is designed to keep user data safe and secure. You can also mask sensitive data or opt-out of sharing data for model improvements.

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How your data is sent and stored

Your AI workloads are securely sent using Transport Layer Security (TLS) 1.2 from your ServiceNow instance to one of three centralized ServiceNow compute hubs (datacenters with GPUs for AI workloads), where the AI prediction processing takes place. The data used to generate the response is deleted from the compute hubs after the response has been generated. The result is then returned to the ServiceNow instance.

The input and output data isn't cached or stored on the compute hub and is transient.

Your data isn't commingled with other customer data when using Now LLM Service for generative AI.

Also, there's no commingling of data for domain-separated instances when you use Generative AI services.

When appropriate, ServiceNow might leverage third-party endpoint services (for example Azure OpenAI Service) to augment Now LLM Service to power Now Assist capabilities. Azure OpenAI is a third-party model, but policies same as the company's, apply, as it's hosted in our compute hubs.

Further, to confirm quality of service, ServiceNow might use Azure-hosted GPUs for Now LLM Service capacity bursting in case of high customer demand. Data processed by third-party endpoints isn't subject to use or access by third-party providers and are operated within the ServiceNow network boundary.

Mask sensitive data

Sensitive data can be masked before sending it to LLMs using Now Assist for Data Privacy. To learn more, see Configuring Data Privacy for ServiceNow Otto.

After you enable the plugin, it's designed to mask sensitive data before it's sent to the LLM, but could result in less accurate results because the specific data isn't included within the prompt.

Note: This plugin, within the context of generative AI products, doesn't mask the sensitive data that exists in records within your instance, nor does it help prevent new sensitive data from being stored on the instance itself.

ServiceNow might use Retrieval Augmented Generation (RAG) for selected AI features (for example NowAssist for AI Search) and passes information to the LLM based on what the requester can access within the system. If a user searches for something in the portal using Now Assist in AI Search, AI Search finds the article and then sends that to the LLM as a part of the prompt. Because AI Search knows what the user has access to, it won't send an article that the user isn't able to access.

Note: For some features, such as case summarization, the agent generating the summary might have more permissions than other people who have access to the record. If they choose to paste that summary to the work notes, the agent should check to confirm that the data they're sharing in the work notes is appropriate to share with others who have access to that record.

Opt out of data sharing

Data Sharing helps ServiceNow to continuously advance and improve its Now LLMs, based on the latest customer usage. If you no longer want to participate in the customer data-sharing program, you're able to opt out.

To opt out, follow the instructions in Opt out of data sharing for Now Assist.

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Troubleshoot an AI skill

Run diagnostics for a skill on the AI Admin Hub console to get information about the status of your skill configuration. The availability of diagnostics depends on the skill.

Before you begin

Role required: sn_nowassist_admin.nsa_admin

About this task

Certain skills have diagnostic scripts that you can run from the AI Admin Hub console. These diagnostic scripts check for successful skill execution and setup of the underlying capability definitions. If you've made a copy of a skill, you will not be able to run diagnostics on the skill copy.

Procedure

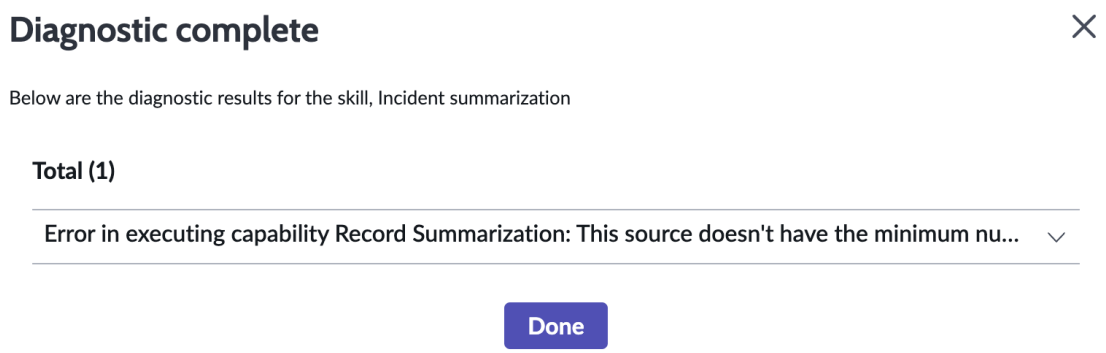
1. Navigate to **All** > *AI Admin Hub* > **Skills**.

   If you're already in the AI Admin Hub console, select the **AI Skills** tab.

2. In the navigation pane, select the workflow of the skill that you want to troubleshoot, such as **Technology** or **Customer**.
3. In the All skills or Active skills section, locate the card for the skill you want to troubleshoot.
4. Select the more options icon ⋮ for the skill, then select **Run diagnostics**.

   Note: **Run diagnostics** is grayed out or not visible when this option is unavailable.

5. After the diagnostics are complete, review the results of each test.



What to do next

If you have identified any problems with your skill configuration, you can edit the skill from the AI Admin Hub console.

If editing the skill does not solve the issue, you can contact ServiceNow Support for additional help.

ServiceNow Otto panel system properties

Use system properties to customize ServiceNow Otto panel. Some properties are available on a system properties form, but some lesser-used properties are available only from the System Property [sys_properties] table.

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Property	Description
sn_nowassist_va_enable_nap_aix_experience	Enabled and integrated chat is available for customers to choose from.
sn_nowassist_va_enable_nap_aix_experience	Disabled, integrated chat is not available for customers to choose from.

Content Understanding

Content Understanding uses AI to extract and summarize information from documents and images, so teams can act on results faster.

Get started

Important:

Now Assist in Document Intelligence has been renamed to Content Understanding. This renaming does not impact any functionality, and existing and new implementations continue to work without changes.

Explore

Learn what Content Understanding is, what problems it solves, and which skills are available.

Configure

Set up Content Understanding skills, AI agents and workflows.

Use

Find day-to-day guidance for working with extracted data, Q&A results, summaries, and agent output.

Reference

Look up supported file types, limits, and other technical details for each capability.

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Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Note: Controls are available to enable or disable data collection and data processing.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

Exploring Content Understanding

Content Understanding brings generative AI to document and visual processing, so you can extract, analyze, summarize, and answer questions about the content in your files.

Content Understanding is a suite of multimodal AI features designed to analyze unstructured content such as PDFs, forms, and images. It transforms this content into structured, actionable data within the ServiceNow AI Platform. This suite includes a variety of skills, and agents that deliver answers, information, summaries, and more to enhance your workflows. By converting information from files into usable values, Content Understanding minimizes the need for manual data entry in your processes.

Skills

Content Understanding includes the following skills:

Extract information from documents skill

Extracts specific fields, tables, and answers to questions from documents and images. You can configure this skill and its use cases in the AI Admin Hub.

Attachment summarization skill

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Summarizes the contents of record attachments alongside the record summary in workspaces such as ServiceNow Otto for ITSM and ServiceNow Otto for HRSD.

AI agents

Content Understanding includes Content insights AI agent. You can add this agent to an agentic workflow to process documents and images. You can configure this agent in AI Agent Studio.

Configuration and usage of skills and AI agents

The following table lists where each skill and AI agent is configured, along with where you can interact with them.

Content Understanding skills and AI agents

Capability	Configured in	Where to interact
Extract information from documents skill	AI Admin Hub	Workspace integrations
Attachment Summarization skill	AI Admin Hub	ITSM Workspace, ServiceNow Otto for HRSD Workspace
Content insights AI agent	AI Agent Studio	ServiceNow Otto for Virtual Agent (conversational) or trigger-based

Content Understanding benefits

Content Understanding includes AI-powered skills and AI agents that extract, process, and summarize information from documents and images. Each capability delivers a distinct benefit for administrators and end users.

Capabilities and benefits

Capability	Type	Benefit
Information extraction	Skill	Transforms unstructured content in documents into structured fields, enabling teams to capture data without the need for manual entry.
Attachment Summarization	Skill	Condenses long attachments into concise summaries, so agents grasp the key points quickly.
Content insights AI agent	AI agent	Analyzes documents and images to extract relevant insights, enabling users to act on findings without reviewing source material.

Extract information from documents

The Extract Information from documents skill (Information Extraction skill) uses generative AI to automatically extract content from documents and images, and to respond to questions about that content.

With the Information Extraction skill, you can extract specific fields, tabular data, and answers about documents or images. You can then integrate the extracted data into your workflows. The skill transforms unstructured files, such as invoices, purchase orders, and contracts, into structured data that populates ServiceNow records, eliminating the need for manual data entry.

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You configure this skill in the AI Admin Hub. You can define one or more use cases that specify what to extract from a particular type of document. For example, a use case for purchase order forms extracts date and number, captures an itemized list with prices, and answers questions about specific terms in the descriptions.

Important: The Extract Information from documents skill can't be cloned. To use the skill, create a new use case or copy an existing one. For more information, see Set up a use case or Copy a use case.

Define the information to extract

Within a single use case, you can define any combination of the following:

- Specific fields to extract, such as a date or a document number.
- A table structure with multiple columns to capture repeating line items.
- Questions for generative AI to answer based on the text and images in a document.

Benefits

The Extract information from documents skill provides the following benefits:

- Populates ServiceNow records with data extracted from documents.
- Reads both text and images in a document.
- Runs automatically or routes results to a reviewer for validation, depending on the automation mode.

Note: The Extract information from documents skill uses generative AI to process documents. Results may be inaccurate or incomplete. Review extracted data before using it in production workflows.

Scenarios

The Extract information from documents skill supports the following scenarios:

Field population

Extracts values from an uploaded document and writes them to the fields of a record.

Assisted review

Presents predicted values to a reviewer for validation before saving them to a record.

Related topics

Use cases in Information Extraction skill

Automation modes

Content extraction methods

The Extract information from documents skill (Information Extraction skill) supports three extraction methods—field, table, and Q&A—each suited for different types of document data. Understanding which method to use helps you capture and store the right information in ServiceNow.

The Information Extraction skill uses AI-assisted parsing to extract data from documents (invoices, purchase orders, and contracts) and then populates records in ServiceNow. Select a

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method or combination of methods that matches the type of information you want to capture and store in ServiceNow tables.

Field extraction

Field extraction captures specific, isolated data points from a document—values that appear exactly once—and maps each to a single field on a ServiceNow record.

Use field extraction for data such as:

- Invoice numbers, purchase order numbers, or document identifiers
- Vendor or customer names
- Dates, such as an invoice date, due date, or contract start date
- Monetary totals or tax amounts
- Addresses or other contact details

You can bundle related single fields into a logical group. For example, a Billing Address group can capture Street, City, State, and ZIP from the same region of a document.

Table extraction

Table extraction captures dynamic, multi-row data from documents where the number of entries varies between documents, such as invoice line items or expense report details. A table acts as a two-dimensional grid of rows and columns that captures a list of related records.

Use table extraction for data such as:

- Invoice or purchase order line items (quantity, description, unit price, total)
- Expense report breakdowns
- Parts lists or bills of materials
- Multi-page flight itineraries or timesheet entries

Q&A extraction

Q&A extraction uses generative AI to answer open-ended, natural language questions about the contents of a document. It is suited for unstructured text that does not fit neatly into a predefined field or table schema. The extraction processes meaning rather than matching a fixed pattern.

⚠ **Warning:** Q&A extraction uses generative AI and may produce inaccurate or incomplete results. Review all AI-generated output before using it to populate records.

Use Q&A extraction for questions such as:

- The reason for termination
- Special shipping or delivery terms
- The designated project manager
- Narrative clauses or conditional language from contracts

You can also use Q&A extraction to categorize documents.

Selecting an extraction method

Use the following guidance to choose the appropriate extraction method.

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Extraction method selection guidance

Extraction method	When to use	Example
Field extraction	Use when the data point appears once and has a well-defined type.	A number, date, or name.
Table extraction	Use when the document contains a list or grid of repeating items where the row count is unknown or varies across documents.	Line items in an invoice or purchase order.
Q&A extraction	Use when the information is embedded in narrative text and requires interpretation rather than pattern matching.	An answer based on contract terms or policy text.

You can combine multiple methods within a single use case to handle all of the data types present in a document.

Related topics

Use cases for the Information Extraction skill

Predictions in Information Extraction skill

A prediction is the value that the Information Extraction skill infers for each field, table, or question in a use case. Predictions drive automation decisions and can be applied automatically or reviewed by a person, depending on the use case configuration.

How predictions are generated

A prediction is the value that the Information Extraction skill infers for a field, table, or question in a specific use case. When you submit a document for processing, the skill processes its content and generates a prediction for each field, table cell, and question set in that use case.

A prediction shows what the skill identifies as the correct value based on the content in the document. Whether a prediction is applied without review or reviewed by a person depends on the automation setting for the use case. To understand how automation settings control whether predictions are applied automatically or sent for review, see Automation modes.

Prediction sources

Prediction sources by use case element

Use case element	Prediction
Field	A single value recognized in the document, such as an invoice number or a date.
Table	Row-level values extracted from a tabular structure in the document, such as line items.
Question	An answer generated from the document content in response to a configured question.

Related topics

Use cases in Information Extraction

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Use cases in Information Extraction skill

Use cases in the Information Extraction skill define what documents to process and what information to extract, so generative AI can accurately retrieve structured data from unstructured documents.

A use case defines the document type to process and the specific information generative AI extracts from it. A single use case applies to all documents that share a common set of values to extract, even when those documents aren't in the same format.

Common use cases

Invoice processing

Extract line items, invoice numbers, totals, and vendor details from PDFs or scanned vendor invoices. For an example implementation, see ServiceNow Otto for Accounts Payable Operations (APO).

HR onboarding

Extract fields such as national IDs, tax declarations, and emergency contacts from employee documents.

Field service

Extract data from purchase orders, equipment maintenance sheets, or work orders to pre-populate service tasks.

Use case structure

A use case consists of the use case record and its related fields, tables, questions, any integrations, and workflows.

- Fields identify specific information within documents relevant to predictions.
- Tables extract information from cells within table columns.
- Questions generate answers based on an analysis of the text and images within a document.

Use case setup

Use case setup includes defining the use case name and details, specifying fields, tables, and questions, configuring integrations and flows, and testing the use case.

The following guidelines help improve extraction precision and relevance.

Identify your requirements

Clearly describe the specific field, table, or answer you want to extract.

Use field prompts

Use the relevant field prompts and descriptions customized for your use case. This guides the extraction process.

Follow the recommended format

To improve accuracy, follow the format provided in the on-screen **Field Assistance** tab. This produces consistent results.

Adjust descriptions

Field descriptions may change during test executions. Reviewing changes helps improve your extraction results.

Follow

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Use case–based extraction flow

Schema definition

You create a use case by defining a schema — a set of specific fields, tables, and questions that you need from that document.

Intelligent extraction

Rather than using rigid templates, generative AI uses the use case to identify the document's structure and extract the target information. Results may vary and human review is recommended before using extracted data in automated workflows.

Workflow automation

After generative AI extracts the data, it populates the required fields in your ServiceNow® workflows, such as ITSM, Field Service Management for Telecommunication, or ServiceNow Otto for HRSD.

Note: When full automation mode is enabled, fulfiller verification is skipped.

Related topics

- Predictions in Information Extraction skill
- Content Understanding personas
- Automation modes
- Set up a use case

Automation modes

Automation modes in the Information Extraction skill determine whether predictions are accepted automatically or routed to a human agent for review before a document task completes.

The Extract information from documents skill (Information Extraction skill) generates predictions for every field, table, and question configured in a use case, regardless of automation mode. The subsequent steps depend on whether the use case is set for full automation.

Automation mode comparison

Automation mode	Description	Suitability
Full automation	Predictions are accepted directly with no review. This mode eliminates the need for manual review by relying entirely on automated predictions. The document task is completed immediately and the integrated workflow continues. **Note:** If any essential fields lack a prediction, you have an option to halt the extraction process. This functionality enables a Human-in-the-Loop (HITL) review to start when crucial predictions are absent, ensuring accuracy and reliability in the data extraction process.	Use this mode when prediction accuracy is consistently high and the risk of errors is low.

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Automation mode comparison (continued)

Automation mode	Description	Suitability
Agent review	The document task is forwarded to a human agent, who validates or corrects the predicted values. The task is completed, and the integrated workflow continues, only after the agent's review.	Use this mode when errors could lead to significant costs, or when prediction reliability has not yet been established.

Related topics

- Predictions in Information Extraction skill
- Turn on full automation mode

Information Extraction skill workflow

Information Extraction is a skill that analyzes documents to provide values for defined fields, table columns, and questions in a use case. It populates ServiceNow records with extracted data from documents.

Processing stages

When a document enters a workflow, the Information Extraction skill examines its content and retrieves the requested information according to the use case. The use case defines what to extract from a document and where to write the results. After a use case is configured, the skill follows these stages at run time:

Stage 1: Document task creation

A trigger — such as a document upload, an inbound email, or an attachment added to a record — creates a document task.

Stage 2: Prediction

The Information Extraction skill processes the document and returns a prediction for each field, table column, or question in the use case.

Stage 3: Review or automation

In full automation mode, the predictions populate the fields in the target table. In agent review mode, the document task goes to a fulfiller, who validates or corrects the predicted values.

Stage 4: Completion

After the document task is complete, the predictions populate the target fields and the integrated workflow continues.

Related topics

- Content Understanding personas
- Predictions in Information Extraction skill
- Use cases in Information Extraction skill
- Automation modes

Attachment Summarization

The attachment summarization skill summarizes a record's attachments alongside the record summary, so agents can review key content without opening each file.

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With the Attachment Summarization skill, agents can view a concise summary of each attachment alongside the record summary. The skill is available in the ServiceNow Otto for IT Service Management (ITSM) and HR Service Delivery workspaces.

Uses of the Attachment Summarization skill

- Triage records that contain one or more attachments.
- Highlight key points of an attachment alongside the record summary.
- Reduce the time agents spend reviewing attachments to find relevant context.

Key capabilities and features

- Supported file types: Processes common file formats such as PDFs, DOCX, TXT, XLSX, CSV, PPTX, JPEG, and PNG.
- Automated triage: When configured, it triggers automatically as soon as a file is uploaded, appending the summary directly to the incident's work notes or activity stream.
- Knowledge Builder: Can analyze attachment content to suggest relevant knowledge articles or extract resolution steps.

Related topics

Configure Attachment Summarization skill

Content insights AI agent

The Content insights AI agent understands documents and images, answers questions, extracts structured data, and summarizes content within a single interface.

The Content insights AI agent processes context from user inputs and attached documents or images. It generates the requested information based on this content and returns it with any relevant task details. You can incorporate the agent into an agentic workflow to enhance document and image understanding within a multi-step automated process.

You configure the Content insights AI agent in AI Agent Studio. Sometimes, the AI agent uses a use case that extracts relevant fields and saves them to the target table. The use case is configured within the Information Extraction skill in the AI Admin Hub.

Note: AI-generated output may be inaccurate. Review all content the agent generates before using it in business processes.

You can provide documents or images to the agent in either of the following ways:

Reference a record

Provide a record number, such as INC0010003, or a sys_id and table name. The agent retrieves all attachments from that record.

Upload a file directly

Upload a document or image directly in the chat window.

Supported content

The Content insights AI agent processes documents and images, such as PDF, DOCX, PNG, and JPEG files.

Agent capabilities

The agent provides three capabilities:

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Question and answer (QnA)

Ask specific questions about documents and images and get accurate answers with citations.

Key information extraction (KIE)

Extract structured data using predefined templates.

Document summarization

Get concise summaries of document and image content.

Note: Interact with the agent directly. The agent orchestrates the underlying tools automatically.

Related topics

Extract information from documents

Use cases in Information Extraction skill

Configuring Content Understanding

Configure the capabilities in Content Understanding to extract, analyze, and answer questions about your document and visual content.

Configuration depends on the capability you want to use. The Extract information from documents skill (Information Extraction skill) and Attachment Summarization are configured in the AI Admin Hub. The Content insights AI agent is configured in AI Agent Studio. Use the following topics to set up and configure Content Understanding:

- Configure Information Extraction skill
- Configure Content insights AI agent
- Configure Attachment Summarization skill

Configure Information Extraction skill

Configure the Extract information from documents skill (Information Extraction skill) to define how AI agents identify and pull structured data from unstructured sources. Use this configuration to control extraction behavior, map output fields, and integrate results into your workflows.

The Information Extraction skill processes unstructured documents and returns structured field values that AI agents can use in downstream workflows. You configure the skill by activating it and defining use cases that map document content to output fields.

Note: AI-generated extraction results may not always be accurate. Review extracted data before using it in automated decisions or business processes.

The Extract Information from documents skill can't be cloned. To set up the skill, activate the skill and configure a use case. See Activate the Extract Information from documents skill and Set up a use case.

Activate the Extract Information from documents skill

Activate the Information Extraction skill, so AI agents can analyze and extract information from documents using generative AI.

Before you begin

Before activating the Information Extraction skill (also known as Extract Information from documents skill), make sure the Content Understanding application is installed.

Role required: DocIntel Admin [sn_docintel.admin] or DocIntel Manager [sn_docintel.manager]

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About this task

Content Understanding skills are enabled by default and are automatically available to users with the appropriate application roles. This default behavior functions as follows:

- New users: When you install a ServiceNow Otto (plugin) product, it automatically enables the designated skills.
- Existing users (starting with Australia Patch 1): There is no change to skills that are currently enabled or customized. A skill is turned on if the ServiceNow Otto plugin is installed, but the skill was never turned on, and an admin has never adjusted its roles. A skill is not turned on if it was previously turned on and then turned off, or if an admin has adjusted its roles.

If a skill was previously turned on and then turned off, or if an administrator adjusted its roles, perform this task to reactivate it.

Note: This task doesn't apply to the multimodal chat skill. The multimodal chat skill enables chat responses about the content of uploaded documents and images. It is used only on the server side by the Content insights AI agent and by the question answering capability in ServiceNow® Otto for Virtual Agent, and it doesn't require configuration in the AI Admin Hub.

Procedure

1. Navigate to **All** > *AI Admin Hub* > **Skills**.
2. In the workflow list, select **Platform** > **Other**.
3. Search for the Extract information from documents skill.
4. Select **Activate skill**.

What to do next

Set up a use case

Set up a use case

Create a use case to define the information to extract from a document for processing.

Before you begin

Several predefined use cases are available within their defined workflow areas. Check whether the available use cases meet your requirements before creating a new one. For more information, see Content Understanding integrations.

Activate the Information Extraction skill. For more information, see Activate the Extract Information from documents skill.

Role required: DocIntel Admin [sn_docintel.admin] or DocIntel Manager [sn_docintel.manager]

About this task

In a use case, specify the document type to process, the fields and tables to detect, the questions to ask, and where to store the results.

After you define a use case, you can begin processing documents for it in the related workflows.

Procedure

1. Navigate to **All** > *AI Admin Hub* > **Skills**.
2. In the workflow list, select **Platform**.
3. From the Platform skills list, search for **Extract information from documents skill**.

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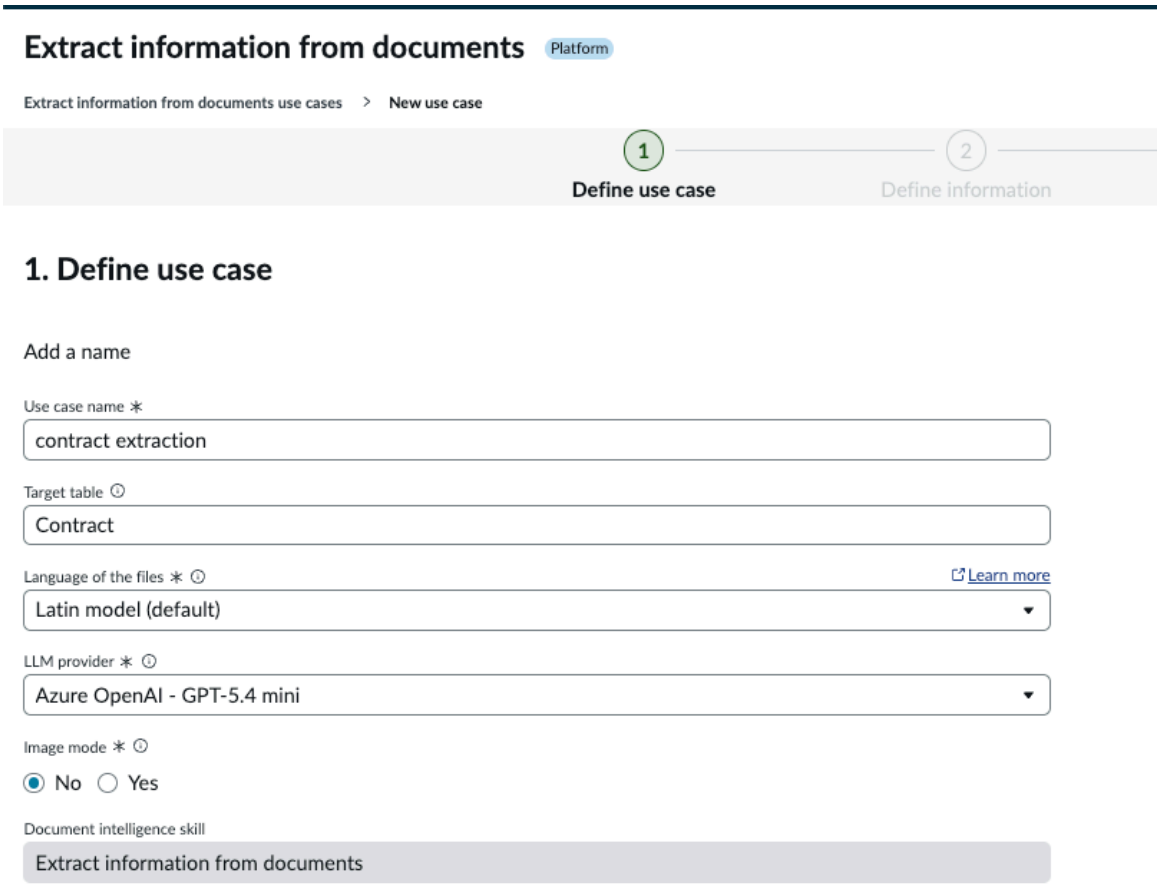
4. Select the options menu ( ), and then select **Edit**.
5. Select **New use case**.
6. Define a use case.



   a. Enter a name for the use case.

   b. Select a target table to store the document processing results for the use case.

   c. Select the language of the files to process for the use case.

      If the files contain multiple languages, select the primary language.

      For more information, see Languages supported by Content Understanding.

   d. Select a large language model (LLM) that will make predictions for the documents processed with this use case.

      For more information, see Large language models used by Content Understanding.

   e. **Optional:** Turn on image mode to process images more efficiently.

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(Optional) Image mode sends pages to the LLM as images to use the visual capability of the multimodal LLM and any of the languages supported by it.

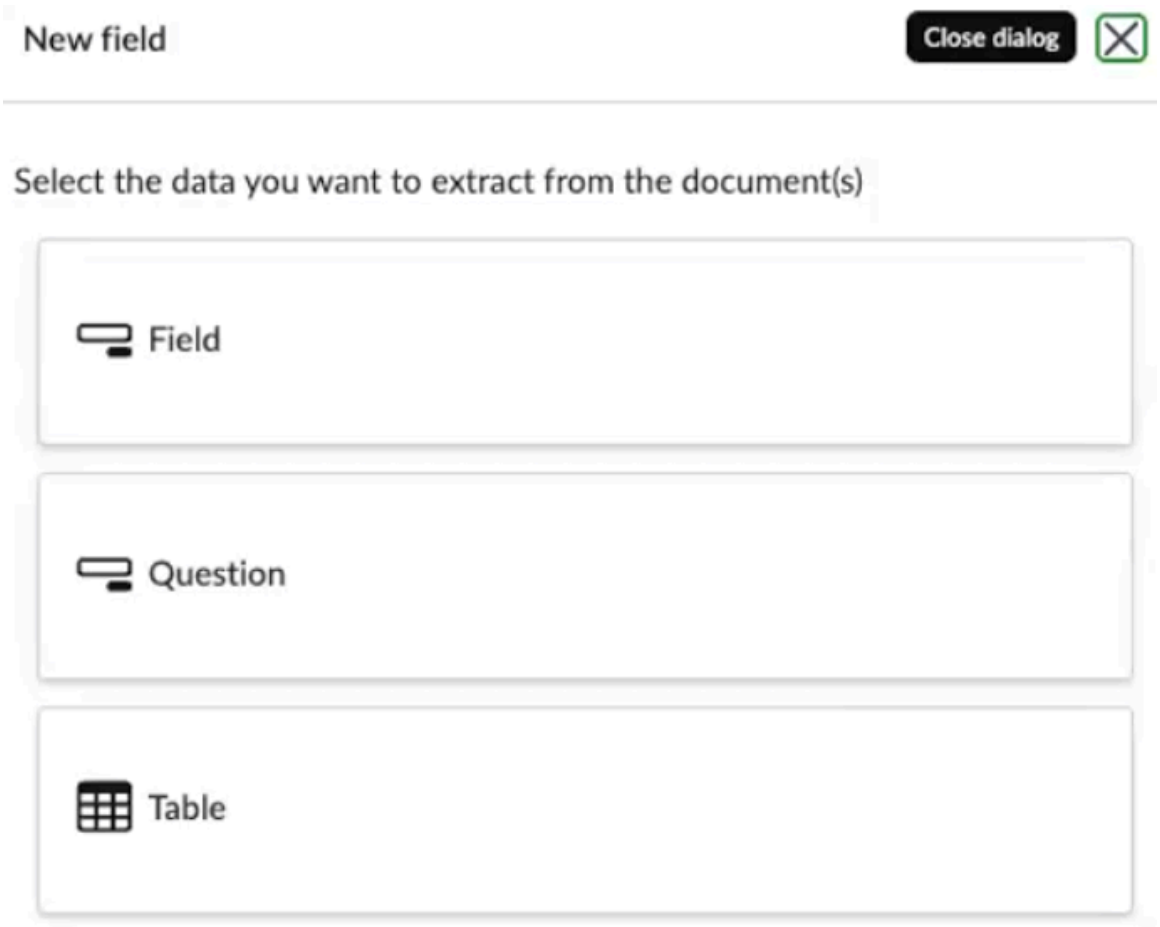
Note: Selecting image mode reduces the page count limit to 10 pages per file.

The image mode option is available when a multimodal LLM is selected.

Note: Now LLM Service is a text-only model and doesn't support image mode.

f. Select **Save and continue**.

7. Define information fields, questions, or tables.



a. Select **Add a field**.

b. Select the type of information to extract from the document.

You can choose one of the following:

Field

Fields are used to extract a single piece of information in the document. For example, a document number or a customer name.

Question

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Define a question to ask about the document.

Table

Tables are used to extract lists or tables of information. A table can have multiple columns. The number of list items or table rows doesn't have to be known in advance.

A field form displays based on the information type you selected.

c. On the form, fill in the fields.

The type of form depends on the type of field:

- Field form fields
- Question form fields
- Table form fields

d. Select **Save**.
The field, question, or table is added to the Information list for the use case.

e. Select **Save and Continue**.

What to do next

1. Test a use case
2. Add integration
3. Review and activate

Test a use case

Test a use case with a sample document to verify how well it extracts and processes information. Upload a document from a record or your device, then review the test outputs before saving your results.

Before you begin

Role required: DocIntel Admin [sn_docintel.admin] or DocIntel Manager [sn_docintel.manager]

Procedure

1. Select **Test a new document**.
2. Select a document:

Document upload options

Option	Description
Upload from record	**a.** Select **Upload from record**. **b.** Enter search criteria in the search field. **c.** Select a record from the list. This option appears only when a target table is selected for the use case.

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Option	Description
Upload from this device	**a.** Select **Upload from this device**. **b.** Select **Add file**. **c.** Select a file and select **Open**. **d.** Select **Upload**.

3. Select **Continue**.

   Tip: Select the **Open in a new tab** button ( ) to view the document in a larger workspace on a separate browser tab.

   The Test Outputs screen appears.
4. Review the performance of the skill for the test document.
5. Select **Save and continue**.

What to do next

1. Add integration
2. Review and activate

Add integration

Connect a use case to a workflow by adding an integration. Integrations automate document task creation or value extraction based on triggers in the target table.

Before you begin

Role required: DocIntel Admin [sn_docintel.admin] or DocIntel Manager [sn_docintel.manager] role

Procedure

1. Select **Add integration**.

   This option is available when a target table is selected for the use case.

   If you have already defined one or more integrations and you want to add another, select **New integration**.
2. Enter a name for the integration.
3. Select the type of integration you want to use.

   The `Process task` type creates an integration point to automatically create and process document tasks based on specific triggers happening in the target table.

   The `Extract values` type creates an integration point to automatically propagate the extracted values to the target table when extraction has been completed.
4. Use the conditions to select certain fields as specific triggers for the integration.

   Conditions are available if you selected `Process task` in the previous step. For more information on conditions, see OR conditions.
5. Select the **Create Flow** option to create a flow for this integration in Workflow Studio.

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Tip: This option should be selected, unless you're planning to write your own custom script to set up the integration. Be sure the integration is activated on Workflow Studio. For more information, see Building flows.

6. Select **Save**.
7. Select **Save and continue**.

What to do next
Review and activate

Review and activate

Review your configuration selections before completing the setup for a use case. Return to any previous step to make changes before finalizing.

Before you begin
Role required: DocIntel Admin [sn_docintel.admin] or DocIntel Manager [sn_docintel.manager]

Procedure

1. Review the configuration selections you've made for the use case.
2. **Optional:** Select **Back** to return to a previous step and make a change.
3. Select **Complete setup**.

Related topics

Review predictions in Information Extraction skill

Turn on full automation mode

Turn on Full automation mode to automatically complete and submit document tasks without an agent review. Full automation mode is turned off by default in document extraction use cases.

Before you begin

- Set up a use case for the Information Extraction skill. For more information, see Configure Information Extraction skill.
- Role required: DocIntel Manager [sn_docintel.manager]

About this task
The extraction mode determines how Content Understanding processes document tasks for a use case. For more information, see Automation modes.

Warning: AI may not always produce accurate, complete, or appropriate information. By choosing to bypass the agent review, there is no way to check the accuracy of the predicted values before using the data in your workflows.

Procedure

1. Navigate to **All** > *AI Admin Hub* > **Skills**.
2. In the workflow list, select **Platform**.
3. In the Platform skills list, find the Extract Information from documents skill and select **Edit** in the options menu ( ).
4. Select the use case you would like to configure.

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5. Select the settings icon ().
6. On the Extraction mode screen, select the **Full automation mode (no agent review required)** option.
7. **Optional:** Select the **Any required field is missing in the document** option to turn off the automation and require an agent review when any of the required fields are missing in the document.
8. Close the Settings box.

Manage use case

Administrators can manage an existing use case by changing the LLM, editing configuration details, creating a copy, deactivating, or deleting it.

About this task

- Change the language models for a use case
- Copy a use case
- Edit a use case
- Deactivate a use case
- Delete a use case

Change the language models for a use case

Select the LLM and file language for a use case to control how documents are processed for information extraction. Change these settings when the default model doesn't suit your use case.

Before you begin

- Set up a use case for the Information Extraction skill. For more information, see Set up a use case.
- Role required: DocIntel Admin [sn_docintel.admin] or DocIntel Manager [sn_docintel.manager].

About this task

Language models detect information in documents and make predictions for information extraction.

Third-party LLM providers are available for skills and AI agents in addition to Now LLM Service. For more information on LLMs, see Manage AI models.

For each use case, only one LLM can be enabled at a time. The selected LLM processes documents for the use case.

For image files that need optical character recognition (OCR) to detect the text in them, OCR models are used to support different language groups. The language selected during use case setup helps the OCR model to detect text in the images.

Procedure

1. Navigate to **All** > *AI Admin Hub* > **Skills**.
2. In the workflow list, select **Platform**.
3. In the Platform skills list, find the applicable skill.
4. Select **Edit** in the options menu ( ) for that skill.
5. Select the use case to configure.

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6. Select the Settings icon ( ).
7. Select the **Manage LLMs** tab.
8. Select the LLM to use for predictions on documents processed with this use case.

   For more information, see Large language models used by Content Understanding.
9. **Optional:** Turn on image mode to process images more efficiently.

   (Optional) Image mode sends pages to the LLM as images to use the visual capability of the multimodal LLM and any languages it supports.

   The image mode option is available when a multimodal LLM is selected.

   Note: Selecting image mode reduces the page count limit to 10 pages per file.
10. Select the **Language of the files** processed for the use case.

    If the files contain multiple languages, select the primary language.

    For more information, see Languages supported by Content Understanding.
11. Select **Save**.

Result
The selected LLM and file language are saved for the use case.

Copy a use case

Copy an existing use case to use as a starting point for a similar one. The copy includes the original fields, tables, questions, integrations, and flows.

Before you begin
Role required: sn_docintel.manager or sn_docintel.admin

Procedure
1. Navigate to **All** > *AI Admin Hub* > **Skills**.
2. In the workflow list, select **Platform**.
3. In the Platform skills list, locate the skill that contains the use case you want to copy.
4. In the options menu ( ), select **Edit**.
5. In the options menu ( ) for the use case you want to copy, select **Make a copy**.
6. In the confirmation dialog, select **Make a copy**.
7. Select **Continue**.
8. In the **Name** field, enter a name for the use case.
9. Select **Make a copy**.

Result
The copied use case appears in the use cases list.

What to do next
Edit the new use case to make any necessary changes, then test it to confirm it works as expected. For steps to edit a use case, see Edit a use case.

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Edit a use case

Update an existing use case to modify its name, fields, tables, questions, integrations, and flows. Use cases marked as read-only must be copied before you can edit them.

Before you begin
Role required: DocIntel Admin [sn_docintel.admin] or DocIntel Manager [sn_docintel.manager] role

About this task
Use cases marked as read-only can't be edited. To edit a read-only use case, first make a copy of it. For more information, see Copy a use case.

Procedure
1. Navigate to **All** > **Now Assist Admin** > **Skills**.
2. In the workflow list, select **Platform**.
3. In the Platform skills list, find a applicable skill.
4. Select **Edit** in the options menu ( ) for that skill.
5. In the row of the use case you want to edit, select **Edit** in the options menu ( ).
6. Make changes as needed.

   For more information on use case setup, see Set up a use case.

Deactivate a use case

Deactivate a use case to stop it from being applied during document processing when it is no longer relevant to your document intelligence workflows.

Before you begin
Role required: DocIntel Admin role [sn_docintel.admin] or DocIntel Manager role [sn_docintel.manager]

Procedure
1. Navigate to **All** > *AI Admin Hub* > **Skills**.
2. In the workflow list, select **Platform**.
3. In the Platform skills list, find a applicable skill.
4. Select **Edit** in the options menu ( ) for that skill.
5. In the row of the use case you want to deactivate, select **Deactivate** in the options menu ( ).
6. In the confirmation box, select **Yes**.

Result
The use case is deactivated and isn't applied during document processing.

Delete a use case

Delete a use case and its associated fields, tables, questions, integrations, and flows from a skill when the use case is no longer needed.

Before you begin
Role required: DocIntel Admin [sn_docintel.admin] or DocIntel Manager [sn_docintel.manager] role

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Procedure

1. Navigate to **All** > *AI Admin Hub* > **Skills**.
2. In the workflow list, select **Platform**.
3. In the Platform skills list, find a applicable skill.
4. Select **Edit** in the options menu ( ) for that skill.
5. In the row of the use case you want to delete, select **Delete** in the options menu ( ).
6. In the confirmation dialog, select **Delete**.

Result
The use case is deleted, including its associated fields, tables, questions, integrations, and flows.

Configure Content insights AI agent

Configure the Content Insights AI agent to control which roles can access it, how it is triggered, and which chat assistants surface it.

Before you begin
Role required: AI Agent Admin [sn_aia.admin]

About this task
The Content Insights AI agent requires configuration before users can interact with it. You define access roles, triggers, and the chat assistants that surface the agent.

Procedure

1. Open AI Agent Studio.
2. Locate the Content Insights AI agent.

   Select **Explore All** or **AI agents** to browse the list of agents, or search for the agent by name.
3. Select the Content Insights AI agent.
4. From the options menu ( ), select **Duplicate** to create an editable copy.

   Note: All edits apply to the copy. The original agent remains unchanged.
5. In the **Define security controls** section, select **Define user access**.
6. Select edit ( ).
   The Edit ACL dialog opens.
7. Add the roles that require access to the agent, and then select **Update**.

   Determine which roles on your instance must use the agent, and add those roles. For example, you might add a requester role or a fulfiller role.
8. In the **Add triggers** section, select **Add triggers**.
   The Add a trigger dialog opens.
9. Select a trigger and then select **Add**.

   You add triggers to define the conditions or events that start the agent. For example, add a trigger for an inbound email.
10. In the **Select channels and status** section, configure the channels and status for the agent.

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a. Turn on the **Allow** toggle to enable the agent on ServiceNow Otto for Virtual Agent.

b. In the **Chat assistants** field, select an assistant to add the agent to.

11. Select **Save and test**.

12. Test and deploy the agent.

a. Run a test on the testing page.

b. Deploy the agent.

Result

The Content Insights AI agent is deployed and available to users with the access roles you defined. The agent activates through the triggers and channels you configured.

Configure Attachment Summarization skill

Configuring Attachment Summarization skill to automate key information extraction from documents.

Attachment Summarization is an AI-powered skill available through IT Service Management and ServiceNow Otto for HR Service Delivery (HRSD). It automatically reads and summarizes the content of uploaded documents, extracting key information in near real-time and significantly reducing manual triage time for agents.

For more information, see Customize a ServiceNow Otto for IT Service Management (ITSM) Incident Summarization skill or Configure attachment summary.

Related topics

Attachment Summarization

Using Content Understanding

Use Content Understanding to process and extract meaning from unstructured content in your ServiceNow instance. This section provides an overview of the workflow and links to the tasks required to complete the process.

Related topics

Use Content insights AI agent

Use Information Extraction skill

The Information Extraction skill generates predictions from activated use cases. In agent review mode, you review and correct predictions before the extracted values populate your records.

After you activate a use case in agent review mode, review and correct the predictions that the Information Extraction skill generates before the extracted values populate your records.

Review predictions in Information Extraction skill

After a use case is activated in agent review mode, you can review the predictions generated by the Information Extraction skill and, if needed, modify them before submitting.

Before you begin

Role required: fulfiller

About this task

When a use case runs in agent review mode, each document task remains open until a fulfiller validates the predicted values before the extraction completes.

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In full automation mode, the review step is skipped and the predictions are applied directly. However, if any required fields are missing predictions, you can pause the extraction process to initiate a Human-in-the-Loop (HITL) review, ensuring accuracy in data extraction.

For more information, see Automation modes.

After you activate your use case, the skill processes documents and generates predictions each time the trigger conditions are met. Each execution creates a document task.

Procedure

1. Navigate to the Document Tasks [sys_di_task] table.

   Tip: To access the Document Tasks table directly, use the following URL format:

   ```
   https://<instance-name>.service-now.com/sys_di_task_list.do
   ```

2. Open the document task that you want to review.
3. Select **Show in Doc Intel**.

   The **Extract Information** workspace opens.

4. Review each prediction, and then accept the value if it's correct or edit it if it isn't.
5. Submit the document task.

Result

After you submit the reviewed values, the second workflow is triggered. This workflow extracts data from the document and populates the fields in the target ServiceNow table.

What to do next

Some workflows incorporate Content Understanding directly into their workspace, so the review happens in that workflow's interface. For other use cases, an administrator can create a UI action to embed the skill in the workspace that the relevant fulfillers use.

Related topics

Set up a use case

Use Content insights AI agent

Use the Content Insights AI agent to generate information from your inputs, attached documents, or images

Use the Content insights AI agent to:

- Ask questions about documents and images
- Extract key information from documents
- Summarize documents and images

Ask questions about documents and images

Use question and answer (QnA) to ask the Content Insights AI agent specific questions about document or image and get cited answers. QnA is the agent's default mode.

Before you begin

Role required: sn_aia.admin

About this task

Use QnA when you:

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- Have a specific question about document or image.
- Want to classify or categorize a document.
- Want to extract values without a predefined template.
- Are asking multiple questions about one or more attachments.

QnA requires a document or image, provided by record reference or upload, and your specific question.

Note: The agent may produce inaccurate results. Review all AI-generated answers before using them.

Procedure

1. Configure the Content Insights AI agent.
   For more information, see Configure Content insights AI agent.
2. Open the ServiceNow Otto panel or ServiceNow Otto for Virtual Agent.
3. Start a conversation with the agent by typing an utterance.
   Include the document, image, incident, or record that you need the agent to process.
4. Ask your question in natural language.
   - Ask clear, specific questions, such as `What is the total invoice amount?` rather than `Tell me about the invoice.`
   - Use simple language and avoid complex logic or conditionals.
   - Combine multiple questions into a single query, such as `What is the effective date, termination clause, and governing law?`
   - Frame requests as questions starting with words such as `What`, `Who`, `When`, or `How much`.
5. Review the AI-generated response.
   Verify the answer against the source document before using the results.

Result

The agent displays the answer with citations from the source document or image.

Example: Example utterances

With uploaded documents:

- `What is the main obligation in this document?`
- `Who are the parties in the attached file?`
- `What type of document is this?`
- `What are the confidentiality terms in this PDF?`

With record references:

- `What is the subject of the document attached to incident INC001234?`
- `Who is the client in the file attached to record TASK123456?`
- `What are the payment terms in the document linked to TASK456789?`
- `What is shown in the screenshot attached to INC001234?`

With an attachment sys_id:

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- `What is the governing law in attachment sys_id abc123?`
- `Who wrote the document with sys_id 123 from table abc?`

Extract key information from documents

Use key information extraction (KIE) to extract structured data from documents with a predefined template, for processing standardized documents such as invoices, contracts, or forms.

Before you begin

Before using KIE, verify that a use case (task definition) is created and configured for your document schema. Have the task definition name, the names of the keys to extract, and either the sys_id of the task definition or search terms that match its name.

Role required: sn_aia.admin

About this task

Use KIE when you:

- Have a predefined task definition (template) for your document type.
- Want to extract specific, structured fields consistently.
- Are processing multiple documents of the same type.

Note: If you request an extraction, for example "extract X and Y," without providing a task definition, the agent treats the request as a question-and-answer (QnA) request instead.

Procedure

1. Configure the Content Insights AI agent.
   For more information, see Configure Content insights AI agent.
2. Open the ServiceNow Otto panel or ServiceNow Otto for Virtual Agent.
3. Start the AI agent by entering an initial message.
   Include the document that the agent should process.
4. Specify the task definition.

   Provide the task definition sys_id for the fastest processing, or use search terms that match your task definition name. For example:

   - `Extract the values in the attachment of incident INC001234. Use task definition sys_456.`
   - `Extract data from attachment sys_123 of record INC001234. Use task definition sys_987.`

   If you don't provide a task definition, the agent prompts you for a sys_id or search query. For example, entering `Extract the values in the attachment of incident INC001234` causes the agent to ask for a task definition before proceeding.

5. Confirm the task definition when prompted.
   When the agent displays search results, confirm which task definition to use before extraction proceeds.

Result

The agent displays the extracted values and provides a link to the full extraction results. Processing time varies with document size and schema complexity.

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Summarize documents and images

Use the Content Insights AI agent to generate a concise summary of document or image from a record reference or uploaded attachment.

Before you begin
Role required: AI Agent Admin [sn_aia.admin]

About this task
Use summarization when you need a high-level overview of document or image, are reviewing multiple attachments, or need to understand a document's purpose before reviewing its details.

Summarization requires only a document or image, provided by record reference or upload.

Procedure

1. Configure the Content Insights AI agent.
   For more information, see Configure the Content Insights AI agent.
2. Open the ServiceNow Otto panel or ServiceNow Otto for Virtual Agent.
3. Start the AI agent by entering a request.
   Provide the document or image that you want the agent to process.
4. Request a summary using clear language.
   Include the word "summarize" or "summary" in your request, and specify which document or attachment to summarize.

Result
The agent displays a concise summary of the document or image.

Example: Example utterances

Basic requests:

- `"Summarize these attachments."`
- `"Provide a summary of the uploaded document."`
- `"What does this file contain? Summarize it."`

With record references:

- `"Summarize the attachment from incident INC001234."`
- `"Summarize the document attached to record TASK123456."`
- `"Summarize the images attached to INC001234."`

With an attachment sys_id:

- `"Write a summary of the attachment with sys_id ABC123."`
- `"Give me a summary of attachment sys_id 12234 from table incident."`

Content Understanding Reference

Reference topics provide additional information about the lists and forms that you use to configure and administer Content Understanding.

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- Content Understanding personas
- Languages supported by Content Understanding
- Large language models used by Content Understanding
- Manage use case
- Content Understanding forms
- Field types in Content Understanding
- Content Understanding integrations
- Data normalization
- Limitations in Content Understanding

Content Understanding personas

Personas define the roles that interact with Content Understanding and the actions each role performs.

Content Understanding personas

Persona	Description
Admin	Activates capabilities, configures use cases (fields, tables, questions, extraction mode), and manages related integrations and flows. Requires the DocIntel Admin [sn_docintel.admin] or DocIntel Manager [sn_docintel.manager] role.
Fulfiller or human agent	Works a record, such as a case or task, and uses Document Q&A or attachment summarization to get context from an attachment without opening the file. Reviews a document task when its use case is not set for full automation, and validates or corrects the predicted values before the task is completed. For more information, see Automation modes.
Requester or end user	Submits the record or request associated with a document and may also need quick answers about an attachment's content. Uses Document Q&A conversationally in Virtual Agent, or views attachment summaries alongside a record.

Languages supported by Content Understanding

Use this reference to identify which languages the Content Understanding application supports for text-based and image-based files, and which optical character recognition (OCR) model applies to each language group.

For text-based files, the AI recognizes any language supported by the selected or default model, as described in the model card for the LLM. For more information on LLMs, see Large language models used by Content Understanding.

For image files that require OCR to detect text, OCR models support different language groups. The language selected during use case setup helps the OCR model detect text in the images. For more information, see Set up a use case.

The following OCR models are available.

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OCR models for Content Understanding

OCR model	Languages supported
Latin model (Default)	English, Dutch, French, German, Italian, Portuguese, and Spanish
CJ model	Japanese and Chinese (simplified)

Large language models used by Content Understanding

The Content Understanding application uses large language models (LLMs) to support generative AI and agentic AI capabilities.

Available LLMs

You can select the LLM when creating a use case. The LLM can also be selected for the AI agent to use when processing documents and images.

Multimodal LLMs support image mode by processing multiple types of inputs — such as text, sound, and images — to generate a text response. Processing may take longer for image inputs.

Note: The Content insights AI agent requires a multimodal LLM. The text-only Now LLM Service is not supported for the AI agent.

AI-generated outputs may be inaccurate or incomplete. Review all AI-generated content before use.

The following table lists the available LLMs for Content Understanding.

LLM options for Content Understanding

LLM	Highlights
Now LLM Service - Large	Text-only model that supports natural language understanding, automation, and decision support.
Now LLM Service - Small	Text-only model that enhances text-based automation and content generation in ServiceNow workflows.
Google Cloud - Gemini Large	Multimodal model with advanced reasoning and problem-solving capabilities.
Google Cloud - Gemini Small	Multimodal model with strong performance in summarization, rewriting, and content transformation.
Azure OpenAI - GPT Large	Multimodal model with strong performance on tasks involving analysis, summarization, and multi-step problem solving.
Azure OpenAI - GPT Small (default)	Multimodal model optimized for routine workflows, including summarization, paraphrasing, and question and answer tasks.
Amazon Bedrock - Claude Large	Multimodal model with strong context management for long documents and dialogs.
Amazon Bedrock - Claude Small	Multimodal model with lower latency and higher efficiency for real-time applications.

For more information, see Large language models on the ServiceNow AI Platform.

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Content Understanding forms

Reference forms provide fields for viewing and updating Content Understanding records, including fields, questions, and tables.

Available forms

- Field form fields
- Question form fields
- Table form fields

Field form fields

The field form defines the information to extract from a document, including the field name, type, and target table.

The following fields are available when configuring a use case for document extraction.

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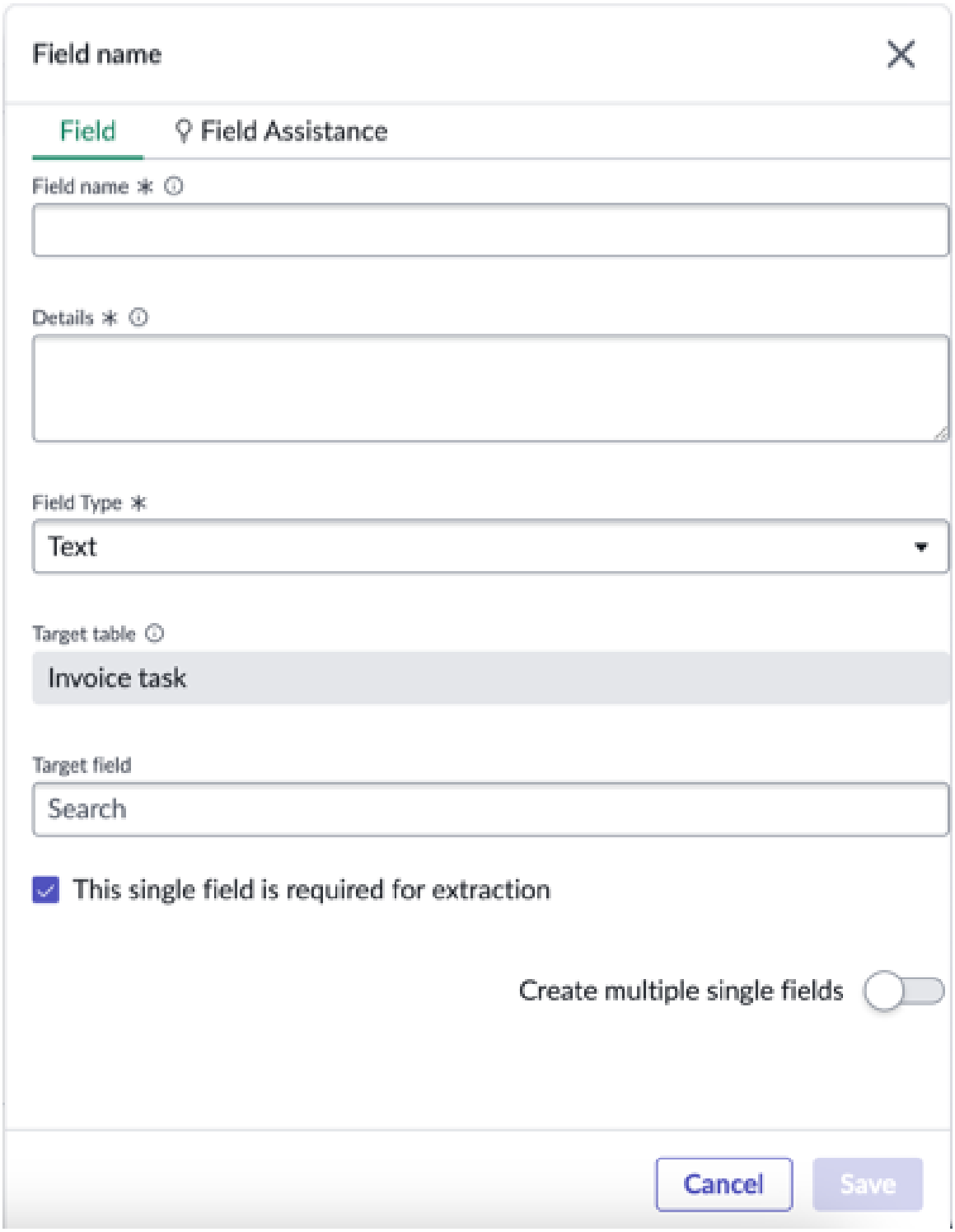
Field form for document extraction



Field form

Field	Description
Field name	Name of the field to extract. State the information to extract clearly and concisely. For example: `Order number`
Details	Description of the information to extract. The field name and description together

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Field form (continued)

Field	Description

	determine what text the system extracts from the document.
	
	Include relevant context or additional details to identify the correct information. This may include keywords. For example, `The contract number or the number of the reference contract.`
	
	Include examples of the information to extract. For example, `AGR-2023-0042`, `CON2039739`, or `BV-22122KEY`.
	
	Example field configuration:
	`Field name: Currency`
	`Details: The currency in which the contract is denominated. Only valid for Order Forms. Otherwise, leave it empty (''). If the currency symbol is '$', answer 'USD'. Examples: 'USD', 'EUROS', 'GBP', etc.`
	
	Tip: Select the **Field assistance** tab for additional guidance on forming an effective field.

Field Type	Type of field, such as text or date. For more information, see Field types in Content Understanding. Some field types convert the extracted value into a standard format. For more information, see Data normalization.
Target table	Table that stores the document processing results for this use case.
Target field	Field on the target table to align with. **Note:** The use case must include a selected target table before this field is available.
This single field is required for extraction	Marks the field as required. Required fields must have a value and can't be left empty or cleared.
Create multiple single fields	Keeps the form open after saving. Select this option when adding more than one field to the use case.

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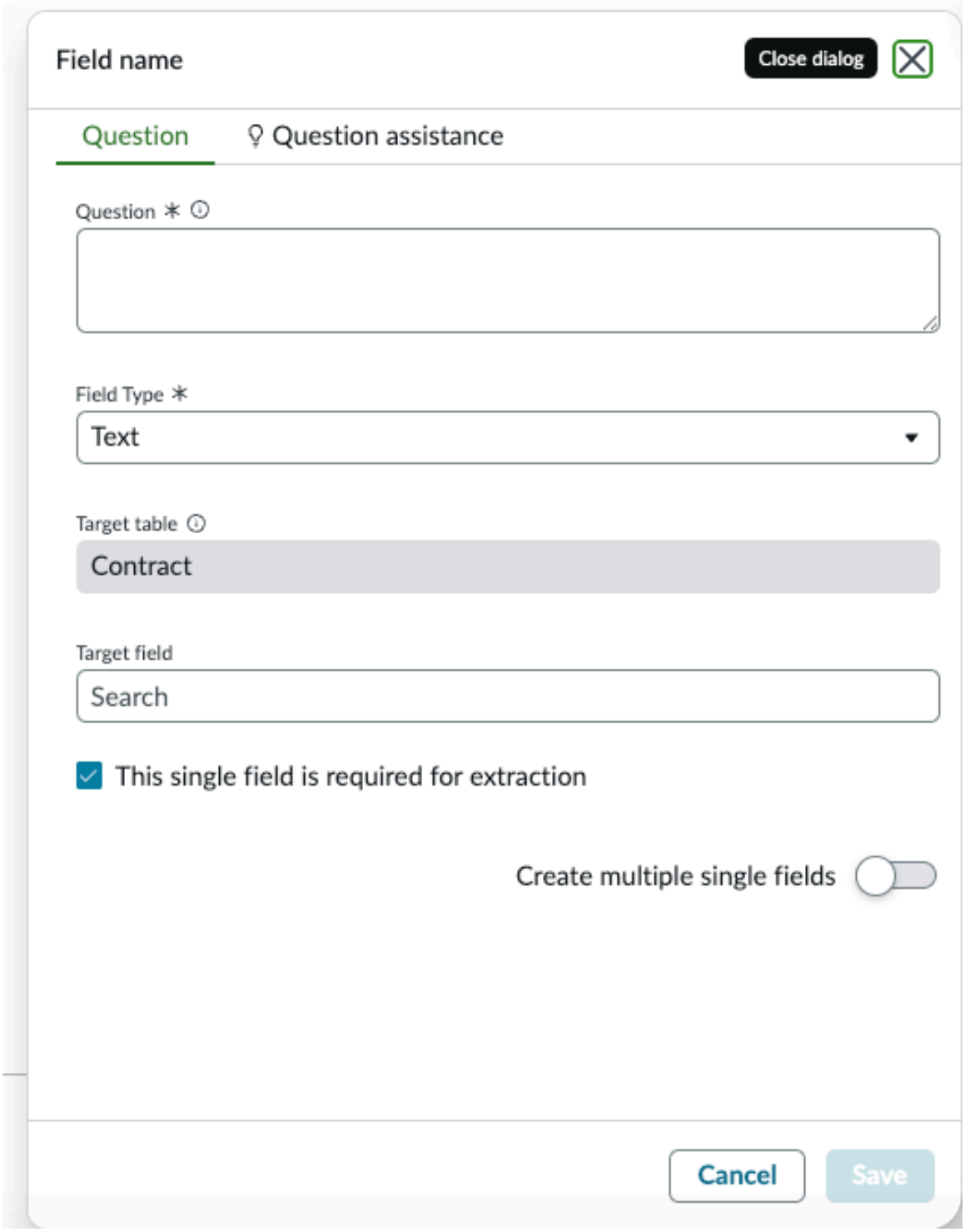
Question form fields

The Question form contains fields that define a question and how its answer is extracted from a document in a use case.

Question form fields

Question form



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Question form

Field	Description
Question	The question about the document that generative AI uses to extract information. This question is displayed to the agent when reviewing answers in the Document Intelligence workspace. **Tip:** Select the **Question assistance** tab for guidance on formulating effective questions.
Field Type	Type of field — for example, text or Boolean. For descriptions of available field types, see Field types.
Provide an explanation for the answer	Option to have generative AI provide an explanation, based on the document text, that supports a yes or no answer. This field appears only when the **Field Type** field is set to **Boolean (True/False)**.
Target table	Table that stores the document processing results for this use case.
Target field	Field on the target table to align with. **Note:** The use case must include a selected target table before this field is available.
This single field is required for extraction	Option to mark a question as required. Required questions must be answered and can't be left empty or cleared.
Create multiple single fields	Option to keep the form displayed on the screen. Select this option when adding more than one question to the use case.

Table form fields

The Table form contains fields for defining a table and its columns for document extraction in a use case.

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Table form fields

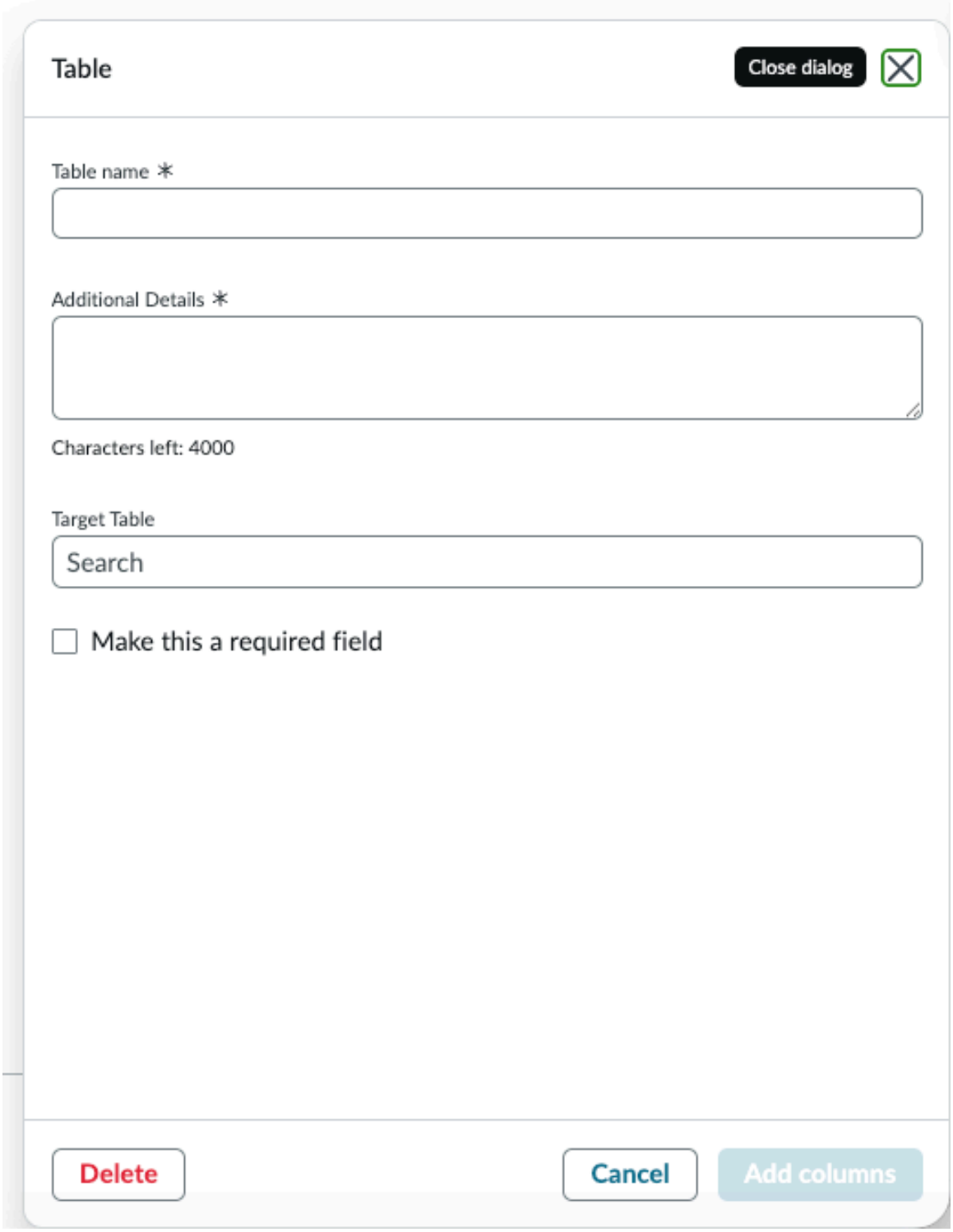

Table form

Field	Description
Table name	Name of the table.
Additional Details	Description of the table information to extract. Along with the table name, the description helps the large language model (LLM) predict which table fields to extract from the document.

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Table form (continued)

Field	Description
	Include any relevant context or additional details to identify the correct information.
Target table	Table that stores the document processing results for these table fields.
Parent mapping to field	Field on the target table to align this table with. Select a target table before configuring this field.
This table is required for extraction	When selected, the table is required for extraction. Required fields must be completed and cannot be left empty or cleared.
Column title	Name of the column header in the table.
Column type	Type of field in the table column — for example, a text or date field. For more information, see Field types in Content Understanding. Some field types convert the extracted value into a standard format. For more information, see Data normalization.
Select target field	Field on the target table to align with. **Note:** The use case must include a selected target table.
New column	Option to add a column to the table.
Create multiple tables	When selected, keeps the form open after saving. Select this option when adding more than one table to the use case.

Field types in Content Understanding

Field types determine what kind of information is extracted from a document and how that information is stored or displayed in a use case.

The following field types are available to administrators when configuring fields for use cases.

Note: Some field types convert the extracted value into a standard format. For more information, see Data normalization.

Field types

Field type	Description
Boolean (True/False)	True or false value. In document Q&A, this value appears as a "yes" or "no" answer. If enabled by the administrator, the answer may include an AI-generated explanation, which may not always be accurate. Available for questions defined in the use case setup.

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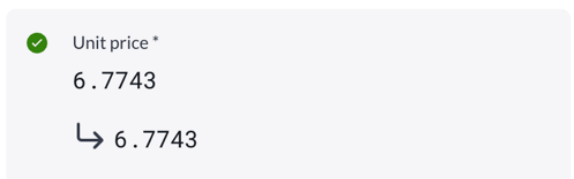
Field types (continued)

Field type	Description
Date	Date displayed in the format extracted from the document. Available for fields and tables defined in the use case setup.
Decimal	Number with up to two decimal places (for example, 12.5 or 12.55). Available for fields and tables defined in the use case setup.
Float (floating point number)	Number with up to seven decimal places (for example, 12.0 to 12.0000000). Available for fields and tables defined in the use case setup. 
Integer	Whole number (for example, 12). Available for fields and tables defined in the use case setup.

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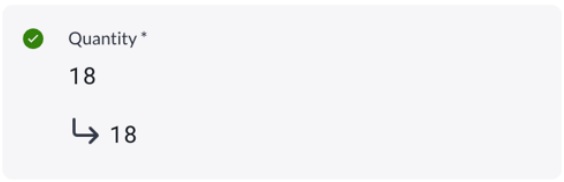
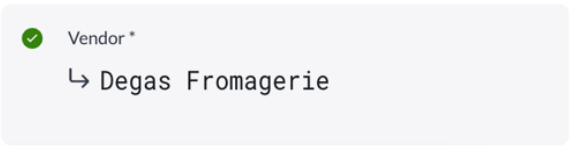
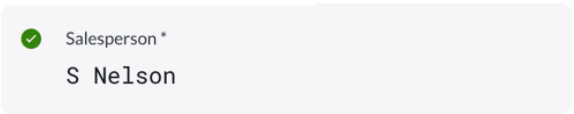
Field types (continued)

Field type	Description
	
Reference	Reference to a field on another table. For example, the **Caller** field on the incident table is a reference to the User [sys_user] table. For more information, see Reference field type. Available for fields and tables defined in the use case setup. 
Text	Text value. Available for fields, tables, and questions defined in the use case setup. 

Content Understanding integrations

Content Understanding integrates with ServiceNow® solutions to extract, analyze, and summarize information documents.

Content Understanding connects with the following ServiceNow products and capabilities:

Note: Content Understanding integrations extend beyond the products listed here. For information about additional available integrations, contact your ServiceNow administrator or visit the ServiceNow Store.

Content Understanding integrations

Product	Integration capability	Learn more
Contract Lifecycle Management (CLM)	Contract metadata extraction and contract analysis. The skills for contract metadata extraction and contract analysis are only available with the Now Assist in Contract Management application.	

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Content Understanding integrations (continued)

Product	Integration capability	Learn more
Accounts Payable Operations (APO)	Invoice data extraction. Extract invoice details from PDFs submitted through email or supplier portal and automatically process the digitized invoice within Accounts Payable Operations (APO).	ServiceNow Otto for Accounts Payable Operations (APO)
Operational Sustainability Management (formerly ESG Management)	ESG information extraction. Extract ESG-related information from invoices to support Operational Sustainability Management (ESG) initiatives and regulatory compliance.	Filter citations documents for Operational Sustainability Management (formerly ESG Management).
IT Service Management (ITSM)	Attachment summarization. Agents can view a summary of attachment content along with the record summary in ITSM. Attachment summarization is available in Now Assist for ITSM.	Customize a ServiceNow Otto for IT Service Management (ITSM) skill
ServiceNow Otto for Virtual Agent	Document chat. Agents can receive chat responses based on document content. Document chat is available in ServiceNow Otto for Virtual Agent.	Upload documents in a chat

Related topics

Data normalization

Data extracted from documents is converted into a standard format. This ensures that values appear consistently across all fields, making the data easier to group, analyze, and integrate with other applications.

Data normalization supports integration with other applications on the ServiceNow AI Platform.

Field types

The following field types are converted to support data normalization:

Supported field types for data normalization

Field type	Description
Date	Standard date format. For example, YYYY-MM-DD.
Reference field	A field that uses a field in another table as a standard. Content Understanding matches the extracted data to the standard. For example, a use case has a reference field called **Vendor** that points to the Name column in the Company table as the reference. When processing a document task, Content Understanding extracts "Degas Dairy Products, Inc" from the document and fills the **Vendor** field with that value. Content

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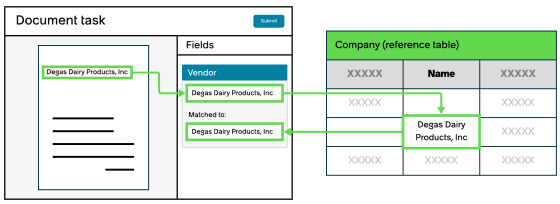
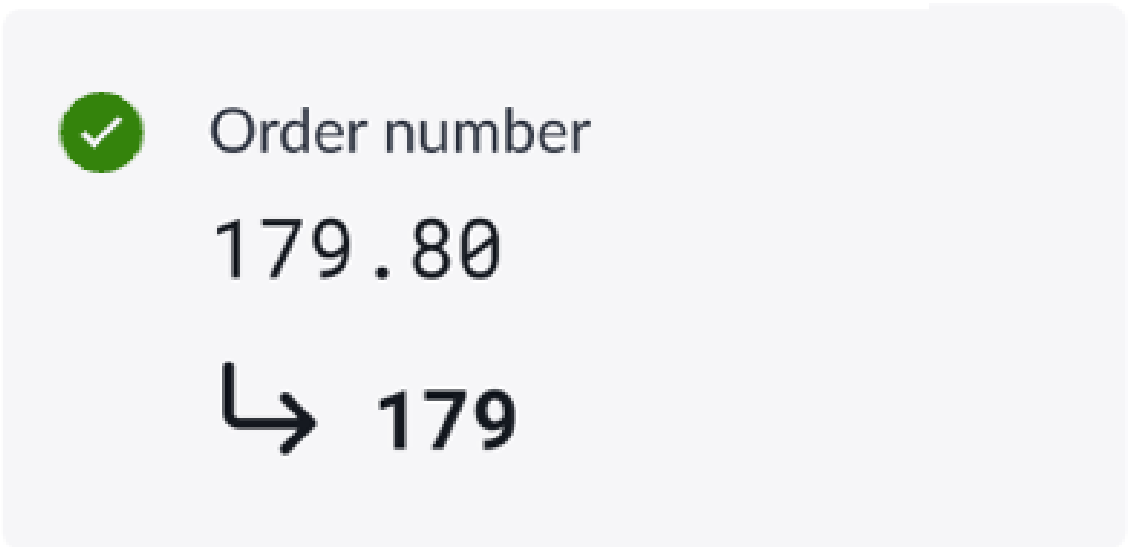
Supported field types for data normalization (continued)

Field type	Description
	Understanding compares the value to the company names in the reference table and finds "Degas Dairy Products, Inc" as a match. In the document task, "Degas Dairy Products, Inc" is matched to "Degas Dairy Products, Inc" in the reference. 
Integer	Whole number. For example, 12.
Decimal	Number with up to two decimal places. For example, 12.5 or 12.55.
Floating point number	Number with up to seven decimal places. For example, 12.0 to 12.0000000.

Display

A completed data extraction field shows the converted value next to it.



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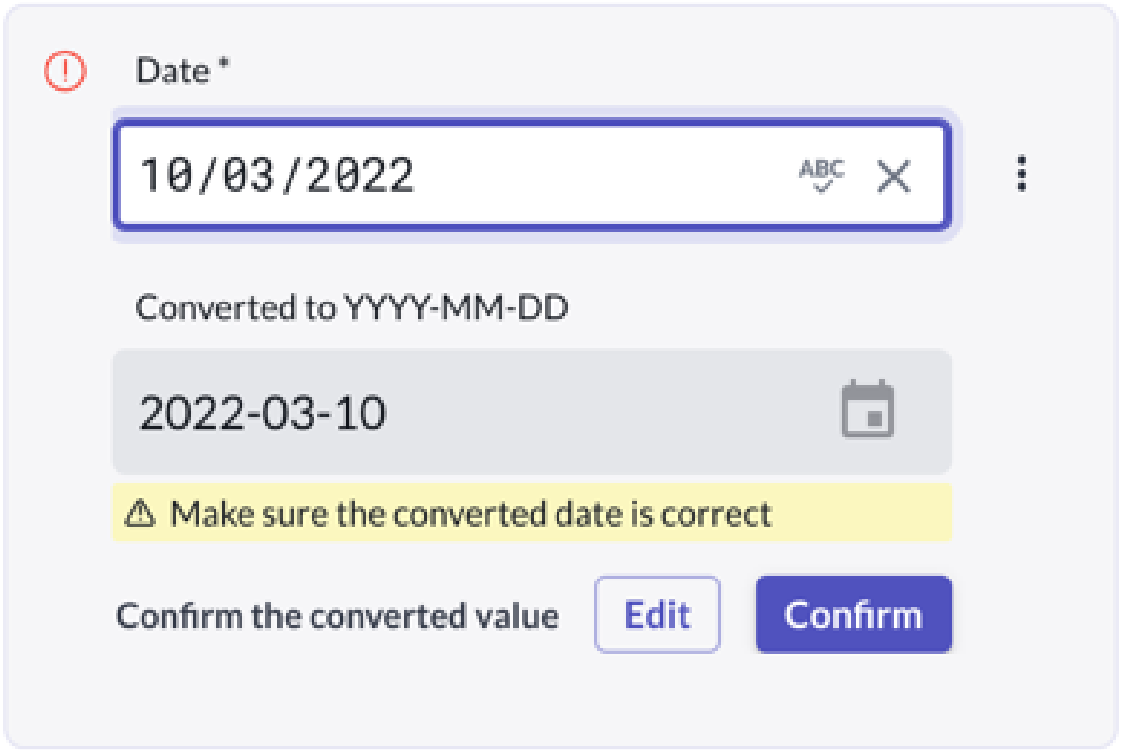

You can adjust the converted date value by selecting **Edit**.

Note: In some cases, the data extracted from the document may not be in a valid format to be converted. For example, if Content Understanding read the letter O instead of a number 0 in a date field (11.12.2o23), then it would not be converted. In this case, edit the field to the correct format.

Ambiguous data

When a document contains ambiguous data, Content Understanding uses the default setting in the use case configuration to determine the correct interpretation. The value requires clarification before it can be converted into a normalized format.

For example, consider a use case with a Date field. The default interpretation of ambiguous dates is set to "Month first." A document containing the date 1/2/2024 is interpreted as January 2, 2024, rather than February 1, 2024.

In such cases, you may need to confirm or correct the interpretation of ambiguous dates. Depending on the configuration of the field within the use case, automated document processing may pause so you can verify that the conversion is accurate.

Limitations in Content Understanding

Review the file format, size, page count, and language limitations that apply to skills and AI agents in Content Understanding.

Information extraction skill limitations

The following table lists the limitations for the Information Extraction skill in Content Understanding.

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Information extraction skill limits

Limit	Description
File formats	The supported file formats are JPEG, PNG, PDF, and DOCX. **Note:** Encrypted files aren't supported.
File size limit	The file size limit is 20 MB.
Page count limit	When image mode is enabled, the suggested upper boundary is 50 pages per file, with a minimum of 10 pages. Actual performance varies based on the following factors: • Model constraints: Some models limit the number of images per request. For example, some models allow a maximum of 20 images per request. • File complexity and size: Documents with dense text or large images consume more tokens and memory, which can affect processing time and efficiency. • Platform payload limits: The upper limit for data passed to the language model is 32 MB. Because image sizes vary, the exact page count that fits within this limit varies by document. Because these constraints depend on your configuration, document characteristics, and the model used, test your documents by gradually increasing the page count to identify the effective limits for your use case. If image mode is enabled, the page count limit is 10 pages per file. If image mode is inactive, the page count limit is: • 200 pages per file if no tables are defined for the use case. • 20 pages per file if a table is defined for the use case. Image mode is selected during use case setup. For more information, see Set up a use case.
Maximum number of fields per use case	The maximum number of fields per use case is 50.
Supported languages	For image files that require OCR (optical character recognition) to detect text, OCR models support different language groups. For more information, see Languages supported by Content Understanding. For text-based files, the skill recognizes any language supported by the selected or default model, as described in the model card for the LLM. For more information on LLMs, see Large language models used by Content Understanding.

Limits for the Content insights AI agent

The following table lists the limitations for the Content insights AI agent.

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Content insights AI agent limits

Limit	Description
File formats	The supported file formats are JPEG, PNG, PDF, DOCX, XLSX, CSV, TXT, and PPTX.
File size limit	The file size limit is 20 MB.
Page count limit	For each document task, the page count limit is 200 pages per file. If the AI agent extracts data based on a use case that includes a table, the limit decreases to 20 pages per file.
Supported languages	For image and text-based files, the AI agent recognizes any language supported by the selected or default model, as described in the model card for the LLM. For more information on LLMs, see Large language models used by Content Understanding.

ServiceNow AI Lens

With ServiceNow AI Lens, which is a ServiceNow® AI application, you can use generative AI to scan, extract, comprehend, and synthesize data to optimize your workflows.

Get started

Explore

Learn about ServiceNow AI Lens concepts and features.

Configure

Configure the ServiceNow AI Lens application to get started.

Use

Capture screens to analyze, comprehend, and use data.

Reference

Get details about ServiceNow AI Lens components, such as roles, tables, and limitations.

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Important:

- Some ServiceNow AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base . Be sure to check for availability updates in future releases.
- Some ServiceNow AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Don't scan any personally identifiable information, such as medical reports, financial reports, or other sensitive data, when using ServiceNow AI Lens as you don't want to expose the large language model (LLM) to any sensitive information.
- ServiceNow AI Lens currently uses Azure OpenAI GPT-4o LLM.

Troubleshoot and get help

- Workflow Automation product on the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. In addition, this application will collect information about scripts (and associated script records) in which ServiceNow Otto for code generation is called. Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

Exploring ServiceNow AI Lens

ServiceNow AI Lens is a ServiceNow® AI application that uses generative AI to scan images and screens, extract information, understand visual data, and take action—such as automatically filling in forms with scanned information—to help improve your workflows.

ServiceNow AI Lens overview

Get an overview of the capabilities and a few use cases of ServiceNow AI Lens.

https://player.vimeo.com/video/1167899406?h=604dc8792d&badge=0&autopause=0&player_id=0&app_id=58479

The ServiceNow AI Lens application extracts and analyzes data from screens or the screenshots of documents such as a scanned handwritten note or an email that you capture or files that you

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upload. ServiceNow AI Lens is integrated with the ServiceNow® forms so that you can create or update forms on the ServiceNow instance by auto-filling data.

By connecting to a ServiceNow instance, you can also use ServiceNow AI Lens in a standalone mode to see a preview of the extracted data or get insights about your use cases. For more information, see ServiceNow AI Lens features.

You can leverage Lens actions to customize the Lens behavior by providing default context, trigger options, and transform response logic for a table. When Lens is triggered to auto-fill a form on this table, it uses the configuration defined in the Lens action to auto-fill the form with the transformed LLM response. You can also define context, trigger options, and post processing instructions in a Lens action, which is used when Lens is triggered from desktop to show preview of extracted data and post process the LLM response. For more information, see Define ServiceNow AI Lens behavior with Lens actions.

Extract data from documents such as an image, a scanned handwritten note, web page, or a Microsoft Word document, and autofill catalog item forms in the Service Portal. For example, autofill a new vendor onboarding form by extracting key details such as vendor name, address, contact email, and banking information from multiple artifacts, including Excel files, emails, images, and PDF documents. For more information, see Autofill catalog item forms on Service Portal using ServiceNow AI Lens.

Trigger ServiceNow AI Lens from the Now Mobile® application to extract data from documents such as an image, a scanned handwritten note, web page, or a Microsoft Word document, and auto-fill fields in a form. For more information, see Trigger ServiceNow AI Lens from Now Mobile® and autofill forms.

Get started with ServiceNow AI Lens directly from your browser - no downloading or installation required or by downloading and installing the desktop application for Windows and macOS

Benefits of ServiceNow AI Lens

ServiceNow AI Lens can do the following tasks automatically for you:

- Fill in a form without having to do it manually. ServiceNow AI Lens can scan and extract the visual data to auto-fill in your forms. For example, it can scan the invoice receipt to auto-fill the fields on the expense submission form.
- Scan and identify the information from handwritten notes or images. For example, ServiceNow AI Lens can scan a sequence diagram to generate a script.
- Search for specific information from images. For example, ServiceNow AI Lens can look for a specific clause in a scanned legal contract.
- Process the screenshots of multiple images or files at once. For example, ServiceNow AI Lens can extract the data from multiple screenshots of an error or a Microsoft Excel file to get insights on the data at one time.

ServiceNow AI Lens skill

ServiceNow Otto for Platform includes the AI-powered ServiceNow AI Lens skill to read, understand, respond, and act on visual data such as hand-written texts, images, and websites and take powerful actions to boost productivity.

Admins can enable the ServiceNow AI Lens skill in the AI Admin Hub console. Once enabled, users can perform the following actions:

- Create or update ServiceNow records by auto-filling forms using the extracted data.
- Preview the extracted data.

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- Provide instructions to extract data in a specific way or to get a specific output.
- Capture multiple screenshots to gather insights from multiple images.

Beyond individual user actions, the ServiceNow AI Lens skill can be used by the AI Agents to incorporate any of these capabilities—data extraction, form auto-filling, and visual analysis—as part of a larger AI Agent workflow or automated workflow step.

To view the procedure to enable the ServiceNow AI Lens skill, see Activate the ServiceNow AI Lens skill.

The ServiceNow AI Lens application requires a Workflow Data Fabric (previously known as Automation Engine) license and a ServiceNow Otto license.

Available LLMs

You can use Azure OpenAI, Google Gemini, or Anthropic Claude on AWS as the AI model provider for ServiceNow AI Lens skill. You can set skill-level preferences in the AI Admin Hub console. For more information, see Large language models on the ServiceNow AI Platform.

What to explore next

To learn how to configure and use ServiceNow AI Lens, see:

- Configure ServiceNow AI Lens
- Using ServiceNow AI Lens
- ServiceNow AI Lens reference

ServiceNow AI Lens features

Learn about the various ServiceNow AI Lens features to help you get started with analyzing and gathering insights from the visual data.

ServiceNow AI Lens offers the following features:

Capture data

Scan and get actionable insights from visual data such as images, scanned handwritten notes, Excel sheets, web pages, or any document that provides visual data.

For example, ServiceNow AI Lens can scan an email and auto-fill the fields on the Incident form.

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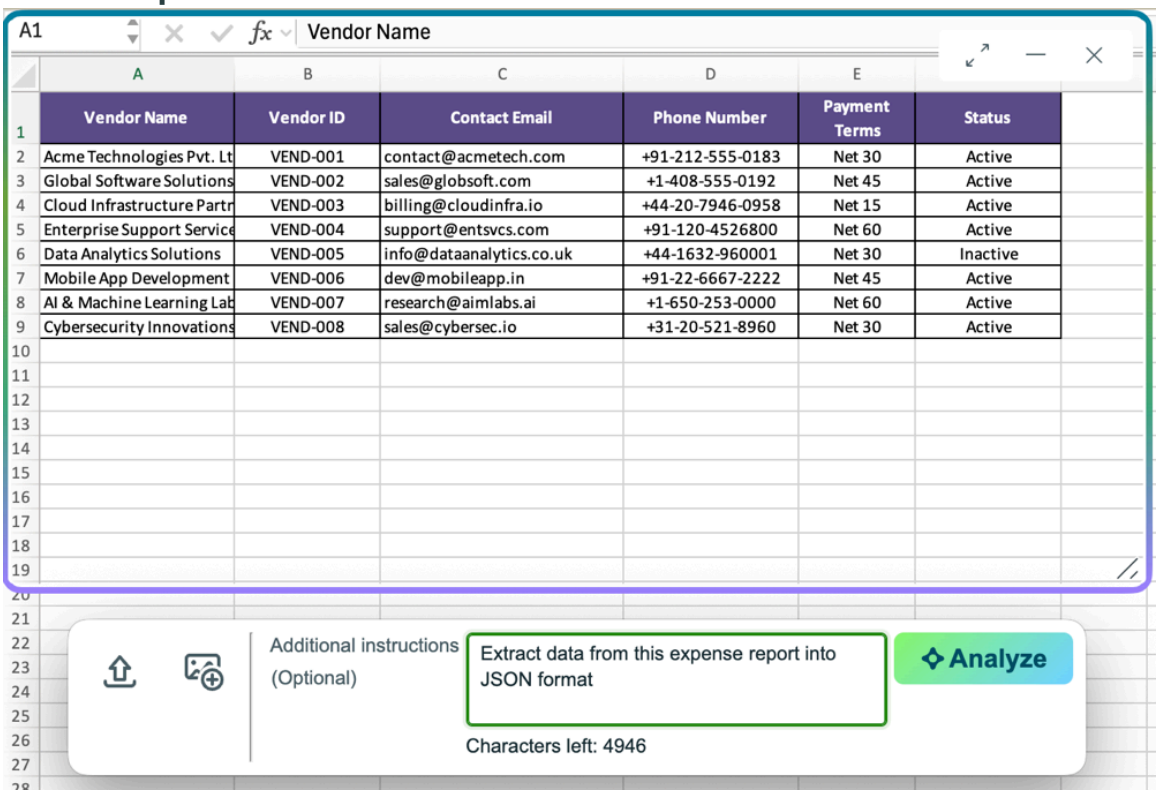
Scan and capture data from email



Use ServiceNow AI Lens from your browser or the desktop application

Get started with ServiceNow AI Lens directly from your browser — no downloading or installation required. Capture your screen or upload one or more files, and let ServiceNow AI Lens analyze the contents and auto-fill your form fields. For the full range of capabilities, open the ServiceNow AI Lens desktop application if it is already installed, or download and install it.

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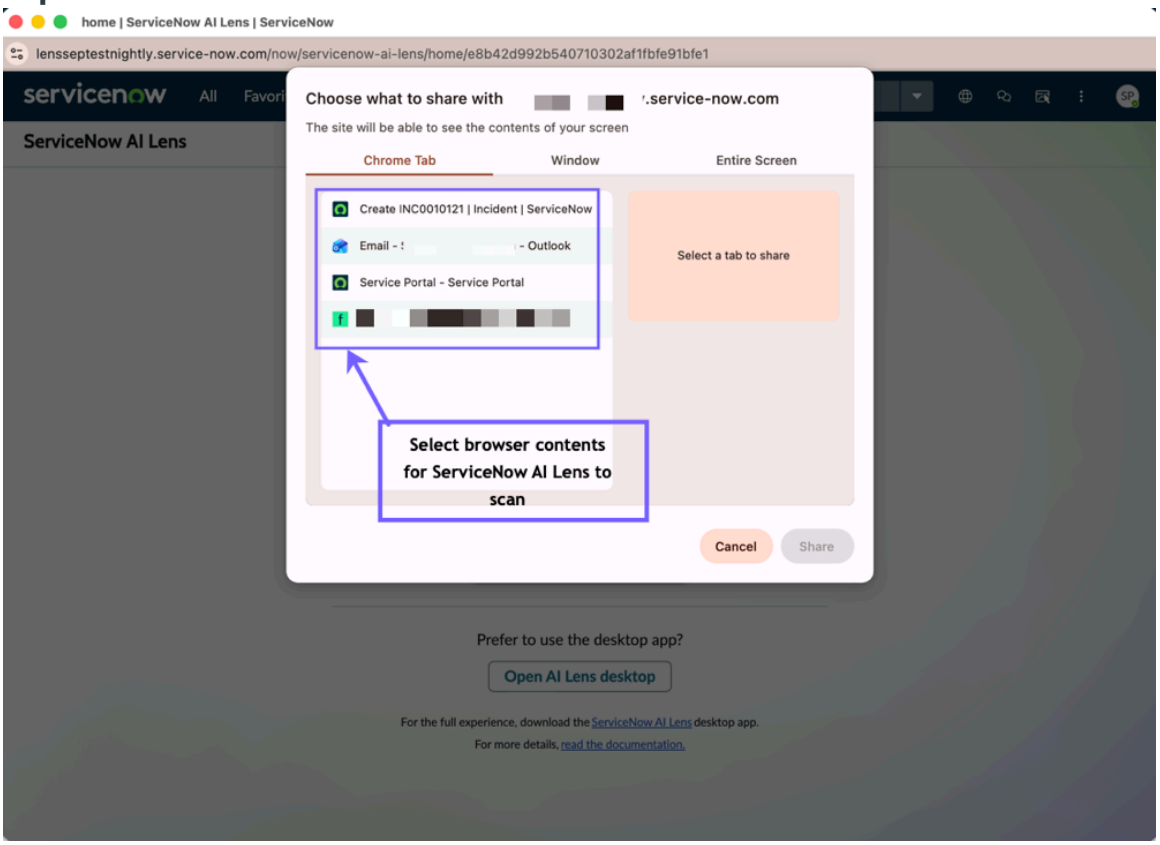
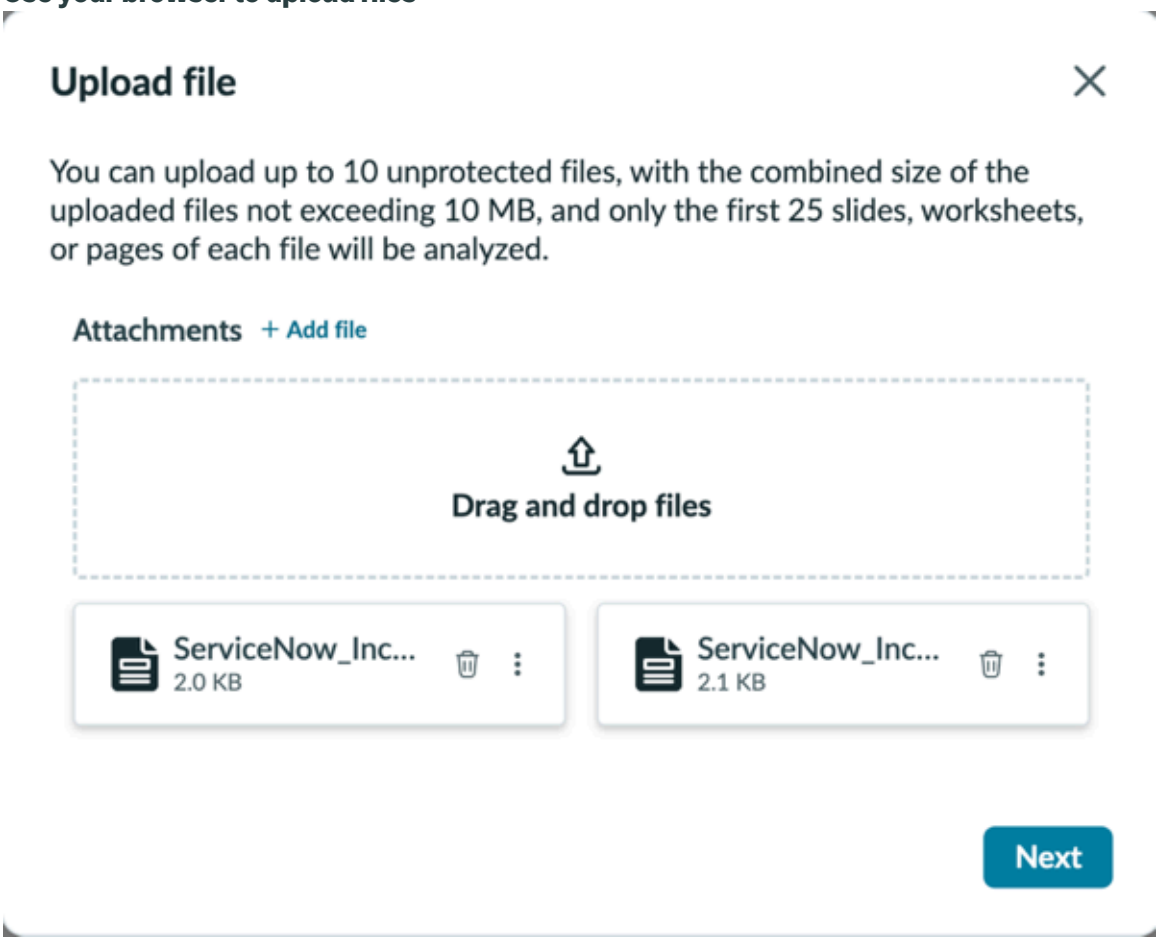
Capture browser contents



Use your browser to upload files



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Upload files

Get actionable insights from the files that you upload. You can upload files by adding or dragging and dropping.

For example, upload copies of all expense bills from your business trips in the last six months. Instruct ServiceNow AI Lens to organize the expense amounts under their respective headings such as food, airfare, cab, and laundry.

File upload window

Provide instructions to analyze data in a specific way

Provide instructions to analyze the data in the screenshots or files after selecting the Edit ( ) icon and entering additional instructions. For example, you can capture screenshots or upload copies of expense bills from your business trips in the last six months. Provide instructions to arrange the expense bill amounts by date and expense category.

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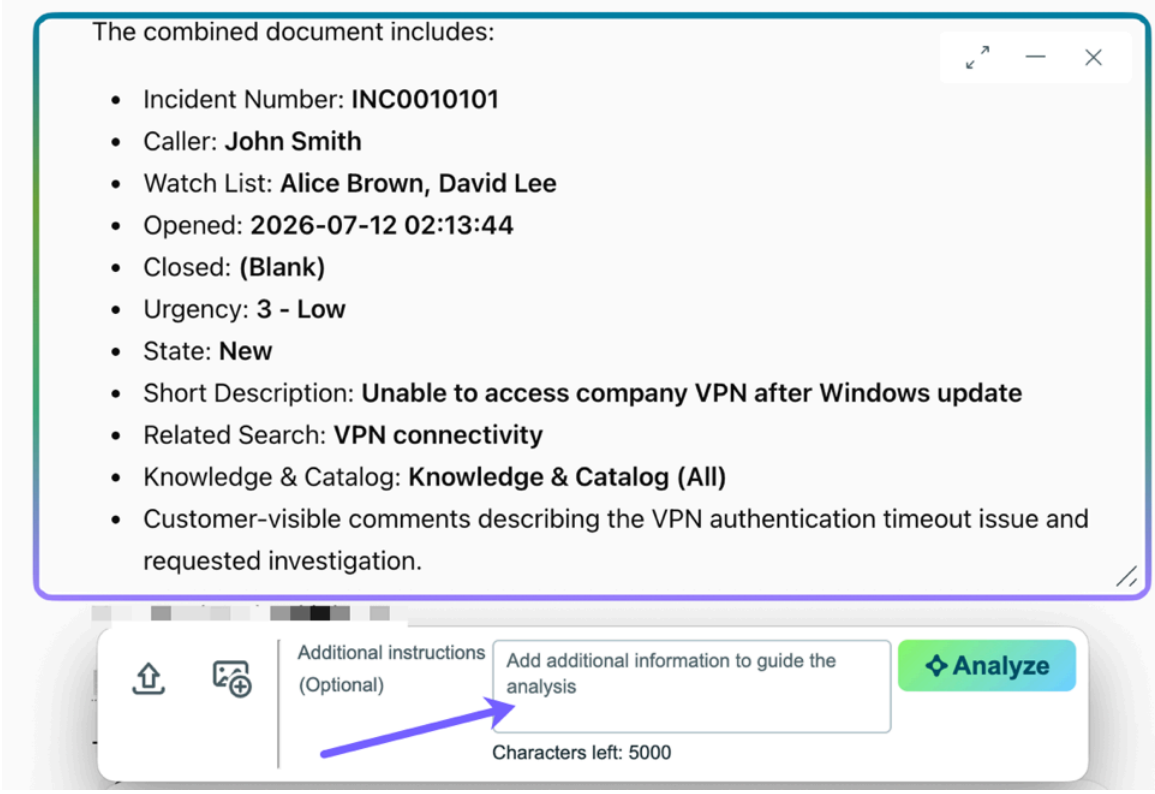
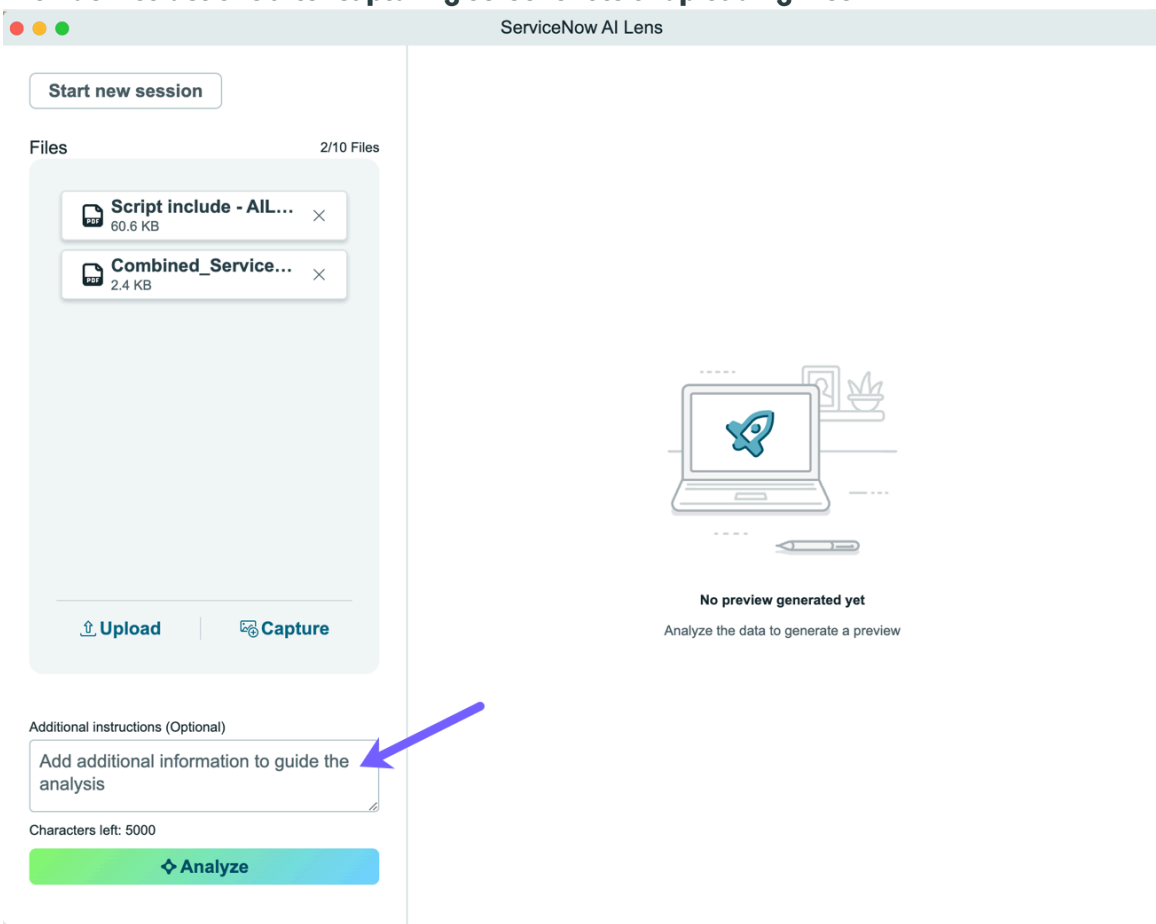
Enter instructions while you capture screenshots



Provide instructions after capturing screenshots or uploading files



Capture multiple screenshots

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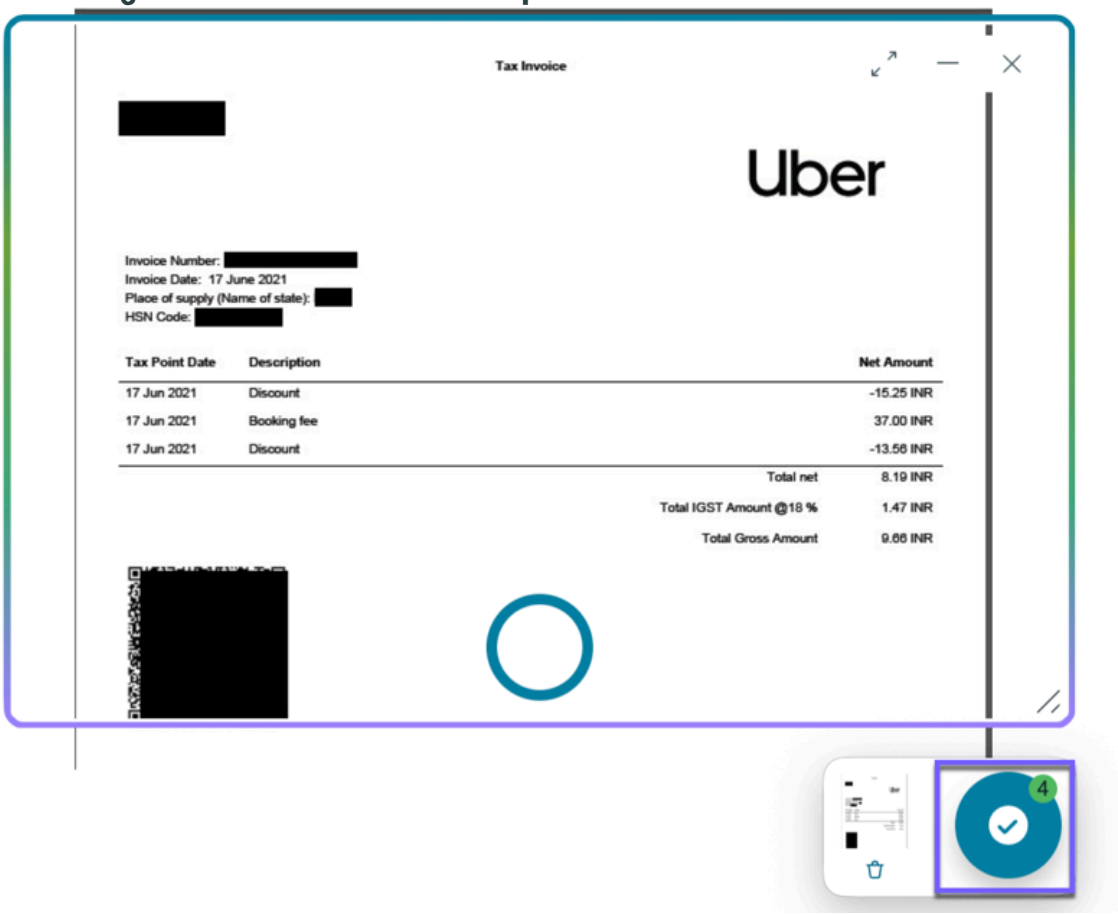
Capture multiple screenshots to analyze and gather data from various images.

For example, ServiceNow AI Lens can scan multiple bills so that you can submit a consolidated invoice report.

Icon showing the number of screenshots captured



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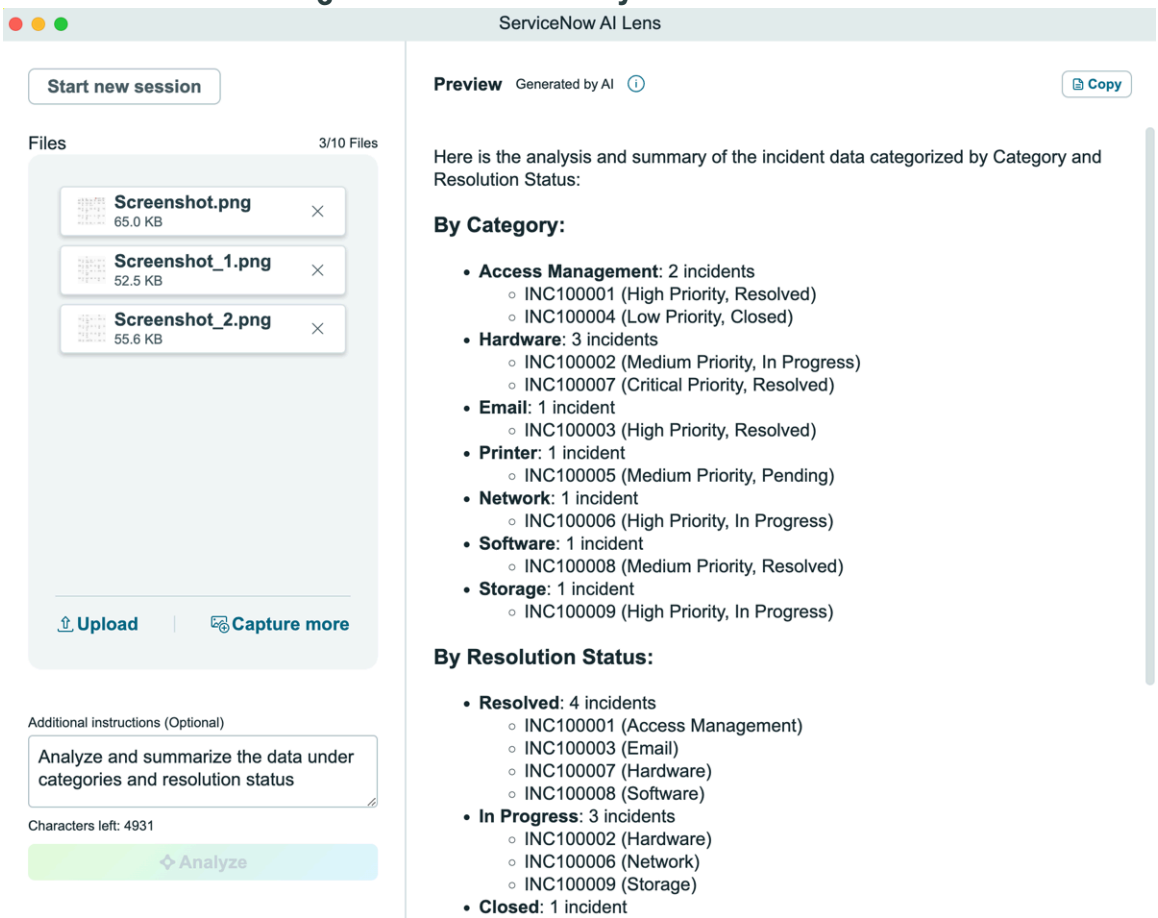
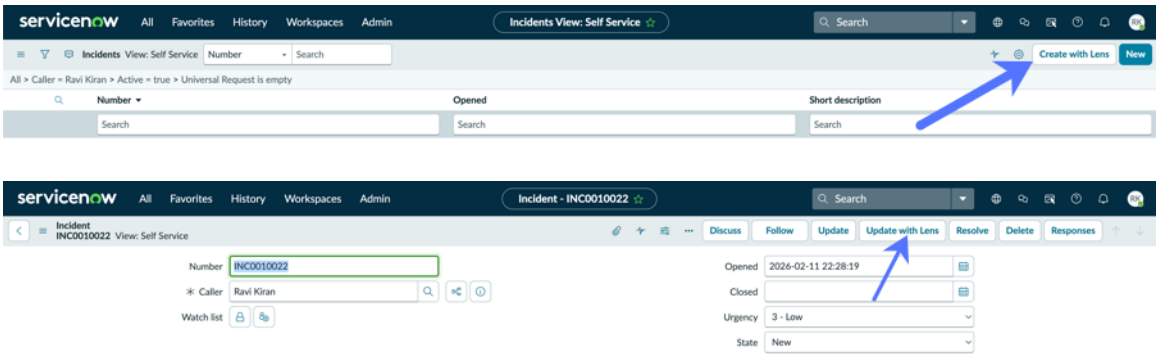
Preview window showing consolidated summary



Launch from ServiceNow instance

Launch ServiceNow AI Lens from a ServiceNow instance to fill the extracted data automatically into the form fields while you're creating or updating records.



Use Lens actions to customize Lens behavior

You can use Lens actions that define Lens behavior depending on how ServiceNow AI Lens is triggered and what context is set. You can define default instructions, trigger options, custom context, transform response logic, and post processing instructions for the Lens execution. With Lens actions, you can customize how a classic form is auto-filled using ServiceNow AI Lens or what data must be extracted for preview and post process the LLM response. For more information, see Customize ServiceNow AI Lens behavior by creating a Lens action.

For example, you can define a Lens action that is used when Lens is triggered from an instance to populate a form of a particular table. You can also define which form fields must be populated.

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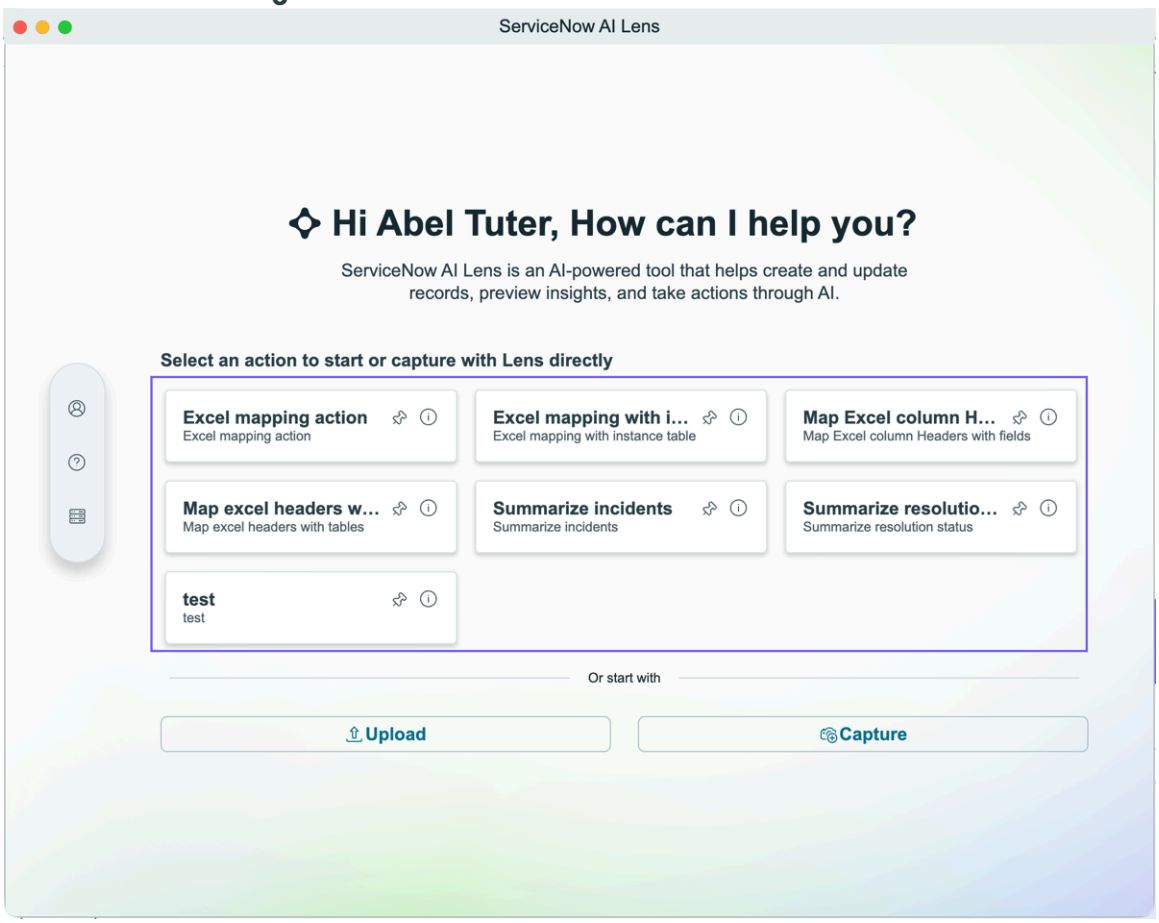
Home screen showing Lens actions



Auto-map Excel sheet column headers with ServiceNow table columns

Define a Lens action that specifically lets ServiceNow AI Lens to auto-map the column headers of an Excel sheet with the columns of a ServiceNow table. Review and update the mapping, if required, and then insert the Excel sheet data into the table.

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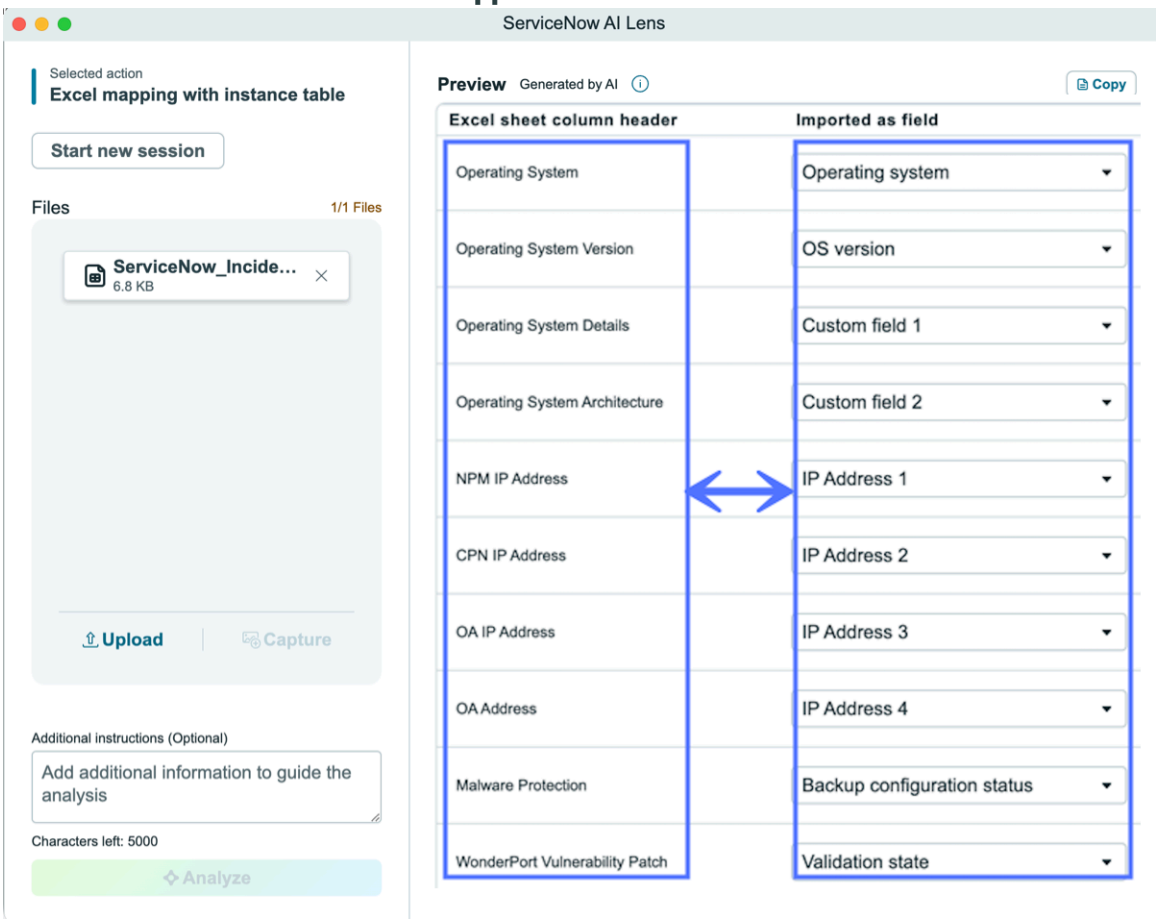
Excel sheet column headers auto-mapped with table columns



ServiceNow AI Lens in Virtual Agent

Trigger ServiceNow AI Lens from a Virtual Agent conversation by using ServiceNow AI Lens topic in Virtual Agent. For more information, see Enabling ServiceNow AI Lens in Virtual Agent and Extract and analyze data using ServiceNow AI Lens from Virtual Agent.

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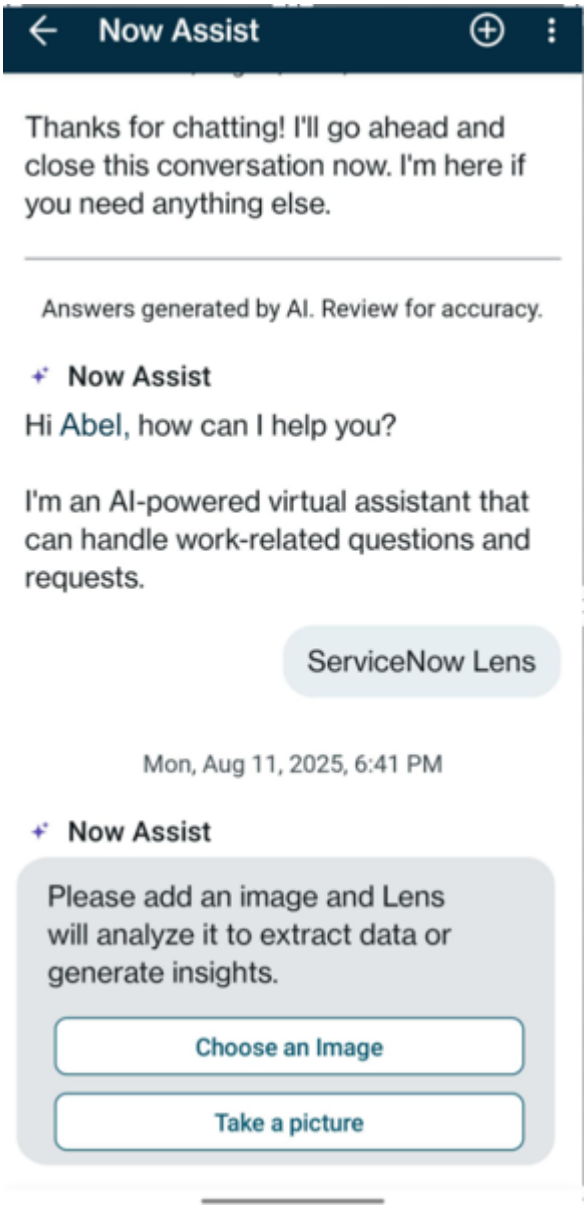

Use as a back-end service

As part of your integration logic, configure a Lens action as one of the steps to invoke a ServiceNow AI Lens service from any part of the ServiceNow AI Platform, such as a workspace form or a portal.

For your own use cases, you can leverage Lens actions for using Lens as a service in the following ways:

- Client service: Launch the Lens client to scan and analyze images. For example, you can configure a UI action on a workspace form or a service portal to launch the Lens client. For more information, see KB2492775.
- Server service: Use Lens as a service to analyze the provided images without launching the Lens client. For example, you can call Lens service from a Script Include or flow action to get the LLM response after analyzing the visual data. For more information, see Script include - AILensActionService.

Attach images to a record

View the captured images attached to the record that is auto-filled using ServiceNow AI Lens. You can later refer the attached images to understand the

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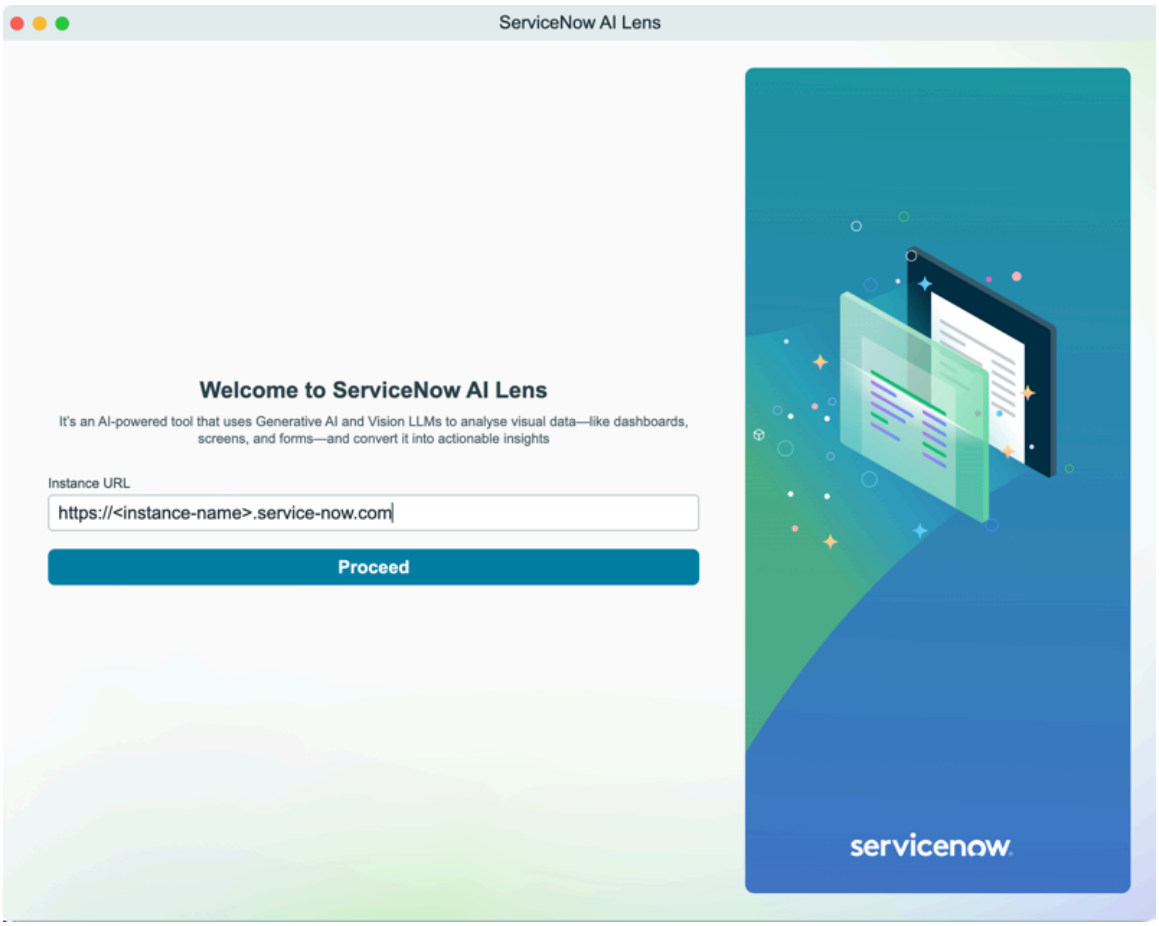
source of the record data. For more information, see Customize ServiceNow AI Lens behavior by creating a Lens action.

Use as a standalone application

Use ServiceNow AI Lens as a standalone application for previewing extracted data or getting insights. You must connect to a ServiceNow instance before you start using ServiceNow AI Lens. For more information, see Extract and analyze data with ServiceNow AI Lens desktop app.



Autofill form fields in the Now Mobile® application

Trigger ServiceNow AI Lens from Now Mobile® application to extract data from artifacts and autofill fields in a form on the Now Mobile® application.. For more information on creating or updating records in the Now Mobile® application, see ServiceNow AI Lens for mobile. You can add a ServiceNow AI Lens button to input form screens to allow users to quickly extract data from attachments and complete forms faster. For more information, see Configure Lens launcher button.

Autofill Catalog Item forms in Service Portal

Autofill Catalog Item form fields by triggering ServiceNow AI Lens from Service Portal. ServiceNow AI Lens extracts data from one or more artifacts and auto fills the relevant fields in the form.. For more information on using ServiceNow AI Lens in the Service Portal, see Auto-fill catalog item form in the Service Portal.

ServiceNow AI Lens desktop app landing page overview

Learn about the ServiceNow AI Lens desktop application landing page.

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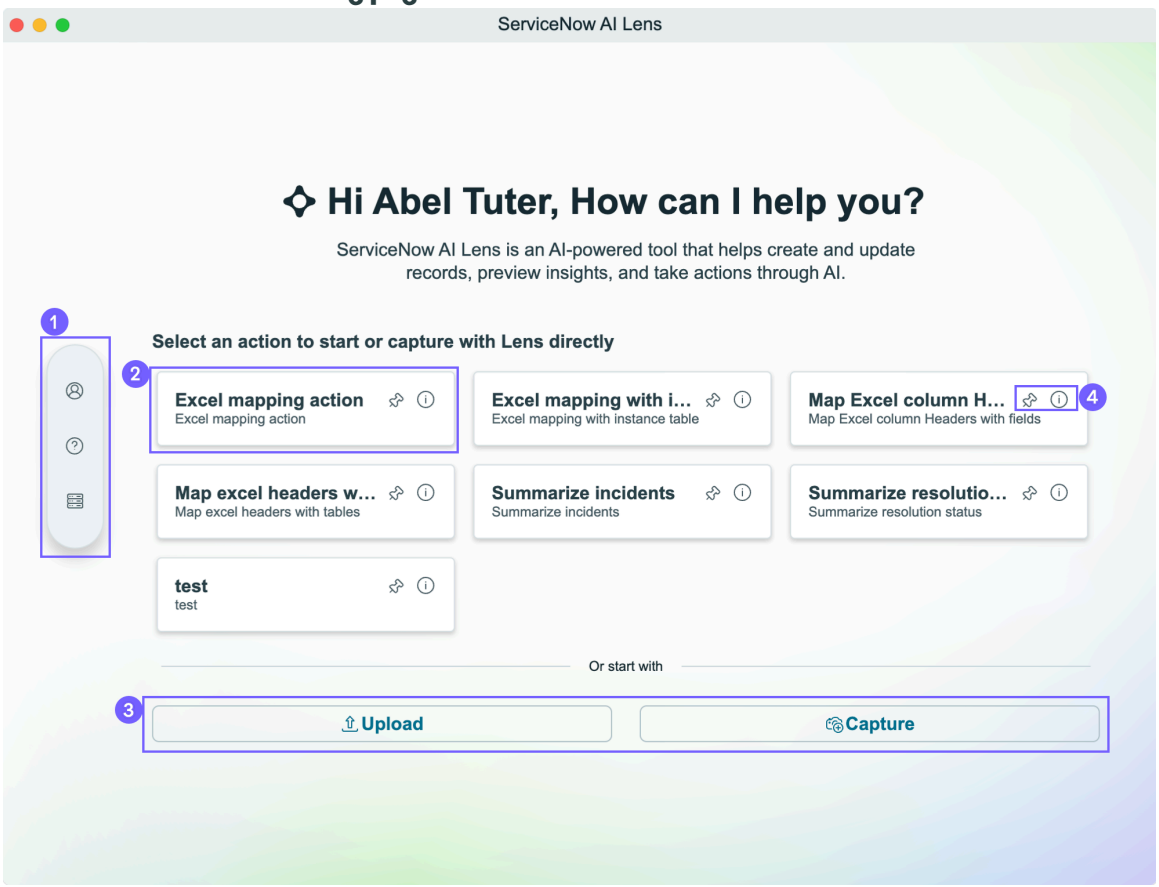
ServiceNow AI Lens landing page



No.	Feature	Description
1	Side panel	Side panel to view user profile and instance details, getting help options, and option to log out from the current session.
2	Action	Preconfigured Lens actions that define behavior of ServiceNow AI Lens. Only the Lens actions that are configured to be triggered from the desktop and are assigned to you are visible on the landing page. If there are no Lens actions assigned to you, you will not see any Lens action on the landing page.
3	Call-to-action buttons	• **Upload** - Button to upload one or more files for analysis. • **Capture** - Button to capture one or more screenshots for analysis.
4	Action card options	• Pin and unpin - Pin option to make the Lens actions favorite on the landing page. The last pinned Lens action appears first in the list. • Details - Shows Lens action details, such as Name, Description, Default additional directions, and Table.

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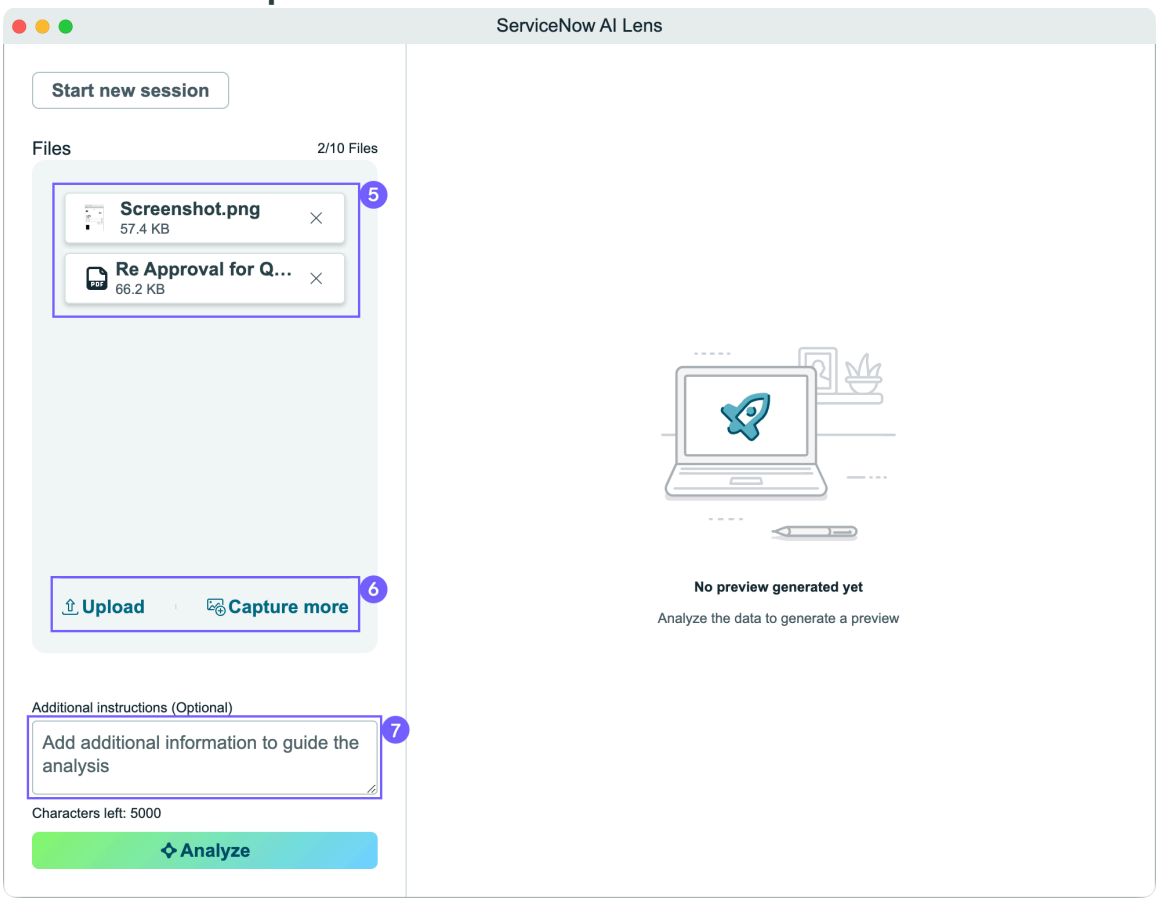
ServiceNow AI Lens preview



No.	Feature	Description
5	Image and file cards	Cards of the screenshots that you captured and the files that you uploaded. You can click a card and view the preview of a screenshot or file in its default application.
6	Additional screenshot capture or file upload buttons	Buttons to capture or upload additional screenshots or files.
7	Additional directions	Option to provide instructions to AI to analyze the data in the screenshots or files in a specific way.

Supporting information for ServiceNow AI Lens

Get a quick overview of the important information that is related to the ServiceNow AI Lens application.

Supported versions

ServiceNow AI Lens is supported from Yokohama Patch 6 and Zurich Patch 1.

Supported user interfaces

To scan artifacts such as images, scanned handwritten notes, Excel sheets, web pages using AI, enable the ServiceNow AI Lens application and then activate the ServiceNow AI Lens skill. For more information, see Configure ServiceNow AI Lens.

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The ServiceNow AI Lens application includes the skills that are listed in the following table.

ServiceNow AI Lens skill supported interfaces

Interface	Skill
• Core UI • Desktop	ServiceNow AI Lens skill

Licensing requirements

The ServiceNow AI Lens application requires a ServiceNow Pro Plus or Enterprise Plus license.

Application information

Enable the ServiceNow AI Lens (com.sn_ai_lens) app plugin to use the ServiceNow AI Lens skill.

This store app has the following dependencies:

- ServiceNow AI Lens Core (sn_app_lens_core)
- ServiceNow Otto for Platform (sn_genai_platform)

ServiceNow AI Lens skill

This skill provides generative AI capabilities to read, understand, respond, and act on visual data such as hand-written texts, images, and websites and take powerful actions to boost productivity.

This skill is a Platform skill that is enabled by the admin from the ServiceNow AI Lens skill card and enables users to perform the following actions:

- Create or update ServiceNow records by auto-filling forms using the extracted data.
- Preview the extracted data.
- Provide instructions to extract data in a specific way or to get a specific output.
- Gather insights from multiple images.

Availability

This skill is available in the workflow and product listed below.

AI products and workflows

Workflow	Product
Platform	ServiceNow AI Lens

Licensing requirements

The ServiceNow AI Lens application requires a ServiceNow Pro Plus or Enterprise Plus license.

Configure ServiceNow AI Lens

If you have the admin role, you can enable the ServiceNow AI Lens application (sn_ai_lens) to extract and comprehend data for various workflows.

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Before you begin

To get started with ServiceNow AI Lens, you must have:

- A ServiceNow Pro Plus or Enterprise Plus license.
- Your ServiceNow® subscription must include access to AI capabilities.
- ServiceNow AI Lens is supported on the following family releases:
  - Australia Patch 1 or later
  - Zurich Patch 1 or later
  - Yokohama Patch 6 or later

Role required: admin

About this task

ServiceNow AI Lens isn't a standalone store application that you can install directly. To enable ServiceNow AI Lens on your instance, you must install other generative AI applications, such as ServiceNow Otto for IT Service Management (ITSM) or ServiceNow Otto for Customer Service Management (CSM).

- Review the ServiceNow AI Lens application listing in ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- Refer to the document to see the prebuilt skills that exist and are currently available for purchase in AI packages and to review the number of assists consumed.
- Perform these steps in your ServiceNow instance.

By enabling the ServiceNow AI Lens application (sn_ai_lens), you can view the ServiceNow AI Lens and download modules in your ServiceNow instance.

The following items are installed with ServiceNow AI Lens:

- Roles
- Tables

For more information, see Components installed with ServiceNow AI Lens.

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. In the search field, under the heading **Search your licensed applications and plugins**, enter the name of the ServiceNow Otto application that you want to install.
   For example, you can enter ServiceNow Otto for IT Service Management (ITSM).
3. Press **Enter**.
   The ServiceNow Otto application listing appears.
4. Select the ServiceNow Otto application card.
5. Select **Install**.

Result

The ServiceNow AI Lens and ServiceNow AI Lens Core applications are installed.

What to do next

Turn on the ServiceNow AI Lens skill to extract, comprehend, and synthesize visual data to optimize your workflows. For more information, see Activate the ServiceNow AI Lens skill.

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Activate the ServiceNow AI Lens skill

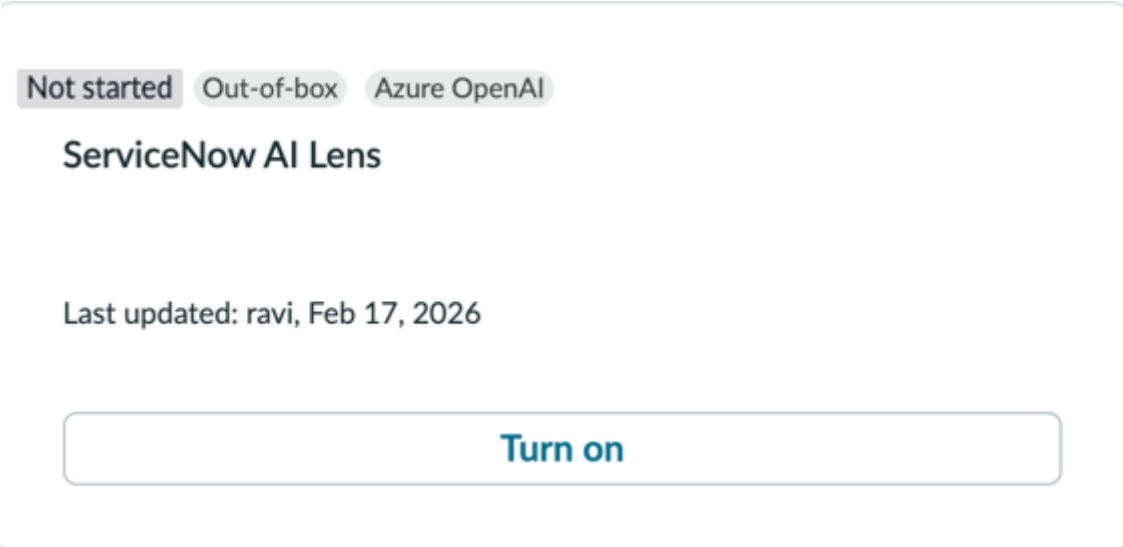
Activate the ServiceNow AI Lens skill to start using generative AI to scan and analyze visual data such as scan artifacts such as images, scanned handwritten notes, Excel sheets, web pages and optimize your workflows.

Before you begin

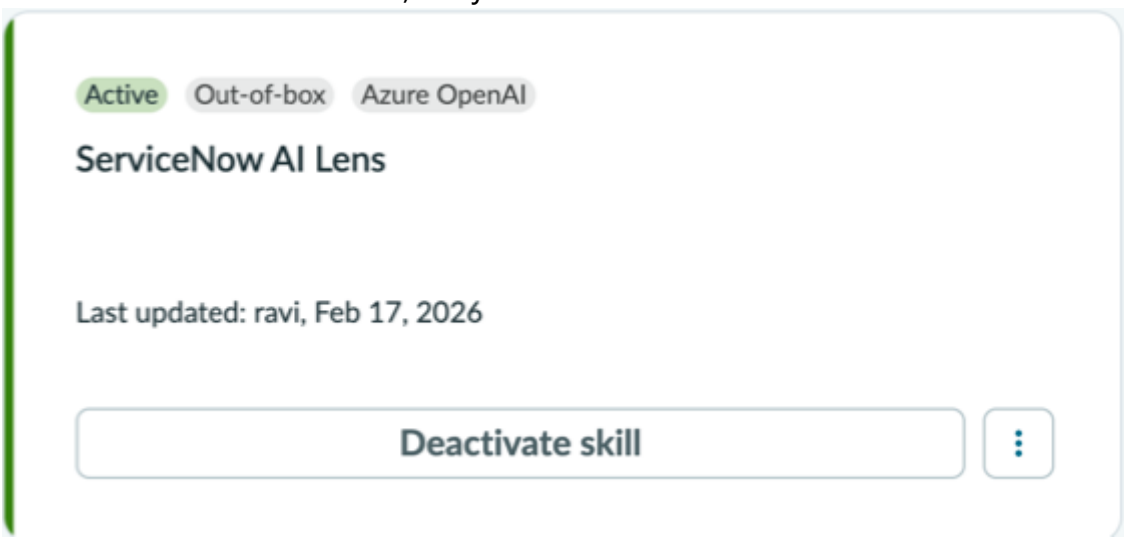
- Confirm that the ServiceNow AI Lens application is installed. For more information, see Configure ServiceNow AI Lens.
- Perform this task in your ServiceNow instance.
- Role required: admin

Procedure

1. Navigate to **All** > *AI Admin Hub* > **AI Skills**.
2. In the workflow list, select **Platform**.
3. In the Search using keywords field, enter ServiceNow AI Lens, and press **Enter**.
4. On the tile for the ServiceNow AI Lens skill, select **Turn on**.



5. On the Successfully activated dialog box, select **Back to skills**.
6. On the ServiceNow AI Lens card, verify that the ServiceNow AI Lens skill is activated.



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Download ServiceNow AI Lens and set launch preference

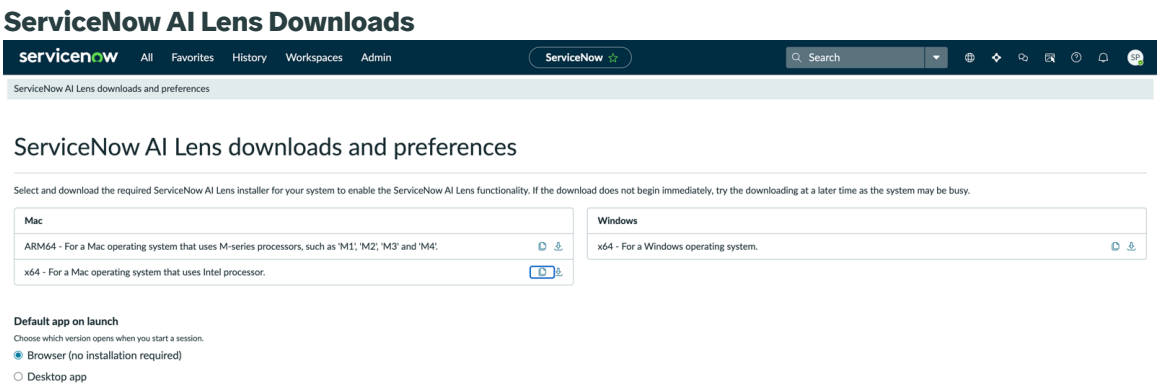
Download the ServiceNow AI Lens installer for your operating system and set your preferred way to launch ServiceNow AI Lens — from your browser or the desktop application.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > *ServiceNow AI Lens* > **Downloads and Preferences**.
2. In the ServiceNow AI Lens downloads and preferences page, do any of the following actions to download the required application for macOS or Windows:
   - Select the Download icon .
   - Select the Copy link icon , and in the browser address bar, right-click and select the **Paste and Go** option.



   A dialog box might prompt you to save or open the file.

   Note: Depending on your browser setting, the browser might automatically save the file to your Downloads folder.

3. Under **Default app on launch**, select how you want ServiceNow AI Lens to open when you start a session:
   - **Browser (no installation required)**: Opens ServiceNow AI Lens in your browser.
   - **Desktop app**: Opens the ServiceNow AI Lens desktop application.

     Note: You can change your launch preference at any time by navigating to **All** > *ServiceNow AI Lens* > **Downloads and Preferences**.

4. Execute the application installation file (.msi file) or (.pkg file).
5. Follow the on-screen instructions to install the application.
6. From the Privacy & Security settings on your macOS system, grant ServiceNow AI Lens permission to record your screen.

What to do next

Use ServiceNow AI Lens to capture screens, extract and comprehend data, and take further actions. For more information, see Using ServiceNow AI Lens.

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Set up auto-login for ServiceNow AI Lens

Pre-configure your organization's ServiceNow® instance URL so that it appears ready-filled when users launch the ServiceNow AI Lens desktop application, and enable auto-login so that users can skip signing in on subsequent launches.

Before you begin

Role required: admin

ServiceNow AI Lens must be installed on the user's machine. For more information, see Download ServiceNow AI Lens and set launch preference.

Procedure

1. On the user's machine, open the `app-config.json` file from the following location depending on the operating system:
   - **Windows:** `<username>\AppData\Roaming\servicenow-lens\app-config.json`
   - **Mac:** `/Users/<username>/Library/Application Support/servicenow-lens/app-config.json`

   Note: The folders in the file path may be hidden by default. Unhide them before navigating to the `app-config.json` file.

2. In the `app-config.json` file, enter your organization's ServiceNow® instance URL as the value for the `instanceUrl` field.

```
{
  "instanceUrl": "https://<your-instance>.service-now.com"
}
```

   Note:
   - The `app-config.json` file is unique to each user on the machine. If ServiceNow AI Lens is installed for all users, the administrator must update the `instanceUrl` field in each user's `app-config.json` file individually. If it is installed for a specific user only, that user can update their own `app-config.json` file.
   - If you change the instance URL on the login screen and successfully sign in, AI Lens saves the new URL. The next time you launch ServiceNow AI Lens, the updated URL appears in the `instanceUrl` field.

3. To enable auto-login, perform the following steps.

   a. Navigate to **All** > **System Definition** > **All Properties**.

   Tip: If your instance can't navigate to **All Properties**, in the search field, enter `sys_properties.list` and press **Enter**.

   b. Search for *`sn_app_lens_core.lens_enable_auto_login`* property.

   c. In the **value** field, set the value to **true**, and select **Update**.

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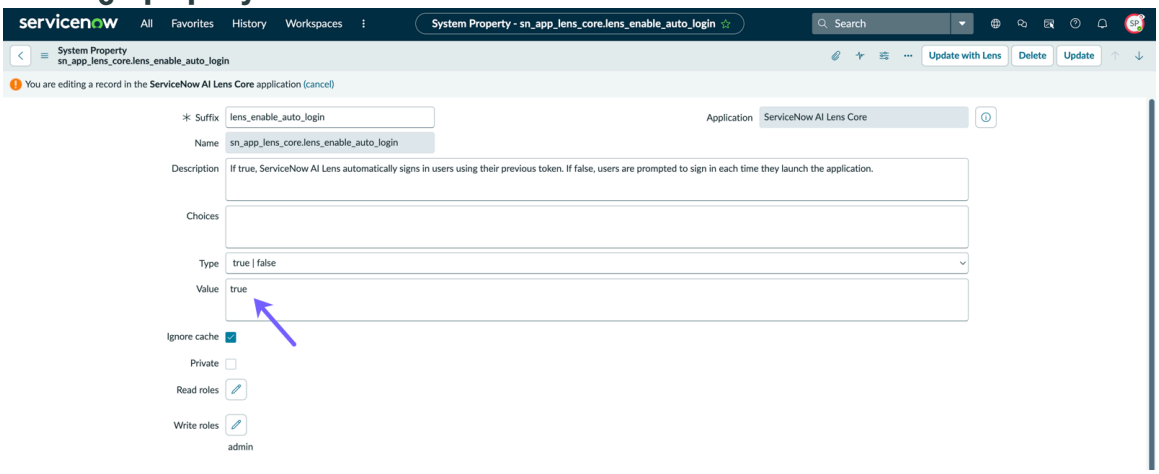
Auto-login property value



Note: When this property is enabled, ServiceNow AI Lens automatically signs in users on subsequent launches without showing the login screen. If a user signs out or their sign-in expires, the login screen reappears with the instance URL already filled in. If you manually update the `app-config.json` file after your first login, you will be prompted to sign in again.

Define default instructions for ServiceNow AI Lens

Create a system property to define default instructions for ServiceNow AI Lens execution on a specific form.

Before you begin

Role required: admin

About this task

You can define default instructions for specific forms to create or update records using ServiceNow AI Lens in a ServiceNow instance. This helps streamline the request process by eliminating the need for users to manually enter the same instructions each time. The defined instructions are automatically included in all ServiceNow AI Lens requests for that form or table.

When users provide additional instructions through the ServiceNow AI Lens UI, those instructions are appended to the default instructions. If there is a conflict between user input, application-generated instructions, and system-defined defaults, ServiceNow AI Lens instructs the LLM to prioritize the user-provided input.

Procedure

1. In the filter navigator, enter *`sys_properties.list`* and press **Enter**.
2. Select **New**.
3. On the System Property form, fill in the details.

Default instructions system property

Field	Description
Name	sn_lens.prompt.<tablename> Replace <tablename> with the internal name of the table. For example, sn_lens.prompt.incident.

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Field	Description
Value	Enter the default instructions. For example - Suggest a suitable start date for this incident based on the incidence type and urgency.

4. Select **Submit**.

Define ServiceNow AI Lens behavior with Lens actions

As a Lens admin, you can create Lens actions in ServiceNow AI Lens to customize Lens behavior by providing default instructions, configuring context, and more.

Use Lens actions to define default instructions, trigger options, custom context, and post processing instructions for the Lens response. With Lens actions, you can achieve the following goals:

- Trigger ServiceNow AI Lens from a desktop, ServiceNow instance, or Virtual Agent (from a mobile device or a portal)
- Auto-fill a form on the ServiceNow instance
- View the gathered insights in an editable preview
- Trigger flows, subflows, or actions after Lens execution
- Invoke AI agents
- Run ServiceNow AI Lens as a back-end service
- Auto-map the column headers of an Excel sheet with the columns of a ServiceNow table, and then insert the Excel sheet data into the ServiceNow table.

Whenever ServiceNow AI Lens is launched from an instance, it checks if any active Lens action is available for the table. If available, it uses the logic defined in Lens action during execution. The Lens action can only be used by the users or groups or roles that are assigned to the Lens Actions record.

Refer to the following examples to understand the different use cases of setting up the Lens actions.

- Example: Scan documents to auto-fill the Insurance Request form
- Example: Extract structured data from vendor agreements
- Example: Auto-fill user records on a user table
- Auto-map Excel sheet column headers with ServiceNow table columns

Customize ServiceNow AI Lens behavior by creating a Lens action

Create a Lens action to define custom context, trigger options, and default instructions for the ServiceNow AI Lens execution.

Before you begin

Role required: lens_admin

About this task

Learn about the various Lens trigger options for ServiceNow AI Lens.

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Lens trigger options

Goal	Trigger From	Trigger For
Auto-fill a form with a custom context and default instructions when triggered from the instance. When ServiceNow AI Lens is triggered from the instance in the context of the Lens action, the default instructions are always applied and specific form fields are extracted. To view the procedure to define default instructions, see Define default instructions for ServiceNow AI Lens.	Instance	Form
Auto-fill a form with a custom context and default instructions when triggered from the ServiceNow AI Lens desktop app. You can trigger ServiceNow AI Lens from the desktop app directly in context of the Lens action instead of launching Lens from the instance. The default instructions are always applied and specific form fields are extracted.	Desktop	Form
Auto-map the column headers of an Excel sheet with the columns of a specified table, and then insert the Excel sheet data into the table. To view the procedure to auto-map the column headers of an Excel sheet with the columns of a table, and insert Excel data into the table, see Auto-map Excel sheet column headers with table columns.	Desktop	Excel Mapping
With the help of a client script or server script, run ServiceNow AI Lens as a back-end service.	Instance	Service
View the gathered insights in the preview window of ServiceNow AI Lens by	Desktop	Others

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Lens trigger options (continued)

Goal	Trigger From	Trigger For
providing custom context and perform post processing steps.		

When ServiceNow AI Lens is triggered from the instance or desktop to auto-fill a form, it uses an active Lens action associated with the target table.

For example, if a user selects **Create with Lens** from Incident table list, ServiceNow AI Lens checks for an active Lens action record for the Incident table where **Trigger From** is set to Instance and **Trigger For** is set to Form. If a matching action record exists, Lens executes in the context of that action.

Procedure

1. Navigate to **All** > *ServiceNow AI Lens* > **Lens Actions**.
2. Select **New**.
3. Enter a name and description for the Lens action in the Name and Description fields respectively.
4. In the **Trigger From** field, select one of the following options.

Option	Description
Desktop	Option to specify that this action must be used when ServiceNow AI Lens is triggered from the ServiceNow AI Lens desktop app.
Instance	Option to specify that this action must be used when ServiceNow AI Lens is triggered from a ServiceNow instance.

5. To save the changes, right-click the form header and select **Save**.
6. Set up the Lens action by filling the fields in the Lens Actions form, under the Customize heading.

Lens Actions form

Field	Description
Trigger For	○ **Form** - Lens action is used when ServiceNow AI Lens is triggered to auto-fill a form. Apply a transformation logic to the Lens response before the form is auto-filled by using the #unique_921_Connect_42_transform-response option. This option is available when you select **Desktop** or **Instance** from the Trigger From list. ○ **Service** - Lens action is used when ServiceNow AI Lens is used as a service. Select this option to trigger Lens from an instance to auto-populate a **Workspace form**, or to trigger it using Virtual Agent or Script Include.

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Field	Description
	This option is available when you select **Instance** from the Trigger From list. ○ **Others** - Lens action is used when ServiceNow AI Lens is triggered to display a preview of extracted data and perform post processing steps, if applicable. This option is available when you select **Desktop** from the Trigger From list. ○ **Excel Mapping** - Option to specify that you can use this Lens action to attach an Excel sheet and let ServiceNow AI Lens auto-map its column headers with the columns of a table. After the auto-mapping is done, you can view and change the mapping, and insert the Excel sheet data to the table. This option is available when you select **Desktop** from the Trigger From list.
Order	Execution priority of the Lens action for a given table: ○ **1**: Highest priority ○ **999999**: Least priority The default value is set to 100. For example, if any user is assigned to two Lens action records for the same table, the Lens action with the least number is used during Lens execution.
Table	Table to which this Lens action applies. Selected table provides context during Lens execution when specific fields are selected or script is provided. For example, Incident table.
Request Context	Option to provide enhanced context during Lens execution by selecting specific fields or providing custom schema via script. ○ **Supported Fields** - Selected fields for providing enhanced context for Lens execution. ○ **Advanced** - Script to generate a custom schema object for providing enhanced context for Lens execution.
Fields	Table fields that you can select to provide enhanced context for Lens execution. Select fields to help Lens determine what information to extract from images. Only fields supported by Lens are available for selection. For more information, see Field types supported. This field appears only when **Supported Fields** is selected from the **Request Context** choice field.
Pre Processing Script	Script to generate a custom schema object to provide enhanced context for Lens execution. Custom schema help Lens determine what information to extract from images.

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Field	Description
	This field appears only when **Advanced** is selected from the **Request Context** choice field. Example sample script: `function preProcessRequest(lensActionRecord, inputJSON) { // Initialize the schema object var schemaObj = {}; /* This is a utility method to generate schema object, users can pass tableName and formFields as an array of fields for the given table to generate custom schema that is passed to the LLM. //Return schemaObj adhering to the structure defined in example // tableName = 'incident' tableName = inputJSON.tableName; //formFields - array of fields for the given table. //formFields = ['short_description', 'comments', 'impact']; fieldsToProcess = inputJSON.formFields; schemaObj = new global.AILensSchemaUtil().generateSchema(tableName, fieldsToProcess); */ return schemaObj; } var schemaObj = preProcessRequest(lensActionRecord, inputJSON);`  Parameters accepted by the `preProcessRequest` method:  ○ **lensActionRecord** (Input) - GlideRecord of the Lens action that is executed.  ○ **inputJSON** (Input) - Optional JSON object that users can pass through service APIs.  ○ **schemaObj** (Output) - Returned JSON object of custom schema.  Example of the returned schemaObj object:  `schemaObj = { "schemaPayload": { "type": "json_schema", "json_schema": { "name": "schema_extraction", "schema": {`

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Field	Description

	<pre>"type": "object",
	"properties": {
	"short_description": {
	"type": "string",
	"label": "Short description"
	},
	"comments": {
	"type": "string",
	"label": "Additional comments"
	},
	"impact": {
	"type": "choice",
	"label": "Impact",
	"choiceValues": ["1", "2", "3"],
	"choiceLabels": {
	"1 - High": "1",
	"2 - Medium": "2",
	"3 - Low": "3"
	}
	}
	},
	"required": [
	"short_description",
	"comments",
	"impact"
	],
	"additionalProperties": false
	}
	}
	},
	"fieldLabels": ["short_description",
	"comments", "impact"] //Optional key
	}</pre>

Default Additional Directions	Default instructions that are supplied to AI in addition to the user-provided instructions. For example, `Summarize this paper by extracting the title, author name, publication date in the dd-mm-yyyy format, abstract, and keywords`
Transform Response	Option to specify the transformation script for transforming the Lens response before auto-filling the form. This field appears only when **Form** is selected from the **Trigger For** choice field.
Transformation Script	Script that transforms the Lens response before populating the form. This field appears only when the **Transform Response** option is selected. Sample script:

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Field	Description

	``
	function
	 transformResponseScript(lensActionRecord,
	 lensResponse) {
	  // Initialize the schema object
	  var transformResponse = {};
	
	  //Add your code here
	
	  //Return schemaObj adhering to the
	 structure defined in example
	  return transformResponse;
	}
	var transformResponse =
	 transformResponseScript(lensActionRecord,
	 lensResponse);
	``
	
	Parameters accepted by the `transformResponseScript` method:
	
	○ **lensActionRecord** (Input) - GlideRecord of the Lens action that is executed.
	○ **lensResponse** (Input) - JSON object of the Lens response provided after Lens execution.
	○ **transformResponse** (Output) - Returned JSON object of transformed schema.
	
	Example of the returned transformResponse object:
	
	``
	transformResponse = {
	  "short_description": "Service Degradation
	 Error in Order Processing System",
	  "description": "The Order Processing API
	 v2.1 encountered a service degradation issue
	 in the Production environment",
	  "urgency": "1"
	}
	``

Enable Post Processing	Option to specify advanced processing instructions after Lens execution is complete. This field appears only when **Others** or **Service** is selected from the **Trigger For** field.

Post Processing Script	Script that is run asynchronously after Lens execution to further process the Lens response, such as triggering a flow, subflow, actions, or AI Agent.
	
	This field appears only when the **Enable Post Processing** option is selected.
	
	``
	function
	 postProcessResponse(lensActionRecord,
	 lensResponse, lensExecutionRecord) {
	
	  //Add your code here
	
	``

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Field	Description

	`}`
	`postProcessResponse(lensActionRecord, lensResponse, lensExecutionRecord);`
	
	Parameters accepted by the `postProcessResponse` method:
	○ **lensActionRecord** (Input) - GlideRecord of the Lens action that is executed.
	○ **lensResponse** (Input) - JSON object of the Lens response provided after Lens execution.
	○ **lensExecutionRecord** (Input) - GlideRecord of the Lens execution record.

Wait for processed response	Option to wait for ServiceNow AI Lens to display the output of post-processing on the Preview window. If enabled, it waits for the post processing output. Else, it doesn't wait for post processing output but post processing continues in the background.
Max wait time (seconds)	The maximum time ServiceNow AI Lens waits to display the output of post-processing. If the output doesn't appear within this duration, the session times out while the post-processing continues in the background until completion.
Attach Captured Images To Record	Option to attach the captured images to the record that is auto-filled using ServiceNow AI Lens. This option is enabled by default.

7. To assign users or groups or roles to the Lens action, under the Assigned Users and Groups or Roles heading, select **New**, and then use any one of the following methods.

Method	Steps
Assign one or more roles to the Lens action	Select **Enable Roles** and perform the following steps. **a.** Select the Unlock Roles ( ) icon. **b.** Select the Look up icon and then select a role. Repeat the step to add more roles. **c.** Select the Lock Roles icon .
Assign one or more users to the Lens action	**a.** To assign yourself, select the Add Me icon . **b.** To assign one or more users, select the Unlock Users ( ) icon. **c.** Select the Look up icon and then select a user.

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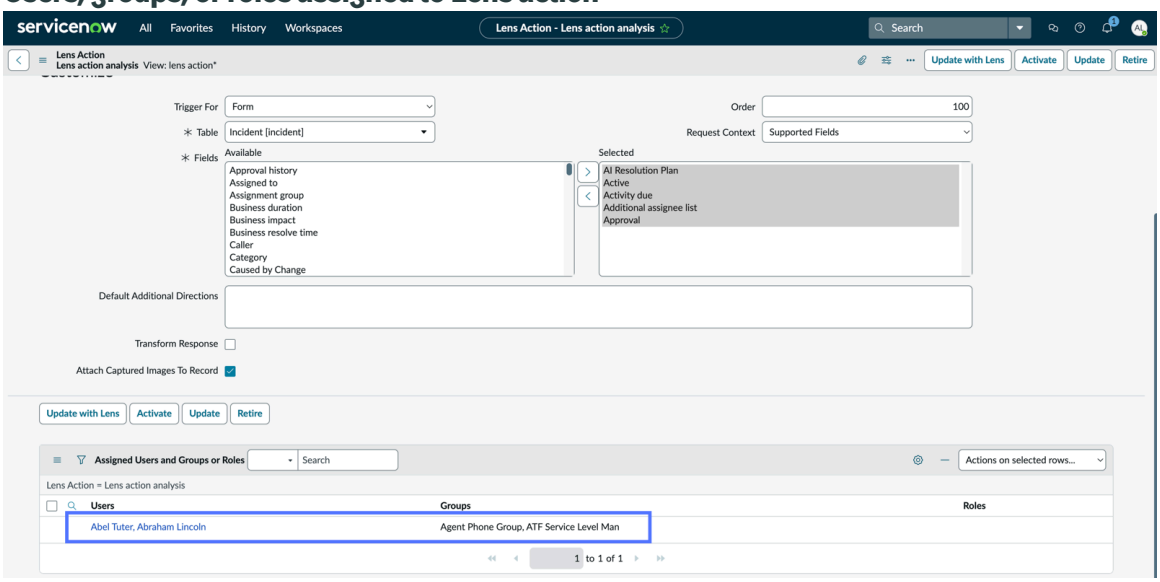
Method	Steps
	d. Repeat the step to add more users. **e.** Select the Lock Users icon .
Assign one or more groups to the Lens action	**a.** Select the Unlock Groups icon. **b.** Select the Look up icon and then select a group. Repeat the step to add more groups. **c.** Select the Lock Groups icon .

You can assign any one of the following combinations to the Lens action:

- Assign roles to the Lens action.
- Assign yourself and one or more groups to the Lens action.
- Assign one or more users and groups to the Lens action

8. Select **Submit**.
   The users or groups, or roles are assigned to the Lens action.

Users, groups, or roles assigned to Lens action



9. Select **Update**.
10. **Optional:** Update the assignment of users or groups or roles to the Lens action.

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Assignment type	Steps
Roles	**a.** Under the heading **Assigned Users and Groups or Roles**, select the role. **b.** To remove a role, select a role and then se lect (×) **c.** Assign one or more new roles. For more in formation, see #unique_921_Connect_42_ assign-roles-to-lens-action
Users	**a.** Under the heading Assigned Users and Groups or Roles, select the user. **b.** To remove a user, select a user and then se lect (×) **c.** Assign one or more new users. For more in formation, see #unique_921_Connect_42_ assign-users-to-lens-action
Groups	**a.** Under the heading Assigned Users and Groups or Roles, select the group. **b.** To remove a group, select a group and then select (×) **c.** Assign one or more new groups. For more information, see #unique_921_Connect_ 42_assign-groups-to-lens-action

11. Select **Activate** for activating the Lens action.
    The Lens action will be available on the ServiceNow AI Lens desktop application landing page.

Example: Scan documents to auto-fill the Insurance Request form

Enable customers to scan documents related to car accident on their desktop to auto-fill the Insurance Request form on the ServiceNow instance.

Before you begin

Role required: lens_admin

About this task

You can define in the Lens action that ServiceNow AI Lens must be triggered from the desktop to auto-fill the Insurance Request form. Lens action includes the fields that must be updated with the extracted data.

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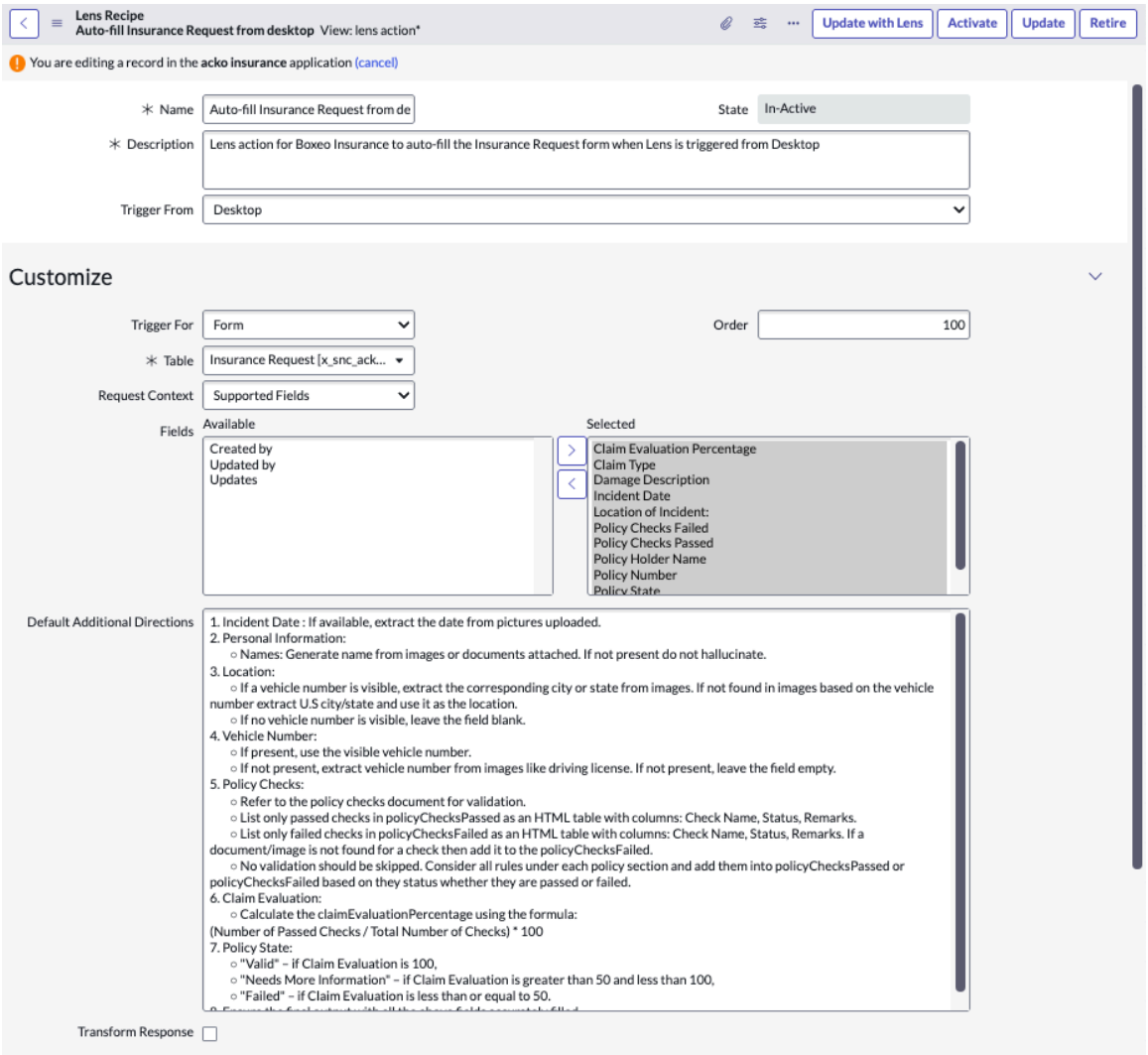

Procedure

1. Navigate to **All** > **ServiceNow AI Lens** > **Lens Actions**.
2. In the **Name** field, enter `Auto-fill Insurance Request from desktop`.
3. In the **Description** field, enter `Lens action for Boxeo Insurance to auto-fill the Insurance Request form when Lens is triggered from Desktop`.
4. From the **Trigger From** option, select Desktop.
5. In the form header, right-click and select **Save**.
6. From the **Trigger For** option, select Form.
7. In the **Table** field, select the Insurance Request table.
8. In the **Request Context** field, select Supported Fields to provide context.
9. From the **Fields** field, move fields to the Selected list.
   `policy_number, location_of_incident, policy_holder_name, vehicle_number, policy_state, policy_checks_failed, policy_checks_passed, incident_date_time, damage_description, claim_type, claim_evaluation_percentage`
10. In the **Default Additional Directions** field, enter the following directions for the AI.

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Example

```
1. Incident Date : If available, extract the date from pictures
 uploaded.
2. Personal Information:
 ○ Names: Generate name from images or documents attached. If
 not present do not hallucinate.
3. Location:
 ○ If a vehicle number is visible, extract the corresponding
 city or state from images. If not found in images based on
 the vehicle number extract U.S city/state and use it as the
 location.
 ○ If no vehicle number is visible, leave the field blank.
4. Vehicle Number:
 ○ If present, use the visible vehicle number.
 ○ If not present, extract vehicle number from images like
 driving license. If not present, leave the field empty.
5. Policy Checks:
 ○ Refer to the policy checks document for validation.
 ○ List only passed checks in policyChecksPassed as an HTML
 table with columns: Check Name, Status, Remarks.
 ○ List only failed checks in policyChecksFailed as an
 HTML table with columns: Check Name, Status, Remarks. If a
 document/image is not found for a check then add it to the
 policyChecksFailed.
 ○ No validation should be skipped. Consider all rules under
 each policy section and add them into policyChecksPassed
 or policyChecksFailed based on they status whether they are
 passed or failed.
6. Claim Evaluation:
 ○ Calculate the claimEvaluationPercentage using the formula:
(Number of Passed Checks / Total Number of Checks) * 100
7. Policy State:
 ○ "Valid" - if Claim Evaluation is 100,
 ○ "Needs More Information" - if Claim Evaluation is greater
 than 50 and less than 100,
 ○ "Failed" - if Claim Evaluation is less than or equal to 50.
8. Ensure the final output with all the above fields accurately
 filled.
```

11. Add users or groups who can use this Lens action.

a. In the Assigned Users and Groups related list, select **New**.

b. Select the required users or group of users that have the lens_user role.
Only the assigned users or group of users can leverage the Lens action during Lens execution.

c. Select **Submit**.

12. Select **Update**.

13. Select **Activate** for activating the Lens action.

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Example: Extract structured data from vendor agreements

Enable compliance analysts to digitize and review several vendor agreements. Instead of manually entering details, they can launch ServiceNow AI Lens directly from the desktop, scan agreements, and adjust extracted values in the preview window before saving.

Before you begin

Role required: lens_admin

About this task

You can define in the Lens action that ServiceNow AI Lens must be triggered from the desktop to scan the documents saved on the user system. With the post processing option, you can edit the extracted information in the preview window before saving and trigger post processing to create related list records.

Procedure

1. Navigate to **All** > **ServiceNow AI Lens** > **Lens Actions**.
2. In the **Name** field, enter `Extract data from vendor agreements`.
3. In the **Description** field, enter `Digitize and review several vendor agreements`.
4. From the **Trigger From** option, select Desktop.
5. In the form header, right-click and select **Save**.
6. From the **Trigger For** option, select Others.
7. In the **Request Context** field, select Advanced.
8. In the **Pre Processing Script** field, enter the script to generate custom schema object for providing enhanced context.

   Example

   Here is the example of returned custom schema object:

```
schemaObj =  {
  "schemaPayload": {
    "type": "json_schema",
    "json_schema": {
      "name": "schema_extraction",
      "schema": {
        "type": "object",
        "properties": {
          "vendorName": {
            "type": "string",
            "label": "Vendor Name"
          },
          "contractTitle": {
            "type": "string",
            "label": "Contract Title"
          },
          "contractReferenceNumber": {
            "type": "string",
            "label": "Contract Reference Number"
          },
          "contractStartDate": {
            "type": "string",
            "label": "Contract Start Date"
          },
```

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```
          "contractEndDate": {
            "type": "string",
            "label": "Contract End Date"
          },
          "renewalTerminationClauses": {
            "type": "string",
            "label": "Renewal / Termination Clauses"
          }
        },
        "required": [
          "vendorName",
          "contractTitle",
          "contractReferenceNumber",
          "contractStartDate",
          "contractEndDate"
        ],
        "additionalProperties": false
      }
    }
  },
  "fieldLabels": ["vendorName", "contractTitle",
 "contractReferenceNumber", "contractStartDate",
 "contractEndDate"]  //Optional key
}
```

9. In the **Default Additional Directions** field, enter directions for the AI, such as `Leave the fields empty if you don't find the relevant information. Don't hallucinate. Enter the date in the DD-MM-YYYY.`
10. Select the **Enable Post Processing** option.
11. In the **Post Processing Script** field, enter the script to provide the post processing logic for the Lens response after the Lens execution is complete.

    Example
    You can provide a post processing logic to pass the data extracted to a subflow for creating related list records.
12. **Optional:** Select the **Wait for processed response** field to enable the ServiceNow AI Lens to wait for ServiceNow AI Lens to display the output of post-processing on the Preview window. If enabled, it waits for the post processing output. Else, it doesn't wait for post processing output but post processing continues in the background.
13. **Optional:** In the **Max wait time (seconds)** field, specify the maximum time ServiceNow AI Lens waits to display the output of post-processing.

    Note: If the output doesn't appear within that duration, the session times out while the post-processing continues in the background until completion.

14. Add users or groups who can use this Lens action.

    a. In the Assigned Users and Groups related list, select **New**.

    b. Select the required users or group of users that have the lens_user role.
    Only the assigned users or group of users can leverage the Lens action during Lens execution.

    c. Select **Submit**.

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15. Select **Update**.
16. Select **Activate** for activating the Lens action.

Example: Auto-fill user records on a user table

Enable service agents to create user records by extracting specific information from identity documents using ServiceNow AI Lens, directly from the ServiceNow instance.

Before you begin
Role required: lens_admin

About this task
A service agent must onboard multiple users by scanning their official ID cards (for example, government-issued ID). Instead of manually entering each user's details, the agents can trigger ServiceNow AI Lens from the instance to automate data extraction and auto-fill specific fields defined in the Lens action record.

You can define in the Lens action that ServiceNow AI Lens must be triggered from the instance to create user records and provide default directions.

Procedure
1. Navigate to **All** > **ServiceNow AI Lens** > **Lens Actions**.
2. Select **New**.
3. In the **Name** field, enter `Auto-fill the user records`.
4. In the **Description** field, enter `Lens action to auto-create the user records on the ServiceNow instance`.
5. From the **Trigger From** option, select Instance.
6. In the form header, right-click and select **Save**.
7. Confirm that the Form option is selected in the **Trigger For** field.
   The Form option is selected by default.
8. In the **Table** field, select the User [sys_user] table.
9. Confirm that Supported Fields is selected in the **Request Context** field.
   The Supported Fields value is selected by default, and it provides context.
10. From the **Fields** field, move the fields to the Selected list.
    `userID, first_name, last_name, title, and date_of_birth`
11. In the **Default Additional Directions** field, enter `User ID must always be in lower case and uses the firstname.lastname format. Enter Date of birth in the dd-mm-yyyy format.`
12. Add users or groups who can use this Lens action.
    a. In the Assigned Users and Groups related list, select **New**.
    b. Select the required users or group of users that have the lens_user role.
       Only the assigned users or group of users can leverage the Lens action during Lens execution.
    c. Select **Submit**.

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13. Select **Update**.
14. Select **Activate** for activating the Lens action.

Auto-map Excel sheet column headers with ServiceNow table columns

Use ServiceNow AI Lens to map the column headers of an Excel sheet that you specify with ServiceNow® table columns and then insert the Excel sheet data into the table.

Before you begin

Role required: lens_user

Ensure that the Lens action for this purpose is already defined. To view the steps to define a Lens action, see Define a Lens action. Ensure that the values in the Lens action form are exactly as specified in the following table.

Lens action Excel mapping configuration options

Field	Option you must select
Trigger From	Desktop
Trigger For	Excel Mapping
Table	Name of the table with which the Lens action will auto-map the Excel sheet column headers.
Request context	Supported Fields
Fields	Columns of the table

Tip: A preconfigured Lens action that is designed to auto-map Excel sheet column headers with table columns is available by default on your instance. The name of the Lens action is `Import Excel Sheet data to custom table`. To use the Lens action, create a copy of this Lens action, and customize to create your own Lens action for this purpose.

Procedure

1. From your system, launch the ServiceNow AI Lens desktop application.
2. On the login page, in the **Instance URL** field, enter the ServiceNow instance URL.

   Example
   For example, `https://<instance name>.service-now.com`.
3. Select **Proceed**.
4. Log in to your ServiceNow account by entering your username and password.
5. **Optional:** On the onboarding journey widget, complete the onboarding and select **Got it**.

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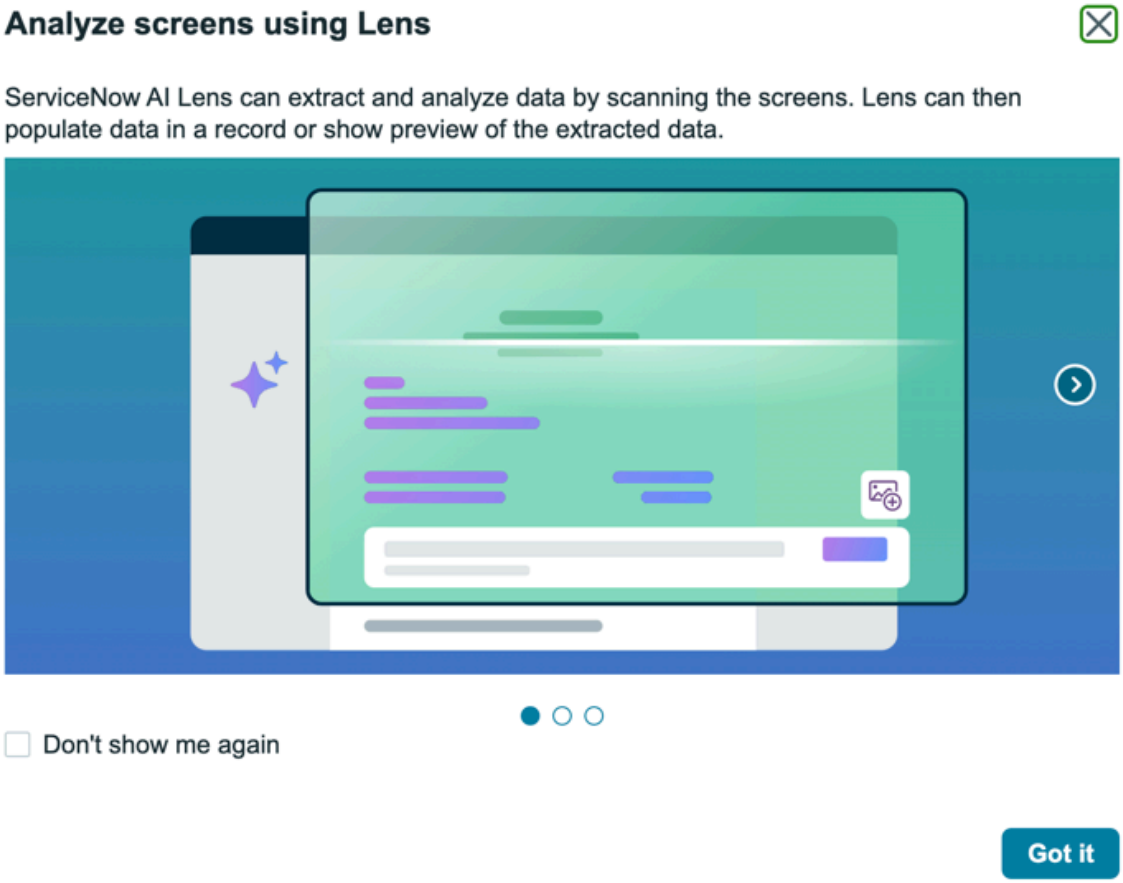

If you launch the ServiceNow AI Lens for the first time, the onboarding journey widget appears. You can select **Don't show me again** to hide the widget the next time you launch ServiceNow AI Lens.

6. Select the Lens action that you have defined for Excel mapping.

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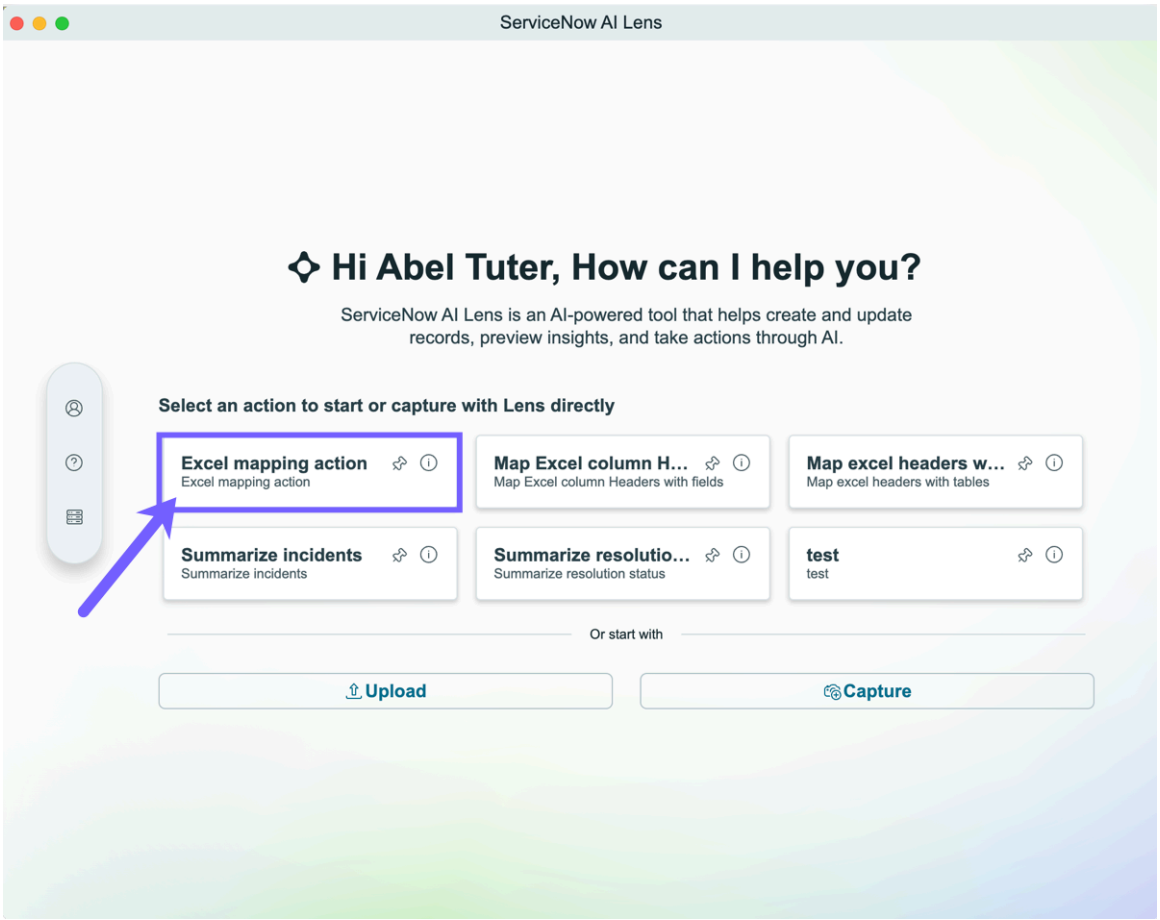
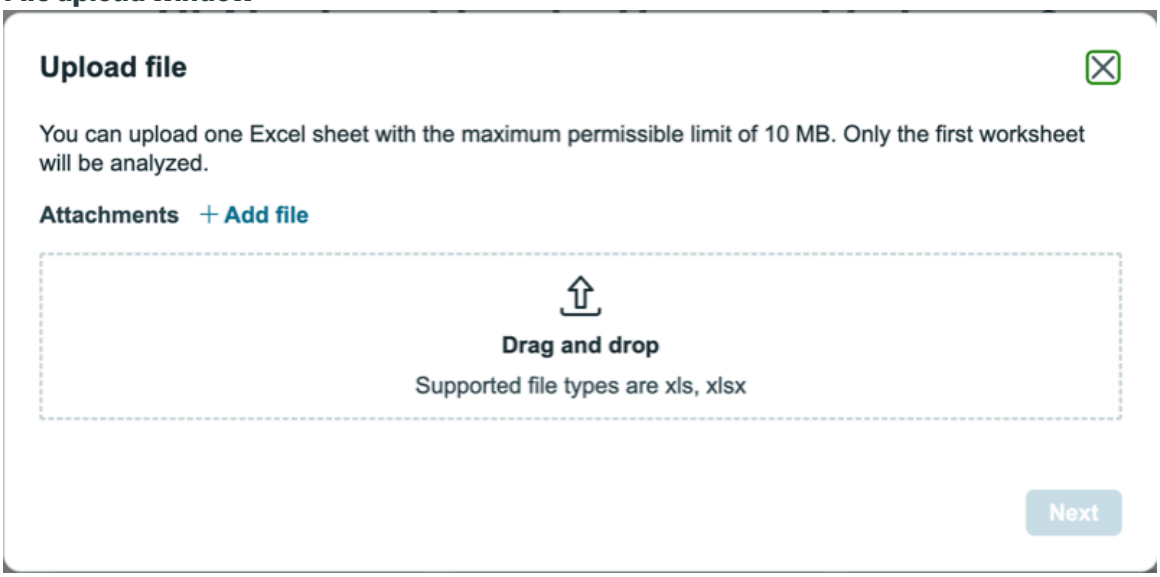


The **Proceed with Lens** button is disabled.

Note: The **Proceed with Lens** button is disabled because to auto-map Excel sheet column headers with the table columns, ServiceNow AI Lens requires you to only attach an Excel sheet.

7. Attach an Excel sheet by selecting **Upload** and then perform any one of the following file upload methods on the Upload file window.

File upload window



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File upload method	File upload procedure
Add file	**a.** Select **+Add file**, **b.** Navigate to the location on your system and select the Excel sheet that you want to upload. **Note:** ▪ You can upload only one Excel sheet. ▪ **Tip:** To remove an Excel sheet that you attached, select the Remove file icon ×. ▪ The data only in the first worksheet of the Excel sheet will be analyzed.
Drag and drop files	**a.** Navigate to the location on your system and select the Excel sheet that you want to upload. **b.** Drag the selected Excel sheet to the Drag and drop section Drag and drop ( ), and release the pointer to drop them. **Note:** ▪ You can drag and drop only one Ex cel sheet. ▪ **Tip:** To remove an Excel sheet that you've attached, se lect the Remove file icon ×. ▪ The data only in the first worksheet of the Excel sheet will be analyzed.

8. Select **Next**.
9. Select **Analyze**.

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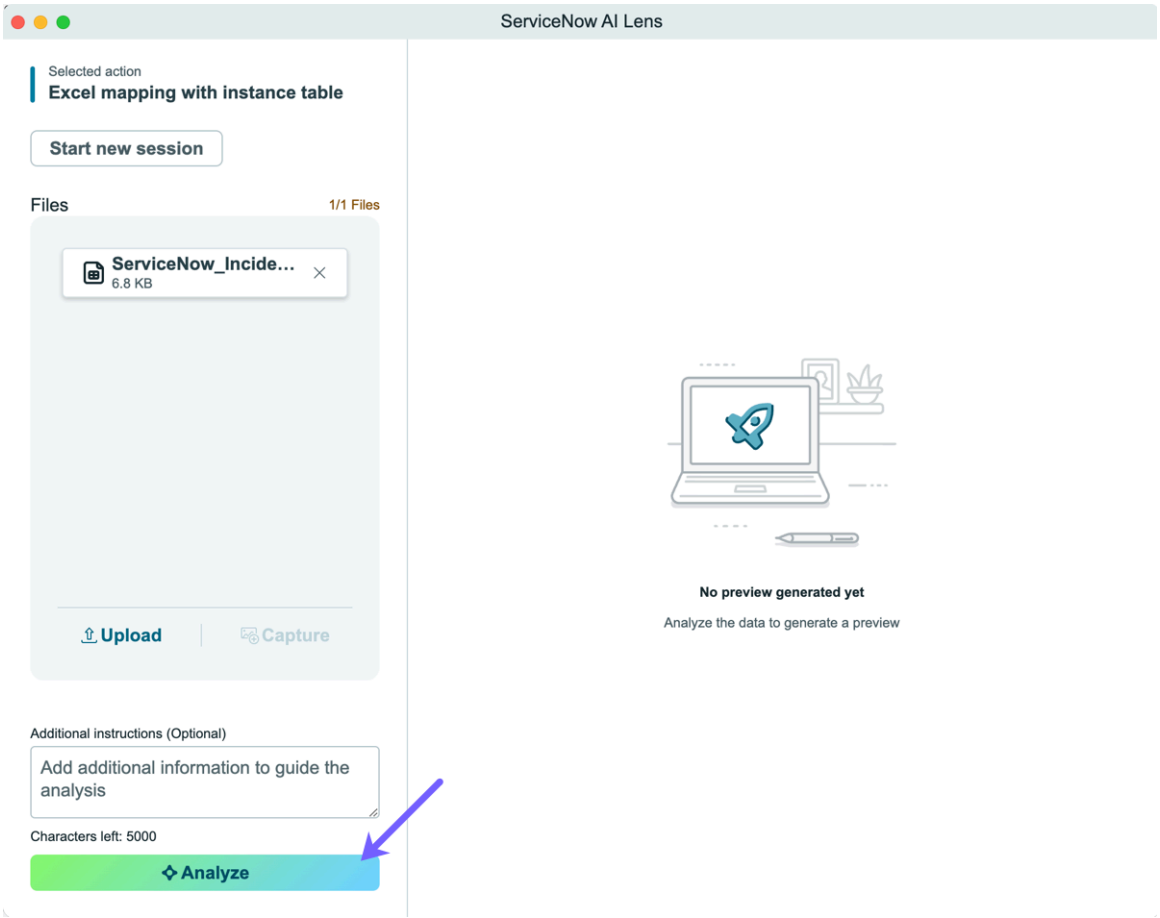

ServiceNow AI Lens auto-maps the column headers of the attached Excel sheet and the table columns.

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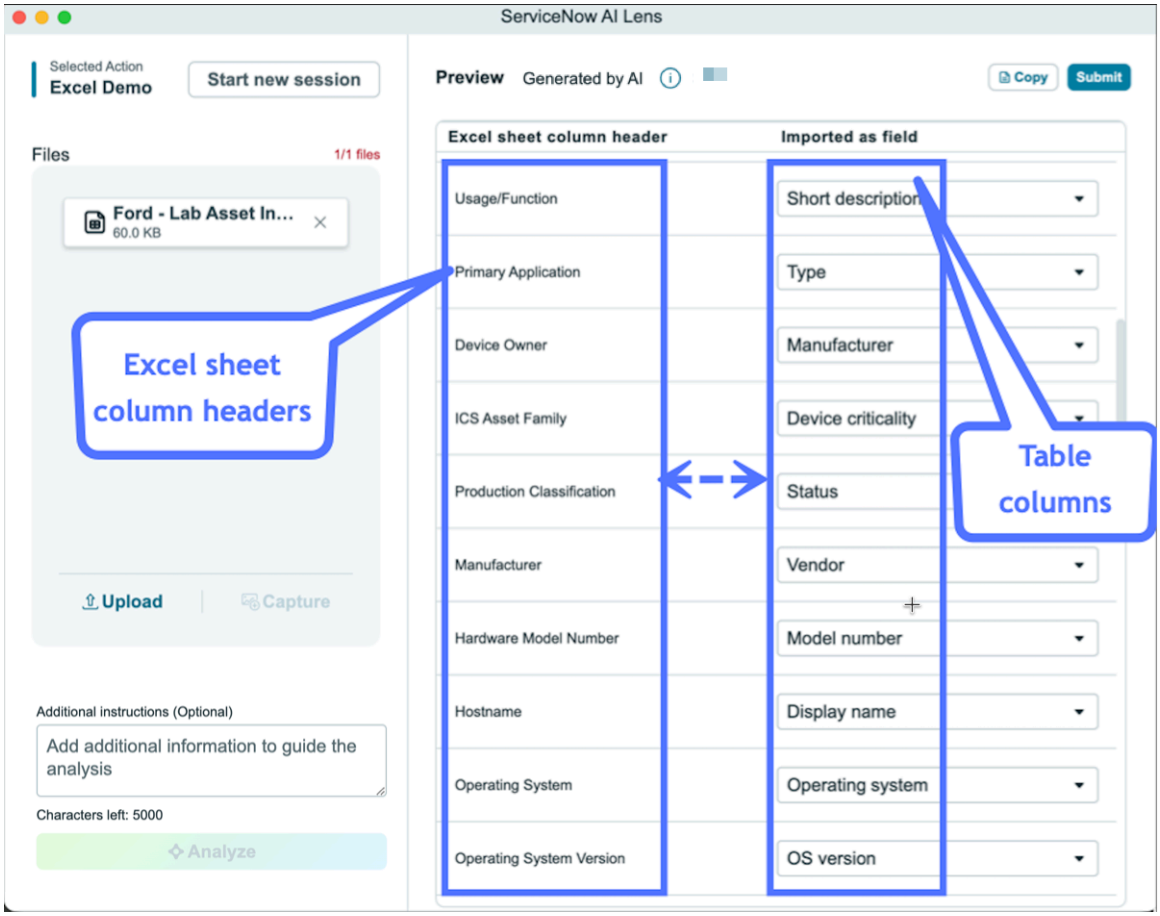

Tip: You can change the mapping by selecting one or more different table columns under the Imported as field heading.

10. Select **Submit**.
    The Excel sheet data is inserted into the table.

Enabling ServiceNow AI Lens in Virtual Agent

You can enable ServiceNow AI Lens in Virtual Agent so that ServiceNow AI Lens can be triggered from Virtual Agent conversation.

By enabling ServiceNow AI Lens in Virtual Agent, you can trigger AI-powered ServiceNow AI Lens to scan an image for getting insights, recommendation, resolution steps, and more.

Enable AI Search

Enable the AI Search application on your instance so that you can use ServiceNow AI Lens skill to gather insights from an image using generative AI.

Before you begin
Role required: ais_admin or admin

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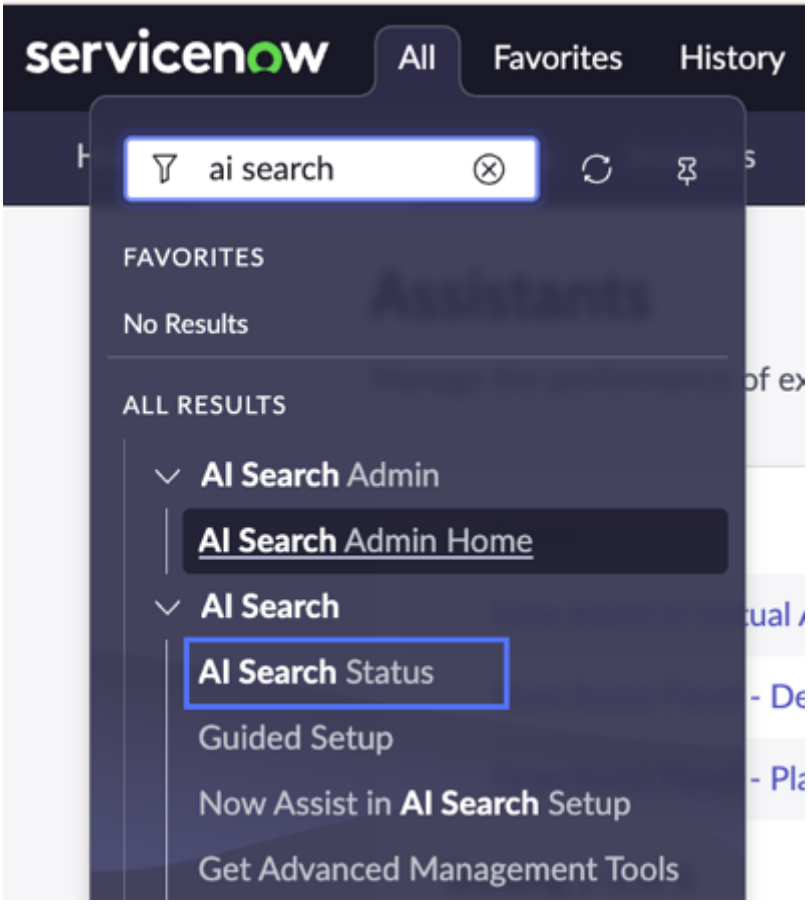
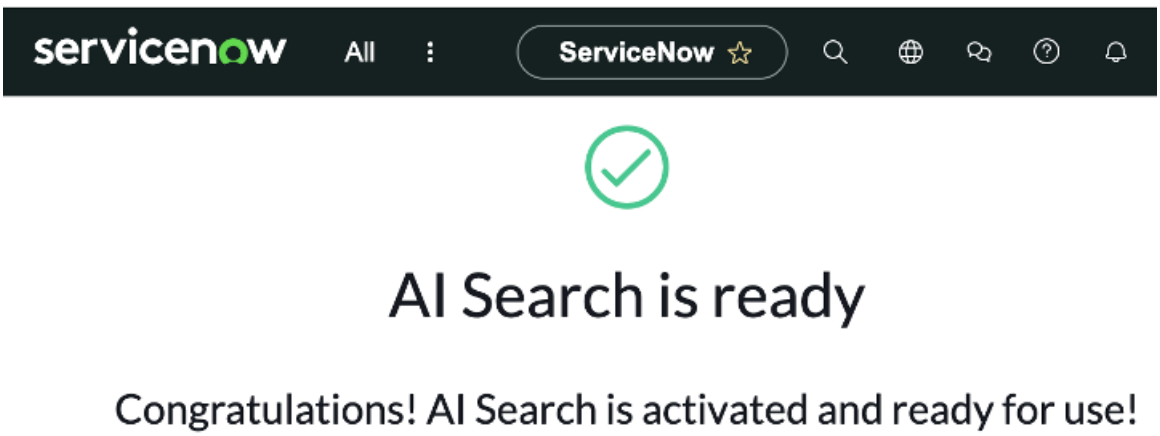
Procedure

1. Navigate to **All** > **AI Search** > **AI Search Status**.



2. If AI search is not enabled, select **Request AI Search**.
   After AI Search is activated in your instance, you will see the following success message.



Enable the default Now Assist assistant for ServiceNow AI Lens

Enable the default Now Assist in Virtual Agent assistant so that you can use ServiceNow AI Lens in Virtual Agent.

Before you begin

If you have another assistant configured for your specific use case or industry, you can skip this procedure and follow Enable other assistants in ServiceNow AI Lens topic.

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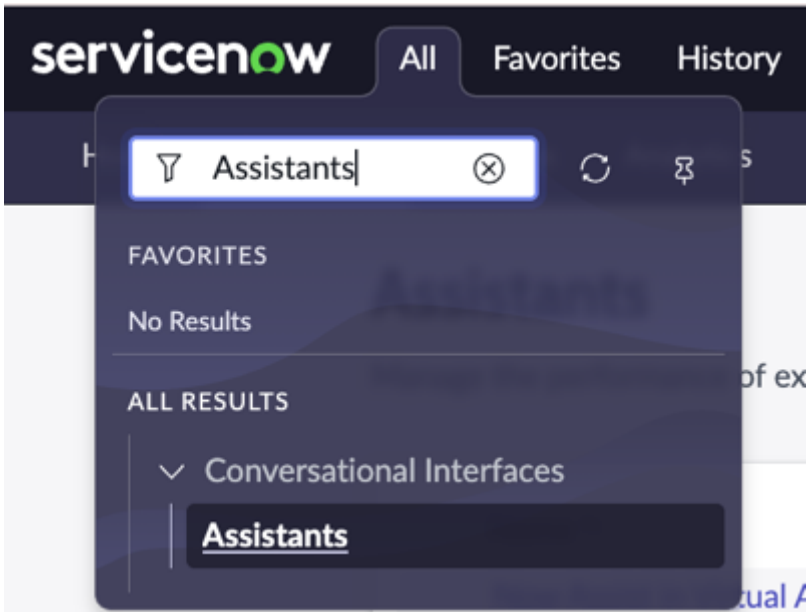
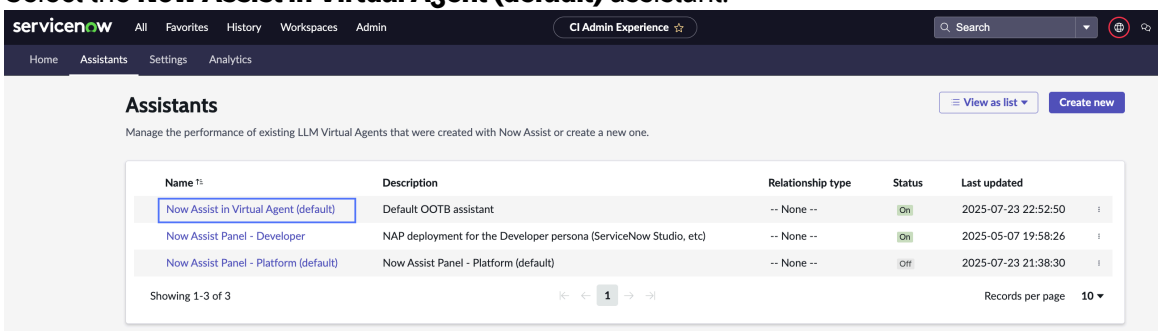
Role required: virtual_agent_admin or admin

Procedure

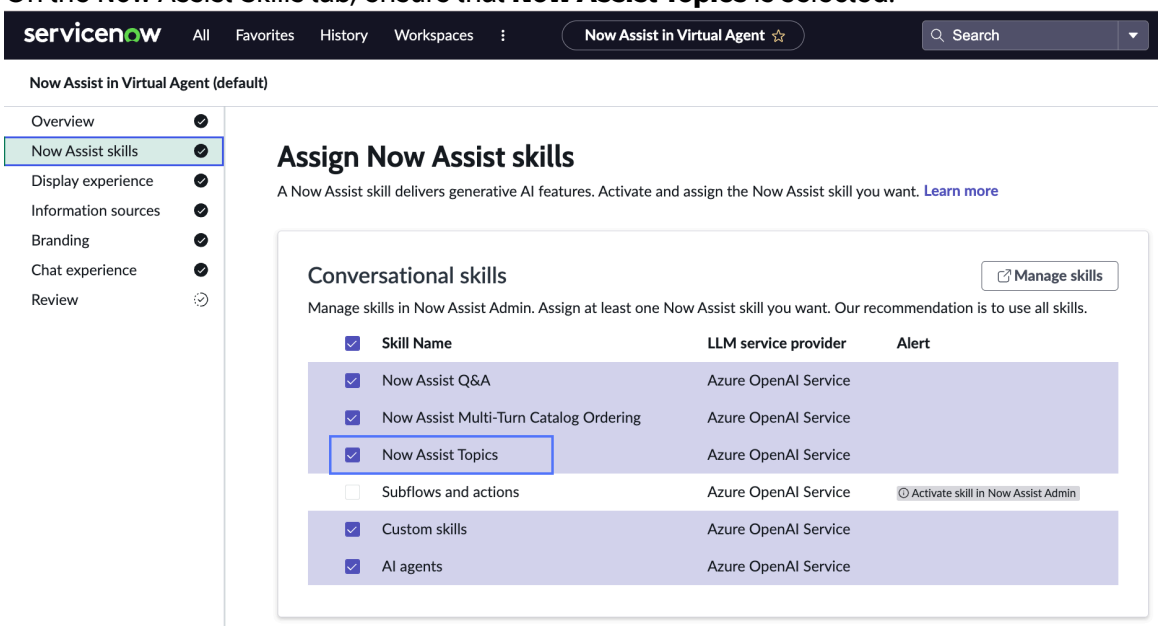
1. Navigate to **All** > **Conversational Interfaces** > **Assistants**.



2. Select the **Now Assist in Virtual Agent (default)** assistant.



3. On the Overview tab, select **Save and continue**.
4. On the Now Assist Skills tab, ensure that **Now Assist Topics** is selected.



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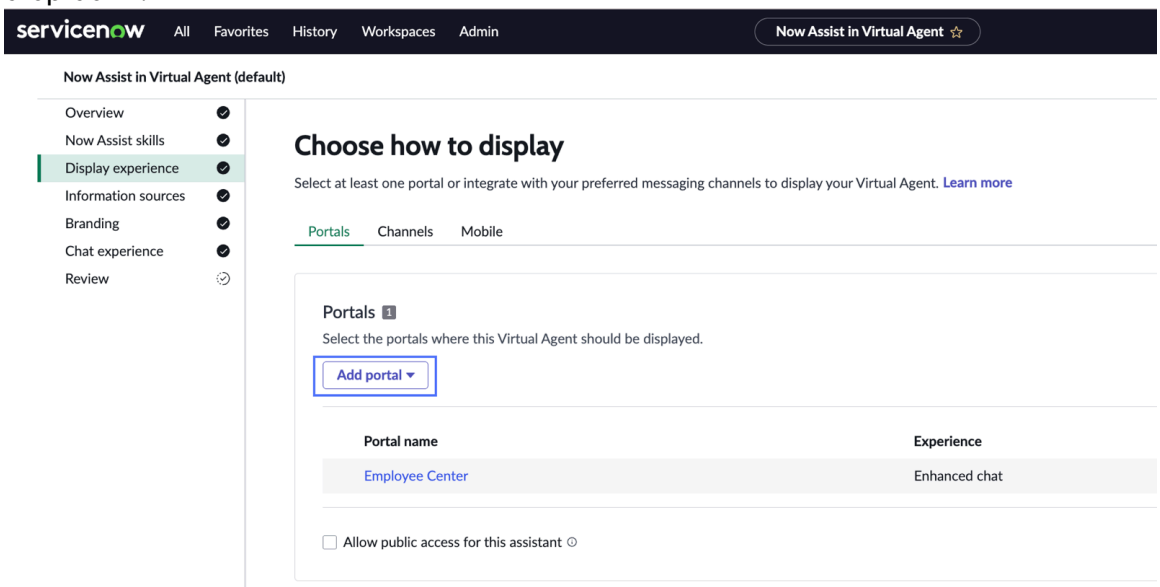
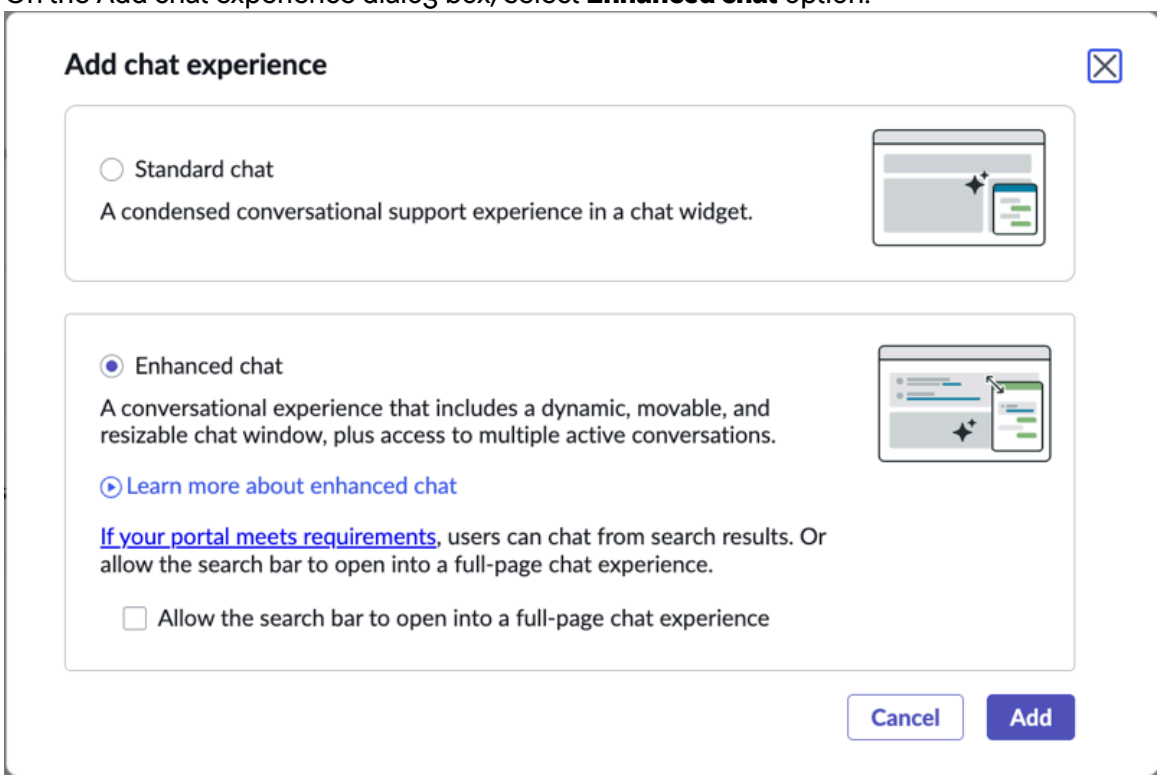
5. Select **Save and continue**.
6. Display your assistant on a portal.

   a. On the Display experience tab, select the Portals tab.

   b. Select the portal for which you want to enable the Now Assist assistant from the **Add portal** drop-down.



   c. On the Add chat experience dialog box, select **Enhanced chat** option.



   d. Select **Add**.

7. Display your assistant on a mobile device.

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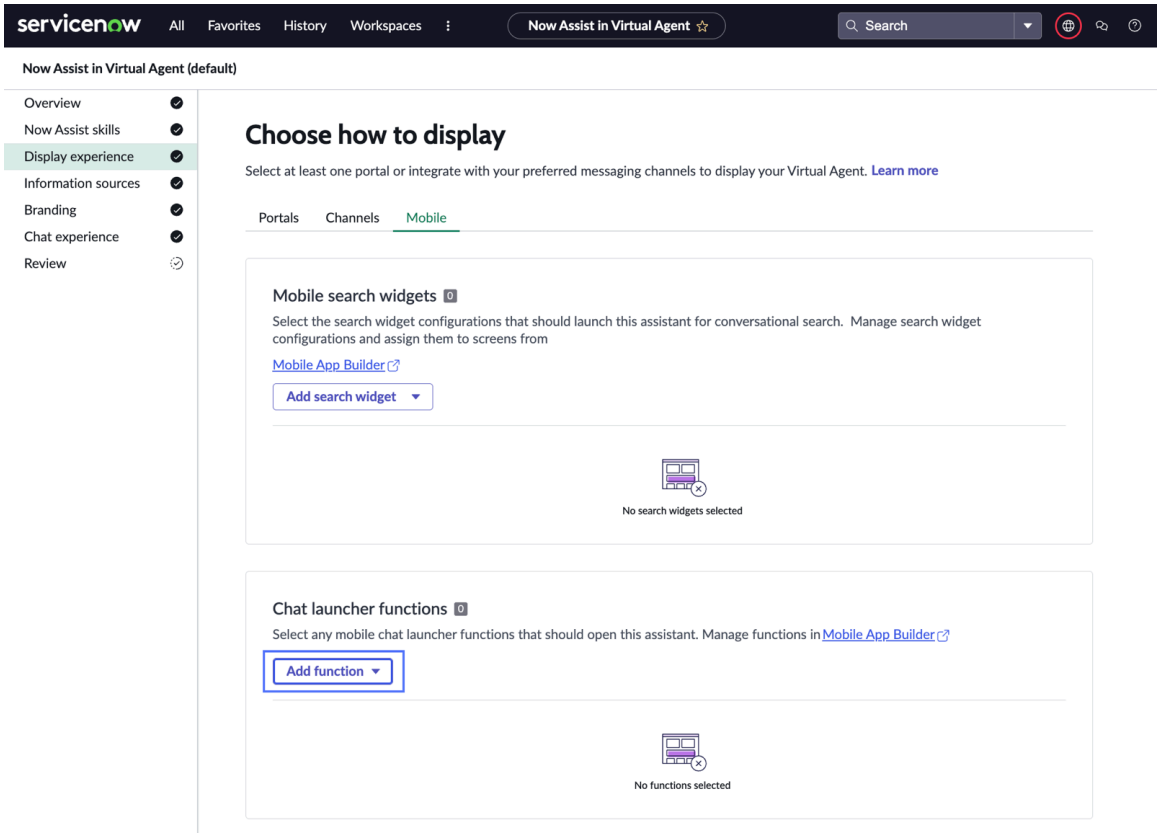
a. On the Display experience tab, select the Mobile tab.

b. Under the Chat launcher functions section, select Agent Chat from the **Add function** drop-down.



c. On the Add chat experience dialog box, select **Enhanced chat** option.

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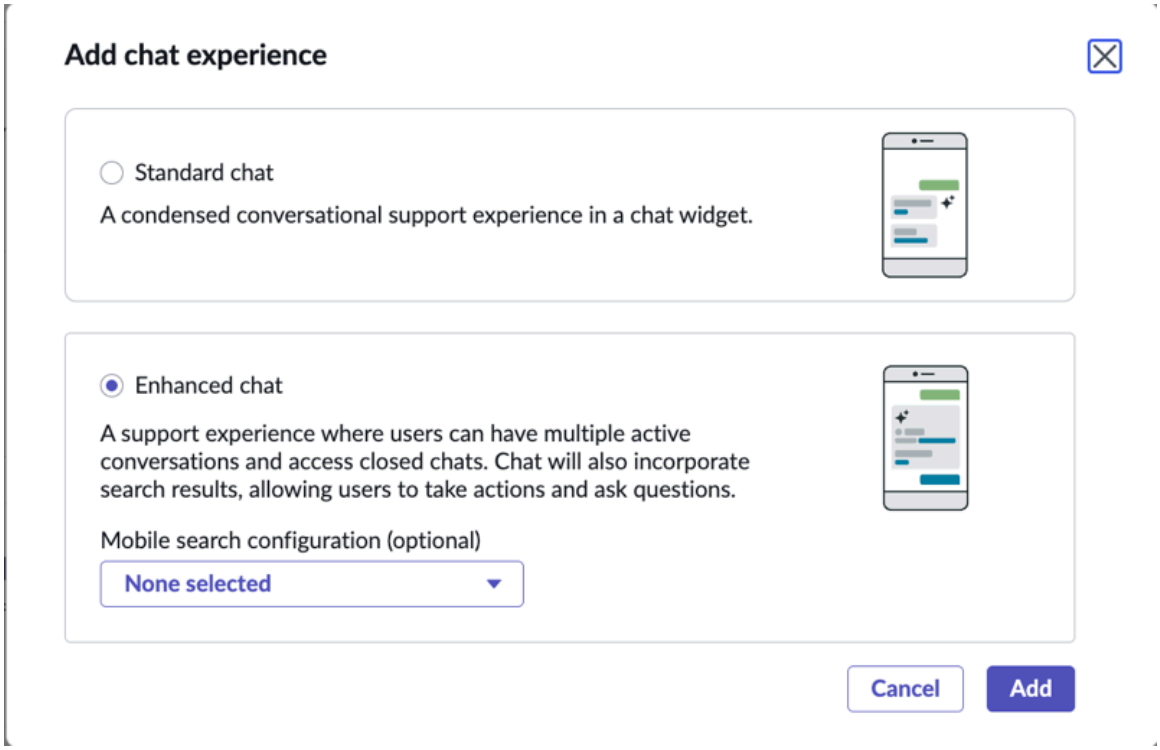

d. Select **Add**.

8. On the Information sources tab, select **Save and continue**.
9. On the Branding tab, select **Save and continue**.
10. On the Chat experiences tab, select **Save and continue**.
11. On the Review tab, select **Done**.

Enable other assistants in ServiceNow AI Lens topic

Enable an assistant other than the default Now Assist in Virtual Agent assistant in ServiceNow AI Lens topic.

Before you begin

Skip this procedure, if you have enabled the default Now Assist assistant in the previous procedure.

Role required: virtual_agent_admin or admin

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Virtual Agent** > **Designer**.
   Virtual Agent Designer opens in a new tab.

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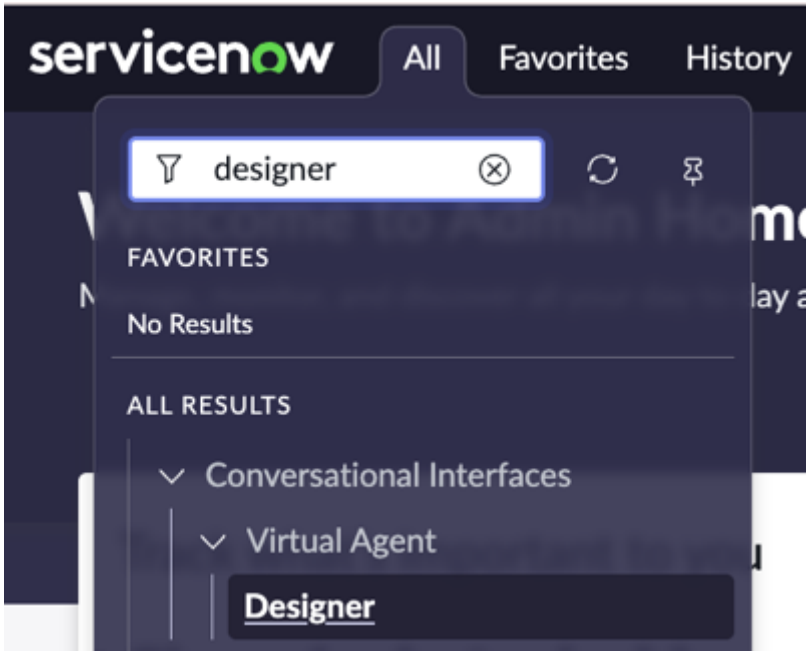
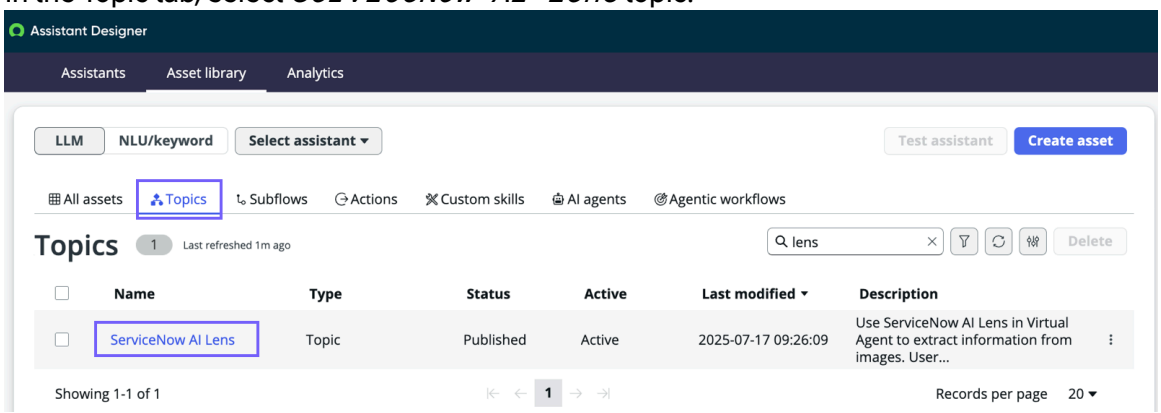


2. In the Topic tab, select *`ServiceNow AI Lens`* topic.



3. In the Select LLM assistants section, select your assistant.

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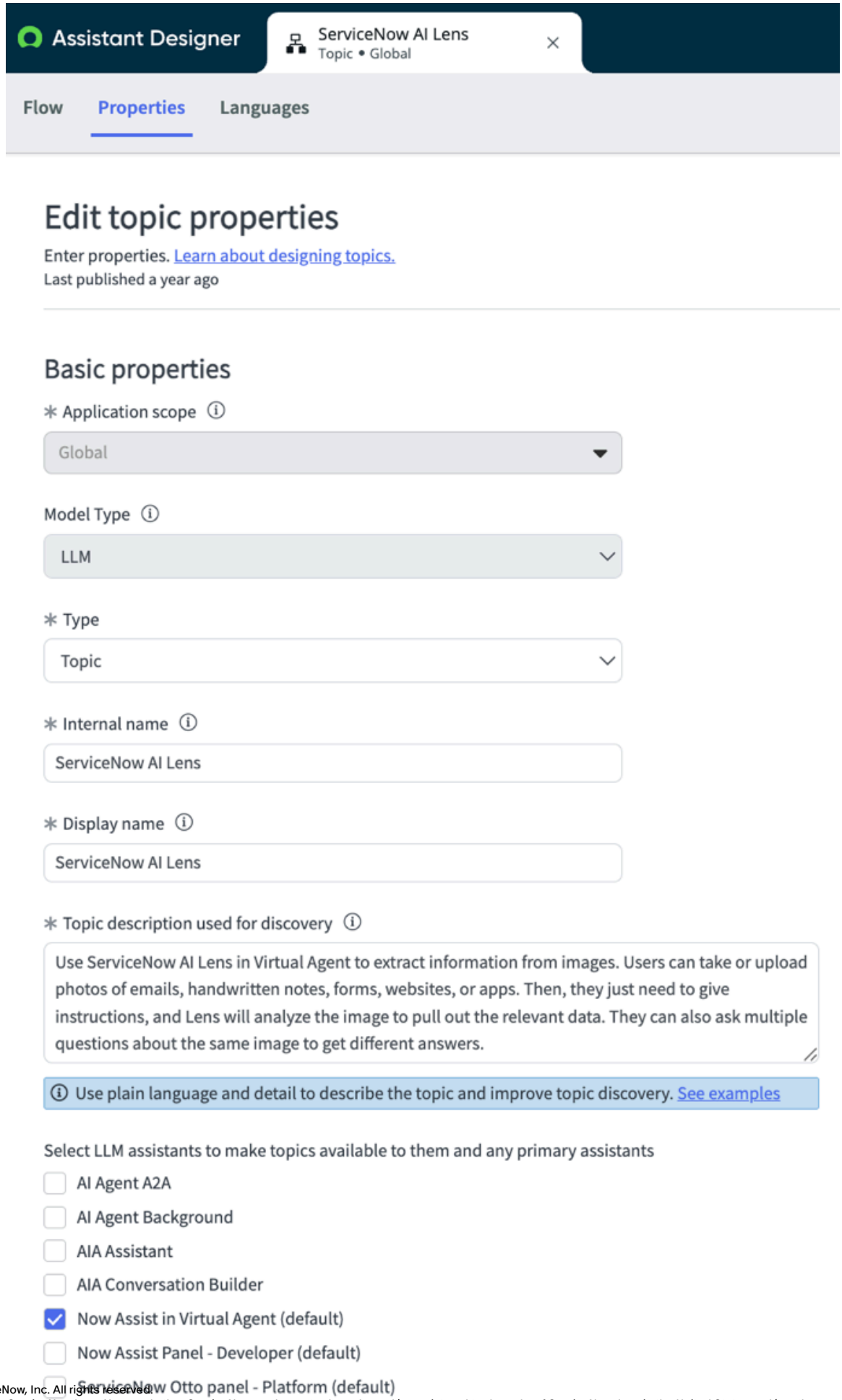

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4. Publish the **ServiceNow Lens** topic.

(Optional) Enable Agent chat function for a mobile app

Enable the chat function in Virtual Agent for a mobile device for ServiceNow AI Lens.

Before you begin

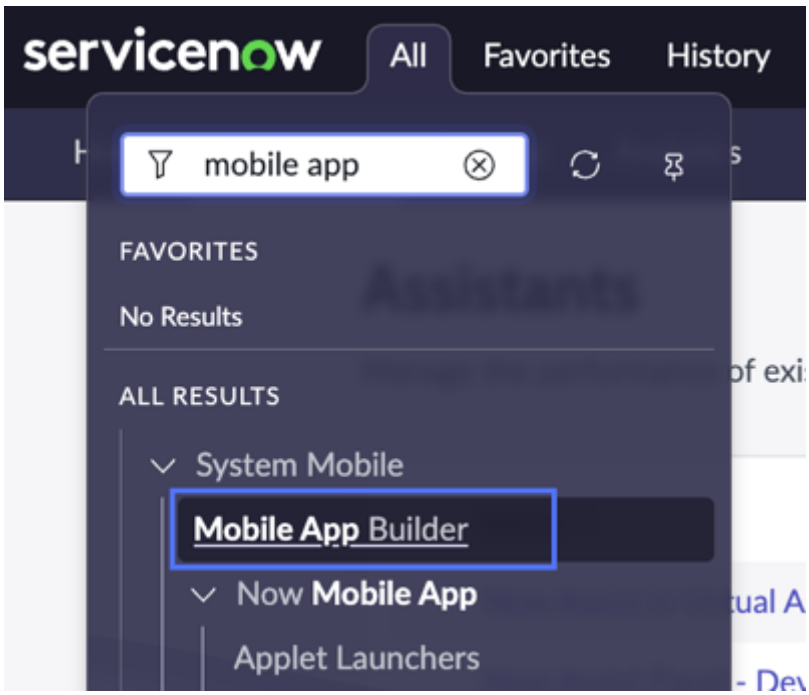
Role required: admin or delegated developer

About this task

Do this procedure when you don't see the ServiceNow Otto icon in the Now Mobile app.

Procedure

1. Navigate to **All** > **System Mobile** > **Mobile App Builder**.



   The Mobile App Builder opens in a new tab.

2. From the search option, search and select **Now Mobile**.

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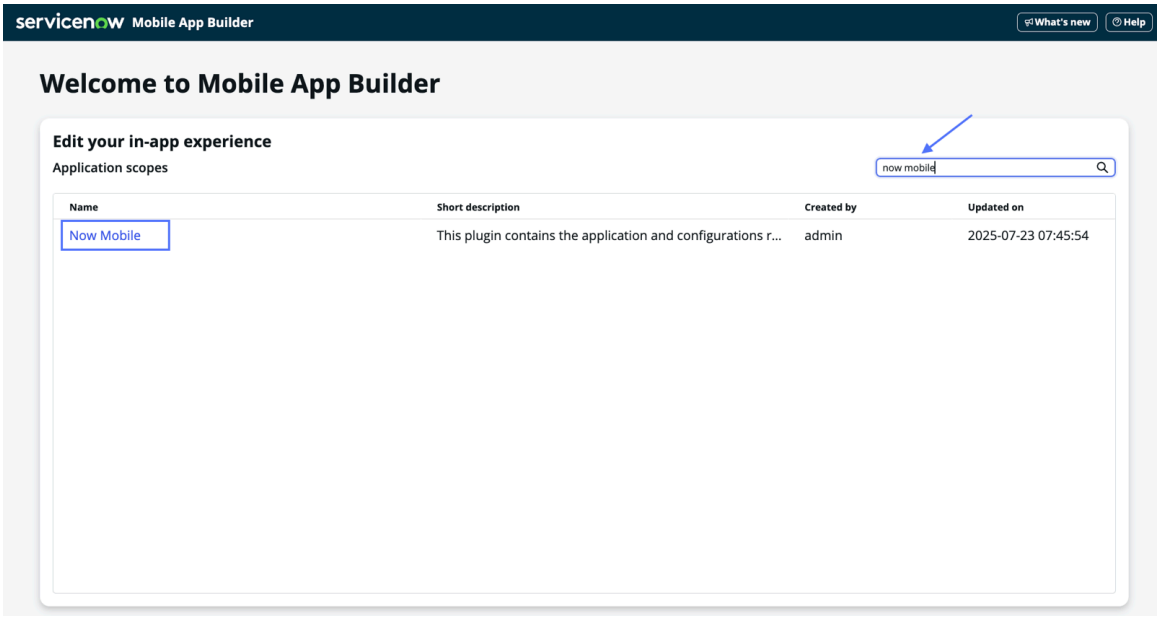
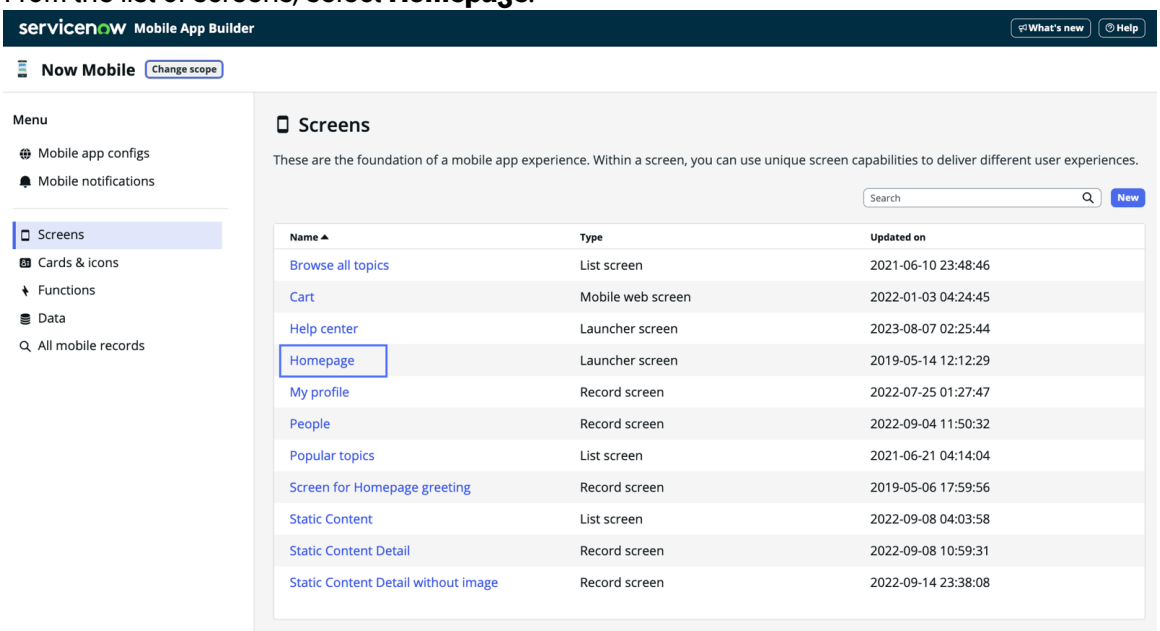


3. From the list of screens, select **Homepage**.



4. From the Now Platform configuration list, select the **Chat** function.

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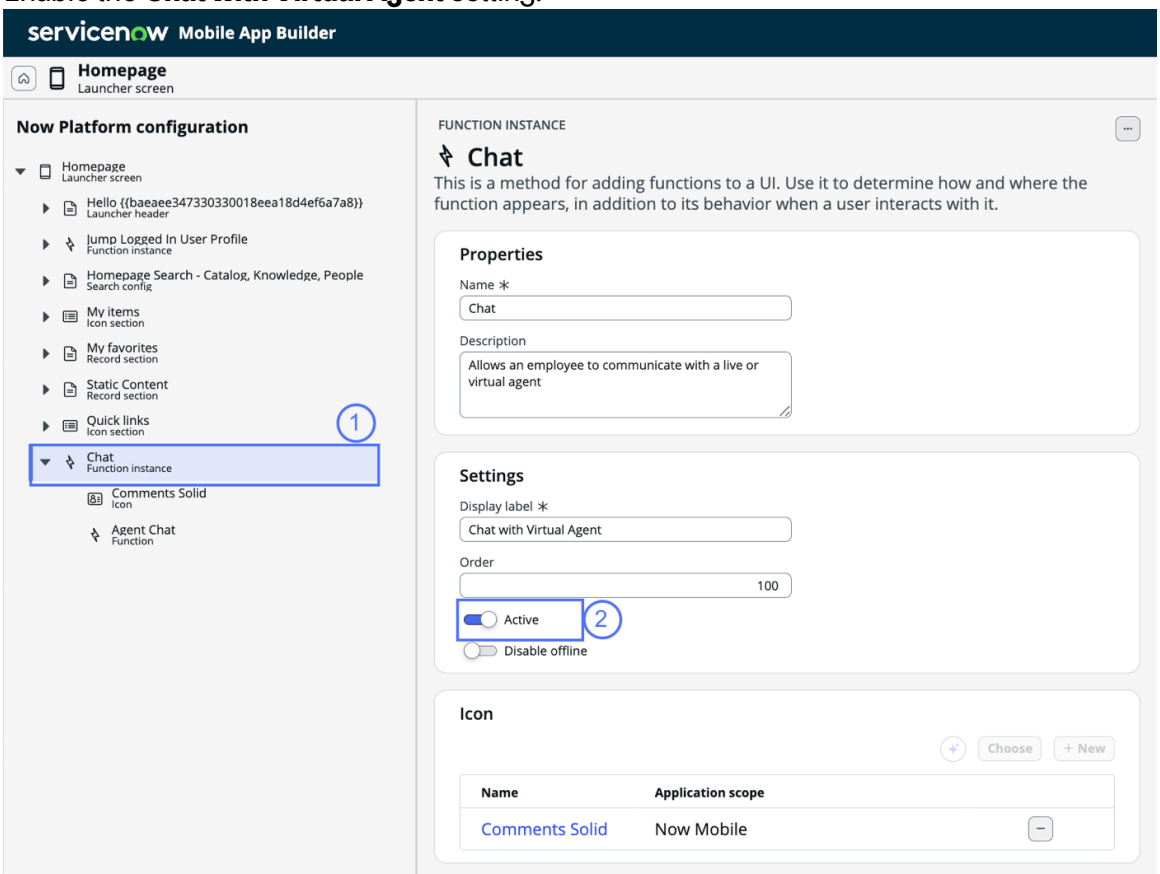
5. Enable the **Chat with Virtual Agent** setting.



Using ServiceNow AI Lens

If you have a lens_user role, and have activated the ServiceNow AI Lens skill, you can use the ServiceNow AI Lens application to capture screens or upload files, extract and comprehend data from the captured screenshots or uploaded files, auto-fill form fields, or preview the extracted data.

Using ServiceNow AI Lens overview

Use ServiceNow AI Lens to do the following tasks:

- Create or update a record directly from your browser by capturing your screen — no installation required. For more information, see Create a record directly from your browser or Update a record directly from your browser.
- Create or update a record in the ServiceNow instance by auto-filling data that is scanned from captured images or extracted from the files that you upload. For more information, see Create or update a record in an instance by using ServiceNow AI Lens.
- Trigger ServiceNow AI Lens in the context of Lens actions to auto-fill a form on the ServiceNow instance or view preview of extracted data. For more information, see Trigger ServiceNow AI Lens from the desktop app.
- Autofill the fields in a catalog item request form in the Service Portal. Launch ServiceNow AI Lens from the catalog item request form, then scan and extract data from artifacts such as Excel files, emails, or images of handwritten notes. For more information, see Auto-fill catalog item form in the Service Portal.
- Scan visual data, such as handwritten texts and notes, images, applications, and websites. You can use ServiceNow AI Lens as a standalone application to preview the generated outcome

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according to the instructions that you provide. For more information, see Extract and analyze data with ServiceNow AI Lens desktop app.

- Extract and analyze data from the files that you upload, and show the outcome of the analysis as a preview. For more information, see Extract and analyze data with ServiceNow AI Lens desktop app.
- Trigger ServiceNow AI Lens in the context of Lens actions from a Virtual Agent conversation. For more information, see Extract and analyze data using ServiceNow AI Lens from Virtual Agent.

Create or update a record in an instance by using ServiceNow AI Lens

Create or update a record in the ServiceNow instance by auto-filling the form fields with data that ServiceNow AI Lens extracts from screens and files.

Before you begin

To access the ServiceNow AI Lens functionality, perform the following steps:

- Install ServiceNow AI Lens on your ServiceNow instance. For more information, see Install the ServiceNow Lens in the ServiceNow instance.
- Turn on the ServiceNow AI Lens skill to add the generative AI capability. For more information, see Activate the ServiceNow AI Lens skill.
- Download the ServiceNow AI Lens installer to scan your desktop screen. For more information, see Download and set how you want to launch ServiceNow AI Lens.

Note:

- To use ServiceNow AI Lens from your browser, turn on the ServiceNow AI Lens skill.
- For the full range of ServiceNow AI Lens capabilities, turn on the ServiceNow AI Lens skill, and download and install the desktop application.

Verify that ServiceNow AI Lens has access to record the screen on your system. For more information, see Providing permission to ServiceNow AI Lens.

Don't scan any personally identifiable information, such as medical reports, financial reports, or other sensitive data, when using ServiceNow AI Lens as you don't want to expose the large language model (LLM) to any sensitive information.

Role required: lens_user

About this task

You can create a record in the ServiceNow instance in two ways:

- **From your browser**: Capture a screen or upload files directly from your browser, and let ServiceNow AI Lens analyze the contents and auto-fill the form fields — no download or installation required. For more information, see Using the Lens browser app.

  Note:

  - The screen capture experience may vary depending on the browser that you use.

    Tip: For the best experience, use ServiceNow AI Lens on any Chromium-based browser.

  - The browser-based experience supports single-screen capture.

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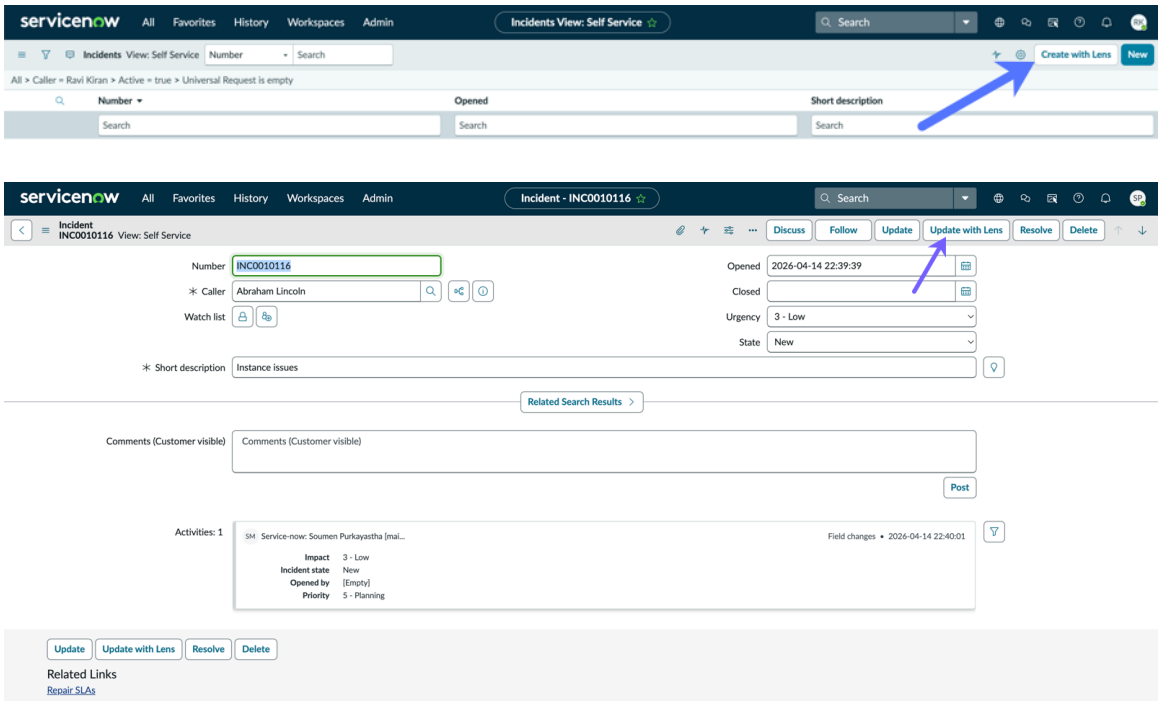
- **From the desktop app**: Use the ServiceNow AI Lens desktop app for the full range of capture and analysis capabilities, such as multi-image capture, auto-map Excel column headers with ServiceNow table fields, and file uploads. For more information, see Using the Lens desktop app.

Procedure

1. In your instance, navigate to the list view of any table, for example, Incidents.
2. Select **Create with Lens** or **Update with Lens**.



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Note:

- If pop-up is blocked, ServiceNow AI Lens screen may not open. Confirm that you've already allowed pop-ups from your browser settings.
- On non-production instances, you can control on which tables the **Create with Lens** and **Update with Lens** buttons appear using the following system properties:
  - *sn_app_lens_core.show_lens_action_on_all_tables*: Set to true to show the **Create with Lens** and **Update with Lens** buttons on all tables. Set to false to show it only on specific tables. Default is true.
  - *sn_app_lens_core.lens_inclusion_table_list*: Enter the names of the tables as comma-separated values where you want the **Create with Lens** and **Update with Lens** buttons to appear. Use this property only when the *sn_app_lens_core.show_lens_action_on_all_tables* property is set to false.
  - *sn_app_lens_core.lens_exclusion_table_list*: Enter the names of the tables as comma-separated values where you want to hide the **Create with Lens** and **Update with Lens** buttons, regardless of how the *sn_app_lens_core.lens_inclusion_table_list* property is set.
- On non-production instances, the **Create with Lens** and **Update with Lens** buttons may appear even if the ServiceNow AI Lens skill is not activated. If you select the button, an error occurs. You can activate the skill or hide the button by entering the name of the table in the *sn_app_lens_core.lens_inclusion_table_list* property
- On production instances, the **Create with Lens** and **Update with Lens** buttons are visible only when the ServiceNow AI Lens skill is active and the user has the lens_user role. To hide the buttons on all tables, set *sn_app_lens_core.show_lens_action_on_all_tables* to false and leave *sn_app_lens_core.lens_inclusion_table_list* empty.

3. Create or update a record in the ServiceNow instance by performing any of the following methods.
   - Using the Lens browser app

     The ServiceNow AI Lens browser app opens in a new browser window.
   - Using the Lens desktop app

     The ServiceNow AI Lens desktop app is launched.

Related topics

Supporting information for ServiceNow AI Lens

ServiceNow AI Lens limitations

Extract and analyze data with ServiceNow AI Lens desktop app

Using the Lens browser app

Capture a screen or upload files directly from your browser, and let ServiceNow AI Lens analyze the contents and auto-fill the form fields — no download or installation required.

Before you begin

Important: Confirm that **Browser** is selected as a default preference in the Downloads and Preferences page. To view the steps, see Set AI Lens to launch with the desktop app

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Role required: lens_user

About this task

When you select **Create with Lens** or **Update with Lens** for a form, the ServiceNow AI Lens browser app opens in a new browser window.

Note:

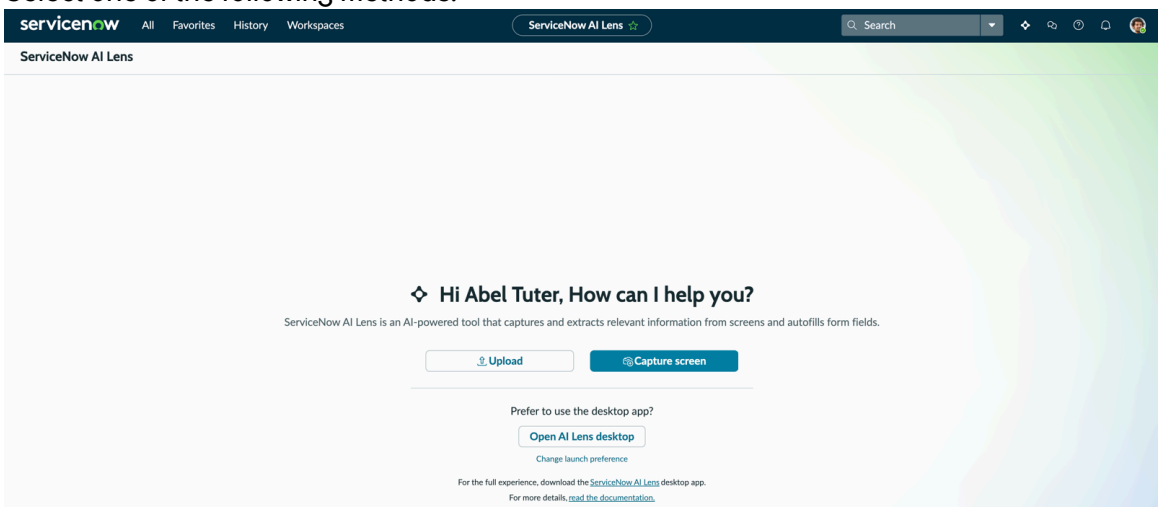
- The screen capture experience may vary depending on the browser that you use.

  Tip: For the best experience, use ServiceNow AI Lens on any Chromium-based browser.

- The browser-based experience supports single-screen capture. To capture multiple screens, Use ServiceNow AI Lens from the desktop application.

Procedure

1. Select one of the following methods.



   - **Capture screen**

     a. Select **Capture screen**.

     b. Select the screen that you want to capture, and then select **Share**.

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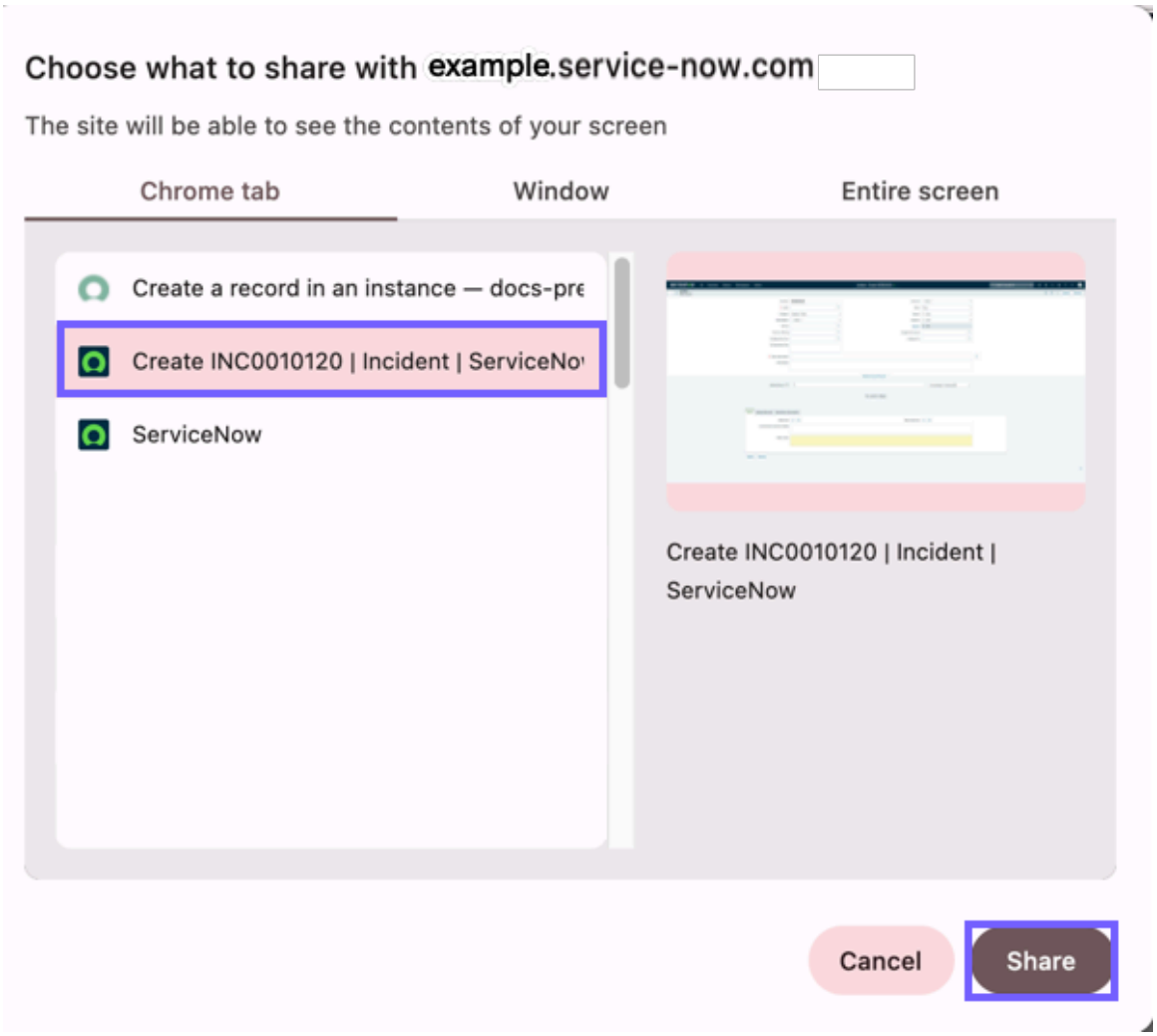
Note:

- The screen capture options depend on your browser.
- For illustration purpose, the following steps show the capturing of an Outlook email screen from Chrome tab.



ServiceNow AI Lens shows the captured Outlook email screen that it will analyze.

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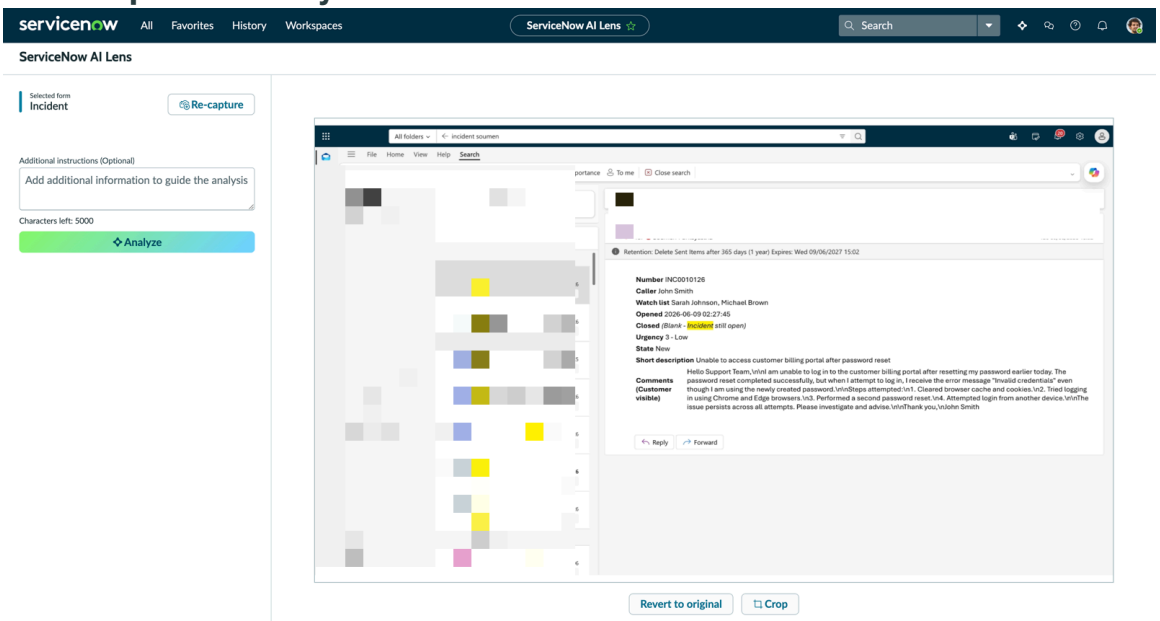
Screen captured for analysis



c. (Optional). To specify the area of the captured screen that you want ServiceNow AI Lens to analyze, select **Crop**, and then use the crop handles.

d. Select **Confirm**.

e. (Optional). Perform the following steps:

- Select **Re-capture** to discard the current capture and capture a new screen.
- Select **Revert to original** to undo the crop and restore the full captured image.
- Select **Crop** to further refine your selection by cropping the already cropped screen.

- **Upload**

a. Select **Upload**.

b. Perform any one of the following file upload methods.

- Upload one or more files by selecting the **+Add file** option.
- Upload one or more files by dragging the selected files to the Drag and drop files section and then select **Upload all**.

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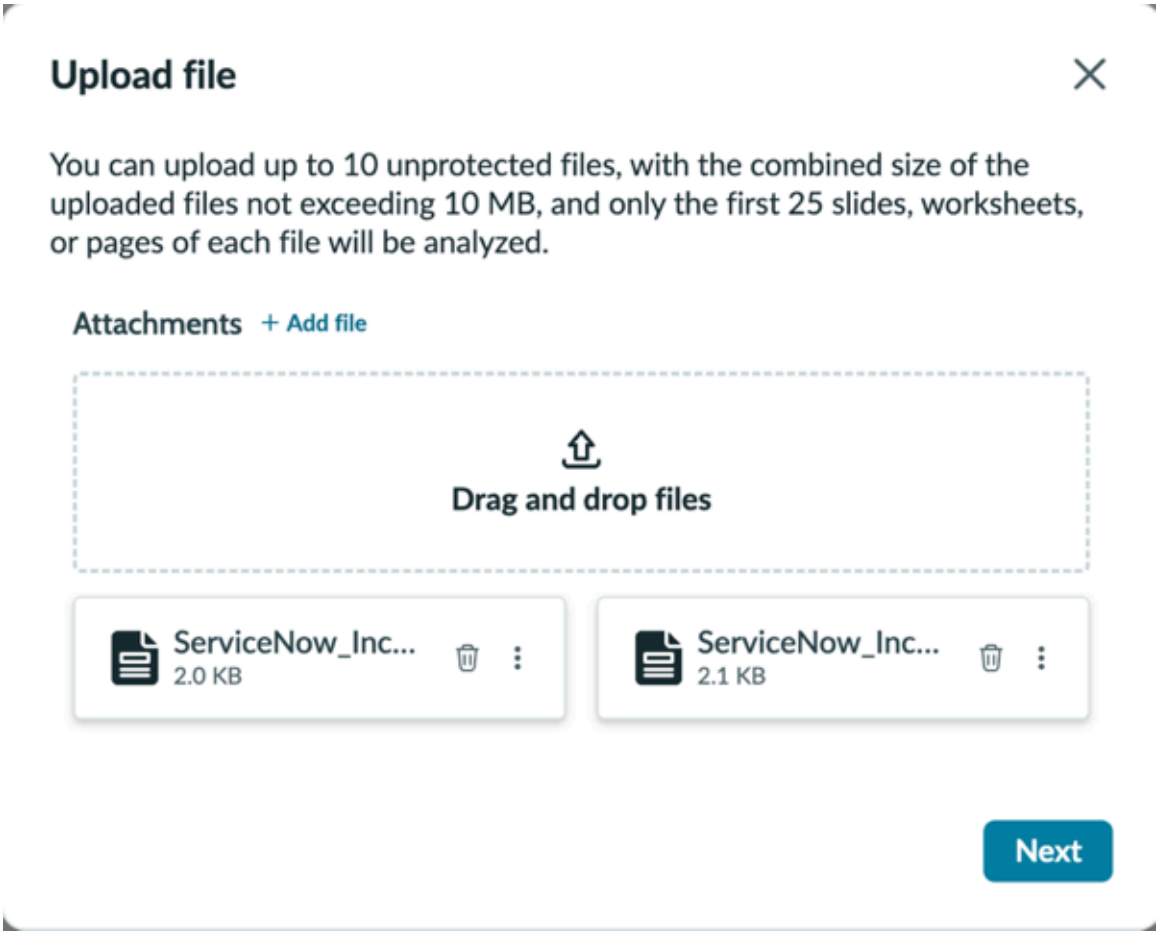

Note:

- You can upload up to 10 unprotected files, with the combined size of the uploaded files not exceeding 10 MB.
- To remove a file that you attached, select the Remove file icon .
- To rename the file that you attached, select the More options icon , and then select **Rename**.

c. Select **Next**.

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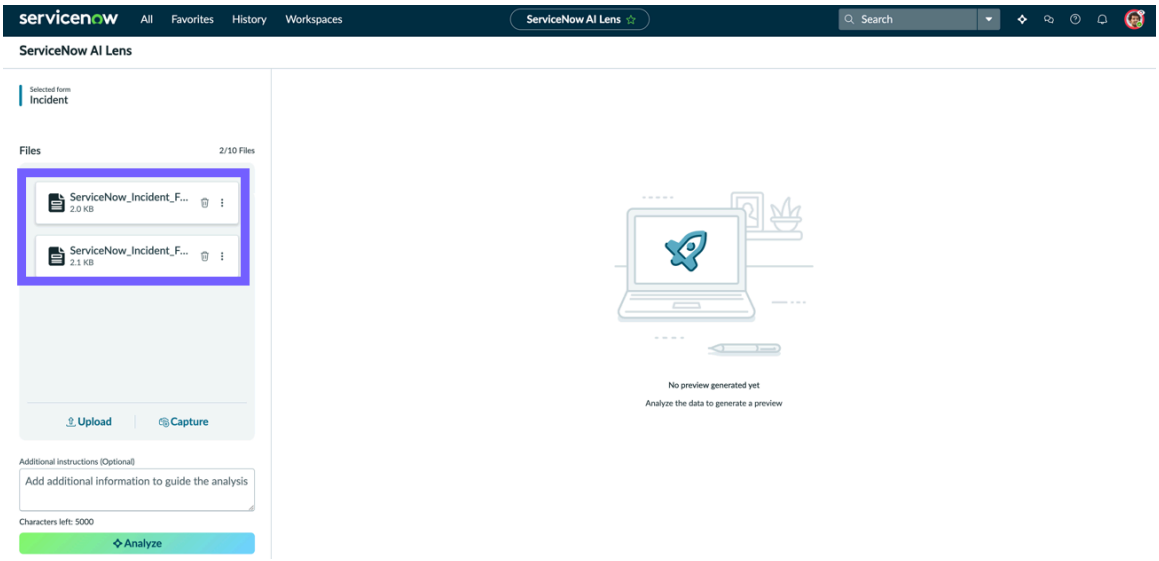
The ServiceNow AI Lens preview window displays the files that you have uploaded

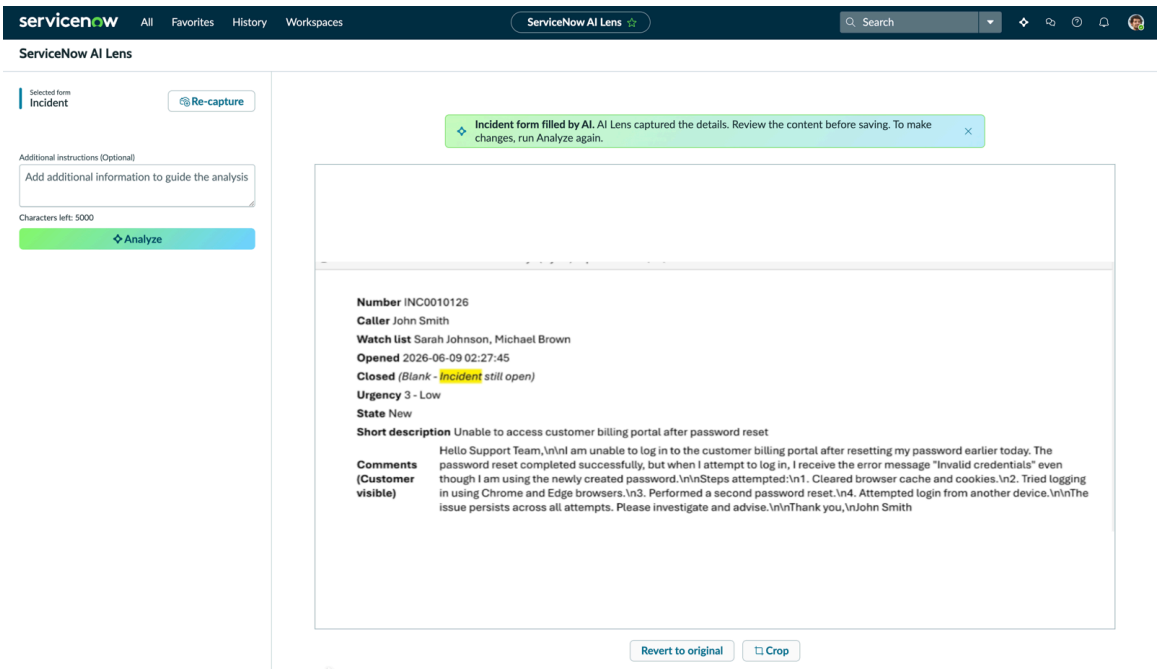


2. To guide ServiceNow AI Lens in extracting the information you need from the uploaded files, enter specific instructions in the **Additional instructions** field.

   The default character limit is 500. Users with the admin role can increase this limit to up to 5000 characters by navigating to the `sn_lens_user_prompt_max_length` system property.

3. To let ServiceNow AI Lens analyze the captured screen, select **Analyze**.

   The form is auto-filled.



4. In the ServiceNow instance, review the text that is auto-filled by AI into your record.
   The fields that are auto-filled by AI are highlighted with the Sparkle icon ✦.

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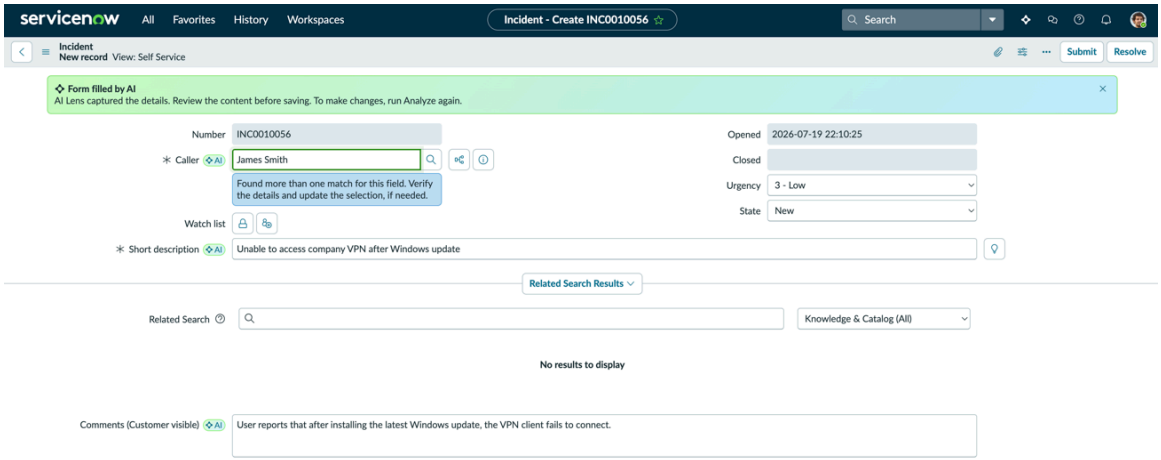

Only the fields that are supported by ServiceNow AI Lens get auto-populated with the extracted data. If you don't have any supported fields in your form, then ServiceNow AI Lens won't update the record. For more information about the supported fields, see Field types supported.

Option	Action
If the auto-filled text looks good	Save the record by selecting **Save**.
If the auto-filled text requires changes	Do one of the following actions: ○ Manually adjust the information in the fields and save the record. ○ In the ServiceNow AI Lens window, provide different instructions or take more screen shots and select **Analyze** so that Service Now AI Lens can extract, comprehend the data again, and auto-fill the data into the record. Save the record by selecting **Save**. You can analyze the artifacts as many times as needed without reloading the form.

Using the Lens desktop app

Use the ServiceNow AI Lens desktop app for the full range of capture and analysis capabilities, such as multi-image capture, auto-map Excel column headers with ServiceNow table fields, and file uploads.

Before you begin

Important: Confirm that **Desktop app** is selected as a default preference in the Downloads and Preferences page. To view the steps, see Set AI Lens to launch with the desktop app

Role required: lens_user

About this task

When you select **Create with Lens** or **Update with Lens** for a form, the ServiceNow AI Lens desktop app is launched.

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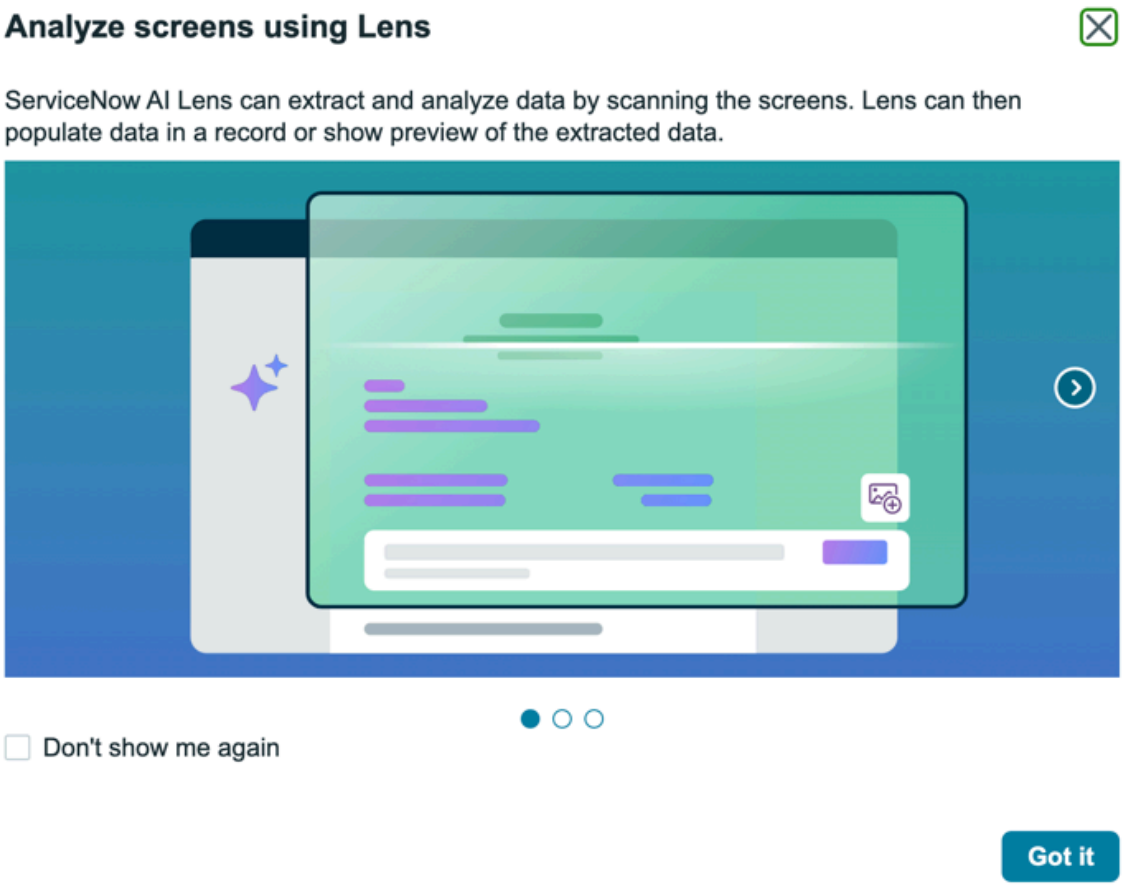
Procedure

1. In the ServiceNow AI Lens.app dialog box, select **Open ServiceNow AI Lens.app**.

   Note:

   - This confirmation dialog appears when you select **Create with Lens** or **Update with Lens** for the first time. You can make this a one-time step by selecting **Always open <instance-name.service-now.com> links of this type in the associated app** before selecting **Open ServiceNow AI Lens.app**.
   - On macOS, when you launch ServiceNow AI Lens desktop app for the first time, your mac asks whether ServiceNow AI Lens can store your login credentials. Select **Always Allow** to avoid entering your credentials every time you open the application.

2. On the onboarding journey widget, complete the onboarding and select **Got it**.



3. Use one of the following methods to extract data from documents.

   Note: A document can be an image, a scanned handwritten note, web page, Excel sheet, or a Microsoft Word document.

   - **Capture screen**

     a. On your system, open one or more documents that you want to scan.

     b. Auto-fill the form on the instance with data extracted from a single screenshot.

        i. Place the ServiceNow AI Lens scanner window on top of the document.

        ii. Resize the ServiceNow AI Lens scanner window by dragging its borders.

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c. (Optional) Auto-fill the form on the instance with data extracted from multiple screenshots.

i. Select the **Multi-capture** button

ii. Select the Capture icon.

iii. Place the ServiceNow AI Lens scanner window over another document or page and then select the Capture icon.

iv. Repeat the step to capture more screenshots, if required.

Note:

- You can capture a total of 10 screenshots with the combined size of all captured screenshots not exceeding 10 MB.
- To enable the desktop app to send large screenshot data to the server, verify that the following system properties are set exactly as shown:

System property

Property name	Type	Recommended value
glide.rest.max_content_length	integer	15
glide.rest.scripted.max_inbound_content_length_mb	integer	15

For more information, see Configure system property.

Note: You must have the admin role to set the system properties.

v. To complete the capture, select the Done icon.

- **Upload**

a. Select **Upload**.

Note:

- You can upload up to 10 unprotected files, with the combined size of the uploaded files not exceeding 10 MB.
- To enable the desktop app to send large data of the uploaded files to the server, confirm that the following system properties are set exactly as shown below:

System property

Property name	Type	Recommended value
glide.rest.max_content_length	integer	15
glide.rest.scripted.max_inbound_content_length_mb	integer	15

For more information, see Configure system property

Note: You must have the admin role to set the system properties.

- To remove a file that you attached, select the Remove file icon.

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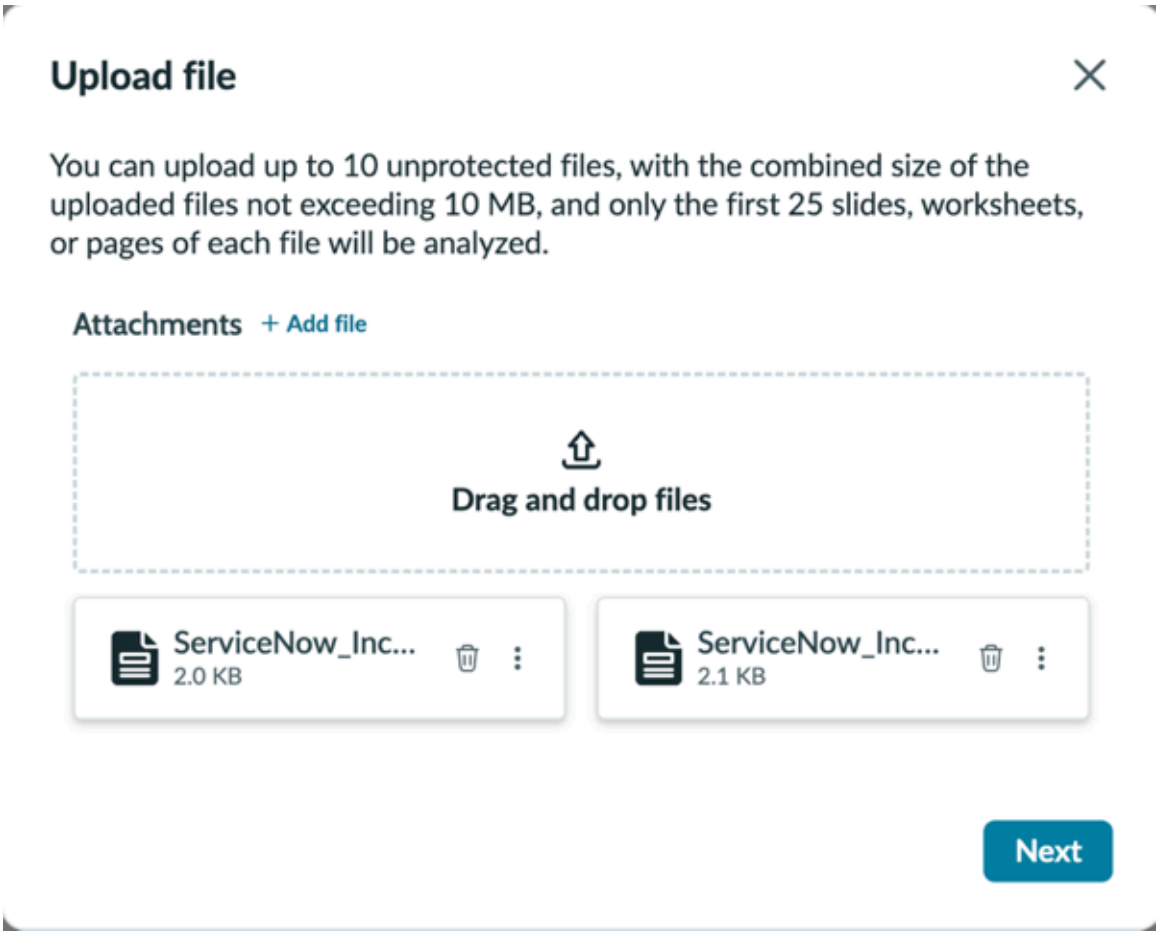
b. Perform any one of the following file upload methods.

- Upload one or more files by selecting the **+Add file** option.
- Upload one or more files by dragging the selected files to the Drag and drop files section and then select **Upload all**.



Note:

- You can upload up to 10 unprotected files, with the combined size of the uploaded files not exceeding 10 MB.
- To remove a file that you attached, select the Remove file icon .
- To rename the file that you attached, select the More options icon , and then select **Rename**.

c. Select **Next**.

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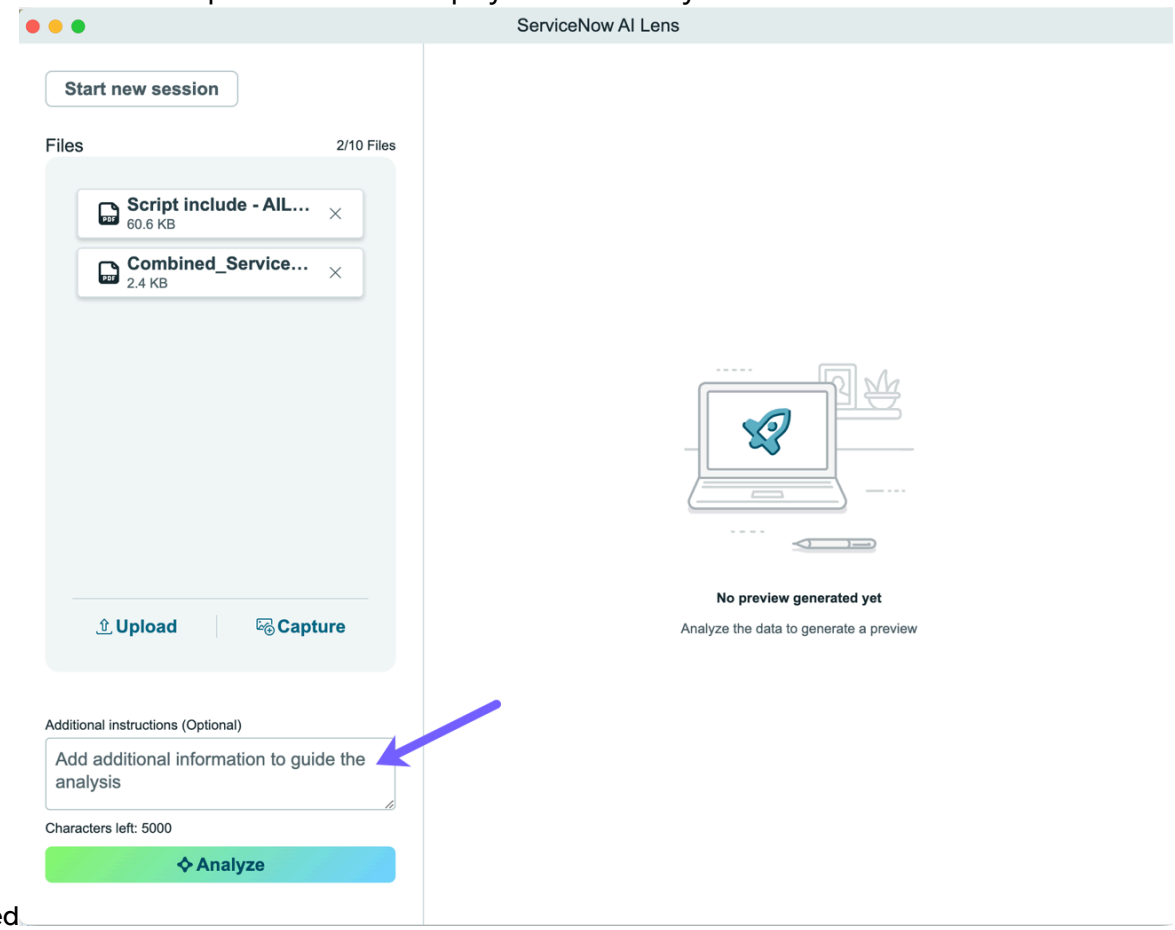
The ServiceNow AI Lens preview window displays the files that you've uploaded.



Tip:

- To view the preview of a file that you uploaded, select the card. The preview of the file opens on its respective default application.
- To remove an uploaded file, select the Remove file icon ×.
- To capture one or more additional files, select **Upload**.

Note: You can upload a total of 10 unprotected files with the combined size of all files not exceeding 10 MB.

4. To guide ServiceNow AI Lens in extracting the information you need from the uploaded files, enter specific instructions in the **Additional instructions** field.

   The default character limit is 500. Users with the admin role can increase this limit to up to 5000 characters by navigating to the *sn_lens_user_prompt_max_length* system property.

5. To let ServiceNow AI Lens analyze the captured screen, select **Analyze**.

   The form is auto-filled.

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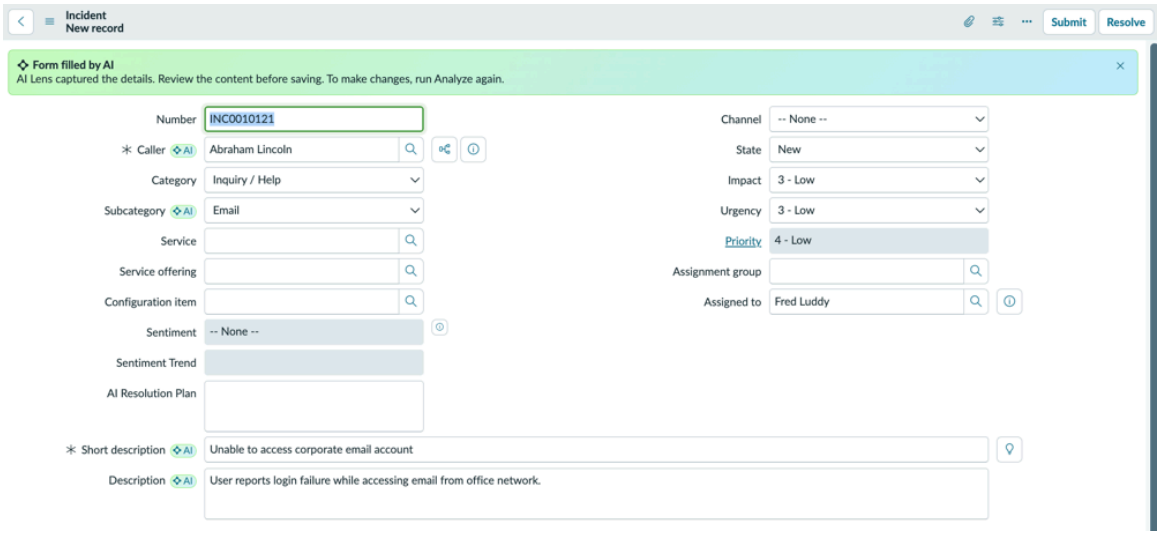
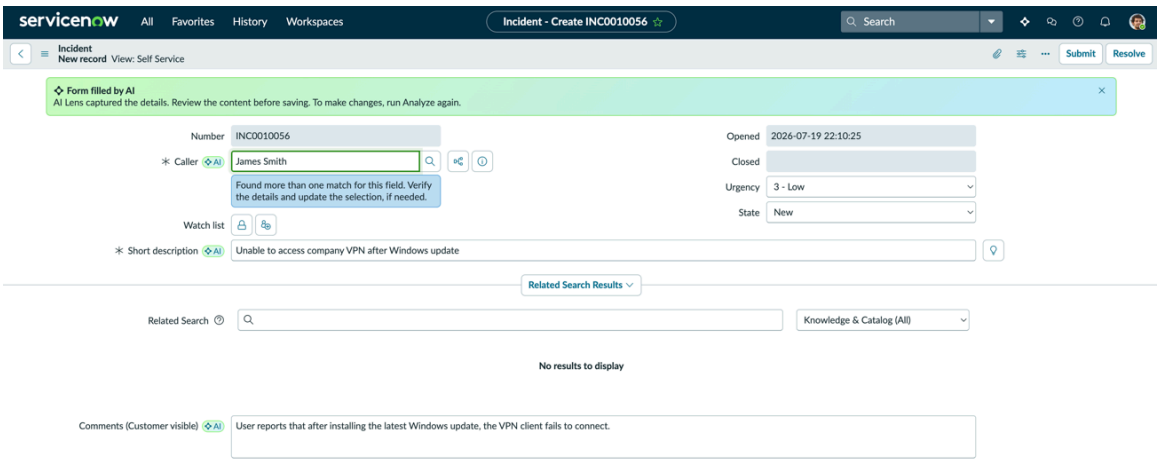


6. In the ServiceNow instance, review the text that is auto-filled by AI into your record. The fields that are auto-filled by AI are highlighted with the Sparkle icon ✨.



Only the fields that are supported by ServiceNow AI Lens get auto-populated with the extracted data. If you don't have any supported fields in your form, then ServiceNow AI Lens won't update the record. For more information about the supported fields, see Field types supported.

Option	Action
If the auto-filled text looks good	Save the record by selecting **Save**.
If the auto-filled text requires changes	Do one of the following actions: ○ Manually adjust the information in the fields and save the record. ○ In the ServiceNow AI Lens window, provide different instructions or take more screen shots and select **Analyze** so that Service Now AI Lens can extract, comprehend the data again, and auto-fill the data into the record. Save the record by selecting **Save**. You can analyze the artifacts as many times as needed without reloading the form.

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Auto-fill catalog item form in the Service Portal

Use ServiceNow AI Lens to extract data from documents and auto-fill catalog item forms in Service Portal. For example, auto-fill a new vendor onboarding form by extracting key details such as vendor name, address, contact email, and banking information from multiple documents, that includes Excel files, emails, images, and PDF documents.

Before you begin

Role required: lens_user

About this task

You can auto-fill catalog item forms in the Service Portal in two ways:

- **From your browser**: Use ServiceNow AI Lens to capture a screen from the browser, analyze the contents of the captured screen and auto-fill the form fields in the Service Portal — no download or installation of the desktop app required.

  Note:

  - The screen capture experience may vary depending on your browser.

    Tip: For the best experience, use ServiceNow AI Lens on any Chromium-based browser.

  - The browser-based experience supports single-screen capture.

- **From the desktop app**: Use the ServiceNow AI Lens desktop app for the full range of capture and analysis capabilities, such as multi-image capture and file uploads.

Procedure

1. Navigate to the Service Portal and log in.
   The URL is

   ```
   https://<instance-name>.service-now.com/sp
   ```

   This procedure demonstrates how to request an iPhone from the Service Portal by capturing the browser screen and auto-filling the form.

2. Navigate to the item that you want to request and select it.
3. Select **Fill with Lens**.

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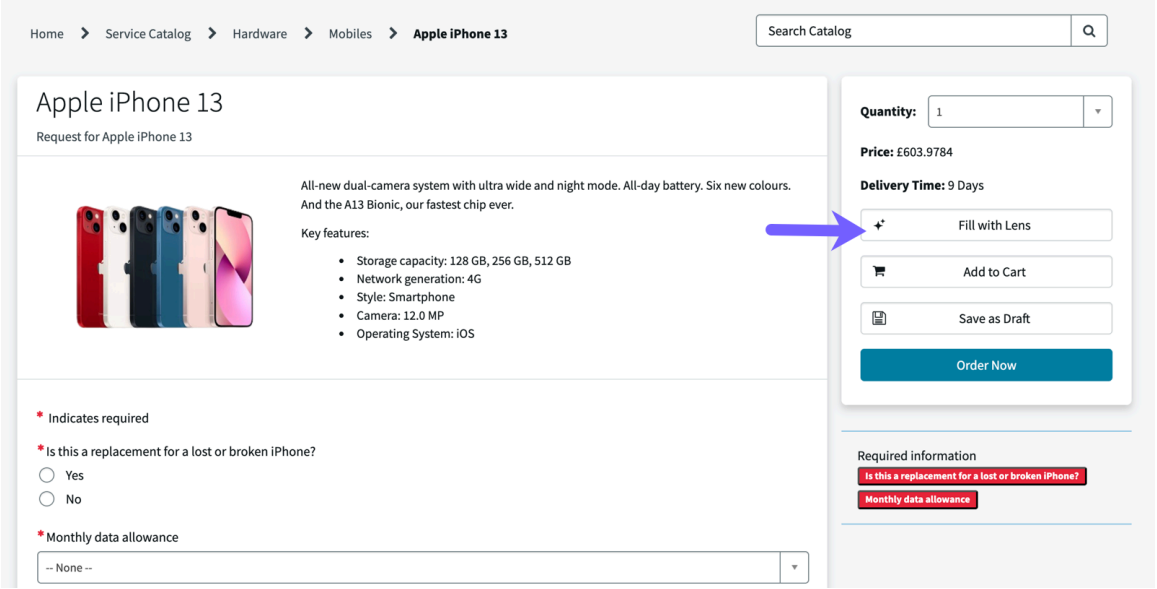

4. Auto-fill catalog item forms in Service Portal by performing any of the following methods.
   - Using the Lens browser app

     The ServiceNow AI Lens browser app opens in a new browser window.
   - Using the Lens desktop app

     The ServiceNow AI Lens desktop app is launched.

Using the Lens browser app

Capture a screen or upload files directly from your browser, and let ServiceNow AI Lens analyze the contents and auto-fill the form fields — no download or installation required.

Before you begin

Important: Confirm that **Browser** is selected as a default preference in the Downloads and Preferences page. To view the steps, see Set AI Lens to launch with the desktop app

Role required: lens_user

About this task

When you select **Fill with Lens** on the Service Portal form, the ServiceNow AI Lens browser app opens in a new browser window.

Note:

- The screen capture experience may vary depending on the browser that you use.

  Tip: For the best experience, use ServiceNow AI Lens on any Chromium-based browser.

- The browser-based experience supports single-screen capture. To capture multiple screens, Use ServiceNow AI Lens from the desktop application.

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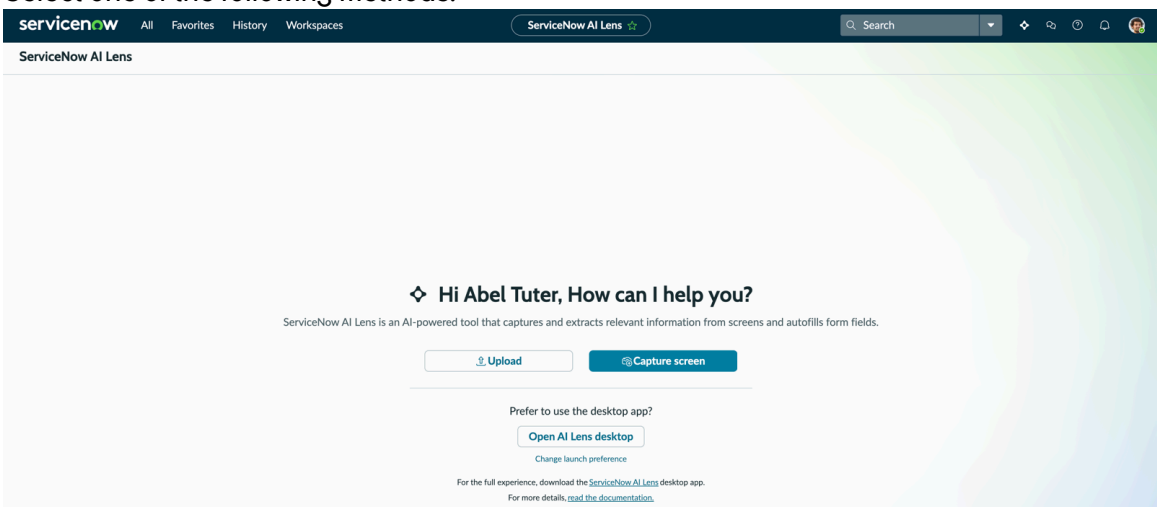
Procedure

1. Select one of the following methods.



   - **Capture screen**

     a. Select **Capture screen**.

     b. Select the screen that you want to capture, and then select **Share**.

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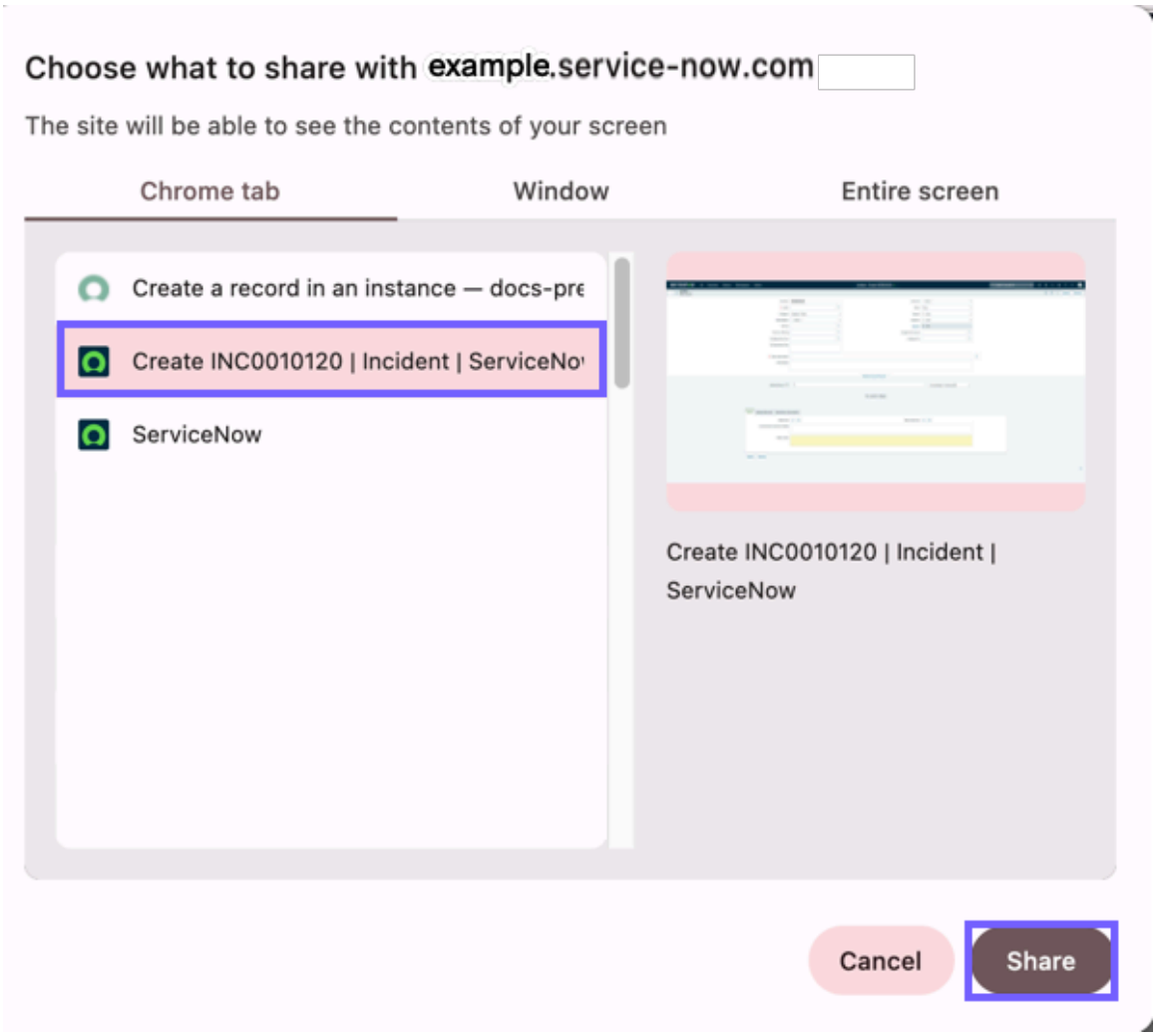
Note:

- The screen capture options depend on your browser.
- For illustration purpose, the following steps show the capturing of an Outlook email screen from Chrome tab.



ServiceNow AI Lens shows the captured Outlook email screen that it will analyze.

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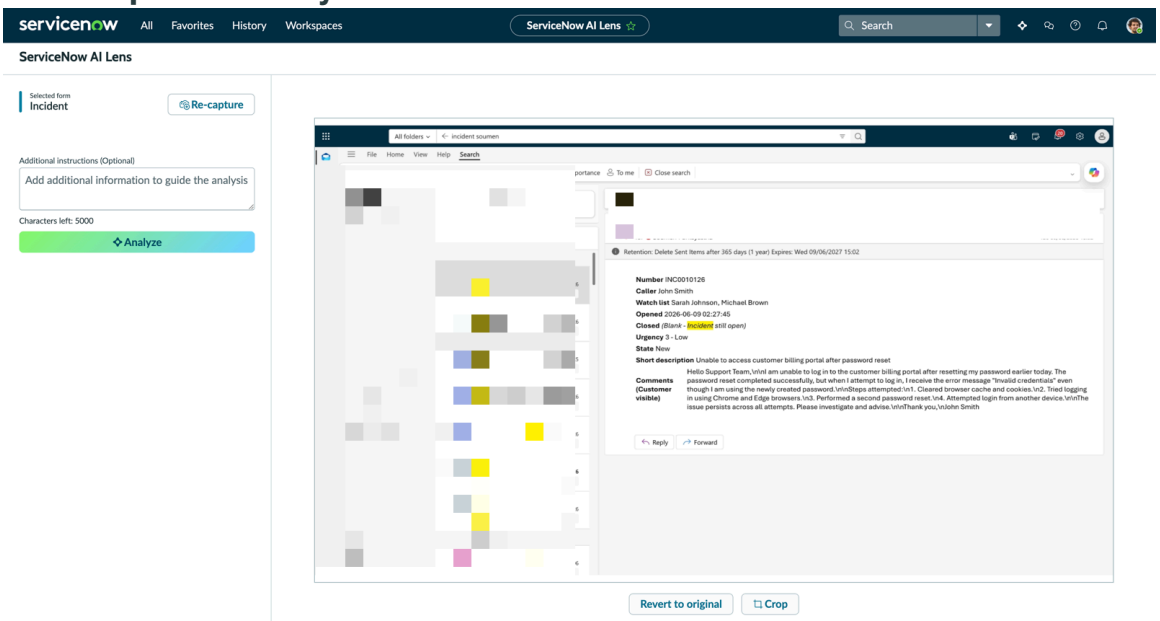
Screen captured for analysis



c. (Optional) To specify the area of the captured screen that you want ServiceNow AI Lens to analyze, select **Crop**, and then use the crop handles.

d. Select **Confirm**.

e. (Optional). Perform the following steps:

- Select **Re-capture** to discard the current capture and capture a new screen.
- Select **Revert to original** to undo the crop and restore the full captured image.
- Select **Crop** to further refine your selection by cropping the already cropped screen.

- **Upload**

a. Select **Upload**.

b. Perform any one of the following file upload methods.

- Upload one or more files by selecting the **+Add file** option.
- Upload one or more files by dragging the selected files to the Drag and drop files section and then select **Upload all**.

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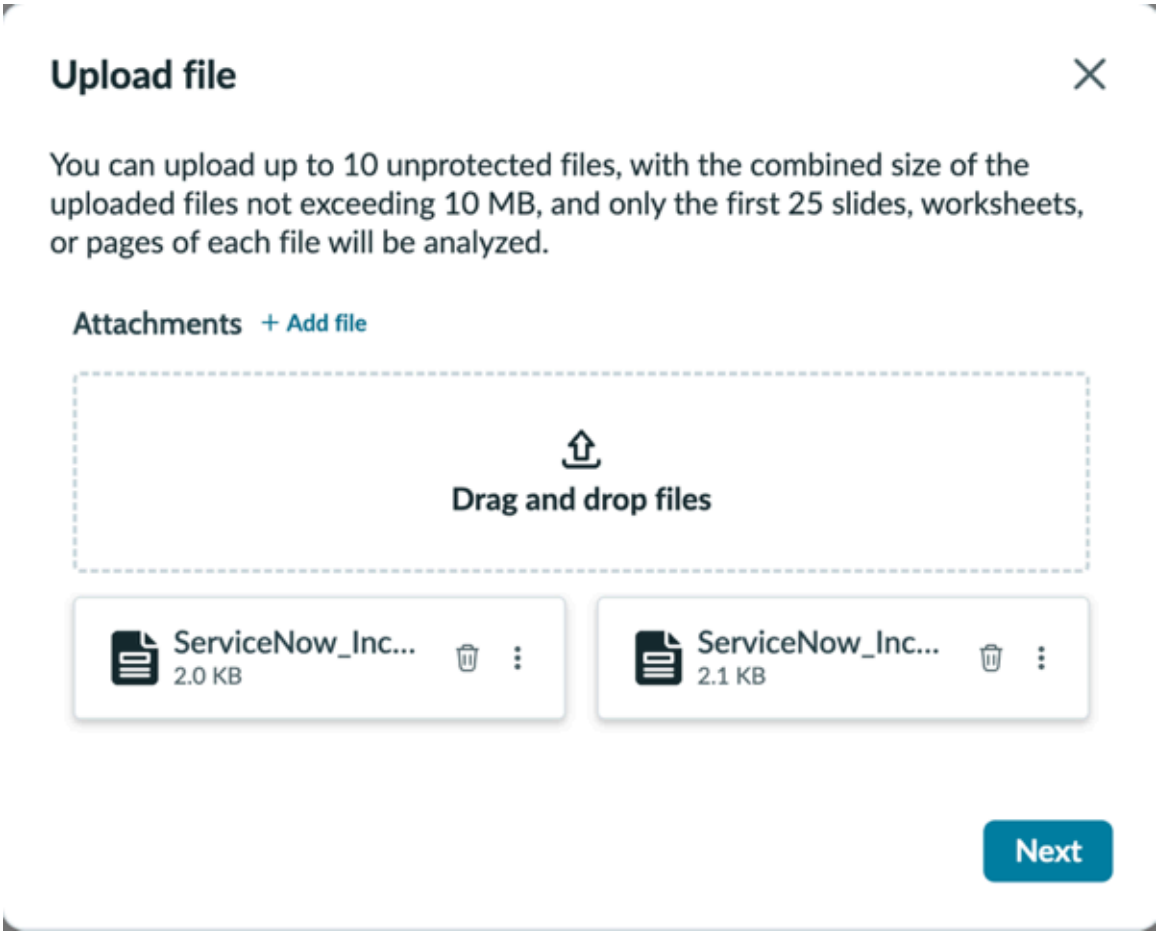

Note:

- You can upload up to 10 unprotected files, with the combined size of the uploaded files not exceeding 10 MB.
- To remove a file that you attached, select the Remove file icon .
- To rename the file that you attached, select the More options icon , and then select **Rename**.

c. Select **Next**.

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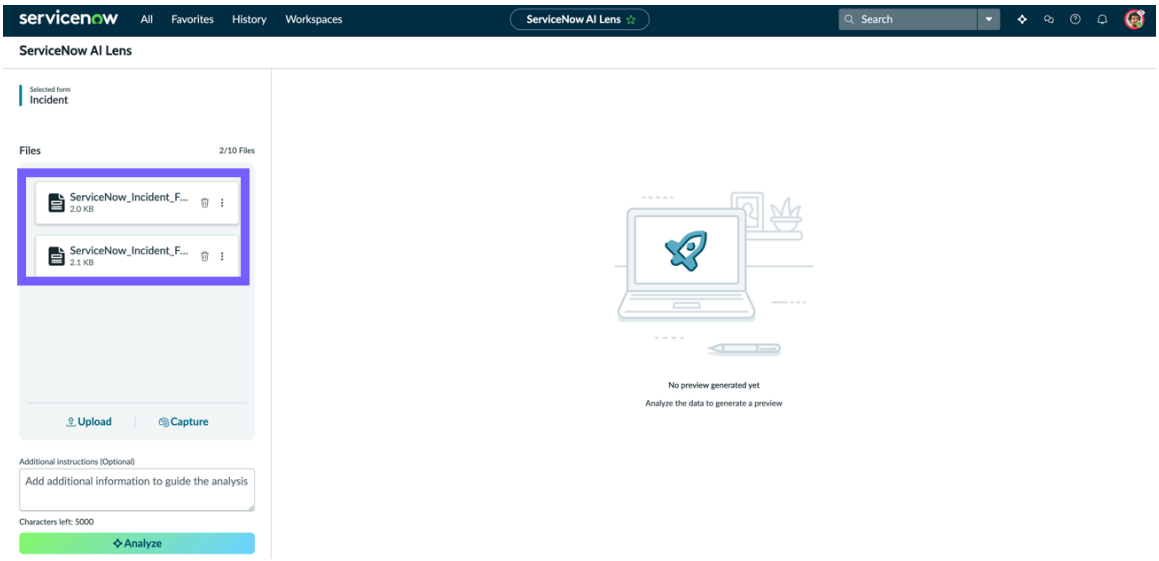
The ServiceNow AI Lens preview window displays the files that you have uploaded

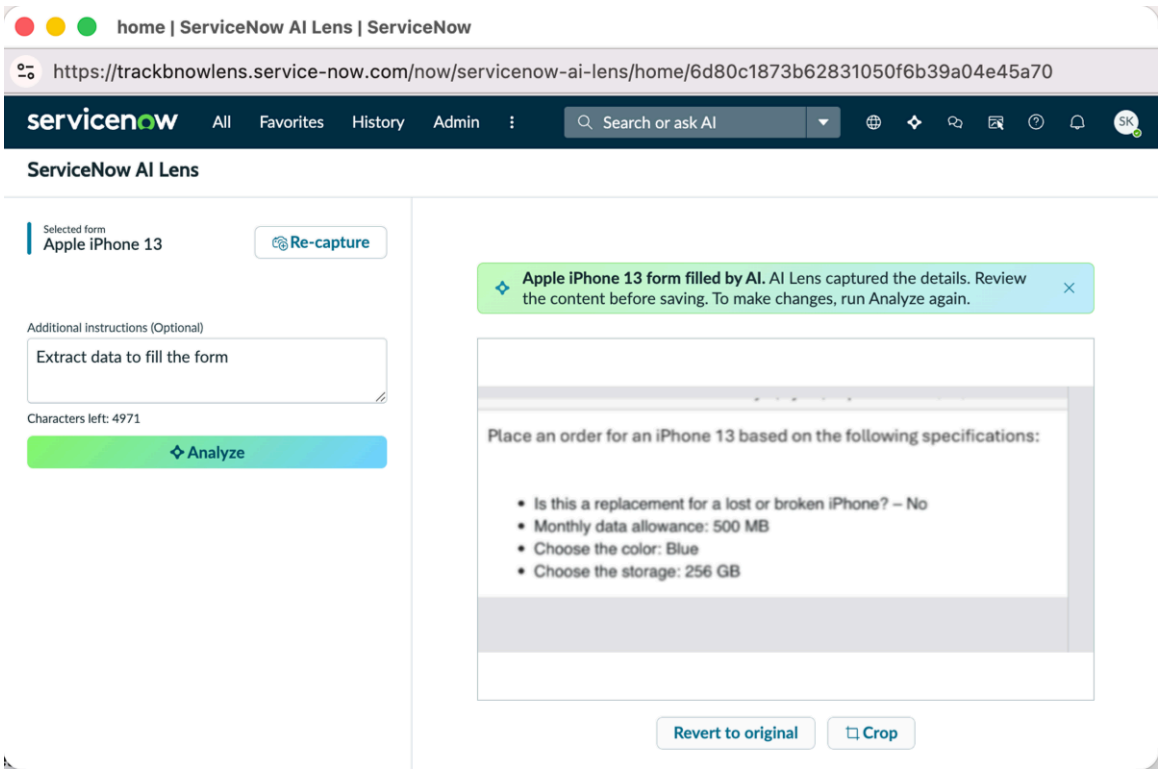


2. To guide ServiceNow AI Lens in extracting the information you need from the uploaded files, enter specific instructions in the **Additional instructions** field.

   The default character limit is 500. Users with the admin role can increase this limit to up to 5000 characters by navigating to the `sn_lens_user_prompt_max_length` system property.

3. To let ServiceNow AI Lens analyze the captured screen, select **Analyze**.

   ServiceNow AI Lens notifies that it has auto-filled the catalog item form fields.



4. Navigate to the catalog item form that you wanted to auto-fill and verify that the fields are correctly filled.

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Only the field types that are supported by ServiceNow AI Lens get auto-populated with the extracted data. If the form doesn't have field types that are supported, then ServiceNow AI Lens won't update the record. For more information about the supported fields, see Field types supported.

Option	Action
If the auto-filled text looks good	Save the record by selecting **Submit**.
If the auto-filled text requires changes	Do one of the following actions: ○ Manually adjust the information in the fields and save the record. ○ In the ServiceNow AI Lens window, provide different instructions or take more screen shots and select **Analyze** so that Service Now AI Lens can extract, comprehend the data again, and auto-fill the data into the record. Save the record by selecting **Sub mit**. You can analyze the artifacts as many times as needed without reloading the form.

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Using the Lens desktop app

Use the ServiceNow AI Lens desktop app for the full range of capture and analysis capabilities, such as multi-image capture, auto-map Excel column headers with ServiceNow table fields, and file uploads.

Before you begin

Important: Confirm that **Desktop app** is selected as a default preference in the Downloads and Preferences page. To view the steps, see Set AI Lens to launch with the desktop app

Role required: lens_user

About this task

When you select **Fill with Lens** on the Service Portal form, the ServiceNow AI Lens desktop app is launched.

Procedure

1. In the ServiceNow AI Lens.app dialog box, select **Open ServiceNow AI Lens.app**.

   Note:

   - This confirmation dialog appears when you select **Create with Lens** or **Update with Lens** for the first time. You can make this a one-time step by selecting **Always open <instance-name.service-now.com> links of this type in the associated app** before selecting **Open ServiceNow AI Lens.app**.
   - On macOS, when you launch ServiceNow AI Lens desktop app for the first time, your mac asks whether ServiceNow AI Lens can store your login credentials. Select **Always Allow** to avoid entering your credentials every time you open the application.

2. On the onboarding journey widget, complete the onboarding and select **Got it**.

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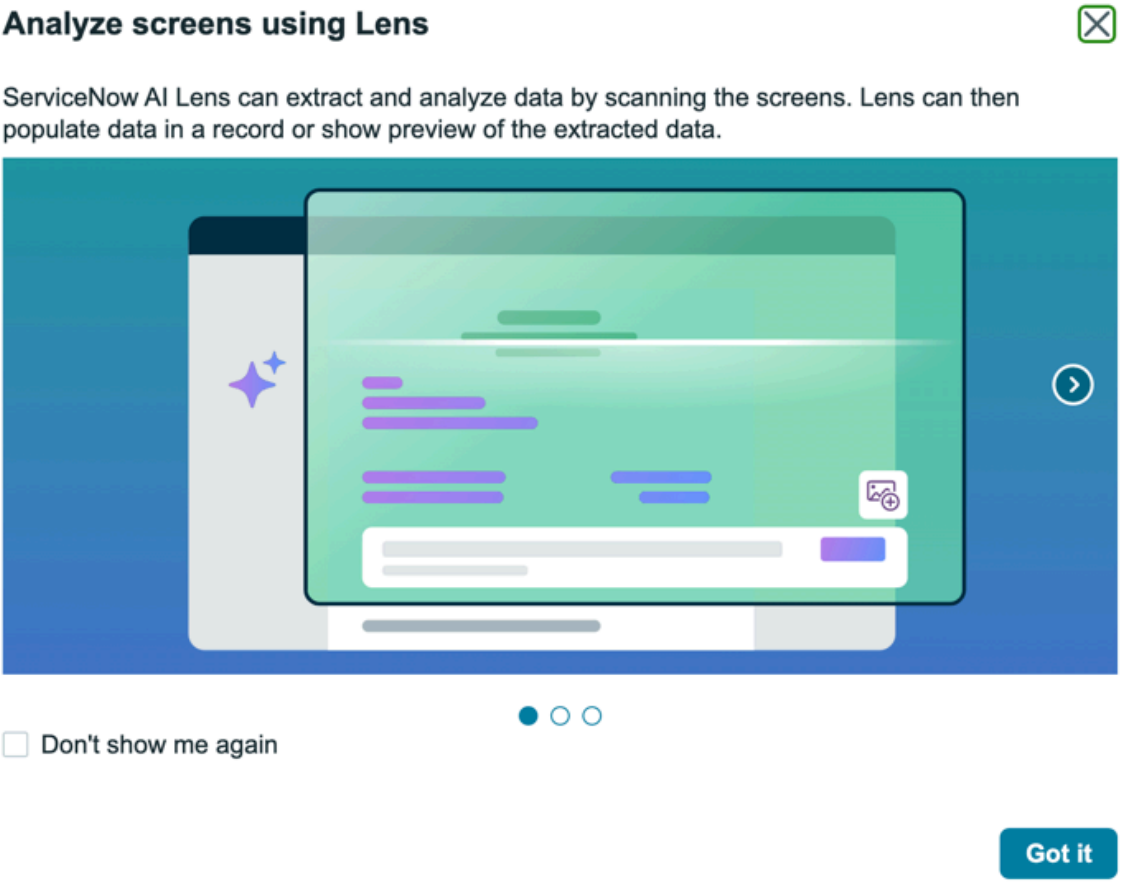

3. Use one of the following methods to extract data from documents.

> **Note:** A document can be an image, a scanned handwritten note, web page, Excel sheet, or a Microsoft Word document.

- **Capture screen**

  a. On your system, open one or more documents that you want to scan.

  b. Auto-fill the form on the instance with data extracted from a single screenshot.

     i. Place the ServiceNow AI Lens scanner window on top of the document.

     ii. Resize the ServiceNow AI Lens scanner window by dragging its borders.

  c. (Optional) Auto-fill the form on the instance with data extracted from multiple screenshots.

     i. Select the **Multi-capture** button

     ii. Select the Capture icon .

     iii. Place the ServiceNow AI Lens scanner window over another document or page and then select the Capture icon .

     iv. Repeat the step to capture more screenshots, if required.

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Note:

- You can capture a total of 10 screenshots with the combined size of all captured screenshots not exceeding 10 MB.
- To enable the desktop app to send large screenshot data to the server, verify that the following system properties are set exactly as shown:

System property

Property name	Type	Recommended value
glide.rest.max_content_length	integer	15
glide.rest.scripted.max_inbound_content_length_mb	integer	15

For more information, see Configure system property.

Note: You must have the admin role to set the system properties.

v. To complete the capture, select the Done icon.

- **Upload**

a. Select **Upload**.

Note:

- You can upload up to 10 unprotected files, with the combined size of the uploaded files not exceeding 10 MB.
- To enable the desktop app to send large data of the uploaded files to the server, confirm that the following system properties are set exactly as shown below:

System property

Property name	Type	Recommended value
glide.rest.max_content_length	integer	15
glide.rest.scripted.max_inbound_content_length_mb	integer	15

For more information, see Configure system property

Note: You must have the admin role to set the system properties.

- To remove a file that you attached, select the Remove file icon.

b. Perform any one of the following file upload methods.

- Upload one or more files by selecting the **+Add file** option.
- Upload one or more files by dragging the selected files to the Drag and drop files section and then select **Upload all**.

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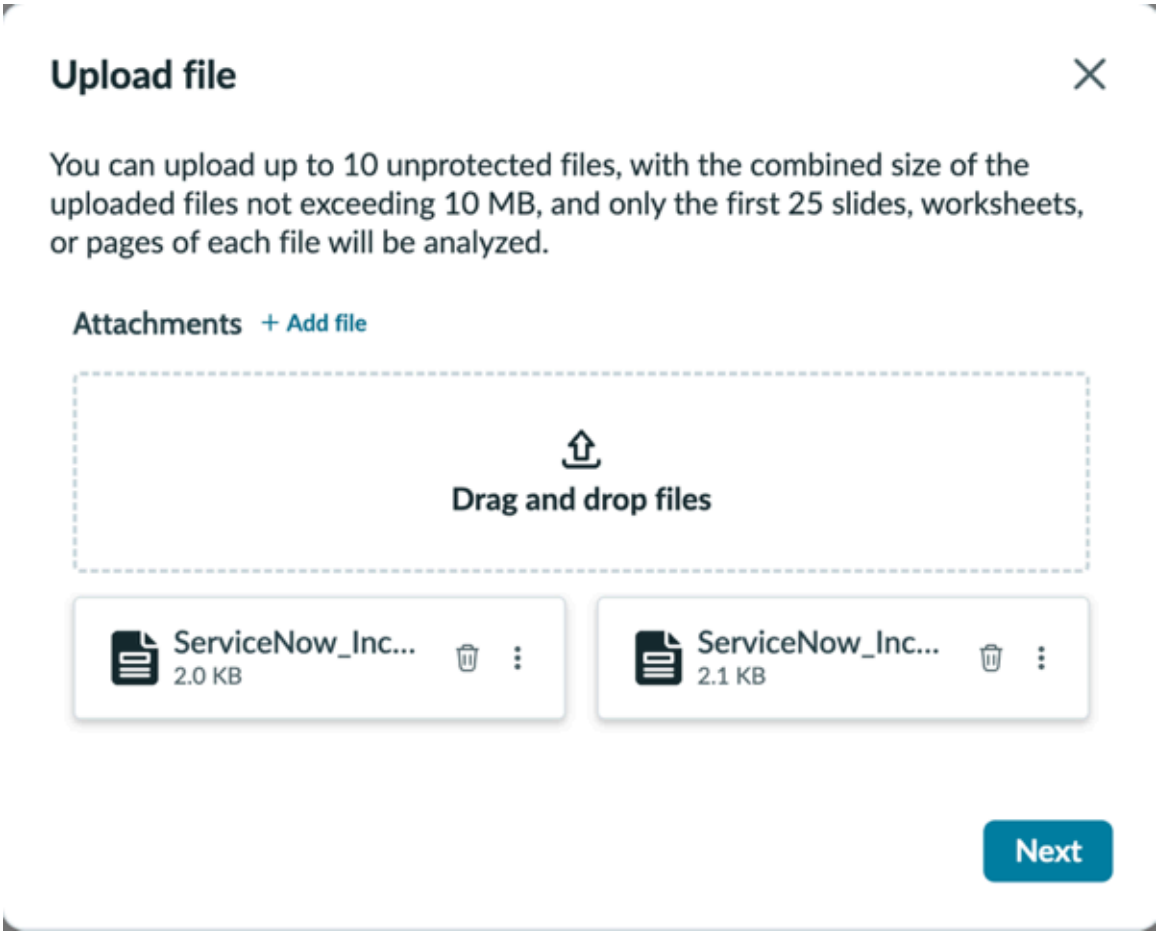

Note:

- You can upload up to 10 unprotected files, with the combined size of the uploaded files not exceeding 10 MB.
- To remove a file that you attached, select the Remove file icon .
- To rename the file that you attached, select the More options icon , and then select **Rename**.

c. Select **Next**.

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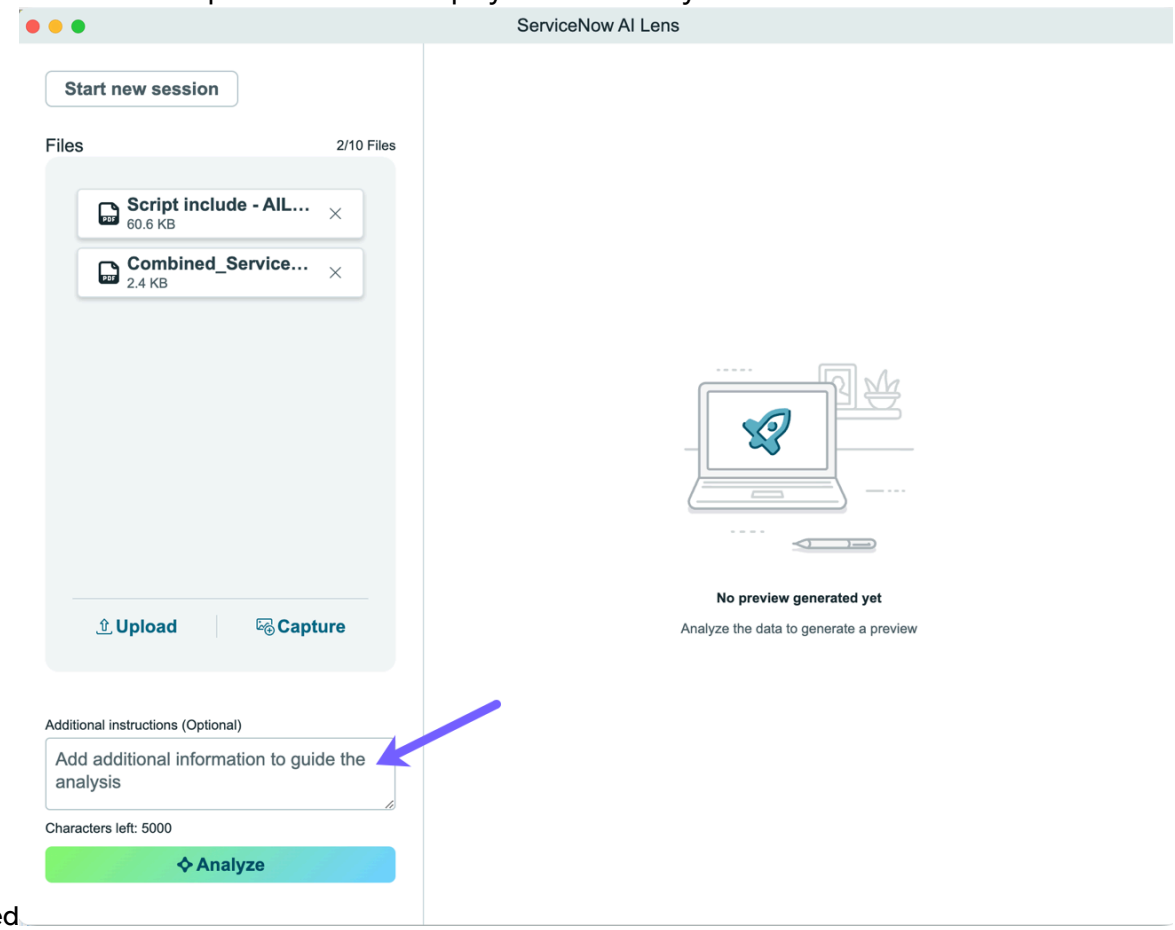
The ServiceNow AI Lens preview window displays the files that you've uploaded.



Tip:

- To view the preview of a file that you uploaded, select the card. The preview of the file opens on its respective default application.
- To remove an uploaded file, select the Remove file icon ×.
- To capture one or more additional files, select **Upload**.

Note: You can upload a total of 10 unprotected files with the combined size of all files not exceeding 10 MB.

4. To guide ServiceNow AI Lens in extracting the information you need from the uploaded files, enter specific instructions in the **Additional instructions** field.

   The default character limit is 500. Users with the admin role can increase this limit to up to 5000 characters by navigating to the `sn_lens_user_prompt_max_length` system property.

5. To let ServiceNow AI Lens analyze the captured screen, select **Analyze**.

   ServiceNow AI Lens notifies that it has auto-filled the catalog item form fields.

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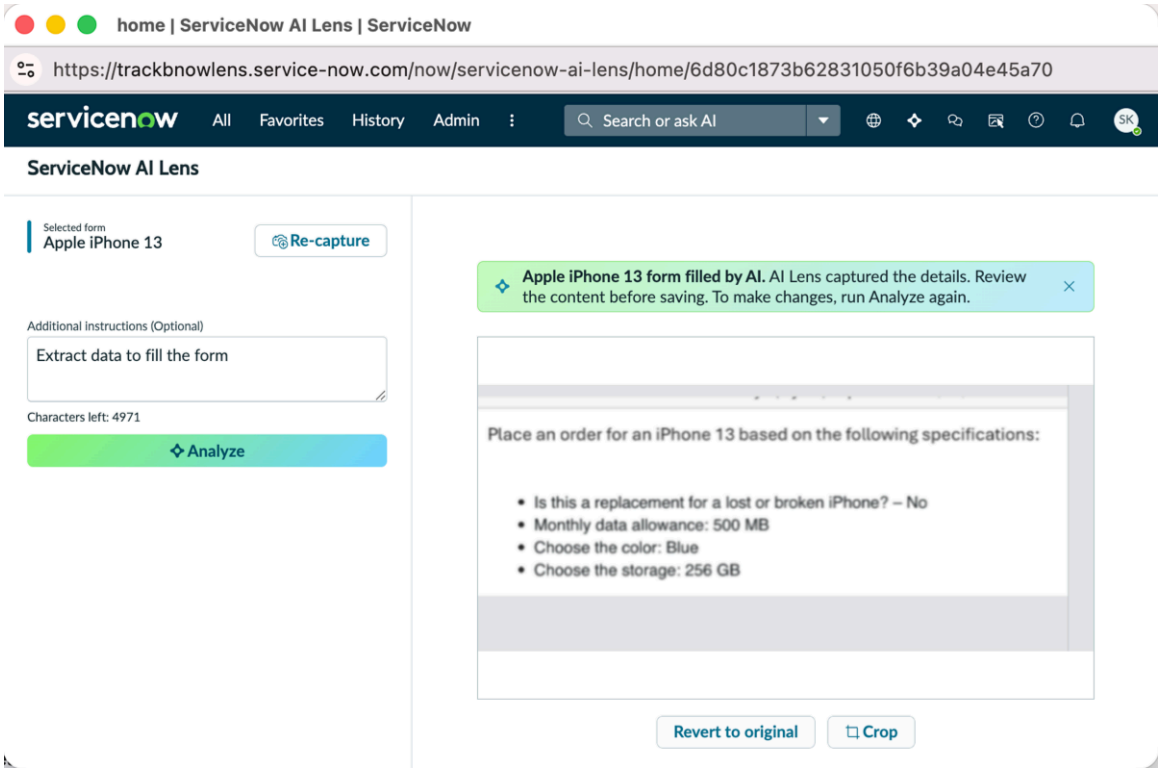

6. Navigate to the catalog item form that you wanted to auto-fill and verify that the fields are correctly filled.

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Only the field types that are supported by ServiceNow AI Lens get auto-populated with the extracted data. If the form doesn't have field types that are supported, then ServiceNow AI Lens won't update the record. For more information about the supported fields, see Field types supported.

Option	Action
If the auto-filled text looks good	Save the record by selecting **Submit**.
If the auto-filled text requires changes	Do one of the following actions: ○ Manually adjust the information in the fields and save the record. ○ In the ServiceNow AI Lens window, provide different instructions or take more screen shots and select **Analyze** so that Service Now AI Lens can extract, comprehend the data again, and auto-fill the data into the record. Save the record by selecting **Sub mit**. You can analyze the artifacts as many times as needed without reloading the form.

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Trigger ServiceNow AI Lens from the desktop app

Trigger ServiceNow AI Lens from the desktop app by using a Lens action to preview the extracted data and initiate post processing or auto-fill a form.

Before you begin

To access the ServiceNow AI Lens functionality, perform the following steps:

- Install ServiceNow AI Lens on your ServiceNow instance. For more information, see Install the ServiceNow Lens in the ServiceNow instance.
- Turn on the ServiceNow AI Lens skill to add the generative AI capability. For more information, see Activate the ServiceNow AI Lens skill.
- Download the ServiceNow AI Lens installer to scan your desktop screen. For more information, see Download and set how you want to launch ServiceNow AI Lens.

Verify that you've defined the Lens action for this purpose. For more information, see Define a Lens action.

Verify that ServiceNow AI Lens has access to record the screen on your system. For more information, see Providing permission to ServiceNow AI Lens.

You must have create and update access privileges for creating or updating a record using ServiceNow AI Lens.

Don't scan any personally identifiable information, such as medical reports, financial reports, or other sensitive data, when using ServiceNow AI Lens as you don't want to expose the large language model (LLM) to any sensitive information.

Role required: lens_user

About this task

By using Lens actions, you can perform one of the following tasks:

Fill a form

In the Lens action configuration, when **Trigger From** is Desktop and **Trigger For** is Form, and a table is selected, ServiceNow AI Lens can be triggered from the desktop to auto-fill a form. It first shows a preview of the data, and if the preview is editable, you can edit the fields before saving. After you select **Submit** in the preview window, it saves the form with the updated data on the ServiceNow instance.

Preview the extracted data

In the Lens action configuration, when **Trigger From** is Desktop and **Trigger For** is Others, ServiceNow AI Lens can be triggered from the desktop to show preview of the extracted data. If the preview is editable, you can edit the fields before saving. After you select **Submit and close preview** in the preview window, it saves the data and initiates post processing.

Procedure

1. From your system, launch the ServiceNow AI Lens desktop application.
2. On the login page, in the **Instance URL** field, enter the ServiceNow instance URL.

   Example
   For example, `https://<instance name>.service-now.com`.
3. Select **Proceed**.
4. Log in to your ServiceNow account by entering your username and password.

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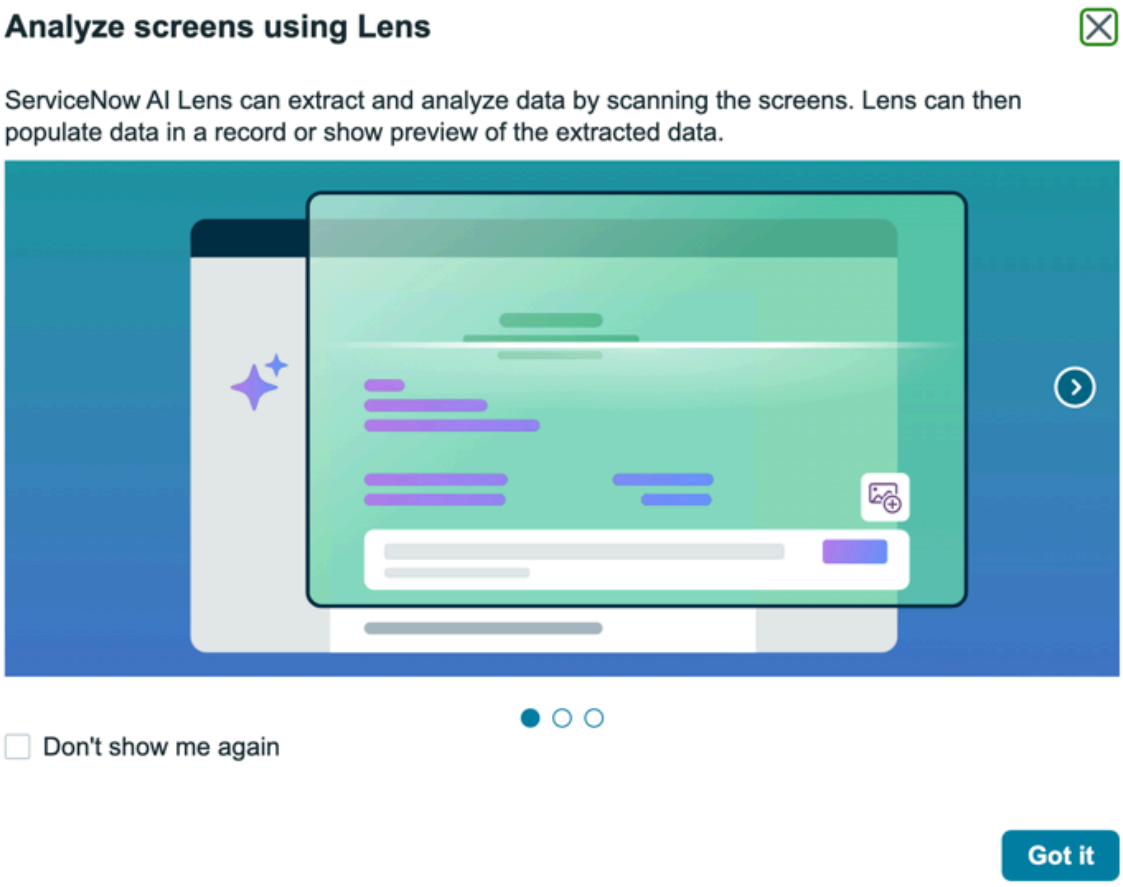
Your account must have the lens_user role.

Note:

- If your administrator has enabled auto-login, you can skip signing in every time you launch ServiceNow AI Lens. After your first login, ServiceNow AI Lens automatically takes you to the home page on subsequent launches as long as your session is active. If your session expires or you sign out, ServiceNow AI Lens shows the login screen again. For more information, see Set up auto-login for ServiceNow AI Lens.
- On macOS, when you launch ServiceNow AI Lens desktop app for the first time, your Mac asks whether ServiceNow AI Lens can store your login credentials. Select **Always Allow** to avoid entering your credentials every time you open the application.

5. **Optional:** On the onboarding journey widget, complete the onboarding and select **Got it**.



If you launch the ServiceNow AI Lens for the first time, the onboarding journey widget appears. You can select **Don't show me again** to hide the widget the next time you launch ServiceNow AI Lens.

6. Select a Lens action.
7. Select **Proceed with Lens**.

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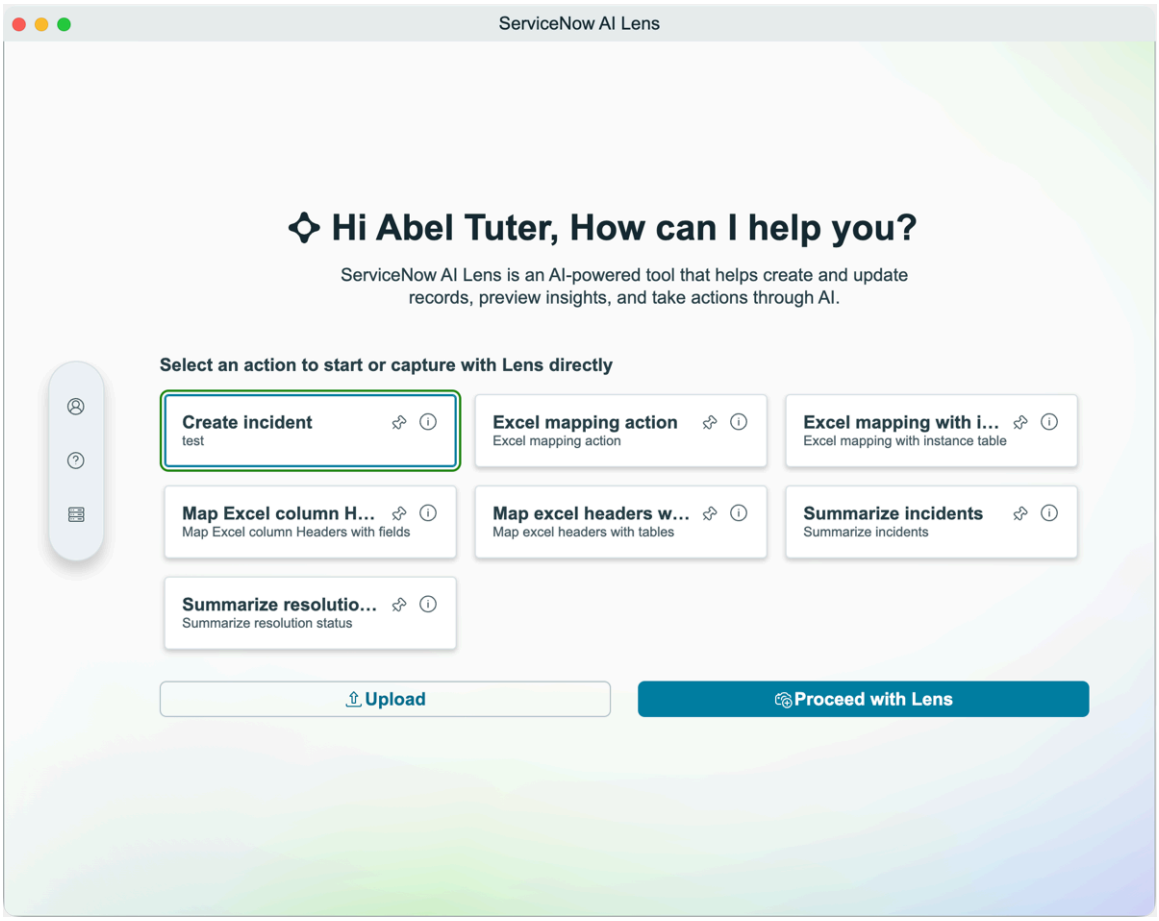

Lens scanner opens in a separate window.

8. Perform one of the following methods to enable ServiceNow AI Lens to extract data from documents.
   - Extract data from a single screen.
     a. On your system, open an artifact that you want to scan.

        An artifact can be an image, scanned or handwritten note, website, or application.

     b. Place the ServiceNow AI Lens scanner window on the top of the artifact.

        You can resize the ServiceNow AI Lens scanner window by dragging its borders.
   - Extract data from multiple screenshots.
     a. Select the **Multi-capture** button .
     b. Select the Capture icon .
     c. Place the ServiceNow AI Lens scanner window over another document or page and then select the Capture icon .
     d. Repeat the step to capture more screenshots, if required.

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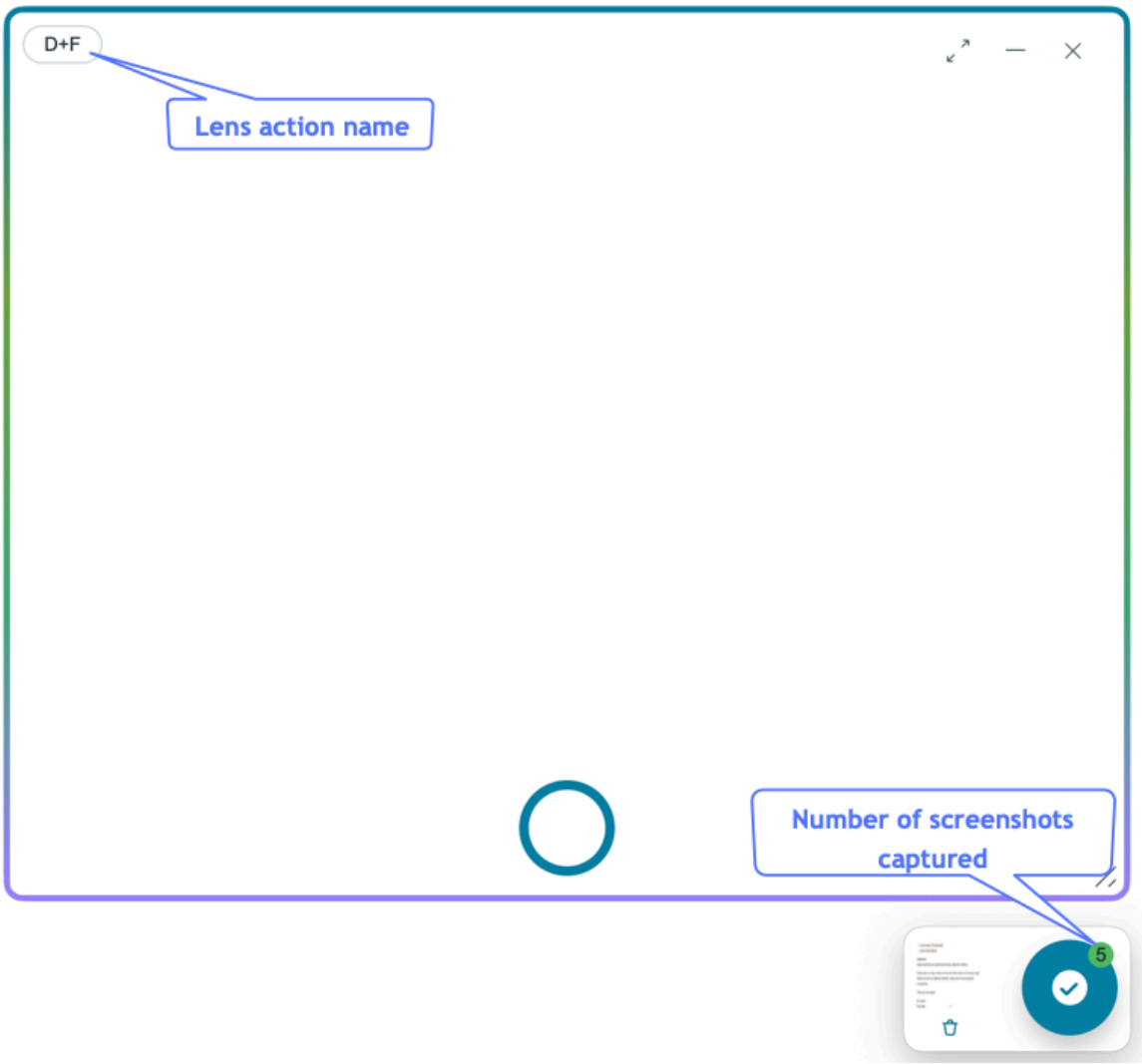
Display of the number of screenshots captured



Note:

- You can capture a total of 10 screenshots with the combined size of all captured screenshots not exceeding 10 MB.
- To enable the desktop app to send large screenshot data to the server, confirm that the following system properties are set exactly as shown below:

System property

Property name	Type	Recommended value
glide.rest.max_content_length	integer	15
glide.rest.scripted.max_inbound_content_length_mb	integer	15

For more information, see Configure system property

Note: You must have the admin role to set the system properties.

e. To complete the capture, select the Done icon .

- Extract data from uploaded documents.

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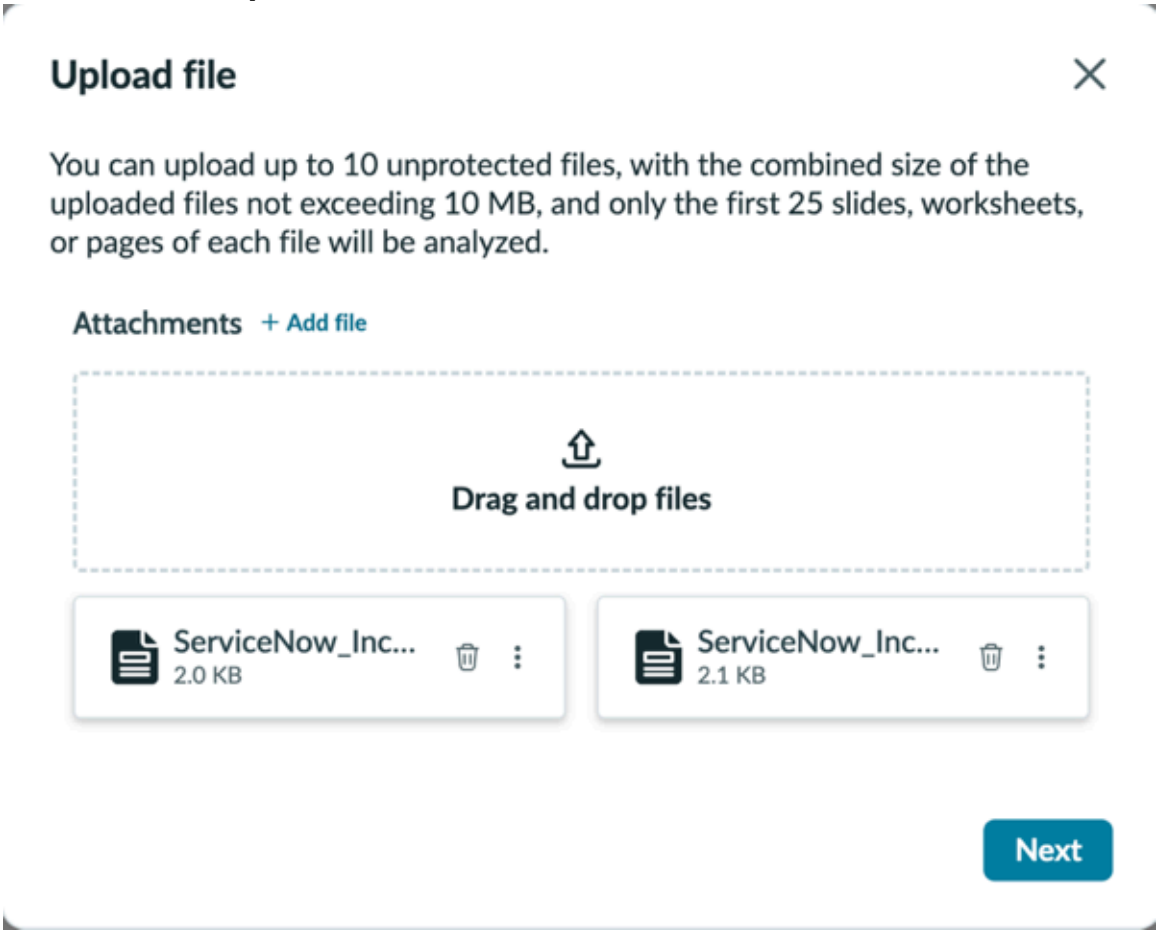
a. Select the Upload files icon .s

b. Perform any one of the following file upload methods.

- Upload one or more files by selecting the **+Add file** option.
- Upload one or more files by dragging the selected files to the Drag and drop files section and then select **Upload all**.



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Note:

- You can upload up to 10 unprotected files, with the combined size of the uploaded files not exceeding 10 MB.
- To enable the desktop app to send large data of the uploaded files to the server, confirm that the following system properties are set exactly as shown below:

System property

Property name	Type	Recommended value
glide.rest.max_content_length	integer	15
glide.rest.scripted.max_inbound_request_content_length_mb	integer	15

For more information, see Configure system property

Note: You must have the admin role to set the system properties.

- To remove a file that you attached, select the Remove file icon .
- To rename the file that you attached, select the More options icon , and then select **Rename**.

c. Select **Next**.

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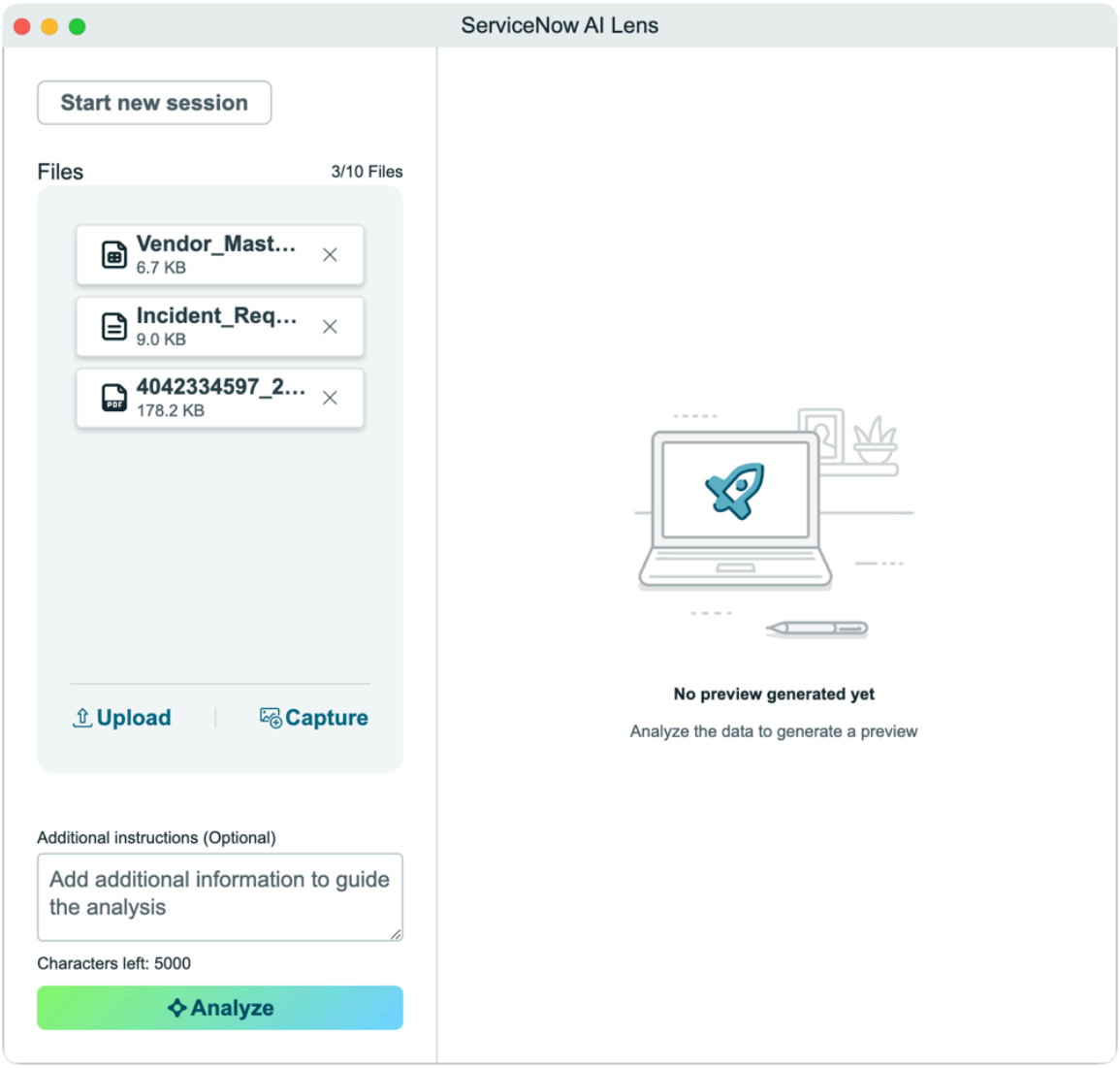
The ServiceNow AI Lens preview window displays the files that you have uploaded



9. To provide instructions to analyze the data in screenshots in a specific way, select the Edit icon , and enter the instructions.
   The default character limit is 500. Users with the admin role can increase this limit to up to 5000 characters by navigating to the *sn_lens_user_prompt_max_length* system property.
10. To analyze the data in the screenshots that you captured, select **Analyze**.

    The ServiceNow AI Lens preview window displays the extracted output in an editable form.

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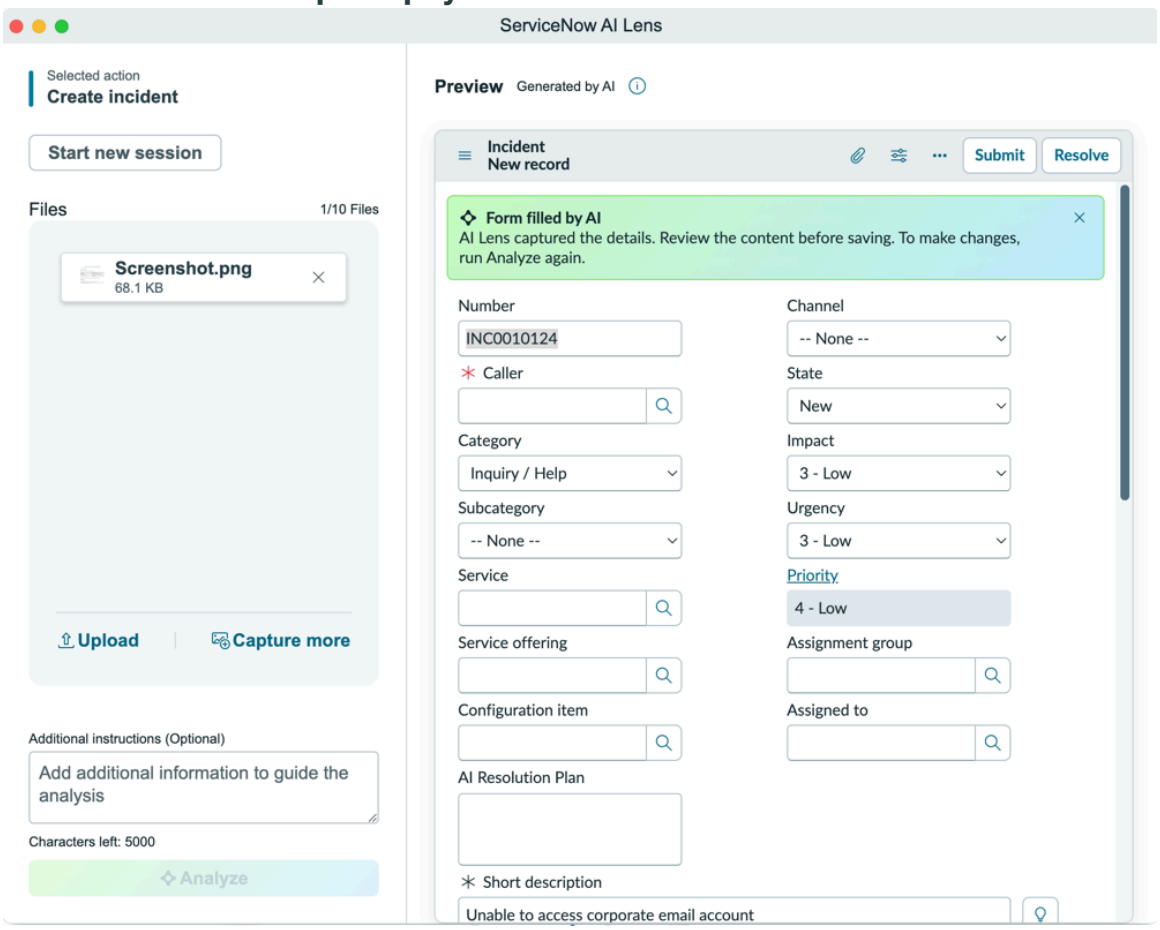
Preview of extracted output displayed in an editable form



11. Depending on the type of Lens action selected, perform the following steps.

Task	Steps
Filling form	**a.** (Optional) In case of editable preview, if necessary, edit the auto-filled field values before saving. **b.** On the form header in the Preview window, select **Submit** to save the filled form on the instance.
Previewing extracted data	**a.** (Optional) In case of editable preview, if necessary, edit the auto-filled field values before saving or copying the values. **b.** (Optional) Copy the previewed data by selecting the Copy icon .

12. End the current session by selecting **Start new session**.

Extract and analyze data with ServiceNow AI Lens desktop app

Extract and analyze data from one or more screenshots that you capture or files that you upload, and then preview the data analysis.

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Before you begin

To access the ServiceNow AI Lens functionality, perform the following steps:

- Install ServiceNow AI Lens on your ServiceNow instance. For more information, see Install the ServiceNow Lens in the ServiceNow instance.
- Turn on the ServiceNow AI Lens skill to add the generative AI capability. For more information, see Activate the ServiceNow AI Lens skill.
- Download the ServiceNow AI Lens installer to scan your desktop screen. For more information, see Download and set how you want to launch ServiceNow AI Lens.

Don't scan any personally identifiable information, such as medical reports, financial reports, or other sensitive data, when using ServiceNow AI Lens as you don't want to expose the large language model (LLM) to any sensitive information.

Verify that you have provided permission to ServiceNow AI Lens to record the screen on your system.

Role required: lens_user

Procedure

1. From your system, launch the ServiceNow AI Lens desktop application.
2. On the login page, in the **Instance URL** field, enter the ServiceNow instance URL.

   Example
   For example, `https://<instance name>.service-now.com`.
3. Select **Proceed**.
4. Log in to your ServiceNow account by entering your username and password.
   Your account must have the lens_user role.

   Note:

   - If your administrator has enabled auto-login, you can skip signing in every time you launch ServiceNow AI Lens. After your first login, ServiceNow AI Lens automatically takes you to the home page on subsequent launches as long as your session is active. If your session expires or you sign out, ServiceNow AI Lens shows the login screen again. For more information, see Set up auto-login for ServiceNow AI Lens.
   - On macOS, when you launch ServiceNow AI Lens desktop app for the first time, your Mac asks whether ServiceNow AI Lens can store your login credentials. Select **Always Allow** to avoid entering your credentials every time you open the application.
5. **Optional:** On the onboarding journey widget, complete the onboarding and select **Got it**.

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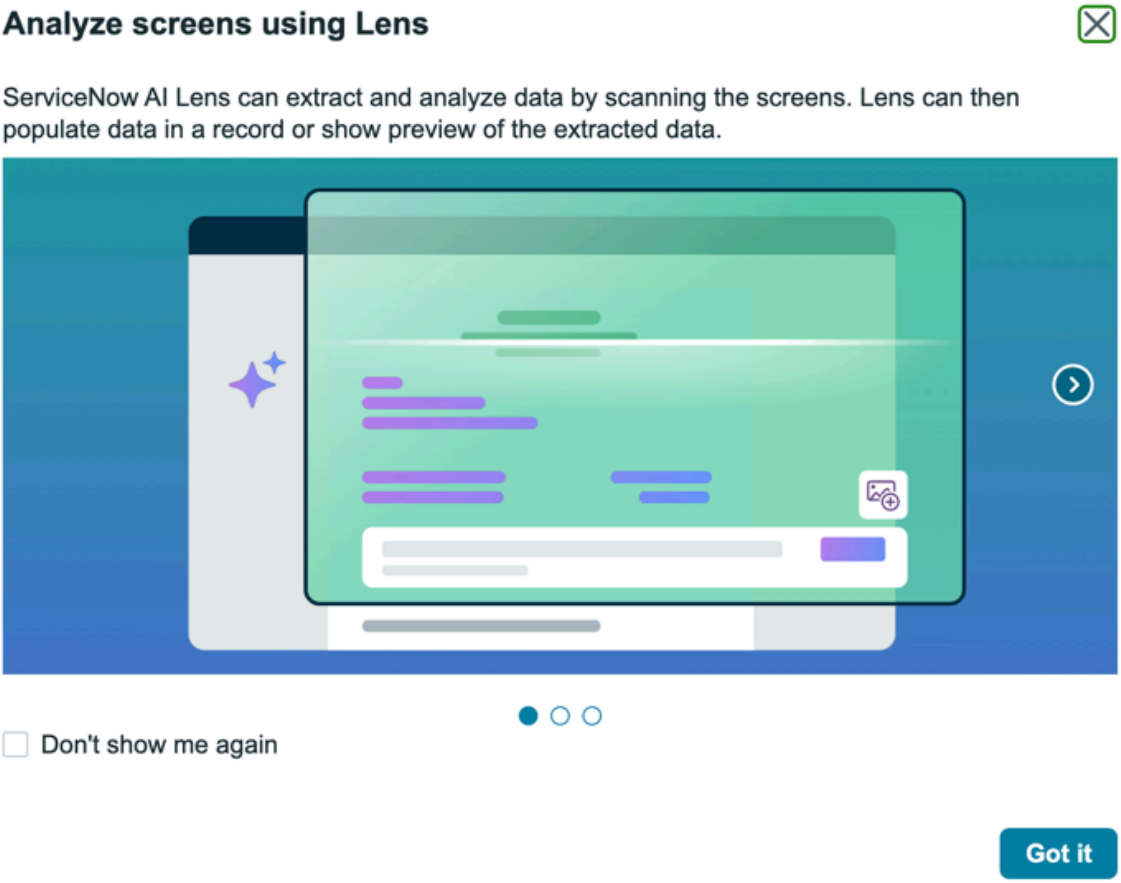

If you launch the ServiceNow AI Lens for the first time, the onboarding journey widget appears. You can select **Don't show me again** to hide the widget the next time you launch ServiceNow AI Lens.

6. Select one of the following methods.

   - **Capture screen**

     a. Select **Capture**.

        The ServiceNow AI Lens scanner window is launched.

     b. On your system, open one or more documents that you want to scan.

        Example of a document: image, scanned handwritten note, Excel sheet, web page, or any document that gives visual data.

     c. Extract data from a single screenshot.

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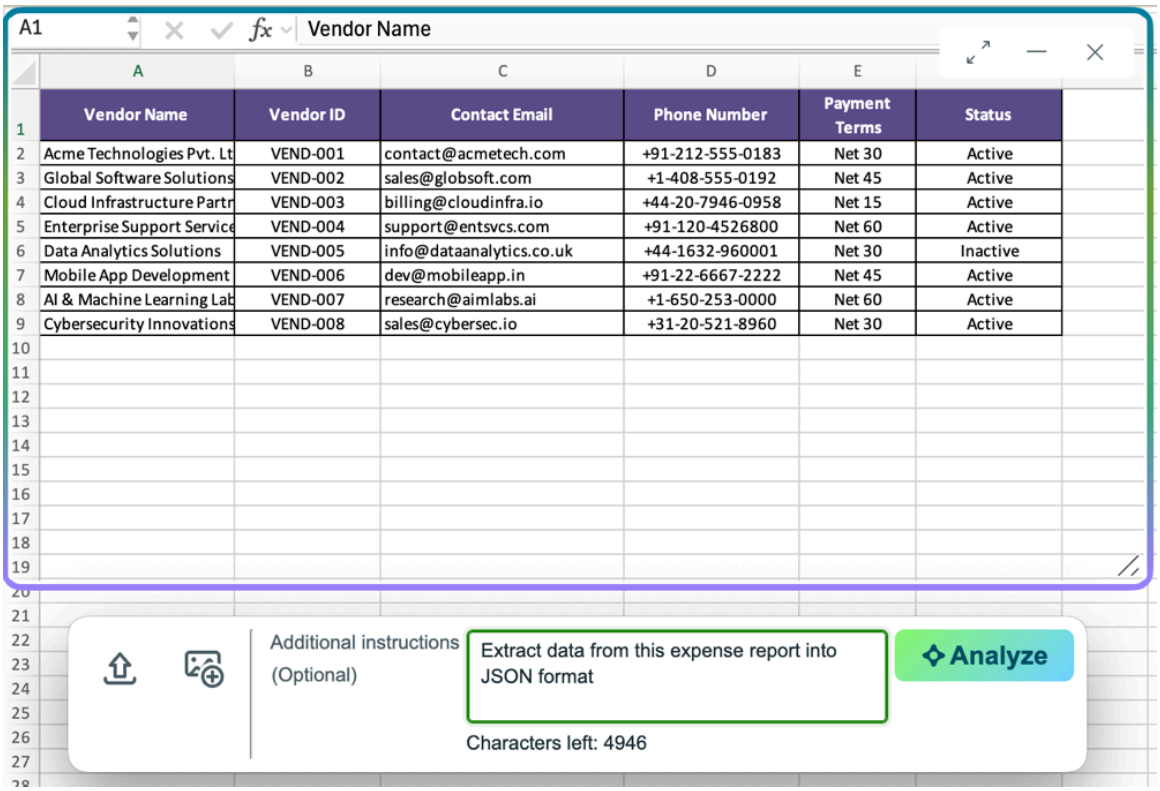
i. Place the ServiceNow AI Lens scanner window on top of the document.

ii. Resize the ServiceNow AI Lens scanner window by dragging its borders.



Vendor Name	Vendor ID	Contact Email	Phone Number	Payment Terms	Status
Acme Technologies Pvt. Lt	VEND-001	contact@acmetech.com	+91-212-555-0183	Net 30	Active
Global Software Solutions	VEND-002	sales@globsoft.com	+1-408-555-0192	Net 45	Active
Cloud Infrastructure Partr	VEND-003	billing@cloudinfra.io	+44-20-7946-0958	Net 15	Active
Enterprise Support Service	VEND-004	support@entsvcs.com	+91-120-4526800	Net 60	Active
Data Analytics Solutions	VEND-005	info@dataanalytics.co.uk	+44-1632-960001	Net 30	Inactive
Mobile App Development	VEND-006	dev@mobileapp.in	+91-22-6667-2222	Net 45	Active
AI & Machine Learning Lab	VEND-007	research@aimlabs.ai	+1-650-253-0000	Net 60	Active
Cybersecurity Innovations	VEND-008	sales@cybersec.io	+31-20-521-8960	Net 30	Active

d. (Optional) Extract data from multiple screenshots.

i. Select the **Multi-capture** button

ii. Select the Capture icon.

iii. Place the ServiceNow AI Lens scanner window over another document or page and then select the Capture icon.

iv. Repeat the step to capture more screenshots, if required.

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Note:

- You can capture a total of 10 screenshots with the combined size of all captured screenshots not exceeding 10 MB.
- To enable the desktop app to send large screenshot data to the server, verify that the following system properties are set exactly as shown:

System property

Property name	Type	Recommended value
glide.rest.max_content_length	integer	15
glide.rest.scripted.max_inbound_content_length_mb	integer	15

For more information, see Configure system property.

Note: You must have the admin role to set the system properties.

v. To complete the capture, select the Done icon.

- **Upload**

a. Select **Upload**.

b. Perform any one of the following file upload methods.

- Upload one or more files by selecting the **+Add file** option.
- Upload one or more files by dragging the selected files to the Drag and drop files section and then select **Upload all**.

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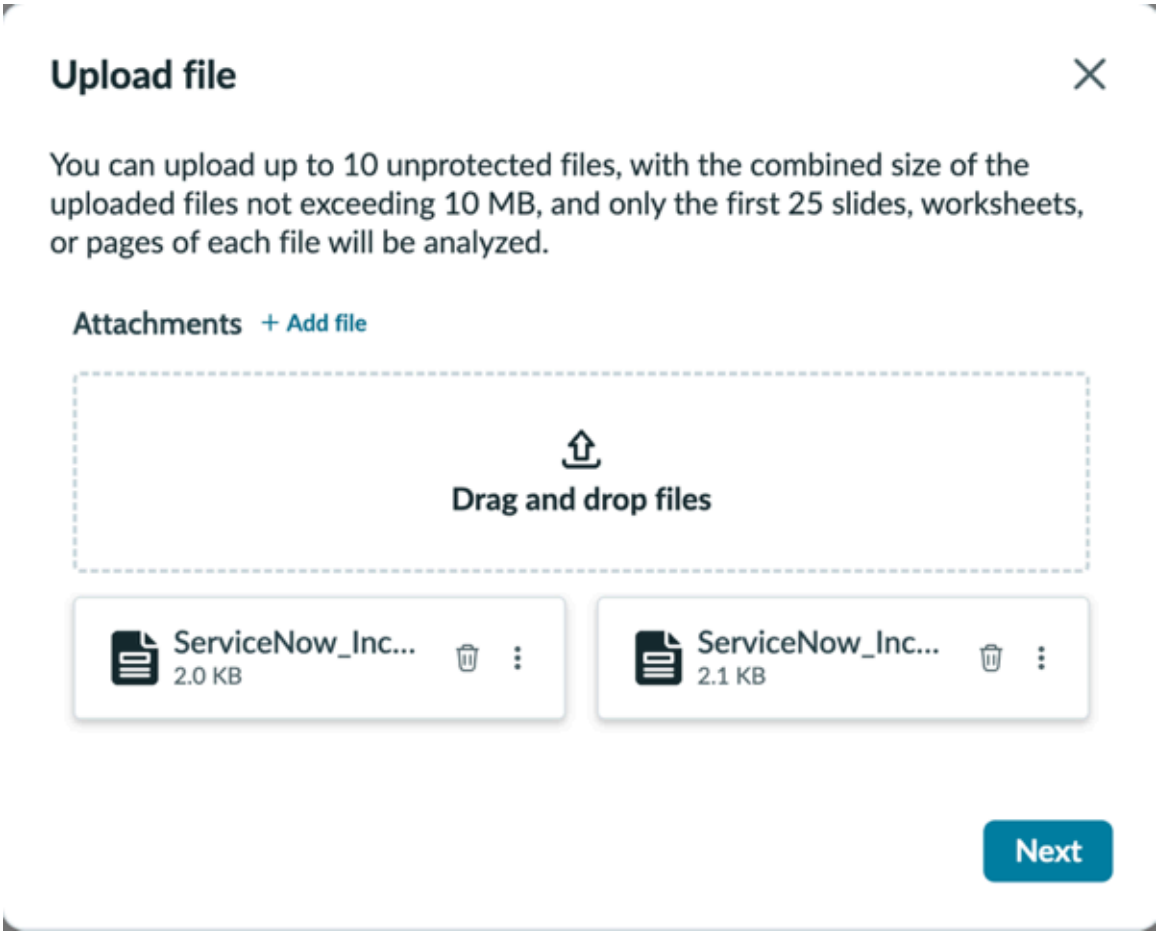

Note:

- You can upload up to 10 unprotected files, with the combined size of the uploaded files not exceeding 10 MB.
- To enable the desktop app to send large data of the uploaded files to the server, confirm that the following system properties are set exactly as shown below:

System property

Property name	Type	Recommended value
glide.rest.max_content_length	integer	15
glide.rest.scripted.max_inbound_content_length_mb	integer	15

For more information, see Configure system property

Note: You must have the admin role to set the system properties.

- To remove a file that you attached, select the Remove file icon .
- To rename the file that you attached, select the More options icon , and then select **Rename**.

c. Select **Next**.

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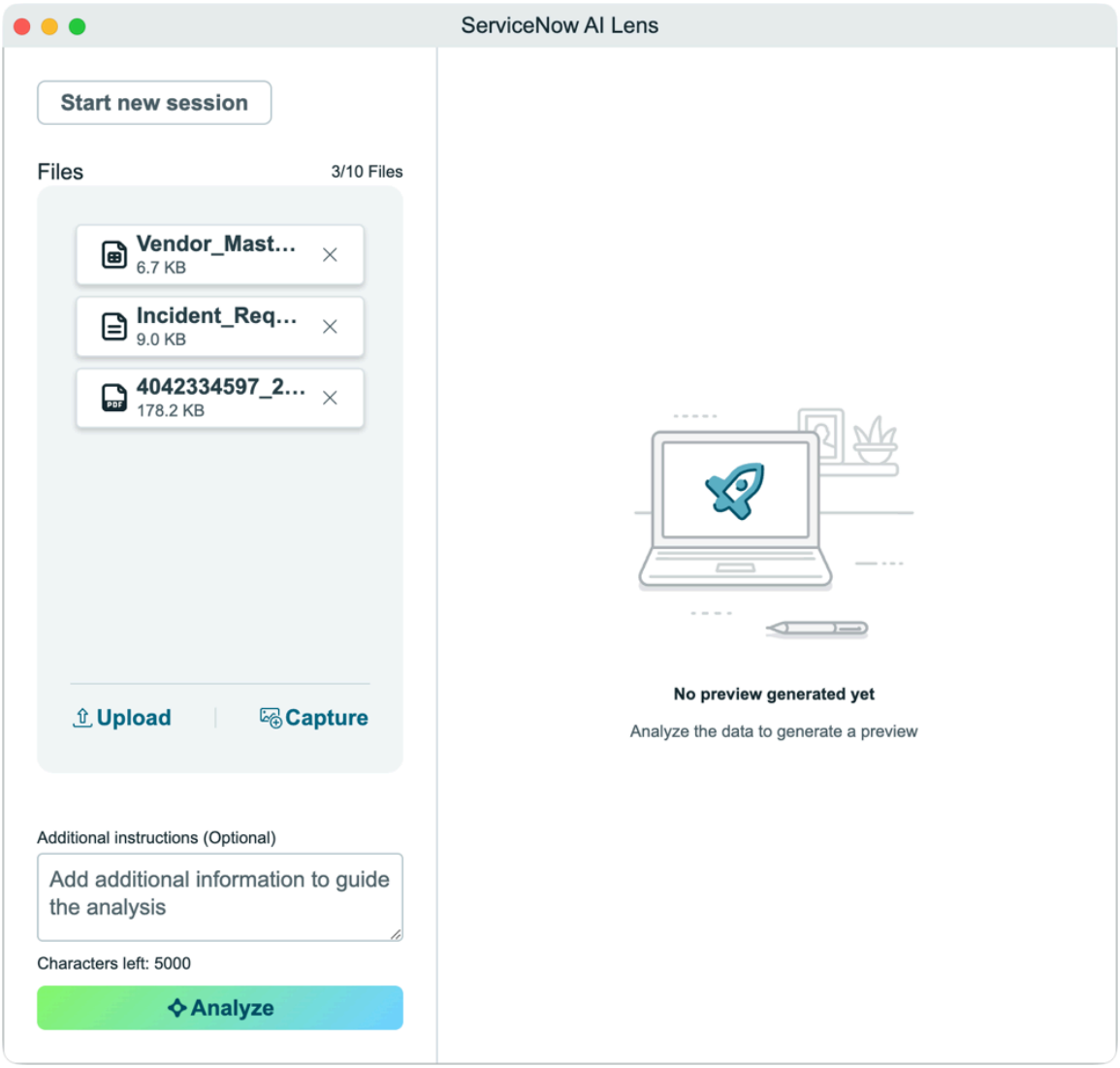
The ServiceNow AI Lens preview window displays the files that you have uploaded



7. To provide instructions to analyze the data in screenshots in a specific way, select the Edit icon , and enter the instructions.
   The default character limit is 500. Users with the admin role can increase this limit to up to 5000 characters by navigating to the *sn_lens_user_prompt_max_length* system property.
8. To analyze the data in the screenshots that you captured, select **Analyze**.
   ServiceNow AI Lens displays the preview of the response

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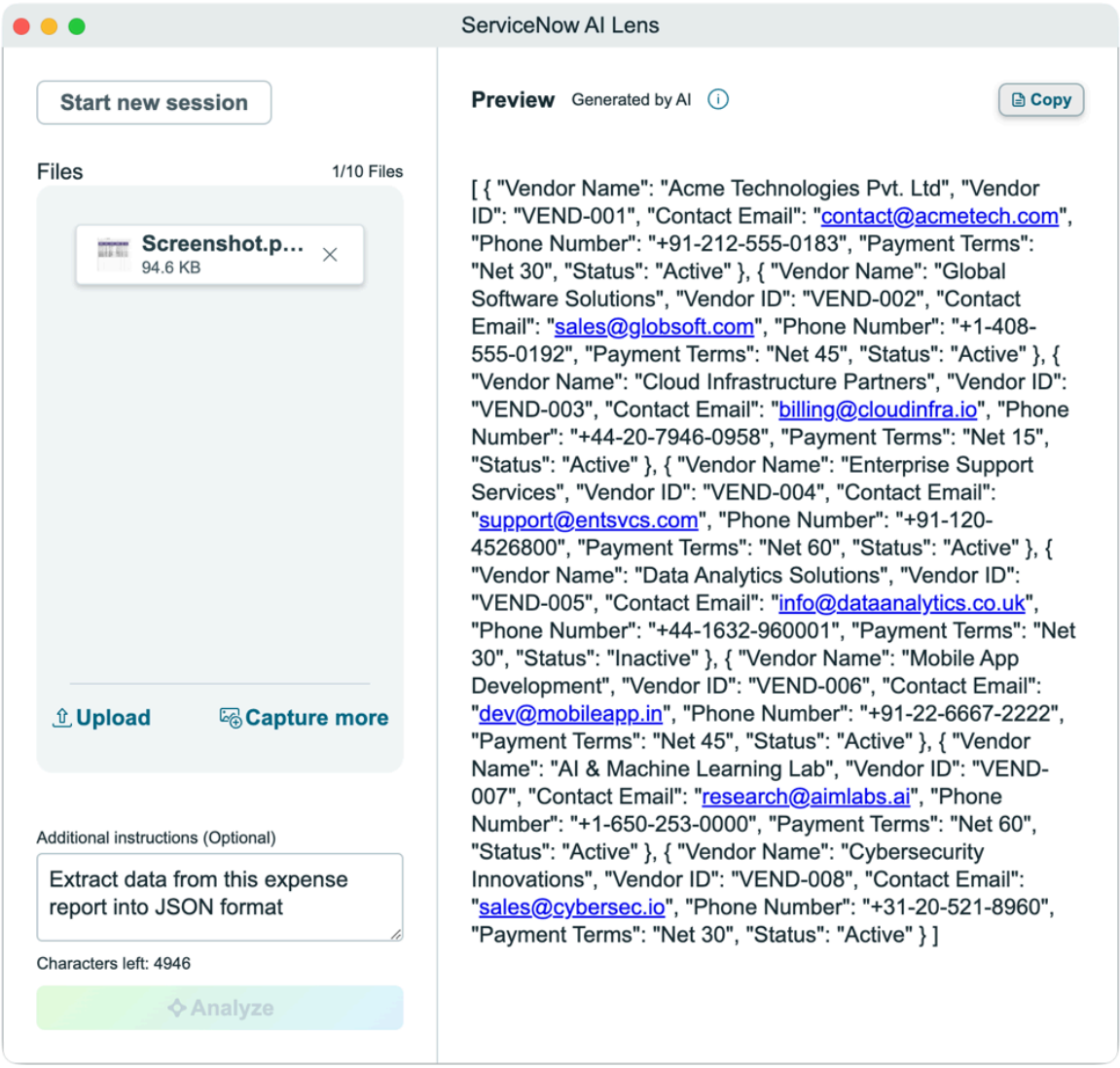

9. Select **Submit** to trigger post processing.
   The **Submit** button appears on the Preview window if the post-processing is enabled in the related ServiceNow AI Lens action.
10. **Optional:** Copy the previewed data by selecting the Copy icon .
11. End the current session by selecting **Start new session**.

Related topics

- Supporting information for ServiceNow AI Lens
- ServiceNow AI Lens limitations
- Create or update a record in an instance by using ServiceNow AI Lens

Extract and analyze data using ServiceNow AI Lens from Virtual Agent

Extract and analyze data from an image using ServiceNow AI Lens from a Virtual Agent conversation on a mobile device or a portal. ServiceNow AI Lens can scan an image and then gather insights or provide recommendations as per your instructions.

Before you begin

To access the ServiceNow AI Lens functionality, perform the following steps:

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- Install ServiceNow AI Lens on your ServiceNow instance. For more information, see Install the ServiceNow AI Lens in the ServiceNow instance.
- Turn on the ServiceNow AI Lens skill to add the generative AI capability. For more information, see Activate the ServiceNow AI Lens skill.
- Enable ServiceNow AI Lens topic for ServiceNow Otto for Virtual Agent. For more information, see Enabling ServiceNow AI Lens in Virtual Agent.

Don't scan any personally identifiable information, such as medical reports, financial reports, or other sensitive data, when using ServiceNow AI Lens as you don't want to expose the large language model (LLM) to any sensitive information.

Role required: lens_user

Procedure

1. Navigate to the home screen on your Now mobile app or a portal.
2. Select the ServiceNow Otto icon .
3. Select **Show all topics** and select ServiceNow AI Lens topic or type ServiceNow AI Lens. You would see a welcome message from ServiceNow AI Lens topic.
4. Select one of the following options:
   - Choose an image
   - Take a picture

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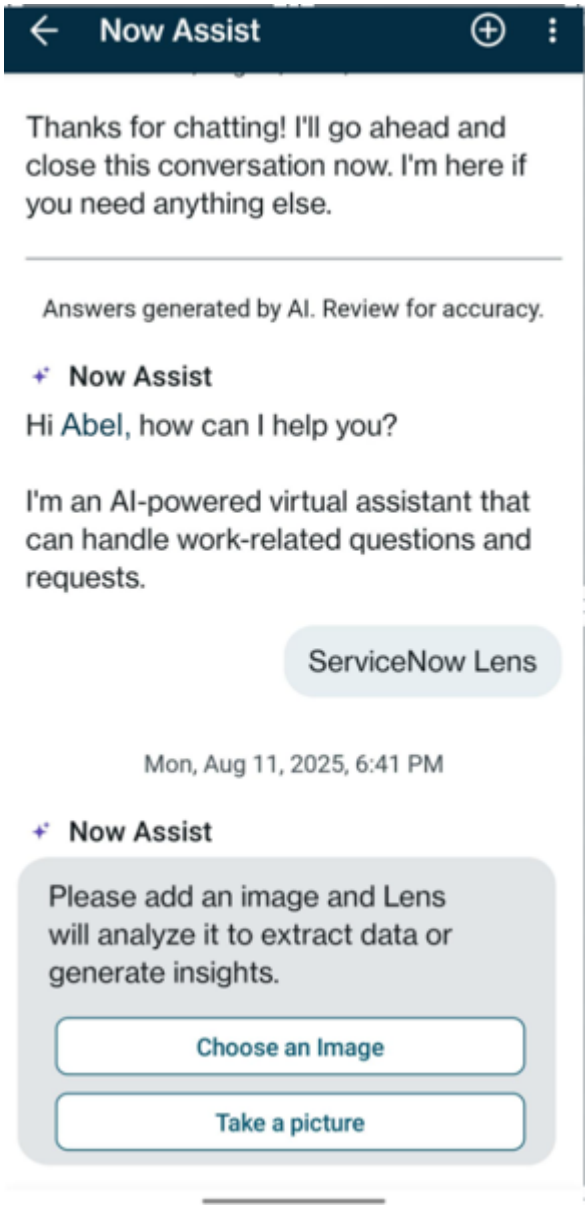

5. Upload an image or take a picture.
6. Provide instructions on how to process the provided image.
   ServiceNow AI Lens can provide insights, recommendations, resolution steps, and more.
7. **Optional:** Ask follow-up questions.
8. When you are done, type Exit to leave the conversation.

ServiceNow AI Lens reference

Reference topics provide additional information about the roles and tables that are installed with the ServiceNow AI Lens application.

Components installed with ServiceNow AI Lens

Several types of components are installed with the activation of the ServiceNow AI Lens plugin, including user roles.

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Roles installed

Role title [name]	Description	Contains roles
Lens user [lens_user]	Enables you to use ServiceNow AI Lens.	sn_nowassist_admin.user
Lens admin [lens_admin]	Enables you to configure lens actions.	lens_user

Tables installed

Table	Description
Lens Execution (lens_execution)	Whenever a record is created or updated by using ServiceNow AI Lens, a record is created in the execution table. This record includes details such as the table from which the UI action is clicked and the editable fields on the form, which are then passed to the Lens app. **Note:** You can view only records created for or assigned to your user account.
Lens Transaction (lens_transaction)	If a user performs the analyze action on the ServiceNow AI Lens app, the response received from the large language model (LLM) is stored in the transaction table. **Note:** You can view only records created for or assigned to your user account.

System properties installed

These properties exist in the System Properties [sys_properties] table. The admin role is necessary to set system properties.

Note:

To open the System Properties [sys_properties] table, enter `sys_properties.list` in the navigation filter.

System property	Description
sn_app_lens_core.lens_enable_auto_login	If true, ServiceNow AI Lens automatically signs in users using their previous token. If false, users are prompted to sign in each time they launch the application. • Type: Boolean • Default value: false
sn_app_lens_core.sn_lens_repository_url	Repository URL for downloading ServiceNow AI Lens

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System property	Description
	• Type: String • Default value: `https://install.service-now.com/glide/distribution/builds/package/app-signed/`
sn_app_lens_core.show_lens_action_on_all_tables	Property to show or hide the **Create with Lens** or **Update with Lens** button on all tables, depending on whether it's set to True or False. If True, includes all tables except those that are specified in the *sn_app_lens_core.lens_exclusion_table_list* property. If False, includes all tables that are specified in the *sn_app_lens_core.lens_inclusion_table_list* property. • Type: Boolean • Default value: true
sn_app_lens_core.lens_inclusion_table_list	Property to specify the tables that will display the **Create with Lens** or **Update with Lens** button. This list will be considered when the *sn_app_lens_core.show_lens_action_on_all_ta* property is set to False. To specify the names of multiple tables, separate the table names with commas. • Type: String • Default value: None
sn_app_lens_core.lens_exclusion_table_list	Property to specify the tables that will not display the **Create with Lens** or **Update with Lens** button. This list will be considered when the *sn_app_lens_core.show_lens_action_on_all_ta* property is set to true. To specify the names of multiple tables, separate the table names with commas. • Type: String • Default value: None
sn_app_lens_core.show_lens_action_on_all_catItems	Property to show or hide the **Create with Lens** or **Update with Lens** button on all catalog items, depending on whether it's set to True or False. If True, includes all catalog items except those that are specified in the *sn_app_lens_core.lens_exclusion_catItem_lis* property. If False, includes all catalog items that are specified in the

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System property	Description
	sn_app_lens_core.lens_inclusion_catItem_lis property. • Type: Boolean • Default value: true
sn_app_lens_core.lens_inclusion_catItem_list	Property to specify the catalog items that will display the **Create with Lens** or **Update with Lens** button. This list will be considered when the *sn_app_lens_core.show_lens_action_on_all_ca* property is set to False. To specify the names of multiple catalog items, separate the catalog item names with commas. • Type: String • Default value: None
sn_app_lens_core.lens_exclusion_catItem_list	Property to specify the catalog items that will not display the **Create with Lens** or **Update with Lens** button. This list will be considered when the *sn_app_lens_core.show_lens_action_on_all_ca* property is set to true. To specify the names of multiple catalog items, separate the catalog item names with commas. • Type: String • Default value: None

Field types supported

Learn about the field types that are currently supported with the ServiceNow AI Lens application.

The following field types are currently supported with ServiceNow AI Lens:

- name
- due_date
- float
- glide_time
- glide_utc_time
- html
- journal
- journals_input
- longint
- password
- password2
- simple_name_values

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- table_name
- translated_html
- translated_text
- boolean
- choice
- decimal
- email
- glide_date
- glide_duration
- insert_timestamp
- integer
- ip_addr
- percent_complete
- phone_number_e164
- price
- script
- script_plain
- string
- string_full_utf8
- url
- reference
- glide_list

For more information about these fields, see Field types reference.

Formatting for date, time, and table name fields

Field	Formatting description
glide_date	• Priority 1 - For a glide_date field type on any record, ServiceNow AI Lens uses the format specified in the date_format field on a user's record of a user running the Lens session. • Priority 2 - If no date_format is specified during user record creation or later, Lens uses the format specified in the system property `glide.sys.date_format`. • Priority 3 - If the system property is not available, the default format `YYYY-MM-DD` is used.

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Formatting for date, time, and table name fields (continued)

Field	Formatting description
glide_time	• Priority 1 - For a glide_time field type on any record, ServiceNow AI Lens uses the format specified in the time_format field on a user's record of a user running the Lens session. • Priority 2 - If no time_format is specified during user record creation or later, Lens uses the format specified in the system property `glide.sys.time_format`. • Priority 3 - If the system property is not available, the default format `HH:mm:ss` is used.
glide_utc_time	The value is populated in the `HH:mm:ss` format.
glide_duration	Duration is populated in the `D HH:mm:ss` format. For example, the duration of 1 day, 2 hours, 30 minutes is populated as 1 02:30:00.
due_date	The value is populated using the formats of glide_date and glide_time, concatenated with a space.
table_name	The value is only populated when the exact internal name of table is identified.

ServiceNow AI Lens limitations

Be aware of a few limitations when you're using the ServiceNow AI Lens application.

Limitations with ServiceNow AI Lens

Limit	Description
Maximum number of images	Maximum number of images that can be uploaded to ServiceNow AI Lens is 10.
Maximum character limit	In the instructions field for the analysis, you can enter up to 500 characters. **Note:** Users with the admin role can increase this limit to up to 5000 characters by navigating to the *sn_lens_user_prompt_max_length* system property.
Themes	When you change the theme on the ServiceNow instance, the theme of the ServiceNow AI Lens is automatically updated. But, if you have already started a ServiceNow AI Lens session and then you change the theme on the instance, the theme doesn't

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Limitations with ServiceNow AI Lens (continued)

Limit	Description
	change automatically until you launch a new session. This behavior is standard for the ServiceNow AI Platform.
Language	When you change the language on the ServiceNow instance, the language of the ServiceNow AI Lens is automatically changed. But, if you have already started a ServiceNow AI Lens session and then you change the language on the instance, the language doesn't change automatically until you launch a new session. This behavior is standard for the ServiceNow AI Platform. When using ServiceNow AI Lens to scan non-English documents—such as invoices in Chinese— you may notice inconsistencies in translation, formatting, or data extraction. These discrepancies result from limitations in how the underlying LLM processes different locales.
Auto-fill	Pre-populated form fields, such as record number, can be overwritten by ServiceNow AI Lens. You must verify the auto-filled form fields before saving the form.
Visibility of the **Create with Lens** button	As a user with the lens_user role, if you don’t have the Write access for the first record of any list, the **Create with Lens** button doesn't appear in the list view of the table. You can sort the records to show a different record on top and reload the list to view the **Create with Lens** button.
Hallucinations	If the large language model (LLM) returns text that doesn’t exist in the source artifacts, the LLM might inject out-of-context information. You must verify that all information aligns with the source material to ensure that there are no fabricated facts or unsupported conclusions.

Script include - AILensActionService

Use the *`AILensActionService`* script include together with Lens actions to leverage ServiceNow AI Lens as a service for extracting information from the provided images and getting answers to your questions.

This script include is part of the ServiceNow AI Lens (sn_ai_lens) store application and is located within the `sn_app_lens_core` scope.

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This script include provides methods that enable the following:

- Calls Lens as a back-end service
- Analyzes and comprehends data from provided images
- Gets response from AI as per provided directions
- Does not require ServiceNow AI Lens desktop app

AILensActionService - AILensActionService()

Creates an AILensActionService instance.

Parameters

Name	Type	Description
None		

The following example shows how to initialize *`AILensActionService`*.

```
var lensService = new sn_app_lens_core. AILensActionService()
```

AILensActionService - invokeLens(String lensActionId, String[] attachmentIds, String userPrompt, Object[] imageArr, Object inputJSON, Object[] additionalContext, Boolean skipACL)

Invokes ServiceNow AI Lens as a service.

Parameters

Name	Type	Description
lensActionId	String	Sys_id of the Lens Actions record created for your use case, or you can select the out-of-the-box option that fits your requirements. Example: 842bfc8e37066210b97528c734924baf This parameter is mandatory.
attachmentIds	String[]	Array of sys_ids for existing image attachments. Example: `["0067e66f93f022108319f9ed1dba108b", "0000e8a42c9a7110f877137af4eab4b5"]` You must pass either `attachmentIds` or `imageArr` parameter.
userPrompt	String	An instruction or question for AI to answer after analyzing the contents of the attachments. Example: `Analyze this production issue and create an incident ticket`
imageArr	Object[]	Array of objects containing name of the screenshot and base64 encoded image data. Example:

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Parameters (continued)

Name	Type	Description

		<pre>[
		    {
		        name: "screenshot1.png",
		        data:
		 "iVBORw0KGgoAAAANSUhEUgAAAAEAAAABCAYAAAA
		fFcSJAAAADUlEQVR42mNkYPhfDwAChwGA60e6kgAA
		AABJRU5ErkJggg=="
		    },
		    {
		        name: "screenshot2.png",
		        data:
		 "iVBORw0KGgoAAAANSUhEUgAAAAEAAAABCAYAAAA
		fFcSJAAAADUlEQVR42mNk+M9Qz0AEYAJMgkU1f5kA
		AAAASUVORK5CYII="
		    }
		];</pre>
		You must pass either `attachmentIds` or `imageArr` parameter.

inputJSON	Object	Additional JSON input parameters that you want to pass in the pre-processing script of the Lens action.
		
		Note: To use Multi-table schema mapping, you must pass at least one table name key and its corresponding value inside the input JSON. For example, { 'tableName': 'sn_ent_model,sn_ent_asset' },
		
		Example:
		<pre>{
		      "type" : "object",
		      "properties" : {
		        "short_description" : {
		          "type" : "string",
		          "label" : "Short description"
		        },
		        "description" : {
		          "type" : "string",
		          "label" : "Description"
		        },
		      },
		      "required" : ["short_description",
		 "comments"],
		   }</pre>

additionalContext	Object	An optional parameter that you can use to pass any extra key–value information while you're performing a Lens service call. The examples show the key–value information that you can pass. • **Example**: <pre>{IsFileUploadEnabled: true}</pre>

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Parameters (continued)

Name	Type	Description
		• **Example**: As part of the Excel mapping services, you can pass key-value information to: ○ auto-map the column headers of an Excel file with ServiceNow table fields ○ auto-map Excel values to ServiceNow drop-down values ○ auto-map Excel values to referenced records in ServiceNow tables For more information on the various key-values of the Excel mapping service, see Key-values of the Excel auto-mapping services **Key-values of the Excel auto-mapping services** ○ **Schema mapping** — Maps Excel column headers to ServiceNow table fields and identifies the field type of each mapped field. You can also use this option to map Excel column headers from a single sheet to multiple ServiceNow tables. Key-values for schema mapping are: ▪ `mappingStrategy`: Set to `'schema_mapping'` ▪ `rowContextSize`: Number of sample data rows to use for mapping context. Default: `10`. ▪ `randomizeRowOrder`: If `true`, Lens selects rows randomly from the Excel file. If `false`, Lens uses rows in order from the top. ▪ `sheetName`: Name of the Excel Sheet. If no name is specified, the first sheet is chosen by default. ▪ `headerRowNumber`: The row number from which the header with column names start with. **Request example**: `var response = new sn_app_lens_core.AILensActionService().invokeLens('b7fbd8694730c310dbc4964a516d431e', ['0c0b1c6d4730c310dbc4964a516d43f2'], '', [], {}, true, {"mappingStrategy":"schema_mapping", sheetName: "Incident Data",headerRowNumber: 2,"rowContextSize":5,"randomizeRowOrder":false }); gs.info("Lens Response : " + JSON.stringify(response));`

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Parameters (continued)

Name	Type	Description
		Response example: { "Owner": { "type": "string", "mappings": { "0.8": ["assigned_to", "parent", "epic"] } }, "Age": { "type": "integer", "mappings": { "0.8": ["story_points"] } }, "Status": { "type": "choice", "mappings": { "0.8": ["state", "priority"] }, "choiceValues": ["Retired", "On Boarding", "Working"] }, "Start Date": { "type": "glide_date", "mappings": { "1.0": ["expected_start"], "0.8": ["due_date"] } }, "End Date": { "type": "glide_date", "mappings": { "1.0": ["due_date"], "0.8": ["expected_start"] } }, "Project Assigned":{ "type": "string", "mappings": { "0.8": ["short_description", "task", "description"] } } } **Multi-table schema mapping** Maps Excel column headers from a single sheet to multiple ServiceNow tables simultaneously. ServiceNow AI Lens identifies the relevant fields in each table for each Excel column header and maps the data accordingly. **Request example** var response = new sn_app_lens_core.AILensActionService().invokeLens("3290a3dc2b420310d666fe3db891bfb8", ["566997542b46c310a371f33ec891bfbc"], "", {}, { 'tableName': 'sn_ent_model,sn_ent_asset' }, true, { "mappingStrategy": "schema_mapping",

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Parameters (continued)

Name	Type	Description

```
        "rowContextSize": 5,
        "randomizeRowOrder": false,
        "headerRowNumber": 2
    }
);
gs.info("Overall Lens Response " +
 JSON.stringify(response));
var res =
 JSON.parse(response.lensResponse);
gs.info("Mapped Object" +
 JSON.stringify(res, null, '   '));
```

- **Choice mapping** — For fields identified as Choice type, maps the unique values from the Excel column to the valid choice values in the ServiceNow table field. Key-values for Choice mapping are:
  - `mappingStrategy`: Set to `'choice_mapping'`.
  - `columnConfigs`: An array of objects that specifies the ServiceNow choice field and the corresponding Excel column to map, including the field name, column header, and optionally the cell values to use instead of reading from the file.

```
Request example: {
    mappingStrategy: 'choice_mapping',

    SheetName:'Incident Data',

    SheetNameheaderRowNumber:2,
    columnConfigs: [
        { field: 'priority', name:
 'Priority' },
        { field: 'state',    name:
 'Ticket Status' }
    ]
}
Response example: [
  {
      "name": "Priority",
      "field": "priority",
      "mappings": [
        { "key": "High",   "value":
 "1", "label": "1 - Critical",
 "score": 1.0 },
        { "key": "Medium", "value":
 "3", "label": "3 - Moderate",
 "score": 0.9 }
      ]
  }
]
```

Multi-column to single field choice mapping

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Parameters (continued)

Name	Type	Description
		Maps multiple Excel column headers and their values to a single ServiceNow field. This is useful when related data from separate columns should be consolidated into one field. **Request example** `var response = new sn_app_lens_core.AILensActionService().invokeLens("4b50a72c2b694710c18df2086e91bf84", ["e782e364936103105357f1cfb903d682"], "", {}, {}, true, { "mappingStrategy": "choice_mapping", "columnConfigs": [{ "field": "location", "name": "city" }, { "field": "location", "name": "zip" }, { "field": "location", "name": "state" }] }); gs.info("response " + JSON.stringify(response, null, ' '));`  **Note:** Multi-column to single field mapping also works with Reference mapping.  ○ **Reference mapping** — Maps Excel cell values to the corresponding ServiceNow reference field records. Key-values for Reference mapping are:  ▪ `mappingStrategy`: Set to `'reference_mapping'`.  ▪ `columnConfigs`: Configuration for the specific column being mapped, including the source column name and the target reference table details.  **Request example**: `var response = new sn_app_lens_core.AILensActionService().invokeLens('b7fbd8694730c310dbc4964a516d431e',`

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Parameters (continued)

Name	Type	Description
		['0c0b1c6d4730c310dbc4964a516d43f2'], '', [], {}, true, { mappingStrategy: 'reference_mapping', SheetName:'Incident Data', SheetNameheaderRowNumber:2, columnConfigs: [{ field: 'assignment_group', name: 'Assignment Group', }] }); **Response example**: [{ "name": "Assignment Group", "field": "assignment_group", "mappings": [{ "key": "IT Help Desk", "value": "abc123...", "label": "IT Help Desk", "score": 1.0 }] }]

Returns

Type	Description
<object>	Returned success object { "status": "success", "lensResponse": "{\"short_description\":\"Service Degradation Error in Order Processing System\",\"description\":\"The Order Processing API v2.1 encountered a service degradation issue in the Production environment.\" }" }
error	Returned error object { "status": "error", "error": {

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Returns (continued)

Type	Description
	"errorType": "Execution Error", "message": "Detailed error message here" } }

This example shows how to call Lens service from a script block.

```
var lensActionId = "cd6570cdf36a2210b9751f09f6968c42";
var attachmentIds = ["3fe930093b626210aba1fadc73e45a38",
 "0000e8a42c9a7110f877137af4eab4b5"];
var userPrompt = "Analyze this production issue and create an
 incident ticket";
var imageArr = [
    {
        name: "screenshot1.png",
        data:
 "iVBORw0KGgoAAAANSUhEUgAAAAEAAAABCAYAAAAfFcSJAAAADUlEQVR42mNkYP
hfDwAChwGA60e6kgAAAABJRU5ErkJggg=="
    },
    {
        name: "screenshot2.png",
        data:
 "iVBORw0KGgoAAAANSUhEUgAAAAEAAAABCAYAAAAfFcSJAAAADUlEQVR42mNk+M
9QzOAEYAJMgkU1f5kAAAAASUVORK5CYII="
    }
];
var inputJSON = {
      "type" : "object",
      "properties" : {
        "short_description" : {
          "type" : "string",
          "label" : "Short description"
        },
        "description" : {
          "type" : "string",
          "label" : "Description"
        },
      },
      "required" : [ "short_description", "comments" ],
   }
var additionalContext = {
      IsFileUploadEnabled: true};

 // Call the method
var result = new sn_app_lens_core.
 AILensActionService().invokeLens(lensActionId, attachmentIds,
 userPrompt, imageArr, inputJSON, skipACL, additionalContext);

// Handle the response
if (result.status === 'success') {
    var response = JSON.parse(result.lensResponse);
    gs.info("AI Lens Analysis Complete:");
```

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```
    gs.info("Title:", response.short_description);
    gs.info("Description:", response.description);
} else {
    gs.error("Error occurred:", result.error.message);
}
```

AI agents and agentic workflows

Design, deploy, and evaluate AI agents and agentic workflows that autonomously complete multi-step tasks on the ServiceNow AI Platform.

Agentic AI

AI agents and agentic workflows pursue a goal across multiple steps with limited human intervention, instead of completing one task at a time. To learn what they are, why they matter, and when to use them rather than a generative AI skill, see About AI agents and agentic workflows.

AI Agents library

Use the ServiceNow AI agents library to review all ServiceNow® created AI agents. Use this reference to understand each agent's purpose, workflow, and configuration.

AI Agent Studio

Use the AI Agent Studio environment to create, manage, and test AI agents and agentic workflows. Putting AI agents to work follows four steps: create an agentic workflow that defines the problem and situation your agents work on, create AI agents equipped with the tools to execute the necessary tasks, test the workflow and make adjustments until it performs as expected, and then deploy your agents across your organization.

AI Agent Studio also provides ready-made agentic workflows and AI agents you can use as-is or incorporate into custom workflows, an analytics dashboard for reviewing agent usage and performance, and testing tools that range from single manual executions to automated agentic evaluations. From the Settings page, you can enable AI Guardian to apply offensiveness detection and prompt injection protection to your agents.

To create, test, and deploy AI agents and agentic workflows in one environment, with ready-made options, analytics, and built-in testing, see AI Agent Studio (legacy).

Now Assist agentic workflows

The ServiceNow AI Platform provides prebuilt platform agentic workflows and AI agents that address common scenarios, such as approval assistance, issue readiness, and request status. Additional AI agents are provided with some Integration Hub spokes and plugins, preconfigured and callable from interfaces such as AI Agent Studio and Virtual Agent. These prebuilt workflows and agents give you a faster path to value than building from scratch, and you can incorporate them as-is or customize them to match your processes.

To put prebuilt agentic workflows and AI agents to work for common scenarios such as approvals, issue readiness, and request status, see Agentic workflows.

AI Desktop Actions

AI Desktop Actions extends AI agent capabilities to applications outside the ServiceNow AI Platform. In the no-code Design workspace, you create desktop actions by auto-capturing or manually recording a series of steps you perform on your computer, such as clicking buttons,

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entering text, or selecting from drop-downs across different applications. You then save that sequence as a reusable desktop action. After you activate a desktop action, it becomes available as a tool in AI Agent Studio, enabling your AI agents to interact with desktop applications as part of an agentic workflow.

To record reusable desktop actions that let your AI agents work in applications outside the ServiceNow AI Platform, see AI Desktop Actions.

ServiceNow® AI agents library

All ServiceNow® AI agents are listed. Depending on your license, not all AI agents may appear in your instance.

Prerequisites and setup

To access an AI agent, you must have either the appropriate ServiceNow Otto plugins installed or have access to the appropriate pricing tier. For more information, see ServiceNow product tiers.

AI agent role filtering

Each AI agent comes with specific user and data access roles by default. These roles vary with the purpose of each AI agent. You can modify these settings as needed on your instance. If an agent is not performing as expected, it may be due to a roles issue. Either it does not have the appropriate user access, or it does not have the appropriate data access.

AI agents use role filtering to determine which users can access them. If you select *`Users with specific roles`* for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define access rules for an AI agent.

In the data access settings, you must also add the necessary roles to enable reading of the tables for the records you want to evaluate for readiness. For example, you can add the itil role to the AI agent's list of approved roles so that it can access Incident records.

AI agents as users

When a Virtual Agent conversation is triggered, any updates or comments in the record's work notes display as the AI agent rather than the user who initiated the conversation.

Accessing an AI agent

1. Navigate to **All** > **AI Agent Studio** > **Agentic Solutions**.
2. Go to the **AI Agents** tab.
3. Select the name of an agent.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy , which may be updated by ServiceNow.

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Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Note: We have controls in place to enable/disable the data collection and data processing.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

Accounts Payable Operations (APO)

Accounts Payable Operations AI agents

The following AI agents are available for Accounts Payable Operations.

Inquiry resolution provider AI agent

This AI agent assists with invoice inquiries by providing resolution details based on the invoice and its related data. It is intended for use by Accounts Payable Operations agents handling invoice inquiries.

Workflow

The agent helps users complete tasks related to inquiry resolution provider.

1. Use the "Invoice Inquiry resolution generator and case update" tool to extract invoice details, payment details, invoice lines, and tax lines for the provided invoice inquiry number.
2. Once the plan is displayed to the user, ask the user if they want to close the case.
3. Based on the user's response, either close the case or update the work notes.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script**

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Configuration (continued)

Field	Description
	Close the case Invoice Inquiry resolution generator and case update
Allowed user roles The specific user roles that can access this AI agent.	sn_ap_cm.agent, now_assist_panel_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_ap_cm.agent, now_assist_panel_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

For more information on Accounts Payable Operations, see Accounts Payable Operations.

Recommend invoice owner AI agent

This AI agent analyzes exception work notes to predict the most likely business owner for an invoice. It works with the Accounts Payable (AP) specialist by suggesting the predicted owner or creating follow-up tasks to validate and resolve ownership.

Workflow

The agent helps users complete tasks related to recommend invoice owner.

1. Execute the "Retrieve recommendation from Exception Record" tool.
2. If there are no invoices present, ask the AP specialist if they want to reach out to a supplier contact with an exception task.
3. If the recommendation mentions processed invoices present but the match score is below the threshold, inform the AP specialist that a recommendation can't be made. Suggest the business owner from the last processed invoice.
4. If the recommendation mentions that the business owner was identified but auto-approval is disabled, ask the AP specialist whether that business owner can be assigned to the invoice.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Create exception task Get BO of last processed invoice Get supplier contacts Retrieve recommendation from Exception Record Update BO on invoice
Allowed user roles The specific user roles that can access this AI agent.	sn_ap_apm.accounts_payable_specialist
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_ap_apm.accounts_payable_specialist
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Not applicable.

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For more information on Accounts Payable Operations, see Accounts Payable Operations.

Email parser agent

This AI agent identifies and classifies actionable requests, and routes them to the appropriate workflows to create invoice cases.

Workflow

The agent can either send the email or save it as a draft.

1. Based on the context provided, analyze the context and determine the intended action (either send email or save a draft).
2. Analyze the context to determine the type of the email: either New or Reply.
3. Verify that all required parameters corresponding to the determined action and type are explicitly present in the provided input or current conversation context. For example, recipient information and email sys_id.
4. Determine the primary goal and business-appropriate purpose for the email.
5. Construct the email.
6. Execute the final action with all inputs.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Save Email Draft Send Email
Allowed user roles The specific user roles that can access this AI agent.	snc_external, snc_internal
Data access roles	email_generator_ai_user, sn_notif_agents.email_generator

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Configuration (continued)

Field	Description
The specific user identity roles that determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Intent to Action

For more information on Accounts Payable Operations, see Accounts Payable Operations.

Zero touch service desk agent

This AI agent investigates supplier invoice inquiry cases and generates a response for the supplier contact. Fulfillers can review its work in the Agentic Processes panel on the case.

Workflow

The agent helps users complete tasks related to recommend invoice owner.

1. Investigate the invoice inquiry case.
2. Generate a response, which appears in the Review output section.
3. Set the invoice inquiry case state to Awaiting acceptance.
4. Notify the requester about the resolution through the Supplier Collaboration Portal.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Get supplier contacts
Allowed user roles The specific user roles that can access this AI agent.	sn_ap_fulfiller
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_ap_fulfiller
Triggers	For APO, the APO Assignment Rule assigns AP cases (`sn_ap_cm_ap_case`) to the AI L1 APO Service Desk Specialist user and the Accounts Payable AI L1 Support group when all of the following are true: • The sub-category is Invoice inquiry or Payment inquiry. • The state is New. • The assignment group is empty.
Channels	Activity stream, for both inbound and outbound messages.
Used in agentic workflows	The agent runs through the L1 APO Service Desk Specialist (APO - ZTSD Worker Template).

For more information on Accounts Payable Operations, see Accounts Payable Operations.

AIOps and AIOps Leap

AIOps and Leap AI agents

The following AI agents are available for AIOps and AIOps Leap.

Alert automation AI agent

This agent interprets free-text user requests related to alert automation and guides users to the appropriate automation experience. It detects whether the user intends to enrich alerts, group alerts, respond to alerts, or any combination of these actions.

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Workflow

The agent helps users complete tasks related to alert automation.

1. Identify requested alert automations, including alert enrichment, alert response, and alert grouping.
2. Provide links to alert automations that fit the query.
3. Create an alert grouping automation record when requested.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Activate Alert Group Automation Alert Group Automation Canonicalizer Create Alerts Grouping Automation Get Alert Automation Link Legacy: Delete Alerts Grouping Automation
Allowed user roles The specific user roles that can access this AI agent.	evt_mgmt_admin, evt_team_operator
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	evt_mgmt_admin, evt_team_operator

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Create alert automation

Learn more about Alert Automation at Alert automation in Service Operations Workspace for ITOM

Alert impact verification AI agent

This agent is responsible for eligibility validation for a given alert, to perform impact analysis on it.

Workflow

The agent helps users complete tasks related to alert impact verification.

1. Validate the alert's eligibility.
2. Run the 'Display error from validation' tool, which uses as an input the exact error message from the 'Alert validation' tool.
3. Run the 'Valid alert message' tool.
4. Run the 'Fetch alert details' tool.
5. Run the 'Work plan message' tool once.
6. Pass the <alert_number> and <alert_sys_id> values to the next agent.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Alert validation Display alert details Display error from validation Fetch alert details Valid alert message Work plan message
Allowed user roles The specific user roles that can access this AI agent.	evt_mgmt_operator
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	evt_mgmt_operator
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	N/A

Learn more about Learning Enhanced Automation Platform (LEAP) at Learning Enhanced Automation Platform (LEAP).

Artifact creation agent AI agent

Assists in creating and viewing artifacts such as problem records, knowledge base articles, and playbooks for an automation opportunity. The agent checks for an automation opportunity number and invokes the artifact creation topic tool to generate the required artifacts.

Workflow

The agent creates automation opportunity artifacts by invoking the artifact creation topic tool with the appropriate context.

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1. Check whether an automation opportunity number is available and, if found, assign it to the artifact creation tool as input context.
2. Invoke the artifact creation topic tool to generate the required artifacts, using optional parameters for the detail page URL and continuation options.
3. Exit the workflow after artifact creation is complete.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Conversational topic (Virtual Agent)** artifact creation topic
Allowed user roles The specific user roles that can access this AI agent.	sn_itom_leap.leap_genai_worker
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_itom_leap.artifact_creator_agent
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	LEAP agent

Learn more about Learning Enhanced Automation Platform (LEAP) at Learning Enhanced Automation Platform (LEAP).

Business and technology management service impact analysis AI agent

This agent calculates the business and technology management services impacted by a given alert.

Workflow

The agent helps users complete tasks related to business and technology management service impact analysis.

1. Check if <impacted_service_instances> is defined; if not defined, then return from the agent.
2. Check if <impacted_service_instances> is empty, then return from the agent.
3. Run the 'Related offerings and services' tool.
4. Check if <offering_message> is defined.
5. Check if <service_message> is defined.
6. Write the <offering_message> and <service_message> to the alert worknotes.
7. Pass the <offering_ids> and <service_ids> values to the next agent.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Display Business/Technology services message Display empty offering or services message

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Configuration (continued)

Field	Description
	Display offering message Related offerings and services Write worknote to alert
Allowed user roles The specific user roles that can access this AI agent.	evt_mgmt_operator
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	evt_mgmt_operator
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	N/A

Learn more about Learning Enhanced Automation Platform (LEAP) at Learning Enhanced Automation Platform (LEAP).

Manage alerts AI agent

Responsible for generating reports for a given alert and storing a structured summary with key insights and recommended next steps in the alert record.

Workflow

The agent helps users complete tasks related to manage alerts.

1. Run the 'Autonomous chain' tool using the provided alert_id to generate a structured alert summary.
2. Validate the output from the 'Autonomous chain' tool.
3. Run the 'Update Alert AI Insights and Worknotes' tool.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Generative AI skill** Autonomous chain **Script** Update Alert AI Insights and Worknotes
Allowed user roles The specific user roles that can access this AI agent.	evt_mgmt_operator
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	evt_mgmt_operator
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Manage alerts autonomously

Learn more about Event Management at Event Management.

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Service instance impact analysis AI agent

This agent performs alert impact analysis on service instances for a given alert.

Workflow

The agent helps users complete tasks related to service instance impact analysis.

1. Check if <alert_sys_id> is defined and that it is not empty.
2. Check if the alert is eligible for analysis.
3. Get alert impact on service instances.
4. Pass <alert_sys_id> and <impacted_service_instances> parameters to the next agent.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Analyze alert impact on service instances Display error for CI check Display service instances result Find CI bound to alert
Allowed user roles The specific user roles that can access this AI agent.	evt_mgmt_operator
Data access roles The specific user identity roles that determine which data the AI agent	evt_mgmt_operator

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	N/A

Learn more about Learning Enhanced Automation Platform (LEAP) at Learning Enhanced Automation Platform (LEAP).

User impact analysis AI Agent

This agent investigates incidents and cases related to the alerts and affected services.

Workflow

The agent helps users complete tasks related to user impact analysis.

1. Check if <offering_ids> and <service_ids> are NOT defined, then return from the agent silently.
2. If <offering_ids> and <service_ids> are BOTH empty, then return from the agent silently.
3. Run the 'Fetch related issues' tool.
4. Check if <incidents> and <cases>, returned in step 3, are empty.
5. Run the "Format related issues summary" tool.
6. Write the formatted summary to the alert worknote.
7. Pass the <offering_ids> and <service_ids> values to the next agent.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Capability** Alert impact analysis **Script** Display empty incidents and cases message Fetch related issues Format related issues summary Write worknote to alert
Allowed user roles The specific user roles that can access this AI agent.	evt_mgmt_operator
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	evt_mgmt_operator
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	N/A

Learn more about Learning Enhanced Automation Platform (LEAP) at Learning Enhanced Automation Platform (LEAP).

Artifact creation agent AI agent

The Artifact creation agent helps users create and view artifacts for an automation opportunity, such as a problem record, a knowledge base article, or a playbook.

Workflow

The agent helps the user create or view artifacts for an automation opportunity.

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1. Check whether an automation opportunity number is available.
2. Start the artifact creation conversation for that automation opportunity.
3. Guide the user to create or view a problem record, knowledge base article, or playbook for the opportunity.
4. End the workflow when the conversation is complete.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Tool** artifact creation topic
Allowed user roles The specific user roles that can access this AI agent.	Not defined.
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_itom_leap.artifact_creator_agent
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	LEAP agent

LEAP Ansible Agent AI agent

The LEAP Ansible agent finds the Ansible job template that best matches the problem behind an automation opportunity. It recommends the template to the user and saves it to the discovered job catalog.

Workflow

The agent helps the user find the most appropriate Ansible job template from Ansible Automation Platform to remediate an automation opportunity.

1. Accept the automation opportunity number and retrieve the problem context for that opportunity.
2. Retrieve the full list of available job templates and their descriptions from Ansible Automation Platform.
3. Compare the problem context with the job templates and identify the template that best matches.
4. Retrieve the full configuration of the matched job template.
5. Return the job template name, ID, and relevant configuration details to the user as the recommended remediation job.
6. Save each matched job template to the discovered job catalog for the automation opportunity.
7. Inform the user if no relevant job templates are found.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Model Context Protocol** Get Job Template Details

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Configuration (continued)

Field	Description
	Job Template List **Script** Get AO Problem Context Publish Job to Table
Allowed user roles The specific user roles that can access this AI agent.	Not defined.
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	• sn_itom_leap.ansible_job_create • sn_itom_leap.ansible_job_read • sn_itom_leap.group_ranking_read • sn_itom_leap.leap_ansible_agent_worker • sn_itom_leap.outcome_snapshot_read
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

LEAP Ansible Execution Agent AI agent

The LEAP Ansible Execution agent runs the Ansible playbooks mapped to each resolution step of an incident. It launches jobs through Ansible Automation Platform, prompts the user to complete unmapped steps manually, and reports job status on request.

Workflow

The agent helps the user remediate an incident by running the Ansible playbooks mapped to its resolution steps.

1. Identify the incident record and log on the record that execution has started.
2. Retrieve the mapping between the resolution steps and their Ansible jobs, and inform the user if no mapping exists.
3. Work through the resolution steps in order, asking the user to complete any step that has no playbook mapped and to confirm when it's done.
4. For each mapped job, show the user the job template details and collect any required launch inputs in a single form.
5. Launch the job, report the Ansible job ID and its status, and wait for the user to confirm before moving to the next step.

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6. Summarize the steps processed, the jobs launched and their status, the manual steps completed, and any failures.
7. Record the overall success or failure status on the incident record.
8. Check job status, show job output, cancel a job, or relaunch a job whenever the user asks.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Model Context Protocol** Get Job Details Job Template Launch Retrieve Job Templates Retrieve Launch Job Templates **Record Operation** Get LEAP Ansible Mapping **Script** Fetch Record SysId and publish Journal entry
Allowed user roles The specific user roles that can access this AI agent.	Not defined.
Data access roles The specific user identity roles that determine which data the AI agent	sn_itom_leap.leap_ansible_agent_worker

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

LEAP KB Creation Agent AI agent

The LEAP KB Creation agent creates draft knowledge base articles from the resolution steps of a LEAP automation opportunity.

Workflow

The agent helps the user create a draft knowledge base article for an automation opportunity.

1. Identify the automation opportunity number from the request.
2. Create a draft knowledge base article from the resolution steps of the automation opportunity.
3. Confirm that the article was created, or report the error details if creation failed.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** LEAP Create KB Article

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Configuration (continued)

Field	Description
Allowed user roles The specific user roles that can access this AI agent.	Not defined.
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_itom_leap.artifact_creator_agent
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	LEAP Autonomous Agent

LEAP Problem Creation Agent AI agent

The LEAP Problem Creation agent creates problem records from the data of a LEAP automation opportunity.

Workflow

The agent helps the user create a problem record for an automation opportunity.

1. Identify the automation opportunity number from the request.
2. Create a problem record from the automation opportunity data.
3. Confirm that the problem record was created and provide a link to it, or report the error details if creation failed.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** LEAP Create Problem Record
Allowed user roles The specific user roles that can access this AI agent.	Not defined.
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_itom_leap.artifact_creator_agent
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	LEAP Autonomous Agent

AI Search

AI Search AI agents

The following AI agents are available for AI Search.

AI Search Configuration AI agent

Responsible for managing the end-to-end process of formally configuring AI Search for ServiceNow internal tables. This agent is invoked whenever a user mentions ServiceNow internal tables in the context of AI Search.

Workflow

The agent helps users complete tasks related to configuring AI Search.

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1. Greet user and help them set up filter conditions for their search.
2. Gather information from user and validate.
3. Create new search source.
4. End flow.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Fetch internal sources configuration Perform Create/update/delete operation on internal sources Text to encoded query generation **Generative AI skill** Identify Search Profile based on user persona/experience **Topic Block** Table Details Analyzer
Allowed user roles The specific user roles that can access this AI agent.	search_application_admin
Data access roles The specific user identity roles that determine which data	agent_role_config_admin, ais_admin, approver_user, catalog, localization_requestor, one_extend_viewer, pa_viewer, personalize_dictionary, public, role_viewer, search_application_admin, search_relevancy_model_admin, sn_ace.ace_user, sn_cd.content_approver, sn_cd.content_manager, sn_cd.content_template_owner, sn_ce.analytics_reader, sn_esign.config_manager, sn_na_analytics.admin, sn_na_analytics.viewer, sn_nowassist_admin.nsa_admin,

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Configuration (continued)

Field	Description
the AI agent can access and what actions it can take.	sn_query_gen.admin, sn_query_gen.user, taxonomy_admin, ui_action_admin, user_criteria_admin, user_criteria_read
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about AI Search at AI Search.

AI Workflow Factory

AI Workflow Factory AI agents

The following AI agents are available for AI Workflow Factory.

Autonomous Engineer

This AI agent helps with implementing ServiceNow applications. The agent accepts requirements, generates a plan with structured work items, and builds all work items in parallel using background AI agents.

Important: Autonomous Engineer uses a different framework than other ServiceNow® AI agents. Review the following workflow and configuration settings for Autonomous Engineer. For more information, see Autonomous Engineer.

Build Agent dependency

Autonomous Engineer uses Build Agent, a separate AI agent part of ServiceNow Otto for Creator, as its execution layer. When you install Autonomous Engineer, Build Agent is installed as a dependency.

Because Autonomous Engineer is powered by Build Agent, both products use the same settings. For more information about these settings, see Build Agent.

Workflow

Autonomous Engineer accepts requirements, generates a structured plan for the user to approve, and builds all work items in parallel using background AI agents.

1. Accept requirements from a natural language prompt or an uploaded file, such as a CSV of user stories.
2. Search the instance for existing artifacts, such as tables, roles, fields, and catalog items, to avoid duplicating them.

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3. Interview the user to resolve ambiguous or incomplete details, and then generate a brief for approval.
4. Generate a plan of work items in Agile user story format, with acceptance criteria and test criteria. Group the work items into logical sections and sequence them using a dependency graph.
5. List any steps that require manual action, such as activating plugins, in a pre-flight verification section.
6. Pause for user review and approval of the plan and its work items.
7. Once approved, load the applicable agent pack, and generate a background agent for each work item.
8. Build all work items in parallel, running each work item only after the work items it depends on are complete.
9. For each work item, build the required metadata, and then run Test Agent to generate and run Automated Test Framework (ATF) tests.
10. If tests fail, identify the root cause and retry the work item. Detect stuck or unresponsive agents and retry their work items automatically.
11. Display the status of each work item on the plan dashboard, and highlight the work items that need attention in the dashboard and chat panel.
12. Pause each completed work item for user validation.
13. Generate an update set for the plan when all work items are complete.

Configuration

Autonomous Engineer configuration

Configuration area	Description
Plugins	The Autonomous Engineer plugin is `sn_autonomous_eng`. When you install Autonomous Engineer, the Build Agent plugin is installed as a dependency.
Access	Autonomous Engineer is accessible via the Build Agent chat panel in ServiceNow Studio.
Agent packs	Autonomous Engineer uses agent packs to understand ServiceNow products. You can install different agent packs depending on the implementation you're completing. For more information, see Agent packs for Autonomous Engineer.

IT Asset Management

Asset Management AI agents

The following AI agents are available for Asset Management.

Asset next best action AI agent

This AI agent validates task numbers, identifies task types, and routes workflows to the correct specialized agent for troubleshooting or repair. It processes one task at a time for accurate handling of hardware asset repair order tasks.

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Workflow

The agent identifies a repair order task type and routes the work to the appropriate specialized agent for completion.

1. Verify that a repair order task number is provided, prompting the user if it is missing.
2. Retrieve the task details and perform validation to confirm the task name, asset information, and status.
3. If validation returns an error, inform the user and end execution.
4. Display the identified task details to the user, including the task name, asset model, and manufacturer.
5. Route to the appropriate workflow: if the task name is Troubleshoot Asset, invoke the evaluate asset AI agent; if the task name is Repair Asset, invoke the repair asset AI agent.
6. Terminate the workflow after the appropriate section has completed execution.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Get task details and perform validation
Allowed user roles The specific user roles that can access this AI agent.	inventory_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	inventory_user, 8c5ce94b77ac4210fa3fca22fe5a994b

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	• Help repair enterprise assets • Help repair hardware assets

Learn more about Asset Management at Asset Management.

Asset sourcing AI agent

This AI agent helps source a requested item by generating and executing sourcing plans through consumption, transfer, and purchase. The agent creates plans autonomously or with user guidance, coordinates with external agents for transfer and purchase orders, and validates sourcing status throughout the process.

Workflow

The agent sources a requested item by executing three independent flows in sequence: auto source, guided source, and user input source.

1. Verify that a requested item number is provided and retrieve the item details, including quantity and model name.
2. Attempt to source the item automatically using the auto source plan flow, consuming, transferring, or purchasing assets as determined by the generated plan.
3. If the item is not fully sourced, generate a guided source plan, present it to the user for confirmation, and execute the approved plan steps.
4. If the item still requires sourcing, generate a user input source plan and prompt the user to confirm transfer and purchase actions as needed.
5. Validate the sourcing status after each phase and notify the user when all requested quantity has been sourced or if quantity remains outstanding.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Auto consume the assets for the requested items Consume the assets for the requested items Fetch the details of the requested item Generate auto source plan for the requested item Generate guided source plan for the requested item Generate user input plan for the requested item Validate the source plan Validate the sourcing status of requested item
Allowed user roles The specific user roles that can access this AI agent.	procurement_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	procurement_user, sn_request_write
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Not defined.
Used in agentic workflows	Help manage enterprise asset requests

Learn more about Asset Management at Asset Management.

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Evaluate asset AI agent

This AI agent helps troubleshoot asset-related issues using the Web Search tool. It guides users to select a resolution and completes the troubleshooting task on confirmation.

Workflow

The agent helps users troubleshoot asset-related issues.

1. Perform a web search and create a step by step hardware evaluation plan. Provide warranty consideration guidelines and void-prevention measures for different inspection scenarios. Give detailed steps for each issue.
2. Refine and format search results.
3. Display numbered troubleshooting steps to the user, one at a time.
4. If the user indicates that the problem is solved, end the workflow.
5. If the user indicates that the problem is not solved, go to the next troubleshooting step.
6. When all steps are exhausted, end the workflow.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Conversational Topic** Repair Order - Troubleshooting result **Web search** Use web search
Allowed user roles The specific user roles that can access this AI agent.	inventory_user
Data access roles The specific user identity roles that	inventory_user, 8c5ce94b77ac4210fa3fca22fe5a994b

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Configuration (continued)

Field	Description
determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	• Help repair hardware assets • Help repair enterprise assets

Learn more about Asset Management at Asset Management .

Purchase order creation AI agent

This AI agent is used to create a purchase order.

Workflow

1. Use the Get Destination Stockrooms for requested item tool to retrieve a list of destination stockrooms.
2. Ask the user to select a stockroom if multiple choices are available. If none are available, end the workflow.
3. Use the Get Vendors for requested item tool to retrieve a list of vendors.
4. Ask the user to select a vendor if multiple choices are available. If none are available, end the workflow.
5. If the requested item is software, use the Get Metric Group and License Metric conversational topic tool to help user get a license.
6. If the requested item is not software, use Create purchase order for requested item tool to create a purchase order for the specified stockroom and vendor.
7. Display purchase order to the user.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and

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Configuration (continued)

Field	Description
	response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Create purchase order for requested item Generate guided purchase order plan and create PO Get Destination Stockrooms for requested item Get Vendors for requested item Purchase Order Auto-Completion **Conversational Topic** Get metric group and license metric
Allowed user roles The specific user roles that can access this AI agent.	procurement_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	procurement_user, itil, sn_request_write
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	• Help manage enterprise asset requests • Help manage hardware asset requests • Help manage software requests

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Repair asset AI agent

This AI agent assists users in resolving issues with assets that are in a defective or pending repair state. It specializes in identifying and suggesting appropriate repair steps by leveraging the Web Search tool. The agent guides users through the repair process, helps them select a suitable resolution, and automatically updates and completes the repair task upon confirmation.

Workflow

The agent helps users to repair assets.

1. Uses the asset manufacturer and model details provided.
2. Determine if the issue is known.
3. If the issue is known, perform a web search and create a step by step hardware evaluation plan. Provide part requirements for each of the suggested repair steps. Give detailed steps for each issue.
4. Refine and format search results.
5. Display numbered repair steps along with part requirements to the user, one at a time.
6. If the user indicates that the problem is solved, end the workflow.
7. If the user indicates that the problem is not solved, ask the user to share the exact query again. Perform a web search based on that query and display the results.
8. End the workflow when the user confirms the steps resolved the issue or when the user remains unsatisfied after the second troubleshooting attempt.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Conversational Topic** Repair Order - Repair result **Web Search** Use web search
Allowed user roles	inventory_user

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	inventory_user, sn_eam.asset_technician
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	• Help repair enterprise assets • Help repair hardware assets

Learn more about Asset Management at Asset Management.

Transfer order creation AI agent

This AI agent is used for creating a transfer order to source a requested item.

Workflow

The agent helps users complete tasks related to transfer order creation.

1. Use the Get Destination Stockrooms for requested item tool to retrieve a list of destination stockrooms.
2. Ask the user to select a stockroom if multiple choices are available. If none are available, end the workflow.
3. Use the Get Source Stockrooms tool to retrieve a list of source stockrooms.
4. Ask the user to select a source stockroom if multiple choices are available. If none are available, end the workflow.
5. Use the Create transfer order using input source plan tool to create the Transfer Order Line with the user's selected source and destination stockroom details.
6. Create the transfer order using the Create transfer order with guided source plan tool.
7. Display results to the user.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Create transfer order for auto-source Create transfer order using input source plan Create transfer order with guided source plan Get Destination Stockrooms Get Source Stockrooms
Allowed user roles The specific user roles that can access this AI agent.	procurement_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	procurement_user, itil, sn_request_write
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.

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Configuration (continued)

Field	Description
Used in agentic workflows	• Help manage hardware asset requests • Help manage enterprise asset requests

Learn more about Asset Management at Asset Management.

Care Team Operations

Care Team Operations AI agents

The following AI agents are available for Care Team Operations.

Care Team Operations case creation AI agent

This AI agent streamlines case creation by analyzing user conversations to accurately determine the service definition for each reported issue. It intelligently identifies multiple issues raised in a single conversation and creates separate cases with correct case type and service definition.

Workflow

The agent helps users complete tasks related to care team operations case creation.

1. From the request summaries generated, note the case type for each distinct request.
2. Read the service definitions for Care Team Operations applications for each case type identified in Step 1.
3. Identify the service definition.
4. Identify the category.
5. Create care team operations case.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.

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Configuration (continued)

Field	Description
Tools	**Conversational topic** Create care team cases **Script** Get service definition details
Allowed user roles The specific user roles that can access this AI agent.	sn_hco.care_team_member, sn_hco.care_team_manager
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_hco.care_team_member, sn_hco.care_team_manager
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Request care team assistance

Learn more about Healthcare Operations at Healthcare Operations.

Care Team Operations case creation AI voice agent

This agent helps healthcare staff report and submit Care Team Operations (CTO) requests. Trigger this agent when a user mentions Care Team Operations, CTO, or asks to submit a care team request.

Workflow

The agent helps users complete tasks related to care team operations case creation voice.

1. Get the requesting unit of the user.
2. Ask the user to describe their issue.
3. Use the Get Relevant Knowledge Articles tool with the query "Case Definition" to classify the issue.
4. Collect any remaining required fields mentioned in the knowledge article one at a time based on <case_type>.
5. Use the Get Service Definitions tool with <case_type> as a JSON array.

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6. Say, "Let me confirm the details of your request before I submit." Read out the details to the user.
7. Say, "Let me create your request." Create the Care Team Operations case using <requesting_unit>, <case_type>, <issue_description>, <location>, <asset_tag>, <priority>, and all additional fields collected.
8. End the conversation by saying, "Thank you for contacting Care Team Operations assistant."

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Create care team operation cases Get service definition details Requesting Unit Lookup **Search retrieval** Get relevant knowledge articles
Allowed user roles The specific user roles that can access this AI agent.	sn_hco.care_team_member, sn_hco.care_team_manager
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_hco.care_team_member, sn_hco.care_team_manager

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure a voice assistant using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about Healthcare Operations at Healthcare Operations.

Care Team Operations case intake AI agent

This workflow guides users through submitting operational issues by prompting for a clear problem description and ensuring required details—such as location, requesting unit, asset tag, and priority—are captured. It intelligently detects and separates multiple requests in a single user utterance, summarizes each request with its details, and confirms accuracy with the user before proceeding.

Workflow

The agent helps users complete tasks related to care team operations case intake.

1. Fetch requesting units.
2. Prompt for issue details.
3. Identify distinct requests.
4. Classify case types.
5. Get remaining information.
6. Generate request summaries.
7. Validate request summaries.
8. Create Care Team Operations case.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Search retrieval** Get relevant knowledge articles **Script** Requesting Unit Lookup
Allowed user roles The specific user roles that can access this AI agent.	sn_hco.care_team_manager, sn_hco.care_team_member
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_hco.care_team_member, sn_hco.care_team_manager
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Request care team assistance

Learn more about Healthcare Operations at Healthcare Operations.

CMDB

CMDB AI agents

The following AI agents are available for CMDB.

CI form contextual help AI agent

CI form contextual help AI agent helps users by answering questions about CI attributes and classes. It guides them through CI forms, dashboards, home pages, and other views on the workspace.

Workflow

The agent helps users complete tasks related to CI form contextual help.

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1. Greet user or ask if they want to continue a previous conversation.
2. Perform search and answer user questions.
3. Close conversation only if user indicates they are completely done.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Get Page Context **Generative AI skill** Search product documentation
Allowed user roles The specific user roles that can access this AI agent.	sn_cmdb_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_cmdb_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Show contextual CI form help

Learn more about Configuration Management Database (CMDB) at Configuration Management Database (CMDB).

CMDB CI creator AI agent

Handles the creation of a configuration item (CI). A CI is a representation of some type of infrastructure, application, software, hardware. Those configuration items belong to classes. Examples of CI classes include Windows Server, Data Center, Internet Cable, Apache Application, and Virtual Machine.

Workflow

The agent helps users complete tasks related to CMDB CI creator.

1. Identify the class for creation.
2. Run the CI Creation tool to create the CI.
3. Wrap up the conversation.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Create new record for CI class Get similar CI Classes
Allowed user roles	sn_cmdb_editor, snc_internal

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_cmdb_editor
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Create configuration item

Learn more about Configuration Management Database (CMDB) at Configuration Management Database (CMDB).

CMDB data certification and attestation manager AI agent

Performs actions related to the data certification and data attestation policies of configuration item (CI) classes

Workflow

The agent helps users complete tasks related to CMDB data certification and attestation manager.

1. If you have done it before, skip to step 2.
2. Ask the user if they want to check the data certification and attestation policies for all principal classes, and if not, which specific class or classes instead.
3. Check if the selected CI classes have data certification and attestation cycle policies.
4. Inform the user that they have completed the step of managing data certification and attestation policies.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Check life cycle policies Get similar CI Classes
Allowed user roles The specific user roles that can access this AI agent.	sn_cmdb_admin, snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_cmdb_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	CMDB Data Governance

Learn more about Configuration Management Database (CMDB) at Configuration Management Database (CMDB).

CMDB data ownership manager AI agent

Performs actions related to the data ownership of configuration item (CI) classes

Workflow

The agent helps users complete tasks related to CMDB data ownership manager.

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1. If you have done it before, skip to step 2.
2. Ask the user what CI class they would like to check the data ownership for.
3. Determine the ownership field of the specified CI class.
4. Ask the user whether the determined ownership field is correct.
5. Evaluate the quality of the data ownership of the specified CI class.
6. Ask the user if they want to check the data ownership of another CI class.
7. Inform the user that they have completed the step of going through the data ownership of CIs.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Determine the ownership of a CI class Evaluate the ownership quality of a CI class Get similar CI Classes
Allowed user roles The specific user roles that can access this AI agent.	sn_cmdb_admin, snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_cmdb_admin

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	CMDB Data Governance

Learn more about Configuration Management Database (CMDB) at Configuration Management Database (CMDB).

CMDB health metrics manager AI agent

Performs actions related to the CMDB health metrics

Workflow

The agent helps users complete tasks related to CMDB health metrics manager.

1. If you have done it before, skip to step 2.
2. Check the CMDB health dashboard jobs and health metrics.
3. If there are no health metrics calculated, skip to step 5.
4. If there are metric scores retrieved, ask the user if they want to retrieve the health scores for all principal classes, and if not, which specific class or classes instead.
5. Retrieve the health scores for the selected CI classes.
6. Inform the user that they have completed the step of going through the CMDB health metrics.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Check CMDB health dashboard jobs and health metrics Get CMDB health scores Get similar CI Classes
Allowed user roles The specific user roles that can access this AI agent.	snc_internal, sn_cmdb_admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_cmdb_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	CMDB Data Governance

Learn more about Configuration Management Database (CMDB) at Configuration Management Database (CMDB).

CMDB life cycle manager AI agent

Performs actions related to the lifecycle management of configuration item (CI) classes

Workflow

The agent helps users complete tasks related to CMDB life cycle manager.

1. If you have done it before, skip to step 2.
2. Ask the user whether they want to check the life cycle policies for all principal classes or just for specific ones.
3. Check if the selected CI classes have life cycle policies.
4. Inform the user that they have completed the step of managing life cycle policies.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Check life cycle policies Get similar CI Classes
Allowed user roles The specific user roles that can access this AI agent.	sn_cmdb_admin, snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_cmdb_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	CMDB Data Governance

Learn more about Configuration Management Database (CMDB) at Configuration Management Database (CMDB).

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CMDB principal class manager AI agent

Performs actions related to principal configuration item (CI) classes

Workflow

The agent helps users complete tasks related to CMDB principal class manager.

1. Check the CMDB governance access level for the current user.
2. If you have done it before, skip to step 3.
3. List all existing and potential principal CI classes.
4. If the user does not have permission to mark principal classes, skip to step 7.
5. Ask the user whether they want to mark a suggested CI class or unmark a current CI class from the list as principal.
6. If the user specifies a class, mark or unmark the selected CI class as principal.
7. Ask the user if they are done reviewing, or if they want to see details about a specific CI class.
8. If the user has write access, inform the user that they have completed the step of managing principal CI classes.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Get CMDB governance access level Get similar CI Classes Identify principal classes Mark CI class as principal Unmark CI class as principal
Allowed user roles	snc_internal, sn_cmdb_admin

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_cmdb_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	CMDB Data Governance

Learn more about Configuration Management Database (CMDB) at Configuration Management Database (CMDB).

CMDB search AI agent

This AI agent searches for data in CMDB.

Workflow

The agent helps users complete tasks related to CMDB search.

1. Receive the user's request and validate required inputs.
2. Execute the appropriate tools to perform the requested action.
3. Return the results or update the relevant record.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Execute search queries Load initial context Single CI Record Processor
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_cmdb_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Search on CMDB

Learn more about Configuration Management Database (CMDB) at Configuration Management Database (CMDB).

Configuration item summarization AI agent

This AI agent uses a sys_id to summarize a configuration item (CI) using an existing skill.

Workflow

The agent helps users complete tasks related to configuration item summarization.

1. Collect the sys_id from the administrator or orchestrator.
2. If the sys_id does not exist, inform the user that there is not enough required information.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Summarize a CI
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_cmdb_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about Configuration Management Database (CMDB) at Configuration Management Database (CMDB).

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Contract Management

Contract Management Pro AI agents

The following AI agents are available for Contract Management Pro.

Contract repository AI agent

This AI agent retrieves contract repository details for a specified record, including vendor information, contract model, and document attachment IDs. It also calculates the average lead time for similar contracts when vendor, supplier, or account data exists.

Workflow

The agent retrieves contract repository details and starts metadata and obligation extraction for a specified record. It also initiates asynchronous extraction of key metadata from contract documents, such as effective dates, renewal and termination notice periods, and auto-renewal clauses.

1. Retrieve the contract repository details for the specified record, including vendor, supplier, or account information, the contract model, and whether the obligations plugin is active.
2. Start metadata extraction for the contract document, such as effective date, end date, and renewal and termination notice periods, without waiting for it to finish, and continue even if it encounters an error.
3. If the obligations plugin is active, also start extraction of contractual obligations from the document without waiting for it to finish, and continue even if it encounters an error.
4. If vendor, supplier, or account information is available, calculate the average lead time for similar contracts.
5. Complete these steps automatically without asking the user for any input.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Calculate average lead time of similar contracts Get Contract repository details

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Configuration (continued)

Field	Description
	Initiate metadata extraction Initiate Obigation Extraction
Allowed user roles The specific user roles that can access this AI agent.	sn_cm_gen_ai.ai_contract_fulfiller
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_cm_gen_ai.ai_contract_fulfiller, sn_lg_ops.request_fulfiller, sn_cm_core.contract_fulfiller, contract_manager, sn_cm_obligation.obligation_fulfiller
Triggers	Activate the following business rules to trigger the agent. • Agentic AI - Set reminders for contract • Agentic AI Set reminders for Econtract business rule to trigger the agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Renewal notice period remainder

For more information, see Contract Management Pro.

Search contracts AI agent

This AI agent helps legal professionals, procurement teams, sales executives, and compliance officers find and understand legal contracts through conversational search and Q&A. It classifies each query, retrieves matching contract metadata or content, and links directly to results, while declining requests to draft, modify, or legally interpret contracts.

Workflow

The agent searches and answers questions about legal contracts on the user's behalf.

1. Determine if the request is for retrieving an attachment from a contract, and if so, retrieve the attachment directly.
2. Otherwise, classify the query as structured (metadata-based), unstructured (content-based), or a combination of both.
3. Run the appropriate contract search based on that classification and check whether matching results were found.
4. If matching results are found, let the user know they can select "Show" to view them; if not, ask the user to rephrase or broaden their search.

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5. Ask for clarification before acting on an ambiguous query instead of guessing what the user means.
6. Politely decline any request that goes beyond factual contract search, such as drafting, modifying, or legally interpreting a contract, and offer to help with a supported request instead.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Subflow** Contract information retrieval **Generative AI Skill** Contracts query classifier **Script** Retrieve attachments of a Record
Allowed user roles The specific user roles that can access this AI agent.	sn_cm_gen_ai.ai_contract_fulfiller
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_cm_gen_ai.ai_contract_fulfiller, sn_lg_ops.request_fulfiller, sn_cm_core.contract_fulfiller, contract_manager, sn_cm_obligation.obligation_fulfiller
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Conversational contract search and insights

For more information, see Contract Management Pro.

Core Business Suite

Core Business Suite AI agents

The following AI agents are available for Core Business Suite.

CBS Bulk Upload AI Agent

The CBS Bulk Upload AI agent handles bulk record creation and updates for the Space, Supplier, and Supplier Contact tables.

Workflow

The agent helps users complete tasks related to Core Business Suite bulk upload.

1. Agent informs user that it will help them upload via a guided process.
2. Select the appropriate table based on user input.
3. Prepare template for data upload and present to user for modifications.
4. User uploads file.
5. Validate the file.
6. If no errors, import the data.
7. Display completion summary.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Agent Context Retriever Copy the Attachment to Data Source Record Get Import Set Record Link Get Records Count Get Template Attachment Link for Bulk Edit Get Template Attachment Link for Bulk Upload Get Validations Run Scheduled Data Import Update agent result **Conversational topics (Virtual Agent)** Submit and Fetch Results Upload Updated Template
Allowed user roles The specific user roles that can access this AI agent.	sn_ia_config.ia_user, import_admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_ia_config.ia_user, import_admin, platform_ml_di.creation_agent
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about Core Business Suite at Core Business Suite.

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Customer Service Management

Customer Service Management AI agents

The following AI agents are available for Customer Service Management.

Case action AI agent

This agent can preform actions for the customer, including case actions (Create a case task, Update work notes, etc.) and more.

Workflow

The agent helps users complete tasks related to case action.

1. Receive the user's request and validate required inputs.
2. Execute the appropriate tools to perform the requested action.
3. Return the results or update the relevant record.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Subflows** Create case task **Flow Action** Update source record worknotes
Allowed user roles The specific user roles that can access this AI agent.	sn_esm_agent
Data access roles The specific user identity roles that determine which	sn_customerservice_agent, sn_customerservice.consumer_agent

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Configuration (continued)

Field	Description
data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Provide customer 360 insights

Learn more about Customer Service Management at Customer Service Management.

Case creation AI agent

The Case creation AI agent is designed to automate and manage the end-to-end process of case creation. This agent should be invoked when a case needs to be created.

Workflow

The agent helps users complete tasks related to case creation.

1. Get the source record details.
2. Identify if the source record is a duplicated.
3. Determine case type.
4. Validate documents.
5. Retrieve if the source record associated record is present.
6. Initiate case creation process.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Create a case record Determine case type Duplicate Case Checker Get record details Update record with AI Agents execution **Search retrieval** Get relevant knowledge articles
Allowed user roles The specific user roles that can access this AI agent.	sn_esm_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_customerservice_agent, sn_customerservice.consumer_agent, sn_customerservice_manager
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Triage cases

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Case status AI voice agent

This AI agent helps users quickly retrieve and understand the status of their cases through a conversational voice interface.

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Workflow

The agent helps users complete tasks related to case status voice agent.

1. Welcome and greeting.
2. Request case number.
3. Confirm case details.
4. Retrieve case information.
5. Generate case summary.
6. Handle follow-up questions.
7. Confirm completion and end the call.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Get case details using number and fields
Allowed user roles The specific user roles that can access this AI agent.	sn_customerservice.customer, sn_customerservice.consumer
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal, snc_external

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure a voice assistant using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about Customer Service Management at Customer Service Management.

Complaint case research plan AI agent

Analyzes "Under Review" complaint cases to identify previously attempted troubleshooting steps and recommends new solutions from similar closed cases and knowledge articles. Prioritizes relevant suggestions, presents them with source attribution, updates work notes, and creates case task plans based on successful resolution patterns. Filters redundant recommendations and ensures proper workflow integration within case management systems.

Workflow

The agent helps users complete tasks related to complaint case research plan agent.

1. Retrieve case details.
2. Display previously attempted troubleshooting steps, if applicable.
3. Search for similar cases and knowledge articles.
4. Analyze troubleshooting steps and similar cases.
5. Generate a list of unique troubleshooting steps and present it to the customer, including links to sources.
6. Ask customer if they want to add these case tasks to the case.
7. Confirm with user and end the process.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Create case tasks Get case details using number and fields Get case task details Update worknotes **Search retrieval** Get Similar complaint cases and Relevant knowledge articles
Allowed user roles The specific user roles that can access this AI agent.	sn_customerservice_agent, sn_customerservice.consumer_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_customerservice_agent, sn_customerservice.consumer_agent
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Accelerate Complaint Case Handling

Learn more about Customer Service Management at Customer Service Management.

Complaint case triage AI agent

This agent is designed to analyze complaint cases after their creation, automatically deriving key classification and prioritization fields. It serves case handlers and support teams by providing reliable, data-driven insights to enhance case management efficiency.

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Workflow

The agent helps users complete tasks related to complaint case triage agent.

1. Filter the categories to only show those that correspond to the case's complaint_type value.
2. The subcategory value must correspond to the selected category value.
3. Examine the output fields returned by the "Get case details using number and fields" tool and use this data to identify the category and subcategory.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Category and subcategory choices Get case details using number and fields Update fields Update worknotes
Allowed user roles The specific user roles that can access this AI agent.	sn_customerservice.consumer_agent, sn_customerservice_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_customerservice_agent, sn_customerservice.consumer_agent

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Not defined.
Used in agentic workflows	Accelerate Complaint Case Handling

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Context validator AI agent

The context validator AI agent is designed to validate the record, analyze the sentiment, and get the list of intents from the input record. This agent should be invoked when the record content needs to be validated.

Workflow

The agent helps users complete tasks related to context validator.

1. Get the source record details.
2. Verify the source record.
3. Determine the sentiment of the source record.
4. Handle negative sentiment of the source record.
5. Handle positive or neutral sentiment of the source record.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script**

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Configuration (continued)

Field	Description
	Extract Intents Get record details
Allowed user roles The specific user roles that can access this AI agent.	sn_esm_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_customerservice_agent, sn_customerservice.consumer_agent, sn_customerservice_manager
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Triage cases

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Create case AI voice agent

This voice agent enables users to log cases using voice input. It guides the user through a structured conversation to capture and validate all mandatory case details, creates the case record, and provides confirmation upon successful submission.

Workflow

The agent helps users log a case from a phone call.

1. Start the conversation politely.
2. Collect the issue details.
3. Validate mandatory information.
4. Generate a short description.
5. Confirm and enrich the details.
6. Create the case record.
7. Confirm case creation.
8. Link the case number and interaction record from the customer's current phone call.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Create Case Record Link case and interaction record
Allowed user roles The specific user roles that can access this AI agent.	sn_customerservice.consumer, sn_customerservice.consumer
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_external, snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure a voice assistant using Assistant Designer.
Used in agentic workflows	Not applicable.

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Customer insight AI agent

This agent is responsible for answering any questions related to the record. The information it can retrieve includes customer information (name, contact info, details, location, history, cases,

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and orders) and case information (next steps, actions, agent, notes, documents, tasks, and resolutions).

Workflow

The agent helps users complete tasks related to customer insight.

1. Question analysis and requirements gathering.
2. Question analysis validation: ensure that the customer has provided all relevant information.
3. Use deep research to retrieve comprehensive data and insights.
4. Generate a response for the customer and respond to follow-up questions.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Deep Research **Search retrieval** Get relevant knowledge articles
Allowed user roles The specific user roles that can access this AI agent.	sn_esm_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_customerservice_agent, sn_customerservice.consumer_agent

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Provide customer 360 insights

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Document verification AI agent

The document verification AI agent verifies the documents on a record to determine if they match the documents listed for the case type. Additionally, they determine if any documents are missing or if document verification has failed. This agent should be invoked when documents need to be verified.

Workflow

The agent helps users complete tasks related to document verification.

1. Get the source record details.
2. Get the case type.
3. Get the list of required documents.
4. Initiate the document verification.
5. Perform the document verification.
6. Compare the valid documents and the list of required documents.
7. Save the list of missing required documents.
8. Communicate to the user the document validation outcome.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Get record details Get Required Documents List Initiate Document Verification Record the results of the document validation process Save the list of missing required documents **Subflow** Verify the documents
Allowed user roles The specific user roles that can access this AI agent.	sn_esm_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_customerservice_agent, sn_customerservice.consumer_agent, sn_customerservice_manager
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Triage cases

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Duplicate identification AI agent

The duplicate identification AI agent identifies duplicate records.

Workflow

The agent helps users complete tasks related to duplicate case records.

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1. Get similar cases.
2. Identify duplicate cases.
3. Verify if a duplicate case has been found.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Search retrieval** Get Similar Cases **Script** Identify Duplicate Case Link to duplicate case and close source record
Allowed user roles The specific user roles that can access this AI agent.	sn_esm_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_esm_agent
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Email response AI agent

The email response AI agent generates and sends an email response.

Workflow

The agent helps generates and sends email.

1. Get source record details.
2. Get preliminary email reply.
3. Generate draft-email-content using source record details.
4. Create email draft using draft-email-content and source record details.
5. Inform the user of the email process result.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Create email draft Generate draft email content Get record details

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Configuration (continued)

Field	Description
	Send Email
Allowed user roles The specific user roles that can access this AI agent.	sn_esm_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_customerservice_agent, sn_customerservice.consumer_agent, sn_customerservice_manager
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Triage cases

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Entity extraction AI agent

The entity extraction AI agent extracts entities from emails and information from documents. It matches the entities with a list of approved fields.

Workflow

1. Get the source record details.
2. Get the case type.
3. Get the operation type.
4. Identify entity extracted fields.
5. Check for task definition ID for document extraction.
6. Perform document extraction.
7. Update the record with the final fields to update.
8. Communicate the final fields to update to the user.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Get record details Identify entity extracted fields Update record fields **Subflows** Perform Document Extraction
Allowed user roles The specific user roles that can access this AI agent.	sn_esm_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_customerservice_agent, sn_customerservice.consumer_agent, sn_customerservice_manager
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Triage cases

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Image to task plan template AI agent

This AI agent asks the user to upload an image, extracts the task dependencies from it, and returns the result as JSON.

Workflow

The agent extracts a list of tasks and their dependencies from an uploaded image.

1. Upload the file automatically, without asking the user to upload it or showing the attachment ID in the conversation.
2. Extract the tasks and their dependencies from the uploaded file.
3. Display the extracted tasks, showing which tasks depend on one or more other tasks.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Extract JSON From Image **Conversational Topic** Upload File
Allowed user roles The specific user roles that can access this AI agent.	sn_task_plan.admin
Data access roles The specific user identity roles that determine which data the AI agent	sn_task_plan.admin

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Design Telecom Order Fulfilment Template

Informational queries AI agent

The informational queries AI agent summarizes all informational answers for a record.

Workflow

The agent summarizes product information, case information, user information, contact information, consumer information, account information, and related fields.

1. Get the source record details.
2. Get the list of all relevant informational fields.
3. Process each informational field to generate a valid answer.
4. Display the summary.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Search retrieval** Gather information from knowledge graph

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Configuration (continued)

Field	Description
	Get relevant knowledge articles **Script** Get record details Record the list of all answers
Allowed user roles The specific user roles that can access this AI agent.	sn_esm_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_customerservice_agent, sn_customerservice.consumer_agent, sn_customerservice_manager
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Triage cases

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Issue identifier complaint case intake AI agent

This AI agent is used for product and location-based grievances. It helps with intakes, documentation, and processing.

Workflow

The agent helps users complete tasks related to issue identifier complaint case intake.

1. Retrieve user information.
2. Determine complaint type.
3. Verify product or location.
4. Handle multiple matches for products or locations.
5. Extract case information.
6. Display all extracted information and confirm its accuracy.
7. Validate field format.
8. Search for similar open complaints.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Convert date Create complaint case record Create new related parties related list Get Logged In user details List related parties type Related parties identification Update fields Verify fields Verify Product and Location **Search retrieval** Search Similar Complaint cases
Allowed user roles The specific user roles that can access this AI agent.	sn_customerservice.customer, sn_customerservice.customer, sn_customerservice.consumer
Data access roles The specific user identity roles that determine which data the AI agent	sn_customerservice.consumer, sn_customerservice.customer

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Default VA Workflow

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Live interaction recommendations AI agent

The agent analyzes the conversation between a customer and a live agent. It recommends actions that help the live agent resolve the customer's issue.

Workflow

The agent helps a live agent during a customer call by surfacing recommendations from the interaction.

1. Show a **Get Recommendations** button when the session starts.
2. Analyze the current interaction when the user selects the button.
3. Display the recommendations, with clarifying options where they apply.
4. Refine the recommendations when the user selects an option or asks a follow-up question.
5. Show the button again so the user can refresh the recommendations as the call continues.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Get Interaction Context **Tool** Analyse Interaction and Generate Recommendation
Allowed user roles The specific user roles that can access this AI agent.	sn_esm_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_customerservice_agent, and sn_customerservice.consumer_agent
Triggers	Live interaction recommendations AI agent - Interaction
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

RMA Assistant AI agent

This AI agent helps customers and human agents with RMA case creation and processing for product returns, repairs, and replacements.

Workflow

The agent helps users complete RMA tasks.

1. Acknowledge concerns empathetically.
2. Inform the user, "I understand this isn't fully addressing your needs."
3. Wait for acknowledgment.
4. Transfer to human agent.
5. End chat only after confirmation.
6. If user asks off-topic questions: Inform politely that this is not part of the RMA Case flow and offer to connect to live agent at the end.
7. After live agent chat ends, or if no agents are found, close the flow smoothly with summary.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Check Product Exceptions Check user has a Customer role Create case line entitlements Create RMA Case Create RMA Case Line Customer identification Fetch Request Reason Code values Fetch the associated case lines Get the available entitlements Get the Recommendations Move case to Request info Move case to WIP Product Lookup RMA Case lookup Send summary email for RMA case Update case lines Update interaction record with account and contact Update RMA case

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Configuration (continued)

Field	Description
	Update RMA Case state Valid RMA case number **Topic Block** Fetch User Context
Allowed user roles The specific user roles that can access this AI agent.	sn_csm_rma_case.csm_rma_case_agent, sn_customerservice.customer
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Transactional queries AI agent

The transactional queries AI agent will update a record with any collected transactional values.

Workflow

The agent helps users complete tasks related to transactional queries.

1. Gather fields to update by calling the entity extraction AI agent (use "update" as the operation type).
2. If there are any field updates found by the entity extraction AI Agent, then update the record.
3. Inform the user of the status and update.
4. Save the transactional agent summary.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Save Transactional Agent Summary Update Record
Allowed user roles The specific user roles that can access this AI agent.	sn_esm_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_esm_agent
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Triage cases planner AI agent

This AI agent triages cases. It takes appropriate actions based on the record's sentiment and intents. It is intended for agents and end-users who need assistance in resolving queries efficiently, as well as assessing a record for possible case creation.

Workflow

The agent helps users complete tasks related to triage cases planner.

1. Invoke the context validator AI agent to validate the record.
2. If the sentiment is negative, use the case creation AI agent to create a case. If the sentiment is neutral or positive, proceed to step 3.
3. Invoke the informational queries AI agent to process informational intents.
4. Invoke the transactional queries AI agent to process the list of transactional intents.
5. Invoke the case creation AI agent from the team to create the case.
6. Generate a customer reply.
7. Invoke the email response AI agent to generate and send an email response.
8. Generate the execution overview and add it to the case work notes.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Generate Customer Reply Content Get list of intent of specific type **Flow Action** Update source record worknotes
Allowed user roles	sn_esm_agent

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_esm_agent
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about Customer Service Management at Customer Service Management.

Triage cases wrap up AI agent

The triage cases wrap up AI agent finalizes the case triage process by synthesizing the execution and posting the summary to the record's work notes.

Workflow

The agent helps users complete tasks related to triage cases wrap up.

1. Gather the record table, record sys_Id, and record number.
2. Gather the AI agents execution summary.
3. Update record work notes with the execution summary, along with the record table, record sys_Id, and record number.
4. Display the AI agents execution summary to the user.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for

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Configuration (continued)

Field	Description
	tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Update record with AI Agents execution
Allowed user roles The specific user roles that can access this AI agent.	sn_esm_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_customerservice_agent, sn_customerservice.consumer_agent, sn_customerservice_manager
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Triage cases

Learn more about Customer Service Management at Customer Service Management.

Troubleshooting steps identification AI agent

An AI agent responsible for gathering required context, identifying troubleshooting steps by comparing with KBs, similar cases and standard operating manuals, and proposing additional troubleshooting steps.

Workflow

The agent helps users complete tasks related to troubleshooting steps identification.

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1. Retrieve case details and identify troubleshooting actions already attempted by the user to avoid duplication.
2. Search for relevant troubleshooting guidance from similar cases and knowledge articles using the case description. If no relevant results are found, exit with the predefined message.
3. Analyze retrieved cases and knowledge articles to extract actionable troubleshooting steps with correct source attribution.
4. Identify and process any related documents linked to the search results, applying deterministic document selection logic and extracting troubleshooting steps when documents exist.
5. Combine troubleshooting steps from cases, knowledge articles, and documents, then remove steps already attempted by the user or semantically equivalent duplicates.
6. Present only unique, value-added troubleshooting recommendations in a structured format, clearly separating top recommendations, additional suggestions, and a fully hyperlinked sources section.
7. Ask for confirmation before updating work notes, update them only upon approval, display the exact confirmation message when successful, and then exit the workflow.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Get case details using number and fields Get document list using comma separated list of 'Id' values Update the work notes of the case **Subflows** Get case details using number and fields Submit and Fetch Results **Search retrieval**

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Configuration (continued)

Field	Description
	Get relevant knowledge articles Get Similar Cases
Allowed user roles The specific user roles that can access this AI agent.	sn_esm_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_customerservice_agent, sn_customerservice.consumer_agent, platform_ml_di.creation_agent
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about Customer Service Management at Customer Service Management.

Employee Experience

Employee Experience AI agents

The following AI agents are available for Employee Experience.

Company news & events AI agent

This AI agent keeps users informed by sharing the latest updates on news, events, and announcements.

Workflow

The agent helps users complete tasks related to company news & events.

1. Retrieve latest news and events using extracted filters.
2. If processedNews is empty or an empty response is returned from previous step, inform the user that no information has been found, and end the conversation.
3. Display processedNews to the user.
4. If NextPageToken is not null, ask the user whether they want to see more results, or if they would like more details about a specific news or event.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Generate news detailed response Get latest news and events Get next news and events Take event action
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	nobody
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Learn more about Employee Experience at Unified Employee Experience.

Employee Service Management

Employee Service Management AI agents

The following AI agents are available for Employee Service Management.

Universal Request departmental ticket creator AI agent

Automates the routing of universal requests to appropriate departmental ticketing systems by analyzing department predictions and creating properly configured HR cases or IT incidents with all necessary field mappings and reference tracking.

Workflow

The agent helps users complete tasks related to universal request departmental ticket creator.

1. Identify the department.
2. Create the ticket.
3. Return the result.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Create HR case for UR Create incident for UR UR Departmental service set identifier
Allowed user roles The specific user roles that can access this AI agent.	snc_internal

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Configuration (continued)

Field	Description
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	platform_ml_read, sn_gaf.data_viewer, sn_gaf.data_writer, sn_uni_req.universal_request_read, sn_uni_req.universal_request_write, sn_ur_ai_agents.universal_request_read, sn_uxc_gen_ai.platform_ai_field_predictor
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Universal Request Router

Learn more about Employee Service Management at Employee Service Management.

Enterprise Architecture

Enterprise Architecture AI agents

The following AI agents are available for Enterprise Architecture.

Enterprise Architecture explorer for analysis and queries AI agent

The agent answers questions about Enterprise Architecture data based on Common Service Data Model (CSDM) 5.0 entities and their relationships. It covers business capabilities, business applications, services, infrastructure, integrations, value streams, AI systems, technology standards, and conformance.

Workflow

The agent helps the user explore, analyze, and get answers about their Enterprise Architecture data.

1. Interpret the user's question and identify the architecture entities it refers to. Ask for clarification only when required information is missing, such as which owner field the user means.
2. Retrieve the requested data, such as application rationalization scores, capability health, technology risk, architectural artifacts, relationships between entities, and field-level details.
3. Trace upstream or downstream dependencies from a named item when the user asks about impact or dependencies.
4. For questions about missing relationships, such as applications with no assigned service, combine results from multiple queries to answer the question completely.
5. Try alternative approaches when a query returns no results before reporting that no data was found.

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6. Present the answer in plain text with links to the relevant records, summarizing large result sets and offering to show more.
7. Highlight notable patterns in the data, such as low scores or coverage gaps, and suggest two or three follow-up questions based on the results.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** App Rationalization Query Artifact Entity Resolver Capability Hierarchy App Resolver Related Entities Resolver **Knowledge Graph** EA Knowledge Graph
Allowed user roles The specific user roles that can access this AI agent.	sn_apm.apm_read, sn_apm.apm_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_apm.apm_read, sn_apm.apm_user

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Enterprise Architecture Explorer Query Agent

Related topics

- Exploring Enterprise Architecture query agent
- Working with Enterprise Architecture query agent
- Enable Knowledge Graph system properties for the Enterprise Architecture query agent
- Exploring ServiceNow Otto for Enterprise Architecture (EA)

Enterprise Architecture diagrams AI agent

The agent finds a business application by name or ID and generates a hierarchy diagram saved as a named architectural artifact. The agent also summarizes the generated diagram.

Workflow

The agent helps the user generate and review a hierarchy diagram for a business application.

1. Look up the business application that the user names or identifies by ID.
2. If no match is found, ask the user for the correct business application name or ID.
3. If several matches are found, list them and ask the user to select one.
4. Ask the user for an artifact name for the diagram, and ask for a different name if an artifact with that name already exists.
5. Generate the hierarchy diagram for the selected business application.
6. Present a link to the generated diagram so the user can review it.
7. Generate and display a summary of the diagram.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Generate Business Application Summary Generate Diagram URL Lookup Business Application
Allowed user roles The specific user roles that can access this AI agent.	Not defined.
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_apm.apm_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Generate enterprise architecture diagram

Related topics

- Enterprise Architecture AI agent diagramming agentic workflow
- Exploring ServiceNow Otto for Enterprise Architecture (EA)

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Enterprise Asset Management

External Content Connectors

Field Service Management

Field Service Management AI agents

The following AI agents are available for Field Service Management.

Create work order AI agent

This AI agent creates work orders using text descriptions and image.

Workflow

The agent helps users complete tasks related to create work order.

1. Receive the user's request and validate required inputs.
2. Execute the appropriate tools to perform the requested action.
3. Return the results or update the relevant record.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Subflow** Submit and Fetch Results **Conversational topic** upload image **Scripts** Attach the image to the work order Get attachment sys id from media link Create and update work order for image

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Configuration (continued)

Field	Description
Allowed user roles The specific user roles that can access this AI agent.	wm_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	wm_agent
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Create a work order

Learn more about at External Content Connectors.

Parts audit AI agent

This AI agent assists technicians in conducting thorough parts validation only for work order tasks. It streamlines the process of verifying and reporting parts usage, ensuring accuracy and accountability.

Workflow

The agent helps users complete tasks related to parts audit agent.

1. Use the appropriate tool to fetch the work notes with record number from context.
2. Extract the model details, such as model name, quantity, and so on.
3. Check for assets.
4. Match usable and removable assets.
5. Present the user with a summary and wait for confirmation.
6. Perform requested operations.
7. Present the user with a final message.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Fetch work notes Remove part action Use part action **Generative AI skills** Removable asset matching tool Usable asset matching tool
Allowed user roles The specific user roles that can access this AI agent.	wm_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	wm_agent
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Validate parts

Learn more about at External Content Connectors .

Shift and schedule management AI agent

This AI agent helps managers create, review, update, and delete shifts and schedules, and assign technicians to them. It suggests default shift details, finds technicians by skill or name, and asks the manager to confirm one complete plan before making changes. Managers can also open shifts for technician signup.

Workflow

The agent helps managers create and manage shifts and schedules and assign technicians.

1. Determine whether the manager wants to create, view, change, or delete shifts and schedules, or find technicians.
2. Fill in any missing shift details using standard defaults, and search for technicians by skill or name.
3. Display a summary of the plan and ask the manager to confirm, change, or cancel.
4. After confirmation, create the shifts and schedule, then assign the technicians directly or open the shifts for signup.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Delete Schedule Plan Display Shift/Schedule Summary Card Display Signup Roster Card

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Configuration (continued)

Field	Description
	Display Technician Selector Card Get Users with Skills Update Schedule Plan executeSchedulePlan getCommonlyUsedShift getManagedAgents manageSignup readSchedulingData
Allowed user roles The specific user roles that can access this AI agent.	wm_manager
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	wm_manager
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	• Default VA Workflow • Shift and schedule management

Financial Services Operations

Financial Services Operations AI Agents

The following AI agents are available for Financial Services Operations.

ACH dispute return recommendation AI agent

The AI agent guides the human agent through a structured decision-making process to determine the best action for an ACH dispute return task. The ACH dispute return recommendation AI agent analyzes disputed transactions based on merchant analysis and Nacha eligibility. The agent recommends actions based on historical data, and applies predefined rules when data is limited.

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Workflow

The AI agent helps the human agent decide how to resolve an ACH dispute return task.

1. Look up the ACH dispute task and display the case, transaction, customer, dispute amount, and reason code.
2. Check historical records for similar disputes with the same reason code and outcome.
3. Determine a recommended action — deny, file a return, or follow up with the ODFI — based on the merchant analysis and NACHA operating guidelines findings, using historical patterns when enough exist.
4. Present the recommendation and its supporting rationale, then ask the human agent to confirm or disagree.
5. If the human agent disagrees, let them choose an alternative action and provide a reason for the change.
6. Record the final action and reasoning on the dispute task.
7. Close the conversation once the task is updated.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Record Operations** Set AI recommendation **Scripts** Fetch historical data count Fetch most recommended frequent record Get recommendation for non historical data Retrieve record data Search retrieval script Updating the record

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Configuration (continued)

Field	Description
Allowed user roles The specific user roles that can access this AI agent.	• sn_bom_credit_card.dispute_agent • sn_bom_credit_card.dispute_agent_connector
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	• sn_bom_credit_card.dispute_agent • sn_bom_credit_card.dispute_agent_connector
Triggers	Recommendation Analysis Trigger
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Banking CSR customer insights AI agent

The AI agent answers a customer service representative's questions about a banking customer, presenting account, transaction, and case information in a clear, structured format so the representative can quickly explore relevant customer data.

Workflow

The AI agent helps the CSR explore a banking customer's account, transaction, and case information through natural-language questions.

1. Load the default configuration for the customer insights session.
2. Ask the CSR what they'd like to know about the customer, offering quick-prompt options alongside free-text entry.
3. Look up the answer to each query using the customer's context and the banking domain.
4. Present the results in a clear, per-topic summary using only the most relevant fields, and let the CSR know when nothing matches.
5. Return to asking for the next question, continuing until the CSR ends the session.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Fetch default configurations **Subflows** CSR query analyser
Allowed user roles The specific user roles that can access this AI agent.	• sn_fso_csr.business_agent • sn_fso_csr.personal_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	• sn_fso_csr.business_agent • sn_fso_csr.personal_agent
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Banking CSR support AI agent

The AI agent acts as a copilot for a customer service representative on a live banking call or chat, retrieving account, transaction, balance, credit, loan, and policy information in real time and presenting it in a clear, conversational format so the representative can respond quickly.

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Workflow

The agent helps the CSR retrieve banking customer information during a live interaction and keeps the conversation moving.

1. When the CSR opens a new customer interaction, load that interaction's context and reset any prior conversation state.
2. Take the CSR's question — a typed banking query or a request to check for a new customer interaction — and send it, with the current customer context, to the query analysis tool.
3. Update the tracked customer context (name, type, and topic) with what the tool returns.
4. Present the results found, showing the most relevant account, transaction, case, or interaction fields, and note plainly when a value wasn't available.
5. Add related knowledge-base information after the account results whenever the tool returns any.
6. If nothing was found for the request, let the CSR know and offer to try again or check for a new customer interaction.
7. End every response with a quick-action button so the CSR can continue the conversation without typing.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Subflows** CSR Query Analyser
Allowed user roles The specific user roles that can access this AI agent.	• sn_fso_csr.business_agent • sn_fso_csr.personal_agent
Data access roles The specific user identity roles that	• sn_fso_csr.business_agent • sn_fso_csr.personal_agent

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Configuration (continued)

Field	Description
determine which data the AI agent can access and what actions it can take.	
Triggers	CSR Interaction
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Dispute communication AI agent

The agent drafts a customer email about a card dispute outcome. It chooses the message template based on the dispute's final action, fills in the relevant transaction and merchant details, and adjusts the tone to match the template's intended message.

Workflow

The agent helps prepare the customer-facing email for a resolved card dispute.

1. Retrieve the dispute task's full details using the given task ID.
2. Find the email template that matches the dispute's final action.
3. Fill in the template with the dispute's transaction, merchant, and customer details.
4. Adjust the tone and phrasing of the filled-in message to match the template's intended tone, while keeping its structure and formatting.
5. Create an email draft record with the finished content and report the outcome.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Fetch card disputes task context details Generate dispute communication email draft record **Search retrievals** Get email templates
Allowed user roles The specific user roles that can access this AI agent.	• sn_bom_credit_card.dispute_agent • sn_bom_credit_card.dispute_agent_connector
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	• sn_bom_credit_card.dispute_agent • sn_bom_credit_card.dispute_agent_connector
Triggers	Dispute communication task
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Friendly fraud AI agent

The agent guides the human agent through resolving a friendly fraud dispute. It recommends an action based on published guidance and similar past overrides, then supports the agent's decision with real-time context to keep resolutions accurate and compliant.

Workflow

The agent helps the human agent decide how to resolve a friendly fraud dispute.

1. Look up the friendly fraud task and display its case, transaction, customer, and dispute amount details.
2. Retrieve the knowledge article on resolving friendly fraud disputes and use it to determine a recommended action and reason.
3. Record the recommended action and reason on the task.
4. Check historical friendly fraud cases where the recommendation was overridden and surface up to two similar past examples.

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5. Present the recommendation, its reasoning, and any historical insight, then ask the agent to choose a resolution action — decline the dispute, issue a credit and write-off, or proceed with the dispute.
6. If the agent's choice differs significantly from the recommendation, ask them to explain why.
7. Draft rejection communication when the agent declines the dispute, and let the agent know what to do next.
8. Update the task with the resolution taken and confirm with a closing message.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Check if friendly fraud task valid for further processing Get recently closed friendly fraud tasks with overrides Update friendly fraud recommended action and recommended action reason Update friendly fraud resolution action taken **Subflows** Get friendly fraud task details **Search retrievals** Get knowledge article
Allowed user roles The specific user roles that can access this AI agent.	• sn_bom_credit_card.dispute_agent • sn_bom_credit_card.dispute_agent_connector

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Configuration (continued)

Field	Description
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	• sn_bom_credit_card.dispute_agent • sn_bom_credit_card.dispute_agent_connector
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Friendly fraud resolving

Insurance CSR customer insights AI agent

The agent acts as a copilot for a customer service representative (CSR), answering natural-language questions about a single customer's insurance policies, coverages, claims, billing, and servicing cases, as well as general product and procedural guidance, and presents structured, context-aware answers with follow-up options.

Workflow

The agent helps the CSR look up a single customer's insurance information and related guidance during the session.

1. Ask the CSR what they'd like to know about the customer identified for this session.
2. Classify the question as a general knowledge question, a product-catalog question, or a question about the customer's own records, and confirm it's within scope — insurance policies, coverages, claims, servicing cases, billing, or procedures.
3. If the question refers to a record picked from an earlier list, resolve which record it means, asking the CSR to confirm when it's ambiguous.
4. If the question asks about a sub-record like coverages or beneficiaries without naming the parent policy or claim, first look up the matching parent records and ask the CSR which one to use.
5. Look up the customer's data, relevant product information, and knowledge-base guidance as needed to answer the question.
6. Present the results — as a list, a single record's details, a sub-record breakdown, or a short summary, depending on what was asked — and cite the knowledge-base source when guidance is included.
7. Let the CSR know when nothing was found, then return to asking for the next question.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Subflows** Insurance Data Lookup
Allowed user roles The specific user roles that can access this AI agent.	• sn_ins_csr.claims_agent • sn_ins_csr.servicing_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	• sn_ins_csr.claims_agent • sn_ins_csr.servicing_agent
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Insurance CSR support AI agent

The agent gives a customer service representative (CSR) real-time answers during a live insurance call, either from a typed question or from the latest call transcript, retrieving the customer's policy, coverage, claim, and billing data or knowledge-base guidance so the CSR can respond quickly without switching screens.

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Workflow

The agent helps the CSR answer a customer's insurance question during a live call, whether typed directly or picked up from the call transcript.

1. When the CSR selects **Get customer request**, read the latest call transcript to pick up the customer's most recent question; otherwise take the CSR's typed question directly.
2. Classify the question as a general knowledge question, a product-catalog question, or a question about the customer's own records, and confirm it's within scope — insurance policies, coverages, claims, servicing cases, or procedures.
3. If the question refers to a record picked from an earlier list, resolve which record it means, asking the CSR to confirm when it's ambiguous.
4. If the question asks about a sub-record like coverages or beneficiaries without naming the parent policy or claim, first look up the matching parent records and ask the CSR which one to use.
5. Look up the customer's data, relevant product information, and knowledge-base guidance as needed to answer the question.
6. Present the results — as a list, a single record's details, a sub-record breakdown, or a short summary, depending on what was asked — citing the knowledge-base source when guidance is included.
7. Let the CSR know when nothing was found, then offer to pull the next customer request and wait for the next question.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Conversation Transcript Reader **Subflows** Insurance Data Lookup

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Configuration (continued)

Field	Description
Allowed user roles The specific user roles that can access this AI agent.	• sn_ins_csr.claims_agent • sn_ins_csr.servicing_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	• sn_ins_csr.claims_agent • sn_ins_csr.servicing_agent
Triggers	CSR Interaction for Insurance
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Merchant analysis for disputes AI agent

The agent evaluates the merchant behind a disputed transaction for credibility. It researches the merchant's reputation and regulatory history, weighs the evidence against a set of rules, and recommends whether the merchant is credible, with a rationale the human agent can accept or override.

Workflow

The agent helps the human agent assess whether a disputed transaction's merchant is credible.

1. Look up the merchant details for the disputed transaction and confirm the required task data is present.
2. Display the task's case, transaction, customer, dispute amount, and reason code.
3. Search the web for information about the merchant's reputation, complaints, and regulatory history, prioritizing government and regulatory sources — or fall back to analyzing the case details alone if search is unavailable.
4. Weigh the findings against a set of credibility rules to determine whether the merchant is credible or not.
5. Present the credibility assessment and its rationale, then ask the agent to agree or disagree.
6. If the agent disagrees, ask for their reasoning and record the opposite assessment instead.
7. Record the final credibility outcome and reasoning on the task, and close the conversation.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Get Merchant Details From Task **Record Operations** Set AI recommendation **Scripts** AI Credibility Determination Logic Fetch Task Details Update Merchant Analysis Final Outcome And Close The Task **Web searches** Web search
Allowed user roles The specific user roles that can access this AI agent.	• sn_bom_credit_card.dispute_agent • sn_bom_credit_card.dispute_agent_connector
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	• sn_bom_credit_card.dispute_agent • sn_bom_credit_card.dispute_agent_connector
Triggers	Merchant analysis task

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Nacha operating guidelines check AI agent

The agent determines whether a return code assigned to a disputed transaction is eligible for filing. It checks the case against NACHA operating guidelines' time-frame and documentation requirements and presents its eligibility decision and reasoning to the human agent for confirmation.

Workflow

The agent helps the human agent confirm whether a return code is eligible for filing under NACHA rules.

1. Look up the return code eligibility task and confirm the return code is present.
2. Display the case, transaction, customer, dispute amount, and reason code details.
3. Fetch the NACHA return-code eligibility guidelines and the customer's intake responses for the transaction.
4. Check the return code's eligibility against the guidelines' time-frame limit and Written Statement of Unauthorized Debit (WSUD) requirement.
5. Present the eligibility decision and its rationale, then ask the agent to agree or disagree.
6. If the agent disagrees, ask for their reasoning and reverse the eligibility decision accordingly.
7. Record the final eligibility outcome and reasoning on the task, and confirm closure with the agent.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Record Operations** Set AI recommendation **Scripts** Fetch intake responses Update eligibility final outcome and close task **Search retrievals** Get knowledge article **Subflows** Get return code eligibility task details
Allowed user roles The specific user roles that can access this AI agent.	• sn_bom_credit_card.dispute_agent • sn_bom_credit_card.dispute_agent_connector
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	• sn_bom_credit_card.dispute_agent • sn_bom_credit_card.dispute_agent_connector
Triggers	Nacha operating guidelines evaluation task
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Governance, Risk, and Compliance

Governance, Risk, and Compliance AI agents

The following AI agents are available for Governance, Risk, and Compliance.

Control objective change AI agent

This AI agent acts as a Compliance Manager that validates if the description and supplemental guidance of a given control objective need updates based on the associated citations. The AI agent recommends new values if changes are required, and updates the control objective record after getting confirmation from the user.

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Workflow

The agent helps users complete tasks related to control objective change agent.

1. Greet the user and fetch the control objective based on the provided sys_id.
2. Review the control objective's description and supplemental guidance fields to determine if updates are needed.
3. If the control objective is up to date, provide the user with an option for a manual update.
4. If the control objective is requires an update, provide recommendations.
5. Based on user's responses, update control objectives. Loop if necessary.
6. Inquire about the next item. Loop until finished.
7. Ending message.

For more information on Governance, Risk, and Compliance, see Governance, Risk, and Compliance

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Fetch control objective details Get list of impacted control objective Mark control objective as reviewed Update control objective details **Generative AI skill** Validate and recommend control objective field values
Allowed user roles	sn_grc_sharegenai.compliance_library_aiagent_user

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_compliance.manager, sn_grc_sharegenai.compliance_library_aiagent_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Not applicable.

For more information on Governance, Risk, and Compliance, see Governance, Risk, and Compliance

Issue action plan AI agent

This AI agent identifies the optimal steps for resolving an issue by referencing the past similar issue details. It presents a step-by-step summarized action plan to the user.

Workflow

The agent helps users complete tasks related to issue action plan.

1. Get record details.
2. Generate an action plan for the issue using the Generate Issue Action Plan tool.
3. Ask for user feedback.
4. If the user chooses to dismiss the action plan, inform the user that they can populate the action plan manually.
5. If the user chooses to edit the action plan, show a message asking for the user's feedback to refine the action plan.
6. Use user feedback to refine the action plan.
7. If the user chooses to accept the action plan, format and save it.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Generative AI skill** Generate Issue Action Plan **Record Operations** Get Issue Detail Issue Resolution Agent Usage Status column Update Tool Save action plan
Allowed user roles The specific user roles that can access this AI agent.	sn_grc_genai.issue_aiagent_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_grc.business_user, 90c5d097533320101d7dddeeff7b126e, sn_grc.compliance_assurance_business_user, sn_grc_genai.issue_aiagent_user, sn_grc.user, snc_required_script_writer_permission
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Not defined.
Used in agentic workflows	Optimize GRC issue resolution

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For more information on Governance, Risk, and Compliance, see Governance, Risk, and Compliance

Remediation tasks AI agent

This AI agent identifies the remediation tasks for resolving an issue by referencing the action plan field on the issue record.

Workflow

The agent helps users complete tasks related to remediation tasks.

1. Fetch the sn_grc_issue sys_id or number from the memory, or ask for the issue number.
2. Use the Suggest remediation tasks for the issue tool to generate recommendations.
3. Ask the user to accept, edit, or dismiss the suggestions.
4. If the user chooses to edit the suggestions, refine them based on feedback.
5. If the user accepts the suggestions, create the remediation tasks.
6. End flow when tasks are complete or the user dismisses suggestions.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Create remediation task **Generative AI skill** Suggest remediation tasks for the issue
Allowed user roles The specific user roles that can access this AI agent.	sn_grc_genai.issue_aiagent_user
Data access roles	sn_grc.business_user, 90c5d097533320101d7dddeeff7b126e, sn_grc.compliance_assurance_business_user,

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Configuration (continued)

Field	Description
The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_grc_genai.issue_aiagent_user, sn_grc.user, snc_required_script_writer_permission
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Optimize GRC issue resolution

For more information on Governance, Risk, and Compliance, see Governance, Risk, and Compliance

Report a GRC issue AI agent

This AI agent enriches the given issue description with additional information by looking at historical data and using GRC context. It analyzes, extracts key information (such as issue type, date of occurrence, and so on), and creates a GRC issue.

Workflow

The agent helps users complete tasks related to report a GRC issue.

1. Receive the user's request and gather key information.
2. Review the isIssue field from the tool response and respond to the user.
3. Ask the user for additional or missing issue details according to a template.
4. Interact conversationally to refine the issue.
5. Create an issue when the user is satisfied and selects **Submit**.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Create an issue Issue related object information finder **Generative AI skill** Issue key information finder
Allowed user roles The specific user roles that can access this AI agent.	sn_grc_genai.issue_aiagent_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_grc.issue_employee_user, sn_grc.business_user, sn_grc_genai.issue_aiagent_user, 90c5d097533320101d7dddeeff7b126e, sn_grc.compliance_assurance_business_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Default VA Workflow

For more information on Governance, Risk, and Compliance, see Governance, Risk, and Compliance

Hardware Asset Management

Hardware Asset Management AI agents

The following AI agents are available for Hardware Asset Management.

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Hardware Asset Management sourcing AI agent

This AI agent helps to source a requested hardware item through consume, transfer, and purchase.

Workflow

The agent helps users complete tasks related to hardware asset management sourcing.

1. Prompt the user for an item number, if not already provided.
2. Use the Fetch the details of the requested item tool to retrieve information for the requested item number.
3. If there's no error, inform the user of the required quantity.
4. Execute workflow A, which sources the item. If auto_consume, auto_transfer, and auto_purchase are true, and there are no problems, validate the sourcing for the user. If successful, continue to the next step.
5. Execute workflow B, which generates a guided source plan for the requested hardware. The user must approve this plan. If successful, continue to the next step.
6. Execute workflow C, which generates the input plan for the requested hardware. The user must approve this plan.
7. End workflow when C completes.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Auto consume the assets for the requested hardware items Consume the assets for the requested hardware items Fetch the details of the requested item Generate auto source plan for the requested hardware item

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Configuration (continued)

Field	Description
	Generate guided source plan for the requested hardware item Generate user input plan for the requested hardware item Validate the source plan Validate the sourcing status of requested item
Allowed user roles The specific user roles that can access this AI agent.	procurement_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	procurement_user, itil
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Help manage hardware asset requests

Learn more about Hardware Asset Management at Hardware Asset Management.

Impact

Impact AI agents

The following AI agents are available for Impact.

Code fix AI agent

This AI Agent automates the process of analyzing, suggesting, and implementing fixes for code violations or issues detected within code repositories or running scripts. It leverages LLM-driven suggestions while keeping the user in control of approval and refinement.

Workflow

The agent helps users complete tasks related to fixing code.

1. Receive the user's code request.
2. Execute the appropriate tools to detect and handle code violations.
3. Allow user-driven approval, rejection, or refinement.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Code Violation Handler Fetch Codefix Issues Make Additional Changes Handler Solution Accepted Handler Solution Rejected Handler
Allowed user roles The specific user roles that can access this AI agent.	sn_impact_gen_ai.ai_fix_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_impact_gen_ai.ai_fix_user, sn_se.scan_engine_read_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Not defined.
Used in agentic workflows	Code Fix Workflow

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Learn more about Impact at Impact.

Integration Hub

Integration Hub AI agents

The following AI agents are available for Integration Hub.

Box Spoke AI agents

The following AI agents are available for Box Spoke.

Box document management AI agent

This AI agent manages Box documents. It uploads, moves, and removes files, looks up file IDs, searches content, adds metadata to files, and attaches Box files to ServiceNow records.

Workflow

The agent helps the user find, organize, and use Box documents from ServiceNow.

1. Ask the user what they want to do and collect the details the action needs, such as the file or folder.
2. Search Box content or look up a file ID.
3. Upload a file.
4. Add metadata to a file.
5. Move an owned item to another location.
6. Attach a Box file to a ServiceNow record.
7. Remove a file.
8. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add Metadata to File

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Configuration (continued)

Field	Description
	Attach Box File to Record Look up File ID Move Owned Item Remove File Search Content Stream Upload File
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Box Spoke

Integration Hub spokes

Box document sharing AI agent

This AI agent manages sharing and collaboration in Box. It creates shared links, looks up folder collaborators, and adds or removes collaborators.

Workflow

The agent helps the user share Box content and manage collaborators.

1. Ask the user what they want to do and collect the details the action needs, such as the file or folder and collaborator.
2. Look up a folder's collaborators.

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3. Add a collaborator or remove one.
4. Create a shared link.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add Collaborator Create Shared Link Look up Folder Collaborators By ID Remove Collaborator
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Box Spoke

Integration Hub spokes

Box group management AI agent

This AI agent manages Box groups. It creates, updates, and deletes groups.

Workflow

The agent helps the user manage groups in Box.

1. Ask the user what they want to do and collect the details the action needs, such as the group name or ID.
2. Create a new group.
3. Update an existing group.
4. Delete a group.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Group

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Configuration (continued)

Field	Description
	Delete Group Update Group
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Box Spoke

Integration Hub spokes

Box folder management AI agent

This AI agent manages Box folders. It creates folders, looks up folder IDs, and deletes folders.

Workflow

The agent helps the user create and remove folders in Box.

1. Ask the user what they want to do and collect the details the action needs, such as the folder name and parent folder.
2. Look up the folder ID.
3. Create a new folder.
4. Delete a folder.
5. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Folder Delete Folder Look up Folder ID
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Related topics

Box Spoke

Integration Hub spokes

Box legal hold management AI agent

This AI agent manages Box legal hold policies. It creates, updates, unassigns, and removes policies and looks up policies and policy assignments.

Workflow

The agent helps the user manage legal hold policies in Box.

1. Ask the user what they want to do and collect the details the action needs, such as the policy or assignment ID.
2. Look up a legal hold policy by ID or list all policies.
3. Look up a policy assignment by ID or list assignments.
4. Create a new legal hold policy or update an existing one.
5. Unassign a legal hold policy.
6. Remove a legal hold policy.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Legal Hold Policy Look up All Legal Hold Policies Stream Look up Legal Hold Policy Assignment by ID Look up Legal Hold Policy Assignments Stream Look up Legal Hold Policy by ID

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Configuration (continued)

Field	Description
	Remove Legal Hold Policy Unassign Legal Hold Policy Update Legal Hold Policy
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Box Spoke

Integration Hub spokes

Box metadata management AI agent

This AI agent retrieves Box metadata instances on files and folders, by file or folder ID or by metadata scope and template key.

Workflow

The agent helps the user read the metadata applied to Box files and folders.

1. Ask the user what they want to do and collect the details the action needs, such as the file or folder ID, scope, and template key.
2. Look up the metadata instance on a file by file ID or by scope and template key.
3. Look up the metadata instance on a folder by folder ID or by scope and template key.
4. Present the metadata to the user.
5. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Metadata Instance on File By File ID Look up Metadata Instance on File by Scope and Template Key Look up Metadata Instance on Folder By Folder ID Look up Metadata Instance on Folder by Scope and Template Key
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Not applicable.

Related topics

Box Spoke

Integration Hub spokes

Box retention policy management AI agent

This AI agent manages Box retention policies. It looks up policies and policy assignments and updates retention policies.

Workflow

The agent helps the user review and update retention policies in Box.

1. Ask the user what they want to do and collect the details the action needs, such as the policy or assignment ID.
2. Look up a retention policy by ID or list policies.
3. Look up a policy assignment by ID or list assignments.
4. Update a retention policy.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Retention Policies Stream Look up Retention Policy Assignment By ID

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Configuration (continued)

Field	Description
	Look up Retention Policy Assignments Stream Look up Retention Policy by ID Update Retention Policy
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Box Spoke

Integration Hub spokes

Box user management AI agent

This AI agent manages Box users. It creates, updates, enables, disables, and deletes users, looks up user IDs, and adds users to groups.

Workflow

The agent helps the user manage Box user accounts.

1. Ask the user what they want to do and collect the details the action needs, such as the user.
2. Look up the user ID.
3. Create a new user or update an existing one.
4. Enable or disable a user.
5. Add a user to a group.
6. Delete a user.
7. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add User To Group Create User Delete User Disable User Enable User Look up User ID Update User
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Box Spoke

Integration Hub spokes

Client Software Distribution 2.0 AI agents

The following AI agents are available for Client Software Distribution 2.0.

Catalog item creation AI agent

This AI agent creates service catalog items for applications from Microsoft Intune, Jamf, and Microsoft Endpoint Configuration Manager. It configures the software model, identifies or creates the target groups or collections, and creates the software configuration and catalog item.

Workflow

The agent helps the user create a service catalog item for an application that is managed in Microsoft Intune, Jamf, or Microsoft Endpoint Configuration Manager.

1. Ask the user for the application name if they haven't provided it.
2. Look up the application and, if several match, show them grouped by provider and server and ask the user to choose one.
3. Identify the software model type and configure a Client Software Distribution software model, or ask the user to choose a Software Asset Management software model.
4. Find the install and, where applicable, uninstall groups or collections for the application's provider, and ask the user to choose one when several are found.
5. Offer to create a group or collection when none exists, collecting the required details such as type, limiting collection, deploy purpose, and enforcement deadline.
6. For Microsoft Intune applications, ask whether the deployment is user-based or device-based.
7. Create the software configuration and the catalog item, and report the catalog item's sys_id to the user.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for

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Configuration (continued)

Field	Description
	tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Jamf Catalog item Create Microsoft Endpoint Configuration Manager Catalog Item Create Microsoft Intune Catalog item Look up Jamf Target groups **Scripts** Identify Software model Look up Computer Target group by Name Look up Mobile Target Group by Name Look up User Target Group by Name **Subflows** Configure CSD Software model Configure Jamf Target group Configure Microsoft Endpoint Configuration Manager Collection Configure Microsoft Intune group Configure SAM Software model Create Jamf Software configuration Create Microsoft Endpoint Configuration Manager Software Configuration Create Microsoft Intune Software configuration Look up Applications Look up Microsoft Endpoint Configuration Manager Collection Look up Microsoft Intune groups

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Configuration (continued)

Field	Description
	Look up SAM Software models
Allowed user roles The specific user roles that can access this AI agent.	sn_csd.CSD Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_csd.CSD Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Client Software Distribution 2.0 application

Integration Hub solutions

Jamf application targets addition AI agent

This AI agent adds static groups as targets to computer or mobile device applications in Jamf. It identifies the group and application, checks whether the group is already a target, confirms the request with the user, and reports the result.

Workflow

The agent helps the user target a computer or mobile device application in Jamf to a static group.

1. Ask the user for the group type and, if it can't be inferred, whether the application is a computer or mobile device application.
2. Ask for the group name or ID.
3. Look up the group by name and, if several match, ask the user to choose the correct one.
4. Ask for the application name or ID.
5. Look up the application by name and, if several match, ask the user to choose the correct one.
6. Check whether the group is already a target of the application and, if it is, tell the user that no change is needed.

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7. Ask the user to confirm the request.
8. Add the group as a target of the application and report the result, or explain any error that occurred.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Look up Computer Application by Name Look up Mobile Device Application by Name Look up Static Computer Group by Name Look up Static Mobile Device Group by Name Look up Static User Group by Name **Subflows** Add Target Group to Application Look up Application Scope
Allowed user roles The specific user roles that can access this AI agent.	sn_csd.CSD Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_csd.CSD Admin

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Jamf Group Management Agentic Team

Related topics

Client Software Distribution 2.0 application

Integration Hub solutions

Jamf application targets removal AI agent

This AI agent removes static groups as targets from computer or mobile device applications in Jamf. It identifies the group and application, checks that the group is a target, confirms the request with the user, and reports the result.

Workflow

The agent helps the user remove a static group as a target of a computer or mobile device application in Jamf.

1. Ask the user for the group type and, if it can't be inferred, whether the application is a computer or mobile device application.
2. Ask for the group name or ID.
3. Look up the group by name and, if several match, ask the user to choose the correct one.
4. Ask for the application name or ID.
5. Look up the application by name and, if several match, ask the user to choose the correct one.
6. Check whether the group is a target of the application and, if it isn't, tell the user that no change is needed.
7. Ask the user to confirm the request.
8. Remove the group as a target of the application and report the result, or explain any error that occurred.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for

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Configuration (continued)

Field	Description
	tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Look up Computer Application by Name Look up Mobile Device Application by Name Look up Static Computer Group by Name Look up Static Mobile Device Group by Name Look up Static User Group by Name **Subflows** Look up Application Scope Remove Target Group from Application
Allowed user roles The specific user roles that can access this AI agent.	sn_csd.CSD Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_csd.CSD Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Jamf Group Management Agentic Team

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Related topics

Client Software Distribution 2.0 application

Integration Hub solutions

Jamf group creation management AI agent

This AI agent creates static computer, mobile device, or user groups in Jamf. It collects the group type and name, confirms the request with the user, and reports the result or any error.

Workflow

The agent helps the user create a static group in Jamf.

1. Ask the user whether to create a computer, mobile device, or user group.
2. Ask for the name of the new group.
3. Ask the user to confirm before creating the group.
4. Create the static group and report its name and ID, or explain any error that occurred.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Subflow** Create Static Group
Allowed user roles The specific user roles that can access this AI agent.	sn_csd.CSD Admin
Data access roles The specific user identity roles that determine which data the AI agent	sn_csd.CSD Admin

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Jamf Group Management Agentic Team

Related topics

Client Software Distribution 2.0 application

Integration Hub solutions

Jamf group deletion management AI agent

This AI agent deletes static computer, mobile device, or user groups in Jamf. It confirms the deletion with the user and, when applications target the group, offers to remove those targets first so that the deletion can proceed.

Workflow

The agent helps the user delete a static group in Jamf.

1. Ask the user for the group type and the group name or ID.
2. Look up the group by name and, if several match, ask the user to choose the correct one.
3. Ask the user to confirm the deletion.
4. Check whether any computer or mobile device applications target the group. If so, list them and ask whether to remove the group as a target from each one.
5. Stop the deletion if the user declines to remove the application targets.
6. Delete the group and report the result, or explain any error that occurred.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Look up Computer Applications by Target Computer Group Look up Computer Applications by Target User Group Look up Mobile Device Applications by Target Mobile Device Group Look up Mobile Device Applications by Target User Group Look up Static Computer Group by Name Look up Static Mobile Device Group by Name Look up Static User Group by Name **Subflows** Delete Group Remove Target Group from Application
Allowed user roles The specific user roles that can access this AI agent.	sn_csd.CSD Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_csd.CSD Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Jamf Group Management Agentic Team

Related topics

Client Software Distribution 2.0 application

Integration Hub solutions

Jamf group membership addition AI agent

This AI agent adds computers, mobile devices, or users to static groups in Jamf. It identifies the group and the member, confirms the request with the user, and reports the result or any error.

Workflow

The agent helps the user add a computer, mobile device, or user to a static group in Jamf.

1. Ask the user for the group type and the group name or ID.
2. Look up the group by name and, if several match, ask the user to choose the correct one.
3. Ask for the name or ID of the computer, mobile device, or user to add.
4. Search for matching members by name, ask the user to choose if several match, and look up the member's Jamf ID.
5. Ask the user to confirm the request.
6. Add the member to the group and report the result, or explain any error that occurred.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add Computer to Static Group Add Mobile Device to Static Group

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Configuration (continued)

Field	Description
	Add User to Static Group Look up Computer by Serial Number Look up Mobile Device by Serial Number Look up User by Username **Scripts** Look up Device by Partial Name Look up Static Computer Group by Name Look up Static Mobile Device Group by Name Look up Static User Group by Name Look up User by Partial Name
Allowed user roles The specific user roles that can access this AI agent.	sn_csd.CSD Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_csd.CSD Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Jamf Group Management Agentic Team

Related topics

- Client Software Distribution 2.0 application
- Integration Hub solutions

Jamf group membership removal AI agent

This AI agent removes computers, mobile devices, or users from static groups in Jamf. It identifies the group and the member, confirms the request with the user, and reports the result or any error.

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Workflow

The agent helps the user remove a computer, mobile device, or user from a static group in Jamf.

1. Ask the user for the group type and the group name or ID.
2. Look up the group by name and, if several match, ask the user to choose the correct one.
3. Ask for the name or ID of the computer, mobile device, or user to remove.
4. Search for matching members by name, ask the user to choose if several match, and look up the member's Jamf ID.
5. Ask the user to confirm the request.
6. Remove the member from the group and report the result, or explain any error that occurred.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Computer by Serial Number Look up Mobile Device by Serial Number Look up User by Username Remove Computer from Static Group Remove Mobile Device from Static Group Remove User from Static Group **Scripts** Look up Device by Partial Name Look up Static Computer Group by Name Look up Static Mobile Device Group by Name Look up Static User Group by Name

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Configuration (continued)

Field	Description
	Look up User by Partial Name
Allowed user roles The specific user roles that can access this AI agent.	sn_csd.CSD Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_csd.CSD Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Jamf Group Management Agentic Team

Related topics

Client Software Distribution 2.0 application

Integration Hub solutions

Microsoft Endpoint Configuration Manager application targets addition AI agent

This AI agent adds collections as deployment targets to applications in Microsoft Endpoint Configuration Manager. It collects the collection, application, and deployment settings, confirms the request with the user, and reports the result.

Workflow

The agent helps the user deploy an application in Microsoft Endpoint Configuration Manager by adding a collection as a target of that application.

1. Ask the user for the collection type and the collection name or ID.
2. Look up the collection by name and, if several match, ask the user to choose the correct one.
3. Ask for the application name or ID.
4. Look up the application by name and, if several match, ask the user to choose the correct one.
5. Ask whether the deployment should install or uninstall the application, and whether its purpose is Available or Required.
6. Ask whether to use the default enforcement deadline or a date and time that the user specifies.

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7. Summarize the deployment details and ask the user to confirm.
8. Add the collection as a target of the application and report the result, or explain any error that occurred.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Look up Application by Name Look up Collection by Name **Subflow** Add Target Collection to Application
Allowed user roles The specific user roles that can access this AI agent.	sn_csd.CSD Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_csd.CSD Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Microsoft Endpoint Configuration Manager Collection Management Agentic Team

Related topics

Client Software Distribution 2.0 application

Integration Hub solutions

Microsoft Endpoint Configuration Manager application targets removal AI agent

This AI agent removes collections as deployment targets from applications in Microsoft Endpoint Configuration Manager. It identifies the collection and application, confirms the request with the user, and reports the result or any error.

Workflow

The agent helps the user remove a collection as a target of an application in Microsoft Endpoint Configuration Manager.

1. Ask the user for the collection type and the collection name or ID.
2. Look up the collection by name and, if several match, ask the user to choose the correct one.
3. Ask for the application name or ID.
4. Look up the application by name and, if several match, ask the user to choose the correct one.
5. Ask the user to confirm the request.
6. Remove the collection as a target of the application and report the result, or explain any error that occurred.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Look up Application by Name Look up Collection by Name **Subflow** Remove Target Collection from Application
Allowed user roles The specific user roles that can access this AI agent.	sn_csd.CSD Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_csd.CSD Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Microsoft Endpoint Configuration Manager Collection Management Agentic Team

Related topics

Client Software Distribution 2.0 application

Integration Hub solutions

Microsoft Endpoint Configuration Manager collection creation management AI agent

This AI agent creates device or user collections in Microsoft Endpoint Configuration Manager. It collects the required details, confirms the request with the user before acting, and reports the result or any error.

Workflow

The agent helps the user create a device or user collection in Microsoft Endpoint Configuration Manager.

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1. Ask the user whether to create a device collection or a user collection.
2. Ask for the name of the new collection.
3. Ask whether to use the default limiting collection or a limiting collection that the user specifies.
4. Summarize the collection details and ask the user to confirm before creating it.
5. Create the collection and report its name and ID, or explain any error that occurred.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Subflow** Create Collection
Allowed user roles The specific user roles that can access this AI agent.	sn_csd.CSD Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_csd.CSD Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Microsoft Endpoint Configuration Manager Collection Management Agentic Team

Related topics

Client Software Distribution 2.0 application

Integration Hub solutions

Microsoft Endpoint Configuration Manager collection deletion management AI agent

This AI agent deletes device or user collections in Microsoft Endpoint Configuration Manager. It confirms the deletion with the user and, when applications target the collection, offers to remove those targets first so that the deletion can proceed.

Workflow

The agent helps the user delete a device or user collection in Microsoft Endpoint Configuration Manager.

1. Ask the user for the collection type and the collection name or ID.
2. Look up the collection by name and, if several match, ask the user to choose the correct one.
3. Ask the user to confirm the deletion.
4. Check whether any applications target the collection and, if so, list them and ask whether to remove the collection as a target from each one.
5. Stop the deletion if the user declines to remove the application targets.
6. Delete the collection and report the result, or explain any error that occurred.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts**

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Configuration (continued)

Field	Description
	Look up Application Dependencies by Target Collection Look up Collection by Name **Subflows** Delete Collection Remove Target Collection from Application
Allowed user roles The specific user roles that can access this AI agent.	sn_csd.CSD Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_csd.CSD Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Microsoft Endpoint Configuration Manager Collection Management Agentic Team

Related topics

Client Software Distribution 2.0 application

Integration Hub solutions

Microsoft Endpoint Configuration Manager collection membership addition AI agent

This AI agent adds devices or users to collections in Microsoft Endpoint Configuration Manager. It collects the required details, confirms the request with the user, checks whether the member already belongs to the collection, and reports the result.

Workflow

The agent helps the user add a device or user to a collection in Microsoft Endpoint Configuration Manager.

1. Ask the user for the name of the collection.
2. Ask whether the member is a device or a user.

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3. Ask for the name of the device or user to add.
4. Ask the user to confirm the request.
5. Check whether the member already belongs to the collection and, if it does, tell the user that no change is needed.
6. Add the member to the collection and report the result, or explain any error that occurred.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Is Device in Collection Is User in Collection Add Device to Device Collection Add User to User Collection
Allowed user roles The specific user roles that can access this AI agent.	sn_csd.CSD Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_csd.CSD Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Microsoft Endpoint Configuration Manager Collection Management Agentic Team

Related topics

- Client Software Distribution 2.0 application
- Integration Hub solutions

Microsoft Endpoint Configuration Manager collection membership removal AI agent

This AI agent removes devices or users from collections in Microsoft Endpoint Configuration Manager. It collects the required details, confirms the request with the user, checks that the member belongs to the collection, and reports the result.

Workflow

The agent helps the user remove a device or user from a collection in Microsoft Endpoint Configuration Manager.

1. Ask the user for the name of the collection.
2. Ask whether the member is a device or a user.
3. Ask for the name of the device or user to remove.
4. Ask the user to confirm the request.
5. Check whether the member belongs to the collection and, if it doesn't, tell the user that no change is needed.
6. Remove the member from the collection and report the result, or explain any error that occurred.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Is Device in Collection Is User in Collection Remove Device from Device Collection Remove User from User Collection
Allowed user roles The specific user roles that can access this AI agent.	sn_csd.CSD Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_csd.CSD Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Microsoft Endpoint Configuration Manager Collection Management Agentic Team

Related topics

Client Software Distribution 2.0 application

Integration Hub solutions

Microsoft Intune application assignment creation AI agent

This AI agent creates application assignments in Microsoft Intune, which target an application to a group. It identifies the group, application, and assignment intent, confirms the request with the user, and reports the result.

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Workflow

The agent helps the user assign an application to a group in Microsoft Intune.

1. Ask the user for the group name or ID.
2. Look up the group by name and, if several match, ask the user to choose the correct one.
3. Ask for the application name or ID.
4. Look up the application by name and, if several match, ask the user to choose the correct one.
5. Ask for the assignment intent: Required, Available, Uninstall, or Available without enrollment.
6. Ask the user to confirm the request.
7. Create the application assignment and report the result, or explain any error that occurred.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Look up Application by Name Look up Group by Name **Subflow** Create Application Assignment
Allowed user roles The specific user roles that can access this AI agent.	sn_csd.CSD Admin
Data access roles The specific user identity roles that determine which data the AI agent	sn_csd.CSD Admin

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Microsoft Intune Group Management Agentic Team

Related topics

Client Software Distribution 2.0 application

Integration Hub solutions

Microsoft Intune application assignment deletion AI agent

This AI agent deletes application assignments in Microsoft Intune, which removes a group as a target of an application. It identifies the group, application, and assignment intent, confirms the request with the user, and reports the result.

Workflow

The agent helps the user remove an application assignment from a group in Microsoft Intune.

1. Ask the user for the group name or ID.
2. Look up the group by name and, if several match, ask the user to choose the correct one.
3. Ask for the application name or ID.
4. Look up the application by name and, if several match, ask the user to choose the correct one.
5. Ask for the intent of the assignment to delete.
6. Ask the user to confirm the request.
7. Delete the application assignment and report the result, or explain any error that occurred.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Look up Application by Name Look up Group by Name Look up Intent **Subflow** Delete Application Assignment
Allowed user roles The specific user roles that can access this AI agent.	sn_csd.CSD Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_csd.CSD Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Microsoft Intune Group Management Agentic Team

Related topics

- Client Software Distribution 2.0 application
- Integration Hub solutions

Microsoft Intune group creation management AI agent

This AI agent creates Microsoft 365 or security groups in Microsoft Intune. It collects the group details, suggests a group description, confirms the request with the user, and reports the result or any error.

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Workflow

The agent helps the user create a Microsoft 365 or security group in Microsoft Intune.

1. Ask the user whether to create a Microsoft 365 group or a security group.
2. Ask for the group name and email alias.
3. Suggest a group description and let the user accept it or provide their own.
4. Summarize the group details and ask the user to confirm before creating it.
5. Create the group and report its name and ID, or explain any error that occurred.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Subflow** Create Group
Allowed user roles The specific user roles that can access this AI agent.	sn_csd.CSD Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_csd.CSD Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Microsoft Intune Group Management Agentic Team

Related topics

Client Software Distribution 2.0 application

Integration Hub solutions

Microsoft Intune group deletion management AI agent

This AI agent deletes groups in Microsoft Intune. It confirms the deletion with the user and, when applications are assigned to the group, lets the user delete those assignments, keep them, or cancel the deletion.

Workflow

The agent helps the user delete a group in Microsoft Intune.

1. Ask the user for the group name or ID.
2. Look up the group by name and, if several match, ask the user to choose the correct one.
3. Ask the user to confirm the deletion.
4. Check whether any application assignments use the group and, if so, list them.
5. Ask whether to delete those application assignments first, delete the group without removing them, or cancel the deletion.
6. Delete the group and report the result, or explain any error that occurred.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Look up Application Dependencies by Group ID Look up Group by Name **Subflow** Delete Application Assignment Delete Group
Allowed user roles The specific user roles that can access this AI agent.	sn_csd.CSD Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_csd.CSD Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Microsoft Intune Group Management Agentic Team

Related topics

- Client Software Distribution 2.0 application
- Integration Hub solutions

Microsoft Intune group membership addition AI agent

This AI agent adds devices, users, or owners to groups in Microsoft Intune. It identifies the group and the member, confirms the request with the user, and reports the result or any error.

Workflow

The agent helps the user add a device, user, or owner to a group in Microsoft Intune.

1. Ask the user for the group name or ID.
2. Look up the group by name and, if several match, ask the user to choose the correct one.

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3. Ask whether to add the member as a device, a user, or an owner.
4. Ask for the member's name or ID.
5. Look up the device or user by name and, if several match, ask the user to choose the correct one.
6. Ask the user to confirm the request.
7. Add the member to the group and report the result, or explain any error that occurred.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add Device to Group Add Owner to Group Add User to Group Look up Devices Stream Look up Users Stream **Script** Look up Group by Name
Allowed user roles The specific user roles that can access this AI agent.	sn_csd.CSD Admin
Data access roles The specific user identity roles that determine which data the AI agent	sn_csd.CSD Admin

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Microsoft Intune Group Management Agentic Team

Related topics

Client Software Distribution 2.0 application

Integration Hub solutions

Microsoft Intune group membership removal AI agent

This AI agent removes devices, users, or owners from groups in Microsoft Intune. It identifies the group and the member, confirms the request with the user, and reports the result or any error.

Workflow

The agent helps the user remove a device, user, or owner from a group in Microsoft Intune.

1. Ask the user for the group name or ID.
2. Look up the group by name and, if several match, ask the user to choose the correct one.
3. Ask whether to remove the member as a device, a user, or an owner.
4. Ask for the member's name or ID.
5. Look up the device or user by name and, if several match, ask the user to choose the correct one.
6. Ask the user to confirm the request.
7. Remove the member from the group and report the result, or explain any error that occurred.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actionx** Look up Devices Stream Look up Users Stream Remove Device from Group Remove Owner from Group Remove User from Group **Script** Look up Group by Name
Allowed user roles The specific user roles that can access this AI agent.	sn_csd.CSD Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_csd.CSD Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Microsoft Intune Group Management Agentic Team

Related topics

Client Software Distribution 2.0 application

Integration Hub solutions

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Coupa Spoke AI agents

The following AI agents are available for Coupa Spoke.

Coupa approval management AI agent

This AI agent retrieves Coupa approvals. It looks up an approval, a list of approvals, and approval details by approval ID.

Workflow

The agent helps the user review approvals in Coupa.

1. Ask the user what they want to do and collect the details the action needs, such as the approval ID or filter criteria.
2. Look up an approval or list approvals.
3. Get an approval's details by approval ID.
4. Present the approval information to the user.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Approval Look up Approval Details by Approval ID Look up Approvals Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles	snc_internal

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Configuration (continued)

Field	Description
The specific user identity roles that determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Coupa Spoke

Integration Hub spokes

Coupa catalog management AI agent

This AI agent creates catalog items in Coupa.

Workflow

The agent helps the user add an item to the Coupa catalog.

1. Ask the user what they want to do and collect the details the action needs, such as the item name and attributes.
2. Create the catalog item with the details the user provides.
3. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Create Item
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Coupa Spoke

Integration Hub spokes

Coupa contract management AI agent

This AI agent manages Coupa contracts. It creates new contracts and looks up existing contracts.

Workflow

The agent helps the user find and create contracts in Coupa.

1. Ask the user what they want to do and collect the details the action needs, such as the contract details.
2. Look up existing contracts.

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3. Create a new contract.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Contract Look up Contracts Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Related topics

Coupa Spoke

Integration Hub spokes

Coupa inventory management AI agent

This AI agent manages Coupa receiving and inventory data. It looks up receipts and receipt details, looks up advanced shipment notices by update date or purchase order line, and creates goods receipts.

Workflow

The agent helps the user track shipments and record receipts in Coupa.

1. Ask the user what they want to do and collect the details the action needs, such as the receipt ID or purchase order line.
2. Look up a receipt, list receipts, or get receipt details by receipt ID.
3. Look up advanced shipment notices updated after a date or for a purchase order line.
4. Create a goods receipt.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Goods Receipt Look up Advanced Shipment Notices Stream After Updated Date Look up Advanced Shipment Notices by Purchase Order Line ID Stream Look up Receipt Look up Receipt Details by Receipt ID

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Configuration (continued)

Field	Description
	Look up Receipts Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Coupa Spoke

Integration Hub spokes

Coupa invoice management AI agent

This AI agent manages Coupa invoices. It creates invoices, looks up invoices, and retrieves invoice payment details.

Workflow

The agent helps the user create invoices and check payments in Coupa.

1. Ask the user what they want to do and collect the details the action needs, such as the invoice or supplier.
2. Look up invoices.
3. Look up an invoice's payment details.
4. Create a new invoice.
5. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Invoice Look up Invoice Payments Details Stream Look up Invoices Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Related topics

Coupa Spoke

Integration Hub spokes

Coupa item management AI agent

This AI agent retrieves items from Coupa. It looks up a specific item or a list of items.

Workflow

The agent helps the user find items in Coupa.

1. Ask the user what they want to do and collect the details the action needs, such as the item ID or filter criteria.
2. Look up a specific item or list items.
3. Present the item details to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Item Look up Items Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which	snc_internal

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Configuration (continued)

Field	Description
data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Coupa Spoke
- Integration Hub spokes

Coupa primary data management AI agent

This AI agent retrieves Coupa reference data. It looks up conversion rates, cost centers, currencies, and legal entities.

Workflow

The agent helps the user find reference data in Coupa.

1. Ask the user what they want to do and collect the details the action needs, such as the type of data and any filter.
2. Look up conversion rates or currencies.
3. Look up cost centers.
4. Look up legal entities.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Conversion Rates Stream Look up Cost Centers Stream Look up Currencies Stream Look up Legal Entities Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Coupa Spoke

Integration Hub spokes

Coupa purchase order management AI agent

This AI agent manages Coupa purchase orders and fixed assets. It looks up purchase orders and purchase order lines, closes purchase orders, and creates fixed assets.

Workflow

The agent helps the user review and close purchase orders in Coupa.

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1. Ask the user what they want to do and collect the details the action needs, such as the purchase order or line ID.
2. Look up a purchase order or list purchase orders.
3. Look up a purchase order line by line ID.
4. Close a purchase order.
5. Create fixed assets.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Close Purchase Order Create Fixed Assets Look up PO Line by Line ID Look up Purchase Order Look up Purchase Orders Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent	snc_internal

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Coupa Spoke

Integration Hub spokes

Coupa requisition management AI agent

This AI agent retrieves Coupa requisitions. It looks up a specific requisition or a list of requisitions.

Workflow

The agent helps the user find requisitions in Coupa.

1. Ask the user what they want to do and collect the details the action needs, such as the requisition ID or filter criteria.
2. Look up a specific requisition or list requisitions.
3. Present the requisition details to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Requisition Look up Requisitions Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Coupa Spoke

Integration Hub spokes

Coupa sourcing management AI agent

This AI agent manages Coupa sourcing events. It looks up existing sourcing events and creates new ones.

Workflow

The agent helps the user find and create sourcing events in Coupa.

1. Ask the user what they want to do and collect the details the action needs, such as the sourcing event details.
2. Look up sourcing events.

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3. Create a new sourcing event.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Sourcing Event Look up Sourcing Events Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Related topics

Coupa Spoke

Integration Hub spokes

Coupa supplier management AI agent

The agent manages Coupa supplier data. It creates suppliers, looks up a supplier or a list of suppliers, and looks up product catalogs.

Workflow

The agent helps the user find and add suppliers in Coupa.

1. Ask the user what they want to do and collect the details the action needs, such as the supplier.
2. Look up a specific supplier or list suppliers.
3. Look up product catalogs.
4. Create a new supplier.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Supplier Look up Product Catalogs Stream Look up Supplier Look up Suppliers Stream
Allowed user roles	snc_internal

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Coupa Spoke
- Integration Hub spokes

Coupa user management AI agent

This AI agent manages Coupa users. It looks up a user or a list of users and resets user passwords.

Workflow

The agent helps the user find Coupa users and reset their passwords.

1. Ask the user what they want to do and collect the details the action needs, such as the user.
2. Look up a specific user or list users.
3. Reset a user's password.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up User Look up Users Stream Reset User Password
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Coupa Spoke

Integration Hub spokes

Docusign eSignature Spoke AI agents

The following AI agents are available for Docusign eSignature Spoke.

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Docusign eSignature account management AI agent

This AI agent retrieves Docusign eSignature account information. It looks up accounts by alias, role IDs, and the signature providers available to an account.

Workflow

The agent helps the user find account details in Docusign eSignature.

1. Ask the user what they want to do and collect the details the action needs, such as the account alias or ID.
2. Look up an account by its alias.
3. Look up a role ID.
4. Look up the account's signature providers.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Account Signature Providers Look up Accounts by Alias Look up Role ID
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which	snc_internal

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Configuration (continued)

Field	Description
data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Docusign eSignature Spoke
- Integration Hub spokes

Docusign eSignature bulk envelopes management AI agent

This AI agent manages Docusign eSignature bulk sending. It creates, updates, looks up, and deletes bulk send lists, creates bulk send and test requests, and looks up and updates bulk send batches.

Workflow

The agent helps the user send envelopes in bulk with Docusign eSignature.

1. Ask the user what they want to do and collect the details the action needs, such as the bulk send list or batch ID.
2. Look up bulk send lists or a specific list.
3. Create, update, or delete a bulk send list.
4. Create a bulk send test request or a bulk send request.
5. Look up bulk send batches, their envelopes, or a batch's status.
6. Update a batch's status or apply a batch action.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and

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Configuration (continued)

Field	Description
	response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Bulk Send List Create Bulk Send Request Create Bulk Send Test Request Delete Bulk Send List Look up Bulk Send Batch Envelopes Stream Look up Bulk Send Batch Status Look up Bulk Send Batches Stream Look up Bulk Send List Look up Bulk Send Lists Update Bulk Send Batch Action Update Bulk Send Batch Status Update Bulk Send List
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Docusign eSignature Spoke
- Integration Hub spokes

Docusign eSignature document management AI agent

This AI agent manages documents in Docusign eSignature envelopes. It adds and replaces documents, looks up documents and document IDs, and attaches individual or combined documents to ServiceNow records.

Workflow

The agent helps the user manage envelope documents and bring them into ServiceNow.

1. Ask the user what they want to do and collect the details the action needs, such as the envelope ID and document.
2. Look up the documents in an envelope or a document ID by name.
3. Add a document to an envelope or replace an existing one.
4. Attach a Docusign document, or the combined envelope document, to a ServiceNow record.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.

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Configuration (continued)

Field	Description
Tools	**Flow Actions** Add Document to Envelope Attach Combined Document to ServiceNow Record Attach DocuSign Document to ServiceNow Record Look up Document ID by Name Look up Documents in an Envelope Replace Document in an Envelope
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Docusign eSignature Spoke
- Integration Hub spokes

Docusign eSignature document signature AI agent

This AI agent generates Docusign eSignature embedded signing URLs so that recipients can sign documents directly within an application.

Workflow

The agent helps the user get an embedded signing link for a Docusign envelope.

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1. Ask the user what they want to do and collect the details the action needs, such as the envelope ID and recipient.
2. Look up the embedded signing URL for the recipient, or its inline variant.
3. Return the signing URL to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Embedded Signing URL Look up Embedded Signing URL Inline
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Not applicable.

Related topics

- Docusign eSignature Spoke
- Integration Hub spokes

Docusign eSignature envelope management AI agent

This AI agent manages Docusign eSignature envelopes. It creates envelopes from templates, manages recipients and field values, sends envelopes and ad-hoc signature requests, waits for signatures, cancels envelopes, and attaches certificates to ServiceNow records.

Workflow

The agent helps the user prepare, send, and track envelopes in Docusign eSignature.

1. Ask the user what they want to do and collect the details the action needs, such as the envelope, template, or recipients.
2. Create a draft envelope from a template or a composite template.
3. Add or remove recipients, and look up recipients or a recipient ID by role name.
4. Look up fields, field IDs, and field values, and set field values.
5. Send the envelope, generate an embedded sending URL, or send an ad-hoc signature request to one or more users.
6. Wait for the signature and attach the completion certificate to a ServiceNow record.
7. Cancel an envelope that is no longer needed.
8. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add Recipient to Envelope Add Recipients to Envelope Attach DocuSign Certificate to ServiceNow Record Cancel Envelope Create Draft Envelope from Template Create Envelope from Composite Template Generate Embedded Sending URL Look up Field ID Look up Field Value Look up Fields Look up Recipient ID by Role Name Look up Recipients in an Envelope Remove Recipient from Envelope Send Adhoc Signature Request to User Send Adhoc Signature Request to Users - Inline Send Envelope Set Field Value Wait for Signature from DocuSign
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Docusign eSignature Spoke

Integration Hub spokes

Docusign eSignature group management AI agent

This AI agent manages Docusign eSignature groups. It looks up group IDs and adds users to or removes users from groups.

Workflow

The agent helps the user manage group membership in Docusign eSignature.

1. Ask the user what they want to do and collect the details the action needs, such as the group name and user.
2. Look up the group ID.
3. Add a user to the group or remove a user from it.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add User to Group Look up Group ID Remove User from Group
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Docusign eSignature Spoke

Integration Hub spokes

Docusign eSignature templates management AI agent

This AI agent retrieves Docusign eSignature template information. It looks up template names for an account and a template's fields and recipients.

Workflow

The agent helps the user explore Docusign eSignature templates.

1. Ask the user what they want to do and collect the details the action needs, such as the account ID or template.
2. Look up the template names for an account.
3. Look up a template's fields.

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4. Look up a template's recipients.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Template Fields Look up Template Recipients **Subflow** Look up Template Names by Account ID
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Not applicable.

Related topics

- Docusign eSignature Spoke
- Integration Hub spokes

Docusign eSignature user management AI agent

This AI agent manages Docusign eSignature users. It creates, updates, and deletes users and looks up user details.

Workflow

The agent helps the user manage Docusign eSignature user accounts.

1. Ask the user what they want to do and collect the details the action needs, such as the user details.
2. Look up a user's details.
3. Create a new user.
4. Update an existing user.
5. Delete a user.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create User Delete User

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Configuration (continued)

Field	Description
	Look up User Details Update User
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Docusign eSignature Spoke

Integration Hub spokes

F5 BIG-IP Spoke AI agents

The following AI agents are available for F5 BIG-IP Spoke.

F5 BIG-IP pool management AI agent

This AI agent manages F5 BIG-IP pools. It creates, checks, and deletes pools and adds, removes, enables, disables, and lists pool members.

Workflow

The agent helps the user manage load-balancing pools on F5 BIG-IP.

1. Ask the user what they want to do and collect the details the action needs, such as the pool name and member details.
2. Check a pool or list its members.
3. Create a new pool.
4. Add a member to a pool or remove one.
5. Enable or disable a pool member.

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6. Delete a pool.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add Pool Member Check Pool Create Pool Delete Pool Disable Pool Member Enable Pool Member Get Pool Members Remove Pool Member
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

F5 BIG-IP Spoke

Integration Hub spokes

F5 BIG-IP server management AI agent

This AI agent manages F5 BIG-IP virtual servers. It creates, updates, and deletes virtual servers and adds profiles to them.

Workflow

The agent helps the user manage virtual servers on F5 BIG-IP.

1. Ask the user what they want to do and collect the details the action needs, such as the virtual server name and parameters.
2. Create a new virtual server with the required parameters.
3. Update an existing virtual server.
4. Add a profile to a virtual server.
5. Delete a virtual server.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add Profile to Virtual Server Create Virtual Server Delete Virtual Server Update Virtual Server
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- F5 BIG-IP Spoke
- Integration Hub spokes

GitHub Spoke AI agents

The following AI agents are available for GitHub Spoke.

GitHub branch management AI agent

This AI agent manages GitHub branches. It lists a repository's branches and creates new branches.

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Workflow

The agent helps the user review and create branches in a GitHub repository.

1. Ask the user what they want to do and collect the details the action needs, such as the repository owner, repository name, and base branch.
2. List the repository's branches.
3. Create a new branch.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Branch Look up Branches Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

GitHub Spoke

Integration Hub spokes

GitHub code automation AI agent

This AI agent acts as a coding partner for GitHub repositories. It clarifies requirements, proposes an approach, generates or updates code in context, and commits changes to a working branch and opens a pull request.

Workflow

The agent helps the user plan, write, and commit code changes to a GitHub repository. The user must provide approval at each step.

1. Clarify what the user wants to build or change, including the tech stack, and present a proposed architecture for the user to approve.
2. Confirm the repository owner, repository name, and base branch, asking the user for any that are missing.
3. List the repository's branches and let the user select an existing branch or create a new one from a base branch.
4. Review the repository structure and the files related to the change.
5. Generate or update each file, show the code to the user, and commit it to the working branch only after the user approves.
6. Ask whether there are more changes to make and, when the user is done, offer to create a pull request.
7. Create the pull request if requested and confirm completion with the user.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Branch Create Pull Request Create or update a File Look up Branches Look up File Content Repository Schema Fetcher
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- GitHub Spoke
- Integration Hub spokes

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GitHub issue management AI agent

This AI agent manages GitHub issues. It creates issues and looks up a repository's issues.

Workflow

The agent helps the user find and create issues in a GitHub repository.

1. Ask the user what they want to do and collect the details the action needs, such as the repository owner and name.
2. Look up the repository's issues.
3. Create a new issue.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Issue Look up Issues Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

GitHub Spoke

Integration Hub spokes

GitHub repository management AI agent

This AI agent manages GitHub repositories and pull requests. It creates and deletes repositories, creates and merges pull requests, manages pull request comments, and looks up repositories, milestones, pull requests, and repository events.

Workflow

The agent helps the user manage GitHub repositories and pull requests.

1. Ask the user to describe the task.
2. Ask the user for required inputs such as the repository owner, and use the user's own identity only when the user refers to themselves.
3. Look up repositories, a repository's details, its milestones, or its events.
4. Create a new repository or delete one.
5. Look up pull requests, create a pull request, or merge one.
6. Look up, update, reply to, or delete comments on a pull request.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Pull Request Create Reply on Pull Request Review Comment Create Repository Delete Comment on Pull Request Delete Repository Look up Comments on Pull Request Stream Look up Milestones Stream Look up Pull Requests Stream Look up Repositories Stream Look up Repository Details Look up Repository Events Stream Merge Pull Request Update Comment on Pull Request
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Not applicable.

Related topics

GitHub Spoke

Integration Hub spokes

GitHub source code management AI agent

This AI agent works with GitHub repository content. It creates or updates files, looks up file content, and looks up commits, commit information, and commit comments.

Workflow

The agent helps the user read, change, and review files and commits in a GitHub repository.

1. Ask the user what they want to do and collect the details the action needs, such as the repository, branch, and file path.
2. Look up the content of a file.
3. Create or update a file.
4. Look up the commits on a repository or a commit's information by ID.
5. Look up the comments on a commit.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create or update a File Look up Comments by Commit ID Stream

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Configuration (continued)

Field	Description
	Look up Commit Information by ID Look up File Content **Subflow** Look up Commits on a Repository Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

GitHub Spoke

Integration Hub spokes

GitLab Spoke AI agents

The following AI agents are available for GitLab Spoke.

GitLab branch management AI agent

This AI agent manages GitLab branches. It creates and deletes branches, deletes merged branches, protects and unprotects branches, compares branches, tags, or commits, and looks up branch details.

Workflow

The agent helps the user manage branches in a GitLab project.

1. Ask the user what they want to do and collect the details the action needs, such as the project ID and branch name.
2. Look up a branch or list the project's branches.

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3. Compare two branches, tags, or commits.
4. Create a new branch.
5. Protect or unprotect a branch.
6. Delete a branch or delete all merged branches.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Compare Branches Tags or Commits Create Branch Delete Branch Delete Merged Branches Look up Branch Look up Branches Stream Protect Branch Unprotect Branch
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which	snc_internal

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Configuration (continued)

Field	Description
data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

GitLab Spoke

Integration Hub spokes

GitLab group management AI agent

This AI agent manages GitLab group membership. It adds users to groups and removes users from groups.

Workflow

The agent helps the user manage who belongs to a GitLab group.

1. Ask the user what they want to do and collect the details the action needs, such as the group and user.
2. Add the user to the group.
3. Remove the user from the group.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add User to a Group Remove User from a Group
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

GitLab Spoke

Integration Hub spokes

GitLab issue management AI agent

This AI agent manages GitLab issues and issue notes. It creates and updates issues, adds, updates, and deletes notes, and looks up issues and their notes.

Workflow

The agent helps the user track and update issues in GitLab.

1. Ask the user what they want to do and collect the details the action needs, such as the project ID and issue number.
2. Look up issues or the notes on an issue.

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3. Create a new issue or update an existing one.
4. Add, update, or delete a note on an issue.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Issue Create Issue Note Delete Issue Note Look up Issue Notes Stream Look up Issues Stream Update Issue Update Issue Note
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

GitLab Spoke

Integration Hub spokes

GitLab merge request management AI agent

This AI agent manages GitLab merge requests. It creates, updates, and accepts merge requests, adds, updates, and deletes merge request notes, and looks up merge requests and their notes.

Workflow

The agent helps the user create, review, and merge GitLab merge requests.

1. Ask the user what they want to do and collect the details the action needs, such as the project ID and merge request.
2. Look up merge requests or the notes on a merge request.
3. Create a new merge request or update an existing one.
4. Add, update, or delete a note on a merge request.
5. Accept a merge request.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Accept Merge Request Create Merge Request Create Merge Request Note Delete Merge Request Note Look up Merge Request Notes Stream Look up all Merge Requests Stream Update Merge Request Update Merge Request Note
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

GitLab Spoke

Integration Hub spokes

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GitLab package management AI agent

This AI agent manages GitLab packages and container registry repositories. It looks up packages, package files, and registry repositories, and deletes packages, package files, repositories, and repository tags.

Workflow

The agent helps the user review and clean up packages and registry repositories in GitLab.

1. Ask the user what they want to do and collect the details the action needs, such as the project or group ID.
2. Look up the packages in a project or group, or a specific project package.
3. Look up the files in a package.
4. Look up registry repositories or a repository's details.
5. Delete a package, a package file, a registry repository, or repository tags.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Delete Package File Delete Project Package Delete Registry Repository Delete Registry Repository Tags Look up Package Files Stream Look up Packages within Group Stream Look up Packages within Project Stream Look up Project Package

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Configuration (continued)

Field	Description
	Look up Registry Repositories Look up Registry Repository Details
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

GitLab Spoke

Integration Hub spokes

GitLab pipeline management AI agent

This AI agent retrieves GitLab pipeline information. It looks up project pipelines, a pipeline by ID, a pipeline's jobs, and its test report.

Workflow

The agent helps the user review CI/CD pipelines in a GitLab project.

1. Ask the user what they want to do and collect the details the action needs, such as the project ID and pipeline ID.
2. Look up a project's pipelines or a specific pipeline by ID.
3. Look up the jobs in a pipeline.
4. Retrieve a pipeline's test report.
5. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Project Pipeline Jobs Stream Look up Project Pipeline Test Report Look up Project Pipeline by ID Look up Project Pipelines Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Related topics

GitLab Spoke

Integration Hub spokes

GitLab project management AI agent

This AI agent manages GitLab projects and milestones. It creates, updates, archives, and deletes projects, manages user and group access, creates, updates, and deletes milestones, and looks up projects, jobs, and milestones.

Workflow

The agent helps the user set up and maintain GitLab projects.

1. Ask the user what they want to do and collect the details the action needs, such as the project ID or name.
2. Look up a project, list projects, or list a project's jobs.
3. Create, update, archive, unarchive, or delete a project.
4. Add a user to a project or remove one, and share or unshare a project with a group.
5. Look up, create, update, or delete milestones.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add User to a Project Archive Project Create Milestone Create Project Delete Milestone

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Configuration (continued)

Field	Description
	Delete Project Look up Milestones Stream Look up Project Look up Project Jobs Stream Look up Projects Stream Remove User from a Project Share Project with Group Unarchive Project Unshare Project with Group Update Milestone Update Project
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- GitLab Spoke
- Integration Hub spokes

GitLab source code management AI agent

This AI agent works with GitLab repository source code. It adds new files to a repository and looks up commits and commit diffs for a project.

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Workflow

The agent helps the user add files and review commits in a GitLab repository.

1. Ask the user what they want to do and collect the details the action needs, such as the project ID and commit or file path.
2. Look up commits for a project.
3. Look up the diff for a commit.
4. Add a new file to the repository.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add New File to Repository Look up Commit Diff Look up Commit by Project ID
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

GitLab Spoke

Integration Hub spokes

GitLab token management AI agent

This AI agent manages GitLab personal access tokens. It looks up tokens and revokes a token that is no longer needed.

Workflow

The agent helps the user review and revoke personal access tokens in GitLab.

1. Ask the user what they want to do and collect the details the action needs, such as the user or token ID.
2. Look up personal access tokens.
3. Revoke a personal access token.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Personal Access Tokens Revoke Personal Access Token
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

GitLab Spoke

Integration Hub spokes

Google Calendar Spoke AI agents

The following AI agents are available for Google Calendar Spoke.

Google Calendar access control list management AI agent

This AI agent manages Google Calendar access control lists. It looks up, updates, and deletes access control rules for a calendar.

Workflow

The agent helps the user control who can access a Google Calendar.

1. Ask the user what they want to do and collect the details the action needs, such as the calendar ID and rule.
2. Look up a calendar's access control rules.

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3. Update an access control rule.
4. Delete an access control rule.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Delete Access Control List Look up Access Control List Stream Look up Access Control List by Calendar ID Update Access Control List
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Google Calendar Spoke
- Integration Hub spokes

Google Calendar event management AI agent

This AI agent manages Google Calendar events. It creates, updates, moves, and deletes events, looks up events by calendar or event ID, and finds busy slots.

Workflow

The agent helps the user schedule and manage events in Google Calendar.

1. Ask the user what they want to do and collect the details the action needs, such as the calendar ID and event details.
2. Look up events, events on a calendar, or an event by ID.
3. Look up busy slots on a calendar.
4. Create a new event or update an existing one.
5. Move an event to another calendar.
6. Delete an event.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Delete Event Look up Busy Slots by Calendar ID (Simplified) Look up Event by Event ID Look up Events Stream Look up Events by Calendar ID Move Event **Subflows** Create Event Update Event
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Google Calendar Spoke
- Integration Hub spokes

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Google Calendar list management AI agent

This AI agent manages a user's Google Calendar list. It looks up calendars in the list and removes calendars from it.

Workflow

The agent helps the user review and clean up their Google Calendar list.

1. Ask the user what they want to do and collect the details the action needs, such as the calendar ID.
2. Look up a calendar in the list by ID or list all calendars.
3. Remove a calendar from the calendar list.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Delete Calendar from Calendar List Look up Calendar from Calendar List by ID Look up Calendars from Calendar List Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent	snc_internal

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Google Calendar Spoke

Integration Hub spokes

Google Calendar metadata management AI agent

This AI agent looks up Google Calendar time zone metadata.

Workflow

The agent helps the user retrieve time zone metadata for Google Calendar.

1. Ask the user what they want to do and collect the details the action needs, such as the time zone.
2. Look up the time zone metadata.
3. Present the metadata to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Look up Time Zones Metadata
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Google Calendar Spoke

Integration Hub spokes

Google Chat Spoke AI agents

The following AI agents are available for Google Chat Spoke.

Google Chat member management AI agent

This AI agent manages Google Chat space membership. It looks up, adds, and removes members and adds or removes the calling application from a space.

Workflow

The agent helps the user manage who belongs to a Google Chat space.

1. Ask the user what they want to do and collect the details the action needs, such as the space and member.
2. Look up a space member.
3. Add a member to the space or remove one.

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4. Add the current application to the space or remove it.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add Current Application to Space Add Member to Space Look up Space Member Remove Current Application from Space Remove Member from Space
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Google Chat spoke

Integration Hub spokes

Google Chat message management AI agent

This AI agent manages Google Chat messages. It looks up messages, creates message threads, sends messages to threads, and deletes messages.

Workflow

The agent helps the user send and manage messages in Google Chat.

1. Ask the user what they want to do and collect the details the action needs, such as the space, thread, or message.
2. Look up a message.
3. Create a message thread in a space.
4. Send a message to a thread.
5. Delete a message.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.

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Configuration (continued)

Field	Description
Tools	**Flow Actions** Create Message Thread Delete Message Look up Message Send Message to Thread
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Google Chat spoke
- Integration Hub spokes

Google Chat space management AI agent

This AI agent manages Google Chat spaces. It creates, updates, looks up, and deletes spaces.

Workflow

The agent helps the user create and manage Google Chat spaces.

1. Ask the user what they want to do and collect the details the action needs, such as the space.
2. Look up a space.
3. Create a new space.
4. Update a space's details.

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5. Delete a space.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
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Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Space Delete Space Look up Space Update Space
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Not applicable.

Related topics

- Google Chat spoke
- Integration Hub spokes

Google Cloud Storage Spoke AI agents

The following AI agents are available for Google Cloud Storage Spoke.

Google Cloud Storage bucket access control management AI agent

This AI agent manages access controls for Google Cloud Storage buckets. It lists, creates, updates, and deletes bucket access control entries.

Workflow

The agent helps the user review and change bucket permissions in Google Cloud Storage.

1. Ask the user what they want to do and collect the details the action needs, such as the bucket and entity.
2. List the access control entries for a bucket.
3. Create or update a bucket access control entry.
4. Delete a bucket access control entry.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create/Update Bucket Access Control

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Configuration (continued)

Field	Description
	Delete Bucket Access Control List All Bucket Access Controls
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Google Cloud Storage Spoke

Integration Hub spokes

Google Cloud Storage bucket management AI agent

This AI agent manages Google Cloud Storage buckets. It creates, updates, and deletes buckets, lists all buckets, and retrieves bucket details, labels, and IAM policies.

Workflow

The agent helps the user create and manage buckets in Google Cloud Storage.

1. Ask the user what they want to do and collect the details the action needs, such as the bucket name.
2. List all buckets or get the details of a specific bucket.
3. Retrieve a bucket's labels or IAM policy.
4. Create a new bucket.
5. Update a bucket's details.
6. Delete a bucket.
7. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Bucket Delete A Bucket Get Bucket Details Get Bucket Labels Get IAM Policy List All Buckets Update Bucket Details
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Google Cloud Storage Spoke
- Integration Hub spokes

Google Cloud Storage object access control management AI agent

This AI agent manages access controls for Google Cloud Storage objects. It lists, creates, updates, and deletes object access control entries.

Workflow

The agent helps the user review and change who can access objects in Google Cloud Storage.

1. Ask the user what they want to do and collect the details the action needs, such as the bucket, object, and entity.
2. List the access control entries for an object.
3. Create or update an object access control entry.
4. Delete an object access control entry.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions**

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Configuration (continued)

Field	Description
	Create/Update Object Access Control Delete Object Access Control List All Object Access Controls
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Google Cloud Storage Spoke

Integration Hub spokes

Google Cloud Storage object management AI agent

This AI agent manages objects in Google Cloud Storage buckets. It uploads, downloads, copies, rewrites, updates, and deletes objects, changes storage classes, and lists or retrieves object details.

Workflow

The agent helps the user manage the objects stored in Google Cloud Storage buckets.

1. Ask the user what they want to do and collect the details the action needs, such as the bucket and object names.
2. List the objects in a bucket or get the details of a specific object.
3. Upload an object to a bucket or download an object to ServiceNow.
4. Copy or rewrite an object to a new location or with new properties.
5. Update an object's metadata or storage class.

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6. Delete an object from a bucket.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Copy Object Delete An Object Download Object To ServiceNow Get Object Details List All Objects ReWrite An Object Update Object Details In A Bucket Update Object Storage Class Upload An Object
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent	snc_internal

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Google Cloud Storage Spoke
- Integration Hub spokes

Google Docs Spoke AI agents

The following AI agents are available for Google Docs Spoke.

Google Docs document management AI agent

This AI agent manages Google Docs documents. It creates documents, adds headers and footers, searches for text, and retrieves document details.

Workflow

The agent helps the user create and work with documents in Google Docs.

1. Ask the user what they want to do and collect the details the action needs, such as the document ID or title.
2. Get a document's details.
3. Search for text in a document.
4. Create a new document.
5. Add a header or footer to a document.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and

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Configuration (continued)

Field	Description
	response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Document Create Footer Create Header Get Document Details Search Text in Document
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Google Docs Spoke

Integration Hub spokes

Google Drive Spoke AI agents

The following AI agents are available for Google Drive Spoke.

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Google Drive file and folder management AI agent

This AI agent manages Google Drive files and folders. It looks up files, folders, and revisions, creates folders, copies and deletes items, updates metadata, and copies files between Google Drive and ServiceNow attachments.

Workflow

The agent helps the user manage Google Drive content and move files to and from ServiceNow.

1. Ask the user what they want to do and collect the details the action needs, such as the file or folder.
2. Look up files, folders, a specific file, or items by name.
3. Look up a file's revisions, copy a revision as an attachment, or delete a revision.
4. Create a folder or copy a file.
5. Update a file or folder's metadata.
6. Copy a ServiceNow attachment to Drive or update it there, or copy a Drive or Docs file to an attachment.
7. Confirm the user's intent and delete a file or folder.
8. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Copy Attachment to Drive Copy Doc File to Attachment Copy Drive File to Attachment Copy File Copy File Revision as Attachment Create Folder

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Configuration (continued)

Field	Description
	Delete File Revision Delete File or Folder Look up File Look up File Revisions Stream Look up Files Stream Look up Files or Folders by Name Look up Folders Stream Update Attachment to Drive Update File or Folder Metadata
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Google Drive Spoke
- Integration Hub spokes

Google Drive permission management AI agent

This AI agent manages Google Drive permissions. It looks up, creates, updates, and deletes file and folder permissions and transfers ownership of all of a user's data.

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Workflow

The agent helps the user control access to Google Drive content.

1. Ask the user what they want to do and collect the details the action needs, such as the file or folder and the user or group.
2. Look up the permissions on a file or folder.
3. Create a permission for a user or group.
4. Update an existing permission.
5. Delete a permission.
6. Transfer ownership of all of a user's data to another user.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create File or Folder Permission Delete File or Folder Permission Look up Permissions Stream Transfer Ownership of All User Data Update File or Folder Permission
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles	snc_internal

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Configuration (continued)

Field	Description
The specific user identity roles that determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Google Drive Spoke
- Integration Hub spokes

Google Meet Spoke AI agents

The following AI agents are available for Google Meet Spoke.

Google Meet artifacts management AI agent

This AI agent retrieves Google Meet artifacts. It looks up meeting recordings, full transcripts, and individual transcript entries.

Workflow

The agent helps the user find recordings and transcripts from Google Meet conferences.

1. Ask the user what they want to do and collect the details the action needs, such as the conference record.
2. Look up a specific recording or list the recordings for a conference.
3. Look up a specific transcript or list the transcripts for a conference.
4. Look up individual transcript entries.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Recording Look up Recordings Stream Look up Transcript Look up Transcript Entries Stream Look up Transcript Entry Look up Transcripts Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Related topics

Google Meet Spoke

Integration Hub spokes

Google Meet conference management AI agent

This AI agent retrieves Google Meet conference records. It looks up a specific conference or a list of conferences.

Workflow

The agent helps the user find details about Google Meet conferences.

1. Ask the user what they want to do and collect the details the action needs, such as the conference or filter criteria.
2. Look up a specific conference or list conferences.
3. Present the conference details to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Conference Look up Conferences Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that	snc_internal

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Configuration (continued)

Field	Description
determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Google Meet Spoke

Integration Hub spokes

Google Meet participant management AI agent

This AI agent retrieves Google Meet participant information. It looks up individual participants, lists of participants, and participant sessions.

Workflow

The agent helps the user find participant and session details for Google Meet conferences.

1. Ask the user what they want to do and collect the details the action needs, such as the conference record or participant.
2. Look up a specific participant or list the participants in a conference.
3. Look up a participant's sessions or a specific session.
4. Present the participant details to the user.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Participant Look up Participant Session Look up Participant Sessions Stream Look up Participants Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Google Meet Spoke
- Integration Hub spokes

Google Meet space management AI agent

This AI agent manages Google Meet meeting spaces. It creates, updates, and looks up meeting spaces, and ends active conferences.

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Workflow

The agent helps the user set up and manage Google Meet meeting spaces.

1. Ask the user what they want to do and collect the details the action needs, such as the meeting space.
2. Create a new meeting space.
3. Look up or update an existing meeting space.
4. End an active conference in a meeting space.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Meeting Space End Active Conference Look up Meeting Space Update Meeting Space
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent	snc_internal

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Google Meet Spoke
- Integration Hub spokes

Google Tasks Spoke AI agents

The following AI agents are available for Google Tasks Spoke.

Google Tasks AI agent

This AI agent finds a Google Tasks task list ID from the task list name.

Workflow

The agent helps the user identify a task list in Google Tasks.

1. Ask the user what they want to do and collect the details the action needs, such as the task list name.
2. Look up the task list ID that matches the name.
3. Return the task list ID to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Subflow** Get TaskList Id from TaskList Name
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Google Tasks Spoke

Integration Hub spokes

Google Tasks task management AI agent

This AI agent manages tasks in Google Tasks. It creates, updates, completes, retrieves, and deletes tasks, and finds a task list ID from its name.

Workflow

The agent helps the user manage tasks in Google Tasks.

1. Ask the user what they want to do and collect the details the action needs, such as the task list and task.
2. Find the task list ID from the task list name.
3. Get a task's details.

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4. Create a new task with the title, description, and due date the user provides.
5. Update a task or mark it complete.
6. Delete a task.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Complete Task Create Task Delete Task Get Task Update Task **Subflow** Get TaskList Id from TaskList Name
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Google Tasks Spoke

Integration Hub spokes

Google Tasks tasklist management AI agent

This AI agent manages task lists in Google Tasks. It creates, updates, and deletes task lists, retrieves a specific task list or all task lists, and finds a task list ID from its name.

Workflow

The agent helps the user manage task lists in Google Tasks.

1. Ask the user what they want to do and collect the details the action needs, such as the task list name or ID.
2. Get a specific task list, all task lists, or a task list ID from its name.
3. Create a new task list.
4. Update a task list's details.
5. Confirm the user's intent and delete a task list.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Tasklist Delete Tasklist Get All Tasklist Get Tasklist Update Tasklist **Subflow** Get TaskList Id from TaskList Name
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Google Tasks Spoke
- Integration Hub spokes

GovNotify Spoke AI agents

The following AI agents are available for GovNotify Spoke.

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GovNotify message management AI agent

This AI agent sends and tracks notifications through GOV.UK Notify. It sends emails, text messages, and letters and looks up notifications and their status.

Workflow

The agent helps the user send and track GOV.UK Notify messages.

1. Ask the user what they want to do and collect the details the action needs, such as the recipient, content, or notification ID.
2. Send an email after validating the recipient and content.
3. Send a text message after validating the phone number and content.
4. Send a letter after validating the recipient details and content.
5. Look up notifications or a notification's status by ID.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Notification Status by ID Look up Notifications Send a Letter Send a Text Message Send an Email
Allowed user roles The specific user roles that can access this AI agent.	snc_internal

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Configuration (continued)

Field	Description
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- GovNotify Spoke
- Integration Hub spokes

Jenkins Spoke AI agents

The following AI agents are available for Jenkins Spoke.

Jenkins build management AI agent

This AI agent manages Jenkins builds. It runs builds, retrieves build numbers, build information, build history, and all builds for a job, and deletes builds.

Workflow

The agent helps the user run and review Jenkins builds.

1. Ask the user what they want to do and collect the details the action needs, such as the job name and build.
2. Run a build with the parameters the user provides.
3. Get all builds, the build history, or a build number for a job.
4. Get a build's information.
5. Confirm with the user and delete a build.
6. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Delete Build Get All Builds Get Build History Get Build Information Get Build Number Perform a Build
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Not applicable.

Related topics

Jenkins Spoke

Integration Hub spokes

Jenkins configuration management AI agent

This AI agent manages Jenkins configuration. It tests the connection, retrieves the version and a CSRF token, creates credentials, and creates or deletes nodes.

Workflow

The agent helps the user manage Jenkins server configuration.

1. Ask the user what they want to do and collect the details the action needs, such as the node or credential details.
2. Test the connection to Jenkins.
3. Get the Jenkins version or a CSRF token.
4. Create Jenkins credentials.
5. Create a node or delete one.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Jenkins Credentials Create Node

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Configuration (continued)

Field	Description
	Delete Node Get CSRF Token Get Version Test Connection
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Jenkins Spoke

Integration Hub spokes

Jenkins job management AI agent

This AI agent manages Jenkins jobs and folders. It copies, reloads, and deletes jobs, creates and deletes folders, and retrieves job configurations, build timestamps, console output, and the jobs in a folder.

Workflow

The agent helps the user manage Jenkins jobs and folders.

1. Ask the user what they want to do and collect the details the action needs, such as the job or folder name.
2. List the jobs in a folder or get a job's configuration.
3. Get a build's timestamp or console output.
4. Copy or reload a job.

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5. Create a folder.
6. Confirm the user's intent and delete a job or folder.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Copy Job Create Folder Delete Folder Delete Job Get All Jobs From Folder Get Build Timestamp Get Console Output Get Job Configuration Reload Job
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent	snc_internal

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Jenkins Spoke

Integration Hub spokes

Jenkins user management AI agent

This AI agent creates and deletes Jenkins users.

Workflow

The agent helps the user manage Jenkins user accounts.

1. Ask the user what they want to do and collect the details the action needs, such as the username.
2. Create a user with the username, email, and other details the user provides.
3. Delete a user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create User Delete User
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Jenkins Spoke

Integration Hub spokes

Jenkins view management AI agent

This AI agent manages Jenkins views. It creates and deletes views, adds and removes jobs, and lists the jobs in a view.

Workflow

The agent helps the user organize jobs into Jenkins views.

1. Ask the user what they want to do and collect the details the action needs, such as the view and job names.
2. List the jobs in a view.
3. Create a new view.
4. Add a job to a view or remove one.

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5. Confirm with the user and delete a view.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add Job To View Create View Delete View Get All Jobs From View Remove Job From View
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Jenkins Spoke

Integration Hub spokes

Jira Spoke AI agents

The following AI agents are available for Jira Spoke.

Jira audit management AI agent

This AI agent retrieves Jira audit logs for a date range, supporting Jira Cloud, Jira Server version 9 and earlier, and Jira Server version 10 and later.

Workflow

The agent helps the user review Jira audit logs.

1. Ask the user to describe the task.
2. Confirm whether the instance is cloud or server and, for server, whether it's version 10 or later.
3. Ask for the date range to retrieve.
4. Look up the audit logs using the action that matches the instance type and version.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Audit Logs Stream Look up Audit Logs Stream (Server 10+)
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Jira Spoke

Integration Hub spokes

Jira group management AI agent

This AI agent manages Jira groups. It creates and removes groups, adds and removes users, and looks up groups and group members.

Workflow

The agent helps the user manage Jira groups and their membership.

1. Ask the user to describe the task.
2. Confirm whether the Jira instance is cloud or server, asking the user rather than assuming, because the required user identifier differs by type.
3. Look up groups, available on Jira Cloud, or the users in a group.
4. Create a new group.

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5. Ask the user for any user identifier the action needs, such as an account ID for cloud or a username for server, rather than defaulting to the logged-in user.
6. Add a user to a group or remove a user from it.
7. Remove a group.
8. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add User to Group Create Group Look up Groups Stream Look up Users by Group Name Stream Remove Group Remove User From Group
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Jira Spoke

Integration Hub spokes

Jira issue management AI agent

This AI agent manages Jira issues. It looks up issues, priorities, statuses, and transitions, transitions and assigns issues, adds comments, manages watchers and attachments, and deletes issues.

Workflow

The agent helps the user find, update, and manage Jira issues.

1. Ask the user to describe the task.
2. Confirm whether the Jira instance is cloud or server, asking the user rather than assuming, because the required user identifier differs by type.
3. Look up an issue, search issues with JQL, or list the issues in a sprint.
4. Look up issue priorities, the issue type statuses for a project, or an issue's available transitions.
5. Transition an issue to a new status or add a comment to it.
6. Ask the user for any user identifier the action needs, such as an account ID for cloud or a username for server, rather than defaulting to the logged-in user.
7. Assign an issue, and add or remove watchers.
8. Copy an attachment from a ServiceNow record to an issue or delete an attachment.
9. Delete an issue.
10. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add Comment Add Watcher Assign Issue Copy Attachment Delete Attachment Delete Issue Delete Watcher Do Transition Look up Issue Type Statuses by Project Look up Issue Look up Issue Priorities Look up Issues Stream Look up Sprint Issues Stream Look up Transitions Look up Watchers
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which	snc_internal

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Configuration (continued)

Field	Description
data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Jira Spoke

Integration Hub spokes

Jira project management AI agent

This AI agent manages Jira projects. It creates projects and looks up a specific project or a list of projects.

Workflow

The agent helps the user find and create Jira projects.

1. Ask the user to describe the task.
2. Confirm whether the Jira instance is cloud or server, asking the user rather than assuming, because the required user identifier differs by type.
3. Look up a project by ID or key, or list projects.
4. Ask the user for the project lead, rather than defaulting to the logged-in user, and create the project.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Project Look up Project Look up Projects Look up Projects Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Jira Spoke

Integration Hub spokes

Jira sprint management AI agent

This AI agent manages Jira sprints. It looks up, updates, and deletes sprints.

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Workflow

The agent helps the user review and change sprints in Jira.

1. Ask the user what they want to do and collect the details the action needs, such as the sprint ID.
2. Look up a sprint's details.
3. Update a sprint's name, dates, goal, or status.
4. Delete a sprint.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Delete Sprint Look up Sprint Update Sprint
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Jira Spoke

Integration Hub spokes

Jira story management AI agent

This AI agent manages Jira stories. It creates and updates stories and looks up stories that match given criteria.

Workflow

The agent helps the user find, create, and update stories in Jira.

1. Ask the user to describe the task.
2. Confirm whether the Jira instance is cloud or server, asking the user rather than assuming, because the required user identifier differs by type.
3. Look up stories that match the user's criteria.
4. Create a new story, asking the user for the assignee rather than defaulting to the logged-in user.
5. Update an existing story.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Story Look up Stories Stream Update Story
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Jira Spoke

Integration Hub spokes

Jira user management AI agent

This AI agent manages Jira users. It creates and removes users, looks up users and the authenticated user, and retrieves a user's group memberships.

Workflow

The agent helps the user find and manage Jira users.

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1. Ask the user to describe the task.
2. Confirm whether the Jira instance is cloud or server, asking the user rather than assuming, because the required user identifier differs by type.
3. Look up users, by stream on cloud or by name on server, or look up the authenticated user.
4. Ask the user for any user identifier the action needs, such as an account ID for cloud or a username for server, rather than defaulting to the logged-in user.
5. Look up a user's group memberships.
6. Create a new user or remove a user.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create User Look up Authenticated User Look up Group Memberships for User Look up Users Stream Look up Users Stream by Name Remove User
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles	snc_internal

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Configuration (continued)

Field	Description
The specific user identity roles that determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Jira Spoke
- Integration Hub spokes

Jira utility management AI agent

This AI agent provides Jira utility actions. It copies issue attachments to ServiceNow records, looks up the latest attachment and comment on an issue, looks up field details, and retrieves server information.

Workflow

The agent helps the user pull Jira issue details and attachments into ServiceNow.

1. Ask the user what they want to do and collect the details the action needs, such as the issue key.
2. Look up Jira server information.
3. Look up field details.
4. Look up the latest comment or latest attachment on an issue.
5. Copy an issue attachment to a ServiceNow record.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Copy Issue Attachment to Record Look up Fields Look up Latest Attachment on Issue Look up Latest Comment on Issue Look up Server
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Related topics

Jira Spoke

Integration Hub spokes

Jira Service Management Spoke AI agents

The following AI agents are available for Jira Service Management Spoke.

Jira Service Management organization management AI agent

This AI agent manages organizations in Jira Service Management. It creates and deletes organizations, adds and removes users, associates organizations with service desks, and looks up organizations and their users.

Workflow

The agent helps the user manage customer organizations in Jira Service Management.

1. Ask the user what they want to do and collect the details the action needs, such as the organization, service desk, or users.
2. Look up organizations or the users in an organization.
3. Create a new organization or delete an existing one.
4. Add users to an organization or remove them.
5. Add an organization to a service desk or remove it.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add Organization to Service Desk Add Users to Organization Create Organization

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Configuration (continued)

Field	Description
	Delete Organization Look up Organizations Look up Users in Organization Remove Organization from Service Desk Remove Users from Organization
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Jira Service Management Spoke
- Integration Hub spokes

Jira Service Management request management AI agent

This AI agent manages Jira Service Management customer requests. It creates requests and comments, performs transitions, manages participants and subscriptions, and looks up requests, comments, attachments, status history, and SLA information.

Workflow

The agent helps the user create, track, and update customer requests in Jira Service Management.

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1. Ask the user what they want to do and collect the details the action needs, such as the request key or service desk.
2. Look up customer requests, their comments and attachments, status history, or SLA information.
3. Create a new customer request or add a comment to one, using temporary files or attachments where needed.
4. Look up the available transitions for a request and perform a transition.
5. Add participants to a request or remove them.
6. Check, start, or stop the subscription to updates for a request.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add Customer Request Participants Create Customer Request Create Customer Request Comment Create Temporary Attachment Create Temporary File Look up Comment Attachment Look up Customer Request Comments Look up Customer Request Participants Look up Customer Request Status History Look up Customer Request Transitions Look up Customer Requests

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Configuration (continued)

Field	Description
	Look up SLA Information Look up Subscription Status Perform Customer Request Transition Remove Customer Request Participants Subscribe Customer Request Unsubscribe Customer Request
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Jira Service Management Spoke

Integration Hub spokes

Jira Service Management service desk management AI agent

This AI agent retrieves Jira Service Management service desk configuration and manages customers. It looks up service desks, queues, issues in queues, request types, and request type fields, adds customers, and finds user account IDs.

Workflow

The agent helps the user explore service desks and add customers in Jira Service Management.

1. Ask the user to describe the task.
2. Look up service desks, queues, or the issues in a queue.

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3. Look up request types and the fields for a request type.
4. Confirm whether the Jira instance is cloud or server, asking the user rather than assuming, because the required user identifier differs by type.
5. Look up a user's account ID, using an email address for cloud or a username for server.
6. Add customers to a service desk.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add Customers Look up Issues in Queue Look up Queue Look up Request Type Fields Look up Request Types Look up Service Desks Look up User Account ID
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent	snc_internal

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Jira Service Management Spoke

Integration Hub spokes

Kubernetes Spoke AI agents

The following AI agents are available for Kubernetes Spoke.

Kubernetes endpoint management AI agent

This AI agent creates and deletes Kubernetes endpoints.

Workflow

The agent helps the user manage endpoints in Kubernetes.

1. Ask the user what they want to do and collect the details the action needs, such as the endpoint name and configuration.
2. Create the endpoints with the provided configuration.
3. Confirm the endpoints to remove and delete them.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Endpoints Delete Endpoints
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Kubernetes Spoke

Integration Hub spokes

Kubernetes namespace management AI agent

This AI agent creates and deletes Kubernetes namespaces.

Workflow

The agent helps the user manage namespaces in Kubernetes.

1. Ask the user what they want to do and collect the details the action needs, such as the namespace name.
2. Validate the namespace name.
3. Create the namespace.

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4. Delete a namespace.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Namespace Delete Namespace
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Related topics

Kubernetes Spoke

Integration Hub spokes

Kubernetes node management AI agent

This AI agent manages Kubernetes nodes. It creates, inspects, and deletes nodes.

Workflow

The agent helps the user manage nodes in a Kubernetes cluster.

1. Ask the user what they want to do and collect the details the action needs, such as the node name.
2. Create a node with the required specifications.
3. Inspect a node.
4. Get explicit confirmation and delete a node.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Node Delete Node Inspect Node
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles	snc_internal

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Configuration (continued)

Field	Description
The specific user identity roles that determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Kubernetes Spoke
- Integration Hub spokes

Kubernetes pod management AI agent

This AI agent manages Kubernetes pods. It creates, inspects, and deletes pods.

Workflow

The agent helps the user manage pods in Kubernetes.

1. Ask the user what they want to do and collect the details the action needs, such as the pod name and namespace.
2. Create a pod with the required specifications.
3. Inspect a pod and summarize its status.
4. Confirm the pod is safe to delete and delete it.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Pod Delete Pod Inspect Pod
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Kubernetes Spoke

Integration Hub spokes

Kubernetes secret management AI agent

This AI agent creates and deletes Docker Hub secrets in Kubernetes.

Workflow

The agent helps the user manage Docker Hub secrets in Kubernetes.

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1. Ask the user what they want to do and collect the details the action needs, such as the secret name and credentials.
2. Create a Docker Hub secret with the credentials the user provides.
3. Confirm the secret name and delete a Docker Hub secret.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Docker Hub Secret Delete Docker Hub Secret
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Not applicable.

Related topics

Kubernetes Spoke

Integration Hub spokes

Kubernetes service management AI agent

This AI agent creates and deletes Kubernetes services.

Workflow

The agent helps the user manage services in Kubernetes.

1. Ask the user what they want to do and collect the details the action needs, such as the service name and namespace.
2. Create a service.
3. Delete a service.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Service Delete Service
Allowed user roles	snc_internal

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Kubernetes Spoke

Integration Hub spokes

Kubernetes volume management AI agent

This AI agent manages Kubernetes persistent storage. It creates and deletes persistent volumes and persistent volume claims and inspects claims.

Workflow

The agent helps the user manage persistent volumes and claims in Kubernetes.

1. Ask the user what they want to do and collect the details the action needs, such as the volume or claim name.
2. Create a persistent volume with the required parameters, such as storage size and access modes.
3. Create a persistent volume claim.
4. Inspect a persistent volume claim.
5. Confirm the claim or volume is no longer in use and delete it.
6. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Persistent Volume Create Persistent Volume Claim Delete Persistent Volume Delete Persistent Volume Claim Inspect Persistent Volume Claim
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Not applicable.

Related topics

Kubernetes Spoke

Integration Hub spokes

Microsoft Active Directory v2 Spoke AI agents

The following AI agents are available for Microsoft Active Directory v2 Spoke.

Microsoft Active Directory computer management AI agent

This AI agent manages Microsoft Active Directory computer accounts. It creates, updates, enables, disables, and deletes computers, looks up computers, and checks whether a computer exists or is disabled.

Workflow

The agent helps the user manage computer accounts in Microsoft Active Directory.

1. Ask the user what they want to do and collect the details the action needs, such as the computer name.
2. Look up a computer or check whether it exists.
3. Check whether a computer is disabled.
4. Create a new computer account or update an existing one.
5. Enable or disable a computer.
6. Delete a computer account.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Computer Delete Computer Disable Computer Does Computer Exists Enable Computer Is Computer Disabled Look up Computer Update Computer
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Microsoft Active Directory v2 Spoke
- Integration Hub spokes

Microsoft Active Directory group management AI agent

This AI agent manages Microsoft Active Directory groups. It creates and deletes groups, looks up groups, checks whether a group exists, and checks whether a user is a member.

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Workflow

The agent helps the user manage groups in Microsoft Active Directory.

1. Ask the user what they want to do and collect the details the action needs, such as the group and user.
2. Look up a group or check whether it exists.
3. Check whether a user is in a group.
4. Create a new group with the required attributes.
5. Confirm the group exists and delete it.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Group Delete Group Does Group Exists Is User in Group Look up Group
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which	snc_internal

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Configuration (continued)

Field	Description
data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Microsoft Active Directory v2 Spoke
- Integration Hub spokes

Microsoft Active Directory object management AI agent

This AI agent manages Microsoft Active Directory objects. It creates and deletes objects, updates object expiration and organizational unit, and looks up objects by filter.

Workflow

The agent helps the user manage directory objects in Microsoft Active Directory.

1. Ask the user what they want to do and collect the details the action needs, such as the object's distinguished name or GUID.
2. Look up objects that match a filter.
3. Create a new object.
4. Update an object's expiration date or move it to another organizational unit.
5. Ask for the DN or GUID of an object to delete, confirm with the user, and delete it.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Object Delete Object Look up Objects by Filter Update Object Expiration Update Object OU
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Microsoft Active Directory v2 Spoke
- Integration Hub spokes

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Microsoft Active Directory user authentication AI agent

This AI agent manages Microsoft Active Directory account access. It unlocks accounts, checks lock status, generates random passwords, resets or changes passwords, and retrieves password expiration details.

Workflow

The agent helps the user resolve sign-in and password issues in Microsoft Active Directory.

1. Ask the user what they want to do and collect the details the action needs, such as the user.
2. Check whether a user's account is locked and unlock it.
3. Look up a user's password expiration details.
4. Generate a random password.
5. Reset or change a user's password.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Change User Password Generate Random Password Is User Locked Look up User Password Expiration Details Reset User Password Unlock User
Allowed user roles	snc_internal

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Microsoft Active Directory v2 Spoke
- Integration Hub spokes

Microsoft Active Directory user management AI agent

This AI agent manages Microsoft Active Directory users. It looks up users, checks whether a user exists or is disabled, enables or disables users, and deletes users.

Workflow

The agent helps the user manage user accounts in Microsoft Active Directory.

1. Ask the user what they want to do and collect the details the action needs, such as the user.
2. Look up a user or check whether the user exists.
3. Check whether a user is disabled.
4. Enable or disable a user after checking the current status.
5. Confirm the user exists and delete the user.
6. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Delete User Disable User Does User Exists Enable User Is User Disabled Look up User
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Not applicable.

Related topics

- Microsoft Active Directory v2 Spoke
- Integration Hub spokes

Microsoft Dynamics CRM Spoke AI agents

The following AI agents are available for Microsoft Dynamics CRM Spoke.

Microsoft Dynamics CRM account management AI agent

This AI agent manages accounts in Microsoft Dynamics CRM. It creates accounts, lists accounts, and looks up account details by account ID.

Workflow

The agent helps the user create and find accounts in Microsoft Dynamics CRM.

1. Ask the user what they want to do and collect the details the action needs, such as the account ID or account details.
2. List accounts or look up an account's details by account ID.
3. Create a new account.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Account

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Configuration (continued)

Field	Description
	Look up Account Details by Account ID Look up Accounts Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Microsoft Dynamics CRM Spoke

Integration Hub spokes

Microsoft Dynamics CRM case management AI agent

This AI agent manages cases in Microsoft Dynamics CRM. It creates cases and looks up case details by case ID.

Workflow

The agent helps the user create and review cases in Microsoft Dynamics CRM.

1. Ask the user what they want to do and collect the details the action needs, such as the case ID or case details.
2. Look up a case's details by case ID.
3. Create a new case.
4. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Case Look up Case Details by Case ID
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	s Not applicable.

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Related topics

Microsoft Dynamics CRM Spoke

Integration Hub spokes

Microsoft Dynamics CRM contact management AI agent

This AI agent manages contacts in Microsoft Dynamics CRM. It creates contacts, lists contacts, and looks up contact details by contact ID.

Workflow

The agent helps the user create and find contacts in Microsoft Dynamics CRM.

1. Ask the user what they want to do and collect the details the action needs, such as the contact ID or contact details.
2. List contacts or look up a contact's details by contact ID.
3. Create a new contact.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Contact Look up Contact Details by Contact ID Look up Contacts Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles	snc_internal

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Configuration (continued)

Field	Description
The specific user identity roles that determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Microsoft Dynamics CRM Spoke

Integration Hub spokes

Microsoft Dynamics CRM lead management AI agent

This AI agent manages leads in Microsoft Dynamics CRM. It creates leads and looks up lead details by lead ID.

Workflow

The agent helps the user create and review leads in Microsoft Dynamics CRM.

1. Ask the user what they want to do and collect the details the action needs, such as the lead ID or lead details.
2. Look up a lead's details by lead ID.
3. Create a new lead.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Lead Look up Lead Details by Lead ID
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Microsoft Dynamics CRM Spoke

Integration Hub spokes

Microsoft Dynamics CRM opportunity management AI agent

This AI agent manages opportunities in Microsoft Dynamics CRM. It creates opportunities, lists opportunities, looks up opportunity details by ID, and parses CRM entity data.

Workflow

The agent helps the user create and find opportunities in Microsoft Dynamics CRM.

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1. Ask the user what they want to do and collect the details the action needs, such as the opportunity ID or opportunity details.
2. List opportunities or look up an opportunity's details by opportunity ID.
3. Create a new opportunity.
4. Parse CRM entity data returned by Microsoft Dynamics CRM.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** CRM Entity JSON Parser Create Opportunity Look up Opportunities Stream Look up Opportunity Details by Opportunity ID
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Microsoft Dynamics CRM Spoke

Integration Hub spokes

Microsoft Dynamics CRM record management AI agent

This AI agent works with records in Microsoft Dynamics CRM. It looks up records by ID or search query, retrieves entity primary attributes and logical names, and deletes records.

Workflow

The agent helps the user find and remove records in Microsoft Dynamics CRM.

1. Ask the user what they want to do and collect the details the action needs, such as the entity and record ID.
2. Look up an entity's primary attributes and logical name.
3. Look up a record by record ID or by search query.
4. Look up records on instances earlier than the Paris release.
5. Delete a record.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Delete Record Look up Primary Attributes and Logical Name Look up Record by Record ID Look up Record by Search Query Look up Records (Before Paris Version)
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Microsoft Dynamics CRM Spoke
- Integration Hub spokes

Microsoft Entra ID Spoke AI agents

The following AI agents are available for Microsoft Entra ID Spoke.

Microsoft Entra ID group management AI agent

This AI agent manages Microsoft Entra ID groups. It creates security groups, deletes groups, looks up groups, and adds or removes members and owners.

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Workflow

The agent helps the user manage groups in Microsoft Entra ID.

1. Ask the user what they want to do and collect the details the action needs, such as the group and user.
2. Look up a group.
3. Create a security group.
4. Add a user to a group or remove one.
5. Add an owner to a group or remove one.
6. Delete a group.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add Owner to Group Add User to Group Create Security Group Delete Group Look up Group Remove Owner from Group Remove User from Group
Allowed user roles The specific user roles that can access this AI agent.	snc_internal

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Configuration (continued)

Field	Description
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Microsoft Entra ID Spoke (formerly Microsoft Azure Active Directory spoke)
- Integration Hub spokes

Microsoft Entra ID license management AI agent

This AI agent manages Microsoft Entra ID licenses. It looks up subscribed SKUs and assigns or removes user licenses.

Workflow

The agent helps the user manage license assignments in Microsoft Entra ID.

1. Ask the user what they want to do and collect the details the action needs, such as the user and license.
2. Look up the subscribed SKUs.
3. Assign a license to a user.
4. Remove a license from a user.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for

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Configuration (continued)

Field	Description
	tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Assign User License Look up Subscribed SKU Remove User License
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Microsoft Entra ID Spoke (formerly Microsoft Azure Active Directory spoke)
- Integration Hub spokes

Microsoft Entra ID user management AI agent

This AI agent manages Microsoft Entra ID users. It creates, enables, disables, and deletes users, looks up users, checks whether a user is enabled, in a group, or owns a group, and fetches user delta tokens.

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Workflow

The agent helps the user manage user accounts in Microsoft Entra ID.

1. Ask the user what they want to do and collect the details the action needs, such as the user ID.
2. Look up a user or check whether the user is enabled.
3. Check whether a user is in a group or owns a group.
4. Create a new user with the mandatory fields.
5. Enable or disable a user.
6. Delete a user.
7. Fetch the latest delta token for users.
8. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create User Delete User Disable User Does User owns Group Enable User Fetch Latest Delta Token for Users Is User Enabled Is User in Group Look up User
Allowed user roles	snc_internal

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Microsoft Entra ID Spoke (formerly Microsoft Azure Active Directory spoke)
- Integration Hub spokes

Microsoft Exchange Online Spoke AI agents

The following AI agents are available for Microsoft Exchange Online Spoke.

Microsoft Exchange Online calendar management AI agent

This AI agent manages Microsoft Exchange Online calendars. It creates and deletes events, finds meeting times, manages event attachments, and looks up calendars, events, occurrences, calendar views, and time zones.

Workflow

The agent helps the user manage calendars and events in Microsoft Exchange Online.

1. Ask the user what they want to do and collect the details the action needs, such as the user, calendar, or event.
2. Look up calendars, a calendar by ID, or a user's calendar events.
3. Look up an event by ID, a calendar view, or the occurrences of a recurring series.
4. Find meeting times and create a calendar event.
5. Copy an attachment to an event, look up an event's attachments, or delete an attachment.
6. Delete a calendar event or event record.

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7. Look up available time zones.
8. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Copy Attachment to Calendar Event Delete Attachment Delete Calendar Event Look up Attachments by Event ID Look up Calendar Events by User ID Look up Calendar View Stream Look up Calendar by ID Look up Calendars Stream Look up Event by ID Look up Occurrence Stream by SeriesMaster ID Look up Time Zones **Subflows** Create Calendar Event Delete Event Record Find Meeting Times
Allowed user roles	snc_internal

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Microsoft Exchange Online Spoke
- Integration Hub spokes

Microsoft Exchange Online mail management AI agent

This AI agent manages Microsoft Exchange Online mail. It looks up mail folders and messages, deletes messages, and sets mailbox automatic replies.

Workflow

The agent helps the user manage mailbox content and automatic replies in Microsoft Exchange Online.

1. Ask the user what they want to do and collect the details the action needs, such as the user ID or mail folder.
2. Look up a user's mail folders.
3. Look up messages for a user or in a mail folder.
4. Delete a message.
5. Set the mailbox's automatic reply.
6. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Delete Message Look up Mail Folders by User ID Look up Messages by Mail Folder ID Look up Messages by User ID Set Mailbox Auto Reply
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Not applicable.

Related topics

Microsoft Exchange Online Spoke

Integration Hub spokes

Microsoft Exchange Online meeting scheduler AI agent

This AI agent schedules meetings in Microsoft Exchange Online. It collects the attendees, subject, date, and time zone, finds times when attendees are available, and creates the calendar event.

Workflow

The agent helps the user find an available time and schedule a meeting in Microsoft Exchange Online.

1. Ask the user for the attendees and look up their email addresses, asking the user to choose when a name matches more than one person.
2. Ask for the meeting title or subject if it isn't provided.
3. Ask for the meeting date or time if it isn't provided.
4. Use the time zone the user mentions or, if none is given, the user's own time zone.
5. Find meeting times when the attendees are available around the requested time or day, and ask the user to pick a slot when the requested time isn't free.
6. Create the calendar event and share the meeting time and a link to the meeting details.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts**

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Configuration (continued)

Field	Description
	Fetch full standard name of time zones Get Logged in User's Timezone Look up Attendees Emails **Subflows** Create Calendar Event Find Meeting Times
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Microsoft Exchange Online Spoke

Integration Hub spokes

Microsoft Exchange Online metadata retrieval management AI agent

This AI agent retrieves Microsoft Exchange Online reference data. It looks up room metadata and time zone metadata.

Workflow

The agent helps the user retrieve room and time zone metadata from Microsoft Exchange Online.

1. Ask the user what they want to do and collect the details the action needs, such as the type of metadata needed.
2. Look up room metadata.
3. Look up time zone metadata.

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4. Present the metadata to the user.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Rooms Metadata Look up Time Zones Metadata
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Related topics

Microsoft Exchange Online Spoke

Integration Hub spokes

Microsoft Exchange Online room management AI agent

This AI agent looks up rooms in Microsoft Exchange Online so that users can find meeting spaces.

Workflow

The agent helps the user find rooms in Microsoft Exchange Online.

1. Ask the user what they want to do and collect the details the action needs, such as any room criteria.
2. Look up rooms that match the user's criteria.
3. Present the room details to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Look up Rooms Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent	snc_internal

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Microsoft Exchange Online Spoke

Integration Hub spokes

Microsoft OneDrive Spoke AI agents

The following AI agents are available for Microsoft OneDrive Spoke.

Microsoft OneDrive drive management AI agent

This AI agent looks up Microsoft OneDrive drives.

Workflow

The agent helps the user find Microsoft OneDrive drives.

1. Ask the user what they want to do and collect the details the action needs, such as the user or drive.
2. Look up the drives.
3. Present the drive details to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Look up Drives
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Microsoft OneDrive Spoke

Integration Hub spokes

Microsoft OneDrive file management AI agent

This AI agent manages Microsoft OneDrive files.

Workflow

The agent looks up items, copies files and folders, uploads and replaces files, handles large uploads, checks files in and out, manages versions, and copies files between Microsoft OneDrive and ServiceNow attachments.

1. Ask the user what they want to do and collect the details the action needs, such as the file or folder.
2. Look up items, or look up a file or folder by ID or path.
3. Copy a file or folder within Microsoft OneDrive.

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4. Copy a ServiceNow attachment to Microsoft OneDrive, or copy a Microsoft OneDrive file or file version to an attachment.
5. Upload and replace a file, or upload a large file using an upload session.
6. Check the status of an upload session or delete it.
7. Check a file out or check it back in.
8. Restore a file version or delete one.
9. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Check In File Check Out File Check Upload Session Status Copy Attachment to OneDrive Copy Attachment to OneDrive Using Path Copy File or Folder Item Copy OneDrive File Version to Attachment Copy OneDrive File to Attachment Using File Path Create Upload Session Delete Upload Session Delete Version of a File Look up File or Folder Item Info by ID

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Configuration (continued)

Field	Description
	Look up File or Folder Item Info by Path Look up Items Restore File Version Upload Large File Upload and Replace File
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Microsoft OneDrive Spoke

Integration Hub spokes

Microsoft OneDrive folder management AI agent

This AI agent manages Microsoft OneDrive files and folders. It creates folders, moves and renames items, and deletes files or folders.

Workflow

The agent helps the user organize files and folders in Microsoft OneDrive.

1. Ask the user what they want to do and collect the details the action needs, such as the item and location.
2. Create a folder in the target location.
3. Move a file or folder, confirming the source and destination.
4. Rename a file or folder.

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5. Confirm and delete a file or folder.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
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Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Folder Delete File or Folder Item Move File or Folder Item Update File or Folder Name
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Not applicable.

Related topics

Microsoft OneDrive Spoke

Integration Hub spokes

Microsoft OneDrive permission management AI agent

This AI agent manages Microsoft OneDrive permissions. It creates sharing links and looks up, updates, and deletes permissions on files and folders.

Workflow

The agent helps the user control access to Microsoft OneDrive files and folders.

1. Ask the user what they want to do and collect the details the action needs, such as the file or folder and the user or group.
2. Look up the permissions on a file or folder.
3. Create a sharing link with the settings the user confirms.
4. Update a user's or group's permission.
5. Confirm with the user and delete a permission.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Sharing Link Delete Permission

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Configuration (continued)

Field	Description
	Look up Permissions Update Permission
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Microsoft OneDrive Spoke

Integration Hub spokes

Microsoft OneDrive sharing management AI agent

This AI agent adds and removes collaborators on Microsoft OneDrive files and folders.

Workflow

The agent helps the user manage collaborators on Microsoft OneDrive content.

1. Ask the user what they want to do and collect the details the action needs, such as the file or folder path and the collaborator.
2. Add a collaborator to the file or folder.
3. Remove a collaborator from the file or folder.
4. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add Collaborator Remove Collaborator
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Microsoft OneDrive Spoke

Integration Hub spokes

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Microsoft Security Response Spoke AI agents

The following AI agents are available for Microsoft Security Response Spoke.

Microsoft Security Response Center security management AI agent

This AI agent retrieves security update information from the Microsoft Security Response Center. It lists available security updates and looks up a specific update by key.

Workflow

The agent helps the user review Microsoft Security Response Center updates.

1. Ask the user what they want to do and collect the details the action needs, such as the update key.
2. List the available security updates.
3. Look up a specific security update by key.
4. Present the update details to the user.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Security Updates Look up Security Updates By Key
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that	snc_internal

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Configuration (continued)

Field	Description
determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Microsoft Security Response Center Spoke
- Integration Hub spokes

Microsoft SharePoint Online Spoke AI agents

The following AI agents are available for Microsoft SharePoint Online Spoke.

Microsoft SharePoint Online change management AI agent

This AI agent retrieves Microsoft SharePoint Online change-tracking tokens. It gets the next token and the delta link token for a drive so that flows can track changes.

Workflow

The agent helps the user get the tokens needed to track changes in Microsoft SharePoint Online.

1. Ask the user what they want to do and collect the details the action needs, such as the drive.
2. Get the next token.
3. Get the delta link token for a drive.
4. Return the token to the user.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and

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Configuration (continued)

Field	Description
	response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Get Delta Link Token For Drive Get Next Token
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Microsoft SharePoint Online Spoke

Integration Hub spokes

Microsoft SharePoint Online file management AI agent

This AI agent manages Microsoft SharePoint Online files.

Workflow

The agent copies, moves, creates, and deletes files, checks files in and out, shares and unshares files, retrieves details, permissions, and download links, and moves files between Microsoft SharePoint and ServiceNow.

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1. Ask the user what they want to do and collect the details the action needs, such as the site, file, and target.
2. Look up a file's details or permissions, or get a download link.
3. Create a text file, copy a file within Microsoft SharePoint, or copy a ServiceNow attachment to a Microsoft SharePoint folder.
4. Move a file or delete it.
5. Check a file out or check it back in.
6. Share a file with a user or group, or unshare it.
7. Attach a Microsoft SharePoint file to a ServiceNow record.
8. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Attach Sharepoint File To A Record (Simplified) Check-in File Check-out File Copy Attachment To Folder (simplified) Copy File Create A Text File Delete File Get File Download Link Look Up File Details Look up File Permissions

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Configuration (continued)

Field	Description
	Move File Share File With Group Share File With User Unshare File With Group Unshare File With User
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Microsoft SharePoint Online Spoke

Integration Hub spokes

Microsoft SharePoint Online folder management AI agent

This AI agent manages Microsoft SharePoint Online folders. It creates, renames, looks up, and deletes folders, lists the files and subfolders in a folder, and shares or unshares folders with users or groups.

Workflow

The agent helps the user organize and share Microsoft SharePoint Online folders.

1. Ask the user what they want to do and collect the details the action needs, such as the site and folder.
2. Look up a folder, or list the files or subfolders in it.
3. Create a new folder or rename an existing one.

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4. Share a folder with a user or group, or unshare it.
5. Delete a folder.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Folder Delete Folder List Files In A Folder List Folders In A Folder Look Up Folder Rename A Folder Share Folder With Group Share Folder With User Unshare Folder With Group Unshare Folder With User
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that	snc_internal

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Configuration (continued)

Field	Description
determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Microsoft SharePoint Online Spoke
- Integration Hub spokes

Microsoft SharePoint Online group management AI agent

This AI agent manages Microsoft SharePoint Online groups and site roles. It creates and deletes groups, adds and removes users, updates group owners, looks up groups and Microsoft 365 members, and adds or removes site roles.

Workflow

The agent helps the user manage Microsoft SharePoint Online groups and site permissions.

1. Ask the user what they want to do and collect the details the action needs, such as the site, group, and user.
2. Look up a group by name or the Microsoft 365 members of a site group.
3. Create a new group or delete one.
4. Add a user to a group or remove a user from it.
5. Update a group's owner.
6. Add a role to a site or remove one.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for

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Configuration (continued)

Field	Description
	tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add Role To Site Add User To Group Create Group Delete Group Look Up Group By Name Look up M365 Members by Site Group Remove Role From Site Remove User From Group Update Group Owner (User)
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Related topics

Microsoft SharePoint Online Spoke

Integration Hub spokes

Microsoft SharePoint Online list item management AI agent

This AI agent manages Microsoft SharePoint Online list items. It creates, updates, and deletes list items and looks up a specific item or the items in a list.

Workflow

The agent helps the user manage items in a Microsoft SharePoint Online list.

1. Ask the user what they want to do and collect the details the action needs, such as the site, list, and item ID.
2. Look up the items in a list or a specific item by ID.
3. Create a new list item.
4. Update a list item by ID.
5. Delete a list item by ID.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create List Item Delete List Item By ID Look Up List Item By ID Look Up List Items In A List Update List Item By ID
Allowed user roles	snc_internal

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Microsoft SharePoint Online Spoke
- Integration Hub spokes

Microsoft SharePoint Online list management AI agent

This AI agent manages Microsoft SharePoint Online lists. It creates, updates, and deletes lists, looks up lists and list IDs, manages list subscriptions, and looks up drives.

Workflow

The agent helps the user create and manage lists in Microsoft SharePoint Online.

1. Ask the user what they want to do and collect the details the action needs, such as the site and list.
2. Get a list, look up list details by ID, or find a list ID by title.
3. Create a new list or update a list's details.
4. Create, renew, or delete a list subscription.
5. Delete a list by ID.
6. Look up drives.
7. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
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Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create List Create List Subscription Delete List By ID Delete List Subscription Get List Look Up List Details By ID Look Up List ID By Title Look up Drives Renew List Subscription Update List Details
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Microsoft SharePoint Online Spoke

Integration Hub spokes

Microsoft SharePoint Online search management AI agent

This AI agent runs searches in Microsoft SharePoint Online and returns the query results.

Workflow

The agent helps the user search content in Microsoft SharePoint Online.

1. Ask the user what they want to do and collect the details the action needs, such as the search query.
2. Run the search query and look up the results.
3. Present the search results to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.

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Configuration (continued)

Field	Description
Tools	**Flow Action** Look up Search Query Results Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Microsoft SharePoint Online Spoke

Integration Hub spokes

Microsoft SharePoint Online site management AI agent

This AI agent manages Microsoft SharePoint Online sites. It creates, updates, and deletes modern sites and subsites, creates root site subscriptions, and looks up sites, site collections, subsites, group information, role assignments, and permissions.

Workflow

The agent helps the user create, review, and manage Microsoft SharePoint Online sites.

1. Ask the user what they want to do and collect the details the action needs, such as the site.
2. Look up sites, a specific site, site collections, or a site collection ID.
3. Look up modern site information or its group information, subsites, or subsite details.
4. Look up a site's role assignments or permissions.
5. Create a modern site or subsite, or create a root site subscription.
6. Update site information.

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7. Delete a subsite, a modern site, or a modern site with its Microsoft 365 group.
8. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Modern Site Create Root Site Subscription Create Subsite Delete Modern Site Delete Modern Site with O365 Group Delete Subsite Get Site Look Up Site Collection ID Look Up Subsite Details Look up Modern Site Group Information Look up Modern Site Information Look up Role Assignments Look up Site Collections Look up Site Permissions Look up Sites Stream Look up Subsites

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Configuration (continued)

Field	Description
	Update Site Information
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Microsoft SharePoint Online Spoke

Integration Hub spokes

Microsoft SharePoint Online user management AI agent

This AI agent retrieves Microsoft SharePoint Online user information. It looks up users by email or login name and the Microsoft SharePoint Online groups a user belongs to.

Workflow

The agent helps the user find Microsoft SharePoint Online user details and group memberships.

1. Ask the user what they want to do and collect the details the action needs, such as the user's email address or login name.
2. Look up user information by email or login name.
3. Look up the Microsoft SharePoint Online groups the user belongs to.
4. Present the results to the user.
5. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look Up User Information By Email Look Up User Information By Login Name Look Up User's Sharepoint Groups
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Related topics

Microsoft SharePoint Online Spoke

Integration Hub spokes

Microsoft Teams Graph Spoke AI agents

The following AI agents are available for Microsoft Teams Graph Spoke.

Microsoft Teams application management AI agent

This AI agent manages Microsoft Teams app installations for users. It looks up the apps installed for a user and installs an app for a user with their consent.

Workflow

The agent helps the user check and install Microsoft Teams apps for a user.

1. Ask the user what they want to do and collect the details the action needs, such as the user and app.
2. Look up the apps installed for the user.
3. Confirm the user's consent before installing anything.
4. Install the specified app for the user.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Install Application to User Look up User App Installation
Allowed user roles	snc_internal

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Not defined.
Used in agentic workflows	Not applicable.

Related topics

- Microsoft Teams Graph Spoke
- Integration Hub spokes

Microsoft Teams calendar management AI agent

This AI agent manages Microsoft Teams meetings. It looks up meeting details and the occurrences of a recurring meeting, and deletes meetings.

Workflow

The agent helps the user review and remove Microsoft Teams meetings.

1. Ask the user what they want to do and collect the details the action needs, such as the meeting ID or organizer.
2. Look up a meeting's details.
3. Look up the occurrences of a recurring meeting.
4. Delete a meeting.
5. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Delete meeting Look up meeting Look up meeting occurrences
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Not defined.
Used in agentic workflows	Not applicable.

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Related topics

Microsoft Teams Graph Spoke

Integration Hub spokes

Microsoft Teams channel management AI agent

This AI agent manages Microsoft Teams channels. It creates and deletes channels, adds and removes channel members, and looks up channels by ID or name, lists channels, and lists channel members.

Workflow

The agent helps the user create and manage channels in Microsoft Teams.

1. Ask the user what they want to do and collect the details the action needs, such as the team and channel.
2. Look up a channel by ID or name, or list a team's channels.
3. Look up the members of a channel.
4. Create a new channel.
5. Add a member to a channel or remove one.
6. Delete a channel.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add member to channel Create channel Delete channel Look up channel

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Configuration (continued)

Field	Description
	Look up channel by name Look up channel members Look up channels Remove member from channel
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Not defined.
Used in agentic workflows	Not applicable.

Related topics

Microsoft Teams Graph Spoke

Integration Hub spokes

Microsoft Teams chat management AI agent

This AI agent retrieves Microsoft Teams chat information. It looks up a user's chats and the content and details of specific messages.

Workflow

The agent helps the user find chats and messages in Microsoft Teams.

1. Ask the user what they want to do and collect the details the action needs, such as the user, chat, or message ID.
2. Look up the user's chats.
3. Look up a specific message's content and details.
4. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
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Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Chats Look up Message
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Not defined.
Used in agentic workflows	Not applicable.

Related topics

Microsoft Teams Graph Spoke

Integration Hub spokes

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Microsoft Teams notification management AI agent

This AI agent posts ServiceNow updates to Microsoft Teams channels. It shares change request details, posts custom messages, and replies to existing channel messages.

Workflow

The agent helps the user send messages and change updates to Microsoft Teams channels.

1. Ask the user what they want to do and collect the details the action needs, such as the team, channel, and message content.
2. Tell the user about any requested input that isn't supported, such as Microsoft SharePoint attachments, mentions, or overridden default fields, and continue without it.
3. Post change request details to a channel.
4. Post a custom message to a channel.
5. Post a reply to an existing message.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Post Change Details Post Message Post Reply to Message
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles	snc_internal

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Configuration (continued)

Field	Description
The specific user identity roles that determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Not defined.
Used in agentic workflows	Not applicable.

Related topics

- Microsoft Teams Graph Spoke
- Integration Hub spokes

Microsoft Teams team management AI agent

This AI agent manages Microsoft Teams teams. It creates, updates, archives, unarchives, and deletes teams, adds and removes members, and looks up a team, its members, or the teams a user belongs to.

Workflow

The agent helps the user create and manage teams in Microsoft Teams.

1. Ask the user what they want to do and collect the details the action needs, such as the team ID or user.
2. Look up a team, its members, or the teams a user belongs to.
3. Create a new team or update an existing team's details.
4. Add a member to a team or remove one.
5. Archive a team to make it inactive while keeping its data, or unarchive it.
6. Delete a team.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add member to team Archive team Create team Delete team Look up team Look up team members stream Look up teams by user Remove member from team Unarchive team Update team
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Not defined.
Used in agentic workflows	Not applicable.

Related topics

- Microsoft Teams Graph Spoke
- Integration Hub spokes

Miro Spoke AI agents

The following AI agents are available for Miro Spoke.

Miro board management AI agent

This AI agent manages Miro boards. It creates, updates, looks up, and deletes boards.

Workflow

The agent helps the user create and manage Miro boards.

1. Ask the user what they want to do and collect the details the action needs, such as the board ID or name.
2. Look up a board.
3. Create a new board.
4. Update an existing board.
5. Get explicit confirmation and delete a board.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Board Delete Board Look up Board Update Board
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Miro Spoke

Integration Hub spokes

Miro board item management AI agent

This AI agent adds items to Miro boards. It creates card, shape, sticky note, and text items on a board.

Workflow

The agent helps the user add content to a Miro board.

1. Ask the user what they want to do and collect the details the action needs, such as the board ID and item details.
2. Identify the type of item to add: card, shape, sticky note, or text.

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3. Add the item to the board.
4. Confirm the item was added and share its details.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add Card Item to Board Add Shape Item to Board Add Sticky Note Item to Board Add Text Item to Board
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Not applicable.

Related topics

Miro Spoke

Integration Hub spokes

Miro team management AI agent

This AI agent manages Miro teams. It creates, updates, looks up, and deletes teams and adds or removes team members.

Workflow

The agent helps the user manage Miro teams and their members.

1. Ask the user what they want to do and collect the details the action needs, such as the team and user.
2. Look up a team.
3. Create a new team or update an existing one.
4. Add a user to a team or remove one.
5. Delete a team.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add User to Team Create Team

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Configuration (continued)

Field	Description
	Delete Team Look up Team Remove User from Team Update Team
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Miro Spoke

Integration Hub spokes

Miro user management AI agent

This AI agent manages Miro users. It creates, updates, activates, deactivates, and deletes users and looks up users, including the authenticated user.

Workflow

The agent helps the user manage Miro user accounts.

1. Ask the user what they want to do and collect the details the action needs, such as the user ID or details.
2. Look up a user or the authenticated user.
3. Create a new user or update an existing one.
4. Activate or deactivate a user.

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5. Delete a user.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Activate User Create User Deactivate User Delete User Look up Authenticated User Look up User Update User
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Miro Spoke

Integration Hub spokes

Okta Spoke AI agents

The following AI agents are available for Okta Spoke.

Okta application access management AI agent

This AI agent manages access to Okta applications. It looks up the users and groups assigned to an application and revokes a user's application access.

Workflow

The agent helps the user review and revoke application access in Okta.

1. Ask the user what they want to do and collect the details the action needs, such as the application ID and user.
2. Look up the users assigned to an application.
3. Look up the groups assigned to an application.
4. Revoke a user's access to the application.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Groups by Application ID Stream Look up Users by Application ID Stream Revoke User Application Access
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Okta Spoke

Integration Hub spokes

Okta application management AI agent

This AI agent retrieves Okta application information. It looks up App Launcher applications and application details by application ID.

Workflow

The agent helps the user find applications in Okta.

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1. Ask the user what they want to do and collect the details the action needs, such as the application ID or user.
2. Look up App Launcher applications.
3. Look up an application by application ID.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up App Launcher Applications Stream Look up Application by Application ID Revoke User Application Access
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Okta Spoke

Integration Hub spokes

Okta group management AI agent

This AI agent manages Okta groups. It creates and updates groups, adds and removes users, checks group membership, and looks up groups and group details.

Workflow

The agent helps the user manage Okta groups and their members.

1. Ask the user what they want to do and collect the details the action needs, such as the group and user.
2. Look up groups, a group ID by name, or a group's details.
3. Create a new group or update an existing one.
4. Check whether a user is in a group.
5. Add a user to a group or remove a user from it.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.

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Configuration (continued)

Field	Description
Tools	**Flow Actions** Add User to Group Create Group Is User in Group Look up Group Details by Group ID Look up Group ID by Name Look up Groups Stream Remove User from Group Update Group
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Okta Spoke
- Integration Hub spokes

Okta group membership management AI agent

This AI agent retrieves Okta group membership. It looks up the members of a group and the groups a user belongs to.

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Workflow

The agent helps the user see Okta group memberships.

1. Ask the user what they want to do and collect the details the action needs, such as the group or user.
2. Look up the members of a group.
3. Look up the groups a user belongs to.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Group Members Stream Look up User Groups Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Okta Spoke

Integration Hub spokes

Okta logs management AI agent

This AI agent retrieves Okta system logs so that users can review sign-in and administrative activity.

Workflow

The agent helps the user review Okta logs.

1. Ask the user what they want to do and collect the details the action needs, such as a time range or filter.
2. Look up Okta logs that match the user's criteria.
3. Present the log entries to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Look up Okta Logs Stream

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Configuration (continued)

Field	Description
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Okta Spoke

Integration Hub spokes

Okta password management AI agent

This AI agent manages Okta passwords and account access. It sets, changes, expires, and resets passwords, resets authentication factors, and unlocks user accounts.

Workflow

The agent helps the user resolve password and sign-in issues in Okta.

1. Ask the user what they want to do and collect the details the action needs, such as the user.
2. Unlock a locked user account.
3. Reset a password to a temporary value or expire a password.
4. Set or change a user's password.
5. Reset a user's authentication factors.
6. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Change User's Password Expire User Password Reset User Factors Reset to Temporary Password Set User Password Unlock User
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Not applicable.

Related topics

Okta Spoke

Integration Hub spokes

Okta user management AI agent

This AI agent manages the Okta user lifecycle. It creates, activates, deactivates, suspends, unsuspends, and deletes users, restarts activation, clears sessions, checks lock status, and looks up users, profiles, and account details.

Workflow

The agent helps the user manage Okta user accounts.

1. Ask the user what they want to do and collect the details the action needs, such as the user.
2. Look up users, a user's Okta ID, profile, or account details.
3. Check whether a user's account is locked.
4. Create a new user, activate one, or restart activation.
5. Suspend or unsuspend a user, or clear a user's sessions.
6. Deactivate or delete a user.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Activate User

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Configuration (continued)

Field	Description
	Clear User Session Create User Deactivate User Delete User Is User Account Locked Look up Okta User ID Look up User Account Details by User ID Look up User Profile by User ID Look up Users Stream Restart User Activation Suspend User Unsuspend User
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Okta Spoke
- Integration Hub spokes

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Oracle HCM Cloud Spoke AI agents

The following AI agents are available for Oracle HCM Cloud Spoke.

Oracle HCM Cloud compensation management AI agent

This AI agent retrieves compensation data from Oracle HCM Cloud. It looks up an employee's total rewards and individual compensation details.

Workflow

The agent helps the user review compensation information in Oracle HCM Cloud.

1. Ask the user what they want to do and collect the details the action needs, such as the employee.
2. Look up an employee's total rewards.
3. Look up an employee's individual compensation details.
4. Present the compensation information to the user.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Individual Compensation Look up Total Rewards
Allowed user roles The specific user roles that can access this AI agent.	sn_oracle_hcm_spk.Oracle Cloud HCM Admin
Data access roles The specific user identity roles that	sn_oracle_hcm_spk.Oracle Cloud HCM Admin

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Configuration (continued)

Field	Description
determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Fetch Individual Compensation and Payslip and Total Rewards

Related topics

Oracle HCM Cloud Spoke

Integration Hub spokes

Oracle HCM Cloud feedback management AI agent

This AI agent looks up feedback records in Oracle HCM Cloud so that users can review feedback without leaving ServiceNow.

Workflow

The agent helps the user retrieve feedback from Oracle HCM Cloud.

1. Ask the user what they want to do and collect the details the action needs, such as the employee or feedback criteria.
2. Look up the feedback that matches the user's request.
3. Present the feedback details to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Look up Feedback
Allowed user roles The specific user roles that can access this AI agent.	sn_oracle_hcm_spk.Oracle Cloud HCM Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_oracle_hcm_spk.Oracle Cloud HCM Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Fetch Goals and Performance Feedback

Related topics

Oracle HCM Cloud Spoke

Integration Hub spokes

Oracle HCM Cloud goals management AI agent

This AI agent looks up goals in Oracle HCM Cloud so that HR professionals and managers can review and track objectives.

Workflow

The agent helps the user review goal information in Oracle HCM Cloud.

1. Ask the user what they want to do and collect the details the action needs, such as the employee or goal criteria.
2. Look up the goals that match the user's request.

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3. Present the goal details to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Look up Goals
Allowed user roles The specific user roles that can access this AI agent.	sn_oracle_hcm_spk.Oracle Cloud HCM Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_oracle_hcm_spk.Oracle Cloud HCM Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Fetch Goals and Performance Feedback

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Related topics

Oracle HCM Cloud Spoke

Integration Hub spokes

Oracle HCM Cloud human capital management AI agent

This AI agent retrieves human capital data from Oracle HCM Cloud. It looks up holiday calendars, employee documents, and the attachments linked to those documents.

Workflow

The agent helps the user find holiday calendars and employee documents in Oracle HCM Cloud.

1. Ask the user what they want to do and collect the details the action needs, such as the employee or document identifier.
2. Look up a holiday calendar to retrieve holiday schedules.
3. Look up an employee's documents.
4. Retrieve the attachments linked to an employee document.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Employee Document Attachments Look up Employee Documents Look up Holiday Calendar
Allowed user roles The specific user roles that can access this AI agent.	sn_oracle_hcm_spk.Oracle Cloud HCM Admin

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Configuration (continued)

Field	Description
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_oracle_hcm_spk.Oracle Cloud HCM Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Oracle HCM Cloud Spoke
- Integration Hub spokes

Oracle HCM Cloud jobs management AI agent

This AI agent looks up recruiting candidates in Oracle HCM Cloud so that HR professionals and recruiters can review candidate details quickly.

Workflow

The agent helps the user find and review recruiting candidates in Oracle HCM Cloud.

1. Ask the user what they want to do and collect the details the action needs, such as the candidate or job criteria.
2. Look up recruiting candidates that match the user's criteria.
3. Present the candidate details to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and

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Configuration (continued)

Field	Description
	response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Look up Recruiting Candidates
Allowed user roles The specific user roles that can access this AI agent.	sn_oracle_hcm_spk.Oracle Cloud HCM Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_oracle_hcm_spk.Oracle Cloud HCM Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Oracle HCM Cloud Spoke

Integration Hub spokes

Oracle HCM Cloud payroll management AI agent

This AI agent retrieves payroll information from Oracle HCM Cloud. It looks up payroll data and employee payslips for HR professionals and payroll administrators.

Workflow

The agent helps the user find payroll and payslip information in Oracle HCM Cloud.

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1. Ask the user what they want to do and collect the details the action needs, such as the payroll or employee identifier.
2. Look up payroll data.
3. Look up an employee's payslip.
4. Present the requested payroll details to the user.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Payroll Look up Payslip
Allowed user roles The specific user roles that can access this AI agent.	sn_oracle_hcm_spk.Oracle Cloud HCM Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_oracle_hcm_spk.Oracle Cloud HCM Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Fetch Individual Compensation and Payslip and Total Rewards

Related topics

Oracle HCM Cloud Spoke

Integration Hub spokes

PagerDuty Spoke AI agents

The following AI agents are available for PagerDuty Spoke.

PagerDuty audit management AI agent

This AI agent retrieves PagerDuty audit records to support compliance and operational review.

Workflow

The agent helps the user review audit records in PagerDuty.

1. Ask the user what they want to do and collect the details the action needs, such as a time range or filter.
2. Look up audit records that match the user's criteria.
3. Present the audit records to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action**

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Configuration (continued)

Field	Description
	Look up Audit Records Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

PagerDuty Spoke

Integration Hub spokes

PagerDuty business service management AI agent

This AI agent manages PagerDuty business services. It creates, updates, and deletes business services and looks up business services, their subscribers, and their dependencies.

Workflow

The agent helps the user manage PagerDuty business services.

1. Ask the user what they want to do and collect the details the action needs, such as the business service ID or details.
2. Look up a business service by ID or list business services.
3. Look up a business service's subscribers or dependencies.
4. Create a new business service.
5. Update an existing business service.
6. Delete a business service.
7. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Business Service Delete Business Service Look up Business Service Dependencies by Business Service ID Look up Business Service Subscribers by Business Service ID Look up Business Service by ID Look up Business Services Stream Update Business Service
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

PagerDuty Spoke

Integration Hub spokes

PagerDuty escalation policy management AI agent

This AI agent manages PagerDuty escalation policies. It creates, updates, and deletes policies and looks up a specific policy or a list of policies.

Workflow

The agent helps the user manage PagerDuty escalation policies.

1. Ask the user what they want to do and collect the details the action needs, such as the escalation policy ID or details.
2. Look up a specific escalation policy by ID or list policies.
3. Create a new escalation policy.
4. Update an existing escalation policy.
5. Delete an escalation policy.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.

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Configuration (continued)

Field	Description
Tools	**Flow Actions** Create Escalation Policy Delete Escalation Policy Look up Escalation Policies Stream Look up Escalation Policy by ID Update Escalation Policy
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

PagerDuty Spoke

Integration Hub spokes

PagerDuty extension management AI agent

This AI agent manages PagerDuty extensions. It creates and updates extensions and looks up a specific extension or a list of extensions.

Workflow

The agent helps the user manage PagerDuty extensions.

1. Ask the user what they want to do and collect the details the action needs, such as the extension ID or details.
2. Look up a specific extension by ID or list extensions.

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3. Create a new extension.
4. Update an existing extension.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Extension Look up Extension by ID Look up Extensions Stream Update Extension
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

PagerDuty Spoke

Integration Hub spokes

PagerDuty incident management AI agent

This AI agent manages PagerDuty incidents. It creates and updates incidents and looks up a specific incident by ID or a list of incidents.

Workflow

The agent helps the user track and update incidents in PagerDuty.

1. Ask the user what they want to do and collect the details the action needs, such as the incident ID or details.
2. Look up a specific incident by ID or list incidents.
3. Create a new incident.
4. Update an existing incident with the latest information.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions**

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Configuration (continued)

Field	Description
	Create Incident Look up Incident by ID Look up Incidents Stream Update Incident
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

PagerDuty Spoke

Integration Hub spokes

PagerDuty notification management AI agent

This AI agent retrieves PagerDuty notifications so that users can review the alerts that were sent.

Workflow

The agent helps the user review notifications in PagerDuty.

1. Ask the user what they want to do and collect the details the action needs, such as a time range or filter.
2. Look up notifications that match the user's criteria, such as a time range.
3. Present the notification details to the user.
4. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Look up Notifications Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

PagerDuty Spoke

Integration Hub spokes

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PagerDuty schedule management AI agent

This AI agent retrieves PagerDuty schedules. It looks up a specific schedule by ID or a list of schedules.

Workflow

The agent helps the user review on-call schedules in PagerDuty.

1. Ask the user what they want to do and collect the details the action needs, such as the schedule ID or filter criteria.
2. Look up a specific schedule by ID or list schedules.
3. Present the schedule details to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Schedule by ID Look up Schedules Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

PagerDuty Spoke

Integration Hub spokes

PagerDuty service management AI agent

This AI agent manages PagerDuty services. It creates and updates services and looks up a specific service by ID or a list of services.

Workflow

The agent helps the user manage PagerDuty services.

1. Ask the user what they want to do and collect the details the action needs, such as the service ID or details.
2. Look up a specific service by ID or list services.
3. Create a new service.
4. Update an existing service.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Service Look up Service by ID Look up Services Stream Update Service
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

PagerDuty Spoke

Integration Hub spokes

PagerDuty tag management AI agent

This AI agent manages PagerDuty tags. It creates, looks up, assigns, and deletes tags used to categorize PagerDuty resources.

Workflow

The agent helps the user organize PagerDuty resources with tags.

1. Ask the user what they want to do and collect the details the action needs, such as the tag or resource.
2. Look up a tag by ID or list tags.

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3. Create a new tag.
4. Assign tags to a resource.
5. Delete a tag that is no longer needed.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Assign Tags Create Tag Delete Tag Look up Tag by ID Look up Tags Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

PagerDuty Spoke

Integration Hub spokes

PagerDuty team management AI agent

This AI agent manages PagerDuty teams. It creates, updates, and deletes teams, adds and removes users and escalation policies, and looks up teams, their users, and their subscriptions.

Workflow

The agent helps the user manage PagerDuty teams and their membership.

1. Ask the user what they want to do and collect the details the action needs, such as the team, user, or escalation policy.
2. Look up a team by ID, list teams, or list a team's users and subscriptions.
3. Create a new team or update an existing team's details.
4. Add a user to a team or remove a user from it.
5. Add an escalation policy to a team or remove it.
6. Delete a team.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add Escalation Policy to Team Add User to Team Create Team Delete Team Look up Subscriptions in Team Look up Team by ID Look up Teams Stream Look up Users in Team Remove Escalation Policy from Team Remove User from Team Update Team
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Related topics

PagerDuty Spoke

Integration Hub spokes

PagerDuty user management AI agent

This AI agent manages PagerDuty users. It creates, updates, and removes users, lists users, and looks up who is currently on call.

Workflow

The agent helps the user manage PagerDuty users and check on-call status.

1. Ask the user what they want to do and collect the details the action needs, such as the user details.
2. Look up users or the users who are currently on call.
3. Create a new user.
4. Update an existing user's details.
5. Remove a user.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
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Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create User Look up On Call Users Look up Users Stream Remove User Update User
Allowed user roles	snc_internal

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

PagerDuty Spoke

Integration Hub spokes

SAP Ariba Spoke AI agents

The following AI agents are available for SAP Ariba Spoke.

SAP Ariba approvals procurement management AI agent

This AI agent looks up the status of procurement approvals in SAP Ariba.

Workflow

The agent helps the user check procurement approval statuses in SAP Ariba.

1. Ask the user what they want to do and collect the details the action needs, such as the approval or request identifier.
2. Look up the approval status for the specified procurement request.
3. Present the status to the user.
4. Report the outcome to the user, including details of any error.

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Configuration

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Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Look up Approvals Status
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Approval Status Lookup and Creation

Related topics

SAP Ariba Spoke

Integration Hub spokes

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SAP Ariba approvals sourcing management AI agent

This AI agent creates approval statuses in SAP Ariba to move sourcing approval workflows forward.

Workflow

The agent helps the user record an approval status for a sourcing approval in SAP Ariba.

1. Ask the user what they want to do and collect the details the action needs, such as the approval request and the status to set.
2. Create the approval status for the specified approval request.
3. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Create Approval Status
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Approval Status Lookup and Creation

Related topics

SAP Ariba Spoke

Integration Hub spokes

SAP Ariba invoice management AI agent

The agent retrieves invoice information from SAP Ariba. It looks up pending message IDs and invoice details using the cXML protocol.

Workflow

The agent helps the user track pending messages and find invoices in SAP Ariba.

1. Ask the user what they want to do and collect the details the action needs, such as the invoice or message criteria.
2. Look up pending message IDs.
3. Look up invoice details.
4. Present the results to the user.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Invoices CXML Look up Pending Messages ID CXML
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

SAP Ariba Spoke

Integration Hub spokes

SAP Ariba procurement export management AI agent

This AI agent looks up procurement receipts in SAP Ariba so that users can access receipt data from ServiceNow.

Workflow

The agent helps the user retrieve receipt data from SAP Ariba.

1. Ask the user what they want to do and collect the details the action needs, such as the receipt criteria.
2. Look up the receipts that match the user's criteria.
3. Present the receipt data to the user.
4. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Look up Receipts
Allowed user roles The specific user roles that can access this AI agent.	pa_power_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	pa_power_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

SAP Ariba Spoke

Integration Hub spokes

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SAP Ariba sourcing event management AI agent

This AI agent manages SAP Ariba sourcing events. It looks up supplier bids and awarded bids, downloads bid response attachments, updates event states, and creates supplier awards.

Workflow

The agent helps the user review bids and manage awards for sourcing events in SAP Ariba.

1. Ask the user what they want to do and collect the details the action needs, such as the sourcing event ID.
2. Look up the supplier bids submitted for a sourcing event.
3. Look up awarded bids.
4. Download attachments from supplier bid responses.
5. Create a supplier award based on the bid evaluation.
6. Update the state of the sourcing event.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Supplier Award Download Attachment from Supplier Bid Responses Look up Awarded Bids Look up Supplier Bids Update Event State
Allowed user roles	pa_power_user

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	pa_power_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

SAP Ariba Spoke

Integration Hub spokes

SAP Concur Spoke AI agents

The following AI agents are available for SAP Concur Spoke.

SAP Concur expense entry management AI agent

This AI agent retrieves the details of a specific expense entry from SAP Concur.

Workflow

The agent helps the user review an expense entry in SAP Concur.

1. Ask the user what they want to do and collect the details the action needs, such as the expense entry ID.
2. Get the details of the specified expense entry.
3. Present the expense entry details to the user.
4. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
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Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Get Expense Entry Details
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

SAP Concur Spoke

Integration Hub spokes

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SAP Concur expense report management AI agent

This AI agent manages expense reports in SAP Concur. It looks up reports modified after a given date, retrieves report comments, submits reports for approval, and runs workflow actions on reports.

Workflow

The agent helps the user find, submit, and act on expense reports in SAP Concur.

1. Ask the user what they want to do and collect the details the action needs, such as the report ID or a last-modified date.
2. Look up expense reports modified after a given date.
3. Retrieve the comments on an expense report.
4. Submit an expense report for approval.
5. Run a workflow action on an expense report.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Execute Workflow Action for Expense Report Look up Comments Look up Expense Reports After Last Modified Date Submit Expense Report
Allowed user roles The specific user roles that can access this AI agent.	snc_internal

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Configuration (continued)

Field	Description
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Upload Expense Receipt Image and Submit Expense Report

Related topics

SAP Concur Spoke

Integration Hub spokes

SAP Concur itinerary management AI agent

This AI agent looks up SAP Concur travel itineraries by trip ID so that users can review travel details from ServiceNow.

Workflow

The agent helps the user retrieve a travel itinerary from SAP Concur.

1. Ask the user what they want to do and collect the details the action needs, such as the trip ID.
2. Look up the itinerary for the given trip ID.
3. Present the travel details to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Look up Itinerary by Trip ID
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

SAP Concur Spoke

Integration Hub spokes

SAP Concur payment request management AI agent

This AI agent retrieves the details of existing payment requests from SAP Concur.

Workflow

The agent helps the user review payment request details in SAP Concur.

1. Ask the user what they want to do and collect the details the action needs, such as the payment request ID.
2. Get the details of the specified payment request.

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3. Present the payment request details to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Get Payment Request Details
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Get Purchase Order and Payment Request Details

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Related topics

SAP Concur Spoke

Integration Hub spokes

SAP Concur purchase order management AI agent

This AI agent retrieves purchase order details from SAP Concur.

Workflow

The agent helps the user review a purchase order in SAP Concur.

1. Ask the user what they want to do and collect the details the action needs, such as the purchase order ID.
2. Get the details of the specified purchase order.
3. Present the purchase order details to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Get Purchase Order Details
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent	Not defined.

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Get Purchase Order and Payment Request Details

Related topics

SAP Concur Spoke

Integration Hub spokes

SAP Concur receipt management AI agent

This AI agent handles expense receipts in SAP Concur. It uploads receipt images to expense reports and retrieves the URL of an expense entry's receipt image.

Workflow

The agent helps the user upload and retrieve expense receipt images in SAP Concur.

1. Ask the user what they want to do and collect the details the action needs, such as the expense report or expense entry ID.
2. Upload a receipt image to an expense report.
3. Retrieve the URL for an expense entry's receipt image.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Get Expense Entry Receipt Image URL Post Expense Report Receipt Image
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Upload Expense Receipt Image and Submit Expense Report

Related topics

SAP Concur Spoke

Integration Hub spokes

Slack Spoke AI agents

The following AI agents are available for Slack Spoke.

Slack conversation management AI agent

This AI agent manages Slack channels. It creates and archives channels, renames conversations, sets channel topics, and adds or removes users.

Workflow

The agent helps the user organize and maintain Slack channels.

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1. Ask the user what they want to do and collect the details the action needs, such as the channel and user.
2. Create a new channel.
3. Rename a conversation or set a channel's topic.
4. Add a user to a channel or remove one.
5. Confirm the channel is no longer needed and archive it.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add User to Channel Archive Channel Create Channel Remove User from Channel Rename Conversation Set Topic for Channel
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent	snc_internal

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Slack Spoke

Integration Hub spokes

Slack notification management AI agent

This AI agent posts ServiceNow record details to Slack channels. It shares incident, problem, and change details with the specified channel.

Workflow

The agent helps the user send incident, problem, or change updates to Slack.

1. Ask the user what they want to do and collect the details the action needs, such as the record and channel.
2. Identify whether the update is for an incident, problem, or change.
3. Confirm the target Slack channel.
4. Post the incident, problem, or change details to the channel.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Post Change Details Post Incident Details Post Problem Details
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Slack Spoke

Integration Hub spokes

Slack user management AI agent

This AI agent looks up Slack users from ServiceNow.

Workflow

The agent helps the user find a Slack user.

1. Ask the user what they want to do and collect the details the action needs, such as the user's name or email.
2. Look up the Slack user.

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3. Present the user details.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Look up User
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Related topics

Slack Spoke

Integration Hub spokes

Smartsheet Spoke AI agents

The following AI agents are available for Smartsheet Spoke.

Smartsheet attachment management AI agent

This AI agent manages Smartsheet attachments. It attaches files or URLs to sheets and looks up a specific attachment or a sheet's attachments.

Workflow

The agent helps the user add and find attachments on Smartsheet sheets.

1. Ask the user what they want to do and collect the details the action needs, such as the sheet ID and the file or URL.
2. Look up an attachment by ID or list a sheet's attachments.
3. Attach a file to a sheet.
4. Attach a URL to a sheet.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Attach File to Sheet Attach URL to Sheet Look up Attachment by ID Look up Attachments Stream
Allowed user roles	snc_internal

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Smartsheet Spoke
- Integration Hub spokes

Smartsheet cell history AI agent

This AI agent retrieves the history of a Smartsheet cell so that users can see how its value changed over time.

Workflow

The agent helps the user review the change history of a cell in Smartsheet.

1. Ask the user what they want to do and collect the details the action needs, such as the sheet ID, row ID, and column ID.
2. Look up the history of the specified cell.
3. Present the cell history to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Look up Cell History Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Smartsheet Spoke

Integration Hub spokes

Smartsheet column management AI agent

This AI agent retrieves Smartsheet column information. It looks up a column by ID or lists a sheet's columns.

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Workflow

The agent helps the user review the columns on a Smartsheet sheet.

1. Ask the user what they want to do and collect the details the action needs, such as the sheet ID and column ID.
2. Look up a column by ID or list the sheet's columns.
3. Present the column details to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Column by ID Look up Columns Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Smartsheet Spoke

Integration Hub spokes

Smartsheet comment management AI agent

This AI agent manages Smartsheet comments. It creates comments, with or without attachments, updates comments, and looks up comments by ID.

Workflow

The agent helps the user add and update comments in Smartsheet.

1. Ask the user what they want to do and collect the details the action needs, such as the sheet ID and discussion or comment ID.
2. Look up a comment by ID.
3. Create a comment, optionally with an attachment.
4. Update an existing comment.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions**

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Configuration (continued)

Field	Description
	Create Comment Create Comment with Attachment Look up Comment by ID Update Comment
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Smartsheet Spoke

Integration Hub spokes

Smartsheet cross sheet reference management AI agent

This AI agent manages Smartsheet cross-sheet references. It creates references and looks up a specific reference or a sheet's references.

Workflow

The agent helps the user link data between sheets in Smartsheet.

1. Ask the user what they want to do and collect the details the action needs, such as the sheet ID.
2. Look up a cross-sheet reference by ID or list a sheet's references.
3. Create a new cross-sheet reference.
4. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Cross Sheet Reference Look up Cross Sheet Reference by ID Look up Cross Sheet References Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Related topics

Smartsheet Spoke

Integration Hub spokes

Smartsheet folder management AI agent

This AI agent manages Smartsheet folders. It creates and updates folders and looks up folders.

Workflow

The agent helps the user organize Smartsheet folders.

1. Ask the user what they want to do and collect the details the action needs, such as the folder or workspace.
2. Look up folders.
3. Create a new folder.
4. Update an existing folder.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Folder Look up Folders Stream Update Folder
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles	snc_internal

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Configuration (continued)

Field	Description
The specific user identity roles that determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Smartsheet Spoke

Integration Hub spokes

Smartsheet group management AI agent

This AI agent manages Smartsheet groups. It looks up the groups in an organization and updates group details.

Workflow

The agent helps the user review and update groups in Smartsheet.

1. Ask the user what they want to do and collect the details the action needs, such as the group ID and new details.
2. Look up the organization's groups.
3. Update a group's details.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Org Groups Stream Update Group
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Smartsheet Spoke
- Integration Hub spokes

Smartsheet row management AI agent

This AI agent adds new rows to Smartsheet sheets.

Workflow

The agent helps the user add a row to a Smartsheet sheet.

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1. Ask the user what they want to do and collect the details the action needs, such as the sheet ID and cell values.
2. Create the row with the values the user provides.
3. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Create Row
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Related topics

Smartsheet Spoke

Integration Hub spokes

Smartsheet sharing management AI agent

This AI agent manages Smartsheet sheet sharing. It looks up a sheet's shares and shares a sheet with users or groups.

Workflow

The agent helps the user review and share Smartsheet sheets.

1. Ask the user what they want to do and collect the details the action needs, such as the sheet ID and recipients.
2. Look up who a sheet is shared with.
3. Share the sheet with a user or group.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Share Sheet Look up Sheet Shares Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that	snc_internal

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Configuration (continued)

Field	Description
determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Smartsheet Spoke

Integration Hub spokes

Smartsheet sheet management AI agent

This AI agent looks up Smartsheet sheets by ID.

Workflow

The agent helps the user retrieve a sheet from Smartsheet.

1. Ask the user what they want to do and collect the details the action needs, such as the sheet ID.
2. Look up the sheet by ID.
3. Present the sheet details to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Look up Sheet by ID
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Smartsheet Spoke

Integration Hub spokes

Smartsheet user management AI agent

This AI agent manages Smartsheet users. It creates, updates, and removes users and looks up users by ID or the admin user.

Workflow

The agent helps the user manage Smartsheet user accounts.

1. Ask the user what they want to do and collect the details the action needs, such as the user ID or email.
2. Look up a user by ID or look up the admin user.
3. Create a new user.

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4. Update an existing user.
5. Remove a user.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create User Look up Admin User Look up User by ID Remove User Update User
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Smartsheet Spoke

Integration Hub spokes

SuccessFactors Spoke AI agents

The following AI agents are available for SuccessFactors Spoke.

SuccessFactors employee management AI agent

This AI agent retrieves employee benefit and time off data from SAP SuccessFactors. It looks up benefit enrollments, time off records, and time off balances.

Workflow

The agent helps the user review an employee's benefits and time off in SuccessFactors.

1. Ask the user what they want to do and collect the details the action needs, such as the employee.
2. Get the employee's benefit enrollments.
3. Look up the employee's time off records.
4. Look up the employee's time off balances.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Employee Time Off Employee Time Off Balances Get Employee Benefit Enrollments
Allowed user roles The specific user roles that can access this AI agent.	sn_successfactors.SuccessFactors Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_successfactors.SuccessFactors Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	• Fetch Employee Payrolls and Benefit Enrollments • Fetch User Details and Time Off Balance and Time Off Details

Related topics

SuccessFactors Spoke

Integration Hub spokes

SuccessFactors HR foundational data AI agent

This AI agent retrieves holiday calendars from SAP SuccessFactors.

Workflow

The agent helps the user retrieve a holiday calendar from SuccessFactors.

1. Ask the user what they want to do and collect the details the action needs, such as the calendar or location.
2. Get the requested holiday calendar.

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3. Present the holiday calendar to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Get Holiday Calendar
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Related topics

SuccessFactors Spoke

Integration Hub spokes

SuccessFactors jobs management AI agent

This AI agent looks up recruiting candidates in SAP SuccessFactors by candidate ID.

Workflow

The agent helps the user retrieve a candidate's details from SuccessFactors.

1. Ask the user what they want to do and collect the details the action needs, such as the candidate ID.
2. Look up the candidate by ID.
3. Present the candidate details to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Look up Candidate by ID
Allowed user roles The specific user roles that can access this AI agent.	sn_successfactors.SuccessFactors Admin
Data access roles The specific user identity roles that determine which data the AI agent	sn_successfactors.SuccessFactors Admin

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- SuccessFactors Spoke
- Integration Hub spokes

SuccessFactors payroll management AI agent

This AI agent looks up employee payrolls in SAP SuccessFactors from ServiceNow.

Workflow

The agent helps the user retrieve employee payroll information from SuccessFactors.

1. Ask the user what they want to do and collect the details the action needs, such as the employee.
2. Look up the payroll records for the specified employee.
3. Present the payroll details to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Look up Employee Payrolls
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Fetch Employee Payrolls and Benefit Enrollments

Related topics

SuccessFactors Spoke

Integration Hub spokes

SuccessFactors todos AI agent

The agent manages SAP SuccessFactors todos from ServiceNow. It creates new todos and retrieves a specific todo by its ID.

Workflow

The agent helps the user create and look up todos in SuccessFactors.

1. Ask the user what they want to do and collect the details the action needs, such as the todo details or todo ID.
2. Create a new todo in SuccessFactors.
3. Retrieve a specific todo by its ID.
4. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Todo Get Todo By ID
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- SuccessFactors Spoke
- Integration Hub spokes

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SuccessFactors user management AI agent

This AI agent retrieves user information from SAP SuccessFactors. It looks up a user by user ID and retrieves a user's personal details.

Workflow

The agent helps the user find personal information for a SuccessFactors user.

1. Ask the user what they want to do and collect the details the action needs, such as the user ID.
2. Look up the user by user ID.
3. Retrieve the user's personal details.
4. Present the user information.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up User Personal Details Look up User by User ID
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent	Not defined.

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Fetch User Details and Time Off Balance and Time Off Details

Related topics

- SuccessFactors Spoke
- Integration Hub spokes

Workday HR Spoke AI agents

The following AI agents are available for Workday HR Spoke.

Workday HR absence management AI agent

This AI agent retrieves an employee's time off balances from Workday HR by employee ID.

Workflow

The agent helps the user check time off balances in Workday.

1. Ask the user what they want to do and collect the details the action needs, such as the employee ID.
2. Get the time off balances for the specified employee ID.
3. Present the balances to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Get Time off Balances By Employee ID
Allowed user roles The specific user roles that can access this AI agent.	sn_workday_hr_spke.workday_admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_workday_hr_spke.workday_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Fetch Employee Time Off and Holiday Calendar

Related topics

Workday HR Spoke

Integration Hub spokes

Workday HR approval management AI agent

This AI agent manages Workday HR approvals. It looks up in-progress approval requests and approves or rejects business processes.

Workflow

The agent helps the user review and act on pending approvals in Workday.

1. Ask the user what they want to do and collect the details the action needs, such as the business process or approval request.
2. Look up in-progress approval requests.
3. Approve a business process.

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4. Reject a business process.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Approve Business Process Look up In-Progress Approval Requests Reject Business Process
Allowed user roles The specific user roles that can access this AI agent.	• pa_power_user • sn_workday_hr_spke.workday_admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	• pa_power_user • sn_workday_hr_spke.workday_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Not applicable.

Related topics

Workday HR Spoke

Integration Hub spokes

Workday HR feedback management AI agent

This AI agent looks up the feedback employees have received in Workday HR to support performance reviews and HR decisions.

Workflow

The agent helps the user review feedback received by an employee in Workday.

1. Ask the user what they want to do and collect the details the action needs, such as the employee.
2. Look up the feedback received for the specified employee.
3. Present the feedback to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Look up Feedback Received
Allowed user roles	pa_power_user

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	pa_power_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

- Workday HR Spoke
- Integration Hub spokes

Workday HR goals management AI agent

This AI agent looks up employee goals in Workday HR so that users can review individual objectives.

Workflow

The agent helps the user review employee goals in Workday.

1. Ask the user what they want to do and collect the details the action needs, such as the employee.
2. Look up the goals for the specified employee.
3. Present the goal details to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Look up Employee Goals
Allowed user roles The specific user roles that can access this AI agent.	pa_power_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	pa_power_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Workday HR Spoke

Integration Hub spokes

Workday HR payroll management AI agent

This AI agent looks up employee payslips in Workday HR.

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Workflow

The agent helps the user retrieve a payslip from Workday.

1. Ask the user what they want to do and collect the details the action needs, such as the employee.
2. Look up the payslip for the specified employee.
3. Present the payslip details to the user.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Look up Payslip
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Workday HR Spoke

Integration Hub spokes

Workday HR performance management AI agent

This AI agent retrieves performance review data from Workday HR. It looks up an employee's latest performance review and historical review data for tracking performance trends.

Workflow

The agent helps the user review employee performance data in Workday.

1. Ask the user what they want to do and collect the details the action needs, such as the employee.
2. Look up the employee's latest performance review.
3. Look up the employee's historical performance review data.
4. Present the review information to the user.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions**

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Configuration (continued)

Field	Description
	Look up Employee Latest Performance Review Look up Employee Performance Review Historical Data
Allowed user roles The specific user roles that can access this AI agent.	pa_power_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	pa_power_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Fetch Employee Profile and Rewards Details and Latest Performance Review

Related topics

Workday HR Spoke

Integration Hub spokes

Workday HR resource management AI agent

This AI agent retrieves employee resource data from Workday HR. It looks up worker profiles, holiday calendars, inbox items, and, by employee ID, documents, total rewards, and benefit enrollments.

Workflow

The agent helps the user find employee profile, benefit, and document information in Workday.

1. Ask the user what they want to do and collect the details the action needs, such as the employee ID.
2. Look up the employee's worker profile.
3. Get the employee's documents by employee ID.
4. Get the employee's total rewards and benefit enrollments by employee ID.
5. Look up the employee's holiday calendars.

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6. Look up the employee's Workday inbox items.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
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Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Get Employee Documents By Employee ID Get Total Benefit Enrollments By Employee ID Get Total Rewards By Employee ID Look up Holiday Calendars Of An Employee Look up Inbox Items Look up Worker Profile
Allowed user roles The specific user roles that can access this AI agent.	• pa_power_user • sn_workday_hr_spke.workday_admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	• pa_power_user • sn_workday_hr_spke.workday_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	• Fetch Employee Profile and Rewards Details and Latest Performance Review • Fetch Employee Time Off and Holiday Calendar

Related topics

Workday HR Spoke

Integration Hub spokes

Wrike Spoke AI agents

The following AI agents are available for Wrike Spoke.

Wrike approvals management AI agent

This AI agent deletes approvals on Wrike tasks and folders after validating the approval ID.

Workflow

The agent helps the user remove an approval in Wrike.

1. Ask the user what they want to do and collect the details the action needs, such as the approval ID.
2. Validate the approval ID and confirm the user wants to delete it.
3. Delete the approval.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Delete Approval
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Wrike Spoke

Integration Hub spokes

Wrike attachment management AI agent

This AI agent manages Wrike attachments. It updates attachments on tasks and folders, downloads attachments to ServiceNow, and deletes attachments.

Workflow

The agent helps the user manage attachments in Wrike.

1. Ask the user what they want to do and collect the details the action needs, such as the attachment, task, or folder ID.
2. Update an attachment, or update the attachment on a task or folder.
3. Download an attachment to ServiceNow.
4. Delete an attachment.
5. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Delete Attachment Download Attachment to ServiceNow Update Attachment Update Attachment to Folder Update Attachment to Task
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Not applicable.

Related topics

Wrike Spoke

Integration Hub spokes

Wrike comment management AI agent

This AI agent manages Wrike comments. It creates comments on tasks or folders and updates or deletes existing comments.

Workflow

The agent helps the user add and manage comments in Wrike.

1. Ask the user what they want to do and collect the details the action needs, such as the task, folder, or comment ID.
2. Create a comment on a task or a folder.
3. Update an existing comment.
4. Delete a comment.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create Comment in Folder Create Comment in Task

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Configuration (continued)

Field	Description
	Delete Comment Update Comment
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Wrike Spoke

Integration Hub spokes

Wrike folder and project management AI agent

This AI agent deletes folders and projects in Wrike after confirming the target with the user.

Workflow

The agent helps the user remove a folder or project from Wrike.

1. Ask the user what they want to do and collect the details the action needs, such as the folder or project ID.
2. Confirm which folder or project to delete and get the user's explicit approval.
3. Delete the folder or project.
4. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Delete Folder or Project
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Wrike Spoke

Integration Hub spokes

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Wrike group management AI agent

This AI agent deletes groups in Wrike.

Workflow

The agent helps the user remove a group from Wrike.

1. Ask the user what they want to do and collect the details the action needs, such as the group ID.
2. Confirm which group to delete.
3. Delete the group.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Delete Group
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Wrike Spoke

Integration Hub spokes

Wrike task management AI agent

This AI agent deletes tasks in Wrike.

Workflow

The agent helps the user remove a task from Wrike.

1. Ask the user what they want to do and collect the details the action needs, such as the task ID.
2. Confirm which task to delete.
3. Delete the task.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
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Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action**

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Configuration (continued)

Field	Description
	Delete Task
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Wrike Spoke

Integration Hub spokes

Wrike user management AI agent

This AI agent manages Wrike users. It retrieves and updates user details.

Workflow

The agent helps the user review and update Wrike user details.

1. Ask the user what they want to do and collect the details the action needs, such as the user ID.
2. Get the user's details.
3. Update the user's details.
4. Report the outcome to the user, including details of any error.

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Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Get User Details Update User Details
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Wrike Spoke

Integration Hub spokes

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X Spoke AI agents

The following AI agents are available for X Spoke.

X tweet management AI agent

This AI agent posts tweets to X from ServiceNow.

Workflow

The agent helps the user post a tweet to X.

1. Ask the user what they want to do and collect the details the action needs, such as the tweet content.
2. Validate the tweet content.
3. Post the tweet.
4. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Tweet
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent	snc_internal

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

X Spoke (formerly Twitter Spoke)

Integration Hub spokes

Zoom Spoke AI agents

The following AI agents are available for Zoom Spoke.

Zoom chat management AI agent

This AI agent manages Zoom Team Chat from within ServiceNow. It creates and updates channels, sends chat messages, adds and removes channel members, and looks up channels, channel members, and a user's messages and channels.

Workflow

The agent helps the user manage Zoom chat channels, members, and messages.

1. Ask the user what they want to do and collect the details the action needs, such as the channel ID, the user, or the members to add.
2. Create a new channel or update an existing channel's details.
3. Send a chat message to a channel.
4. Add members to a channel or remove a member from it.
5. Look up a channel, its members, or the channels a user belongs to.
6. Retrieve chat messages from a specific user.
7. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add Members to Channel Create Channel Look up Channel Look up Channel Members Stream Look up User Channels Stream Look up User Chat Messages Stream Remove Member from Channel Send Chat Message Update Channel
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Not applicable.

Related topics

Zoom Spoke

Integration Hub spokes

Zoom cloud recording management AI agent

This AI agent retrieves Zoom cloud recordings. It looks up recordings, a meeting's recordings, and a meeting's recording settings.

Workflow

The agent helps the user find Zoom cloud recordings.

1. Ask the user what they want to do and collect the details the action needs, such as the meeting ID or user.
2. Look up cloud recordings.
3. Look up the recordings for a meeting.
4. Look up a meeting's recording settings.
5. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Look up Meeting Recording Settings Look up Meeting Recordings

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Configuration (continued)

Field	Description
	Look up Recordings Stream
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Zoom Spoke

Integration Hub spokes

Zoom meeting management AI agent

This AI agent manages Zoom meetings. It creates, updates, ends, and deletes meetings, adds registrants, and looks up meeting details, live meetings, ended meeting instances, and past participants.

Workflow

The agent helps the user schedule and manage Zoom meetings.

1. Ask the user what they want to do and collect the details the action needs, such as the meeting ID or user.
2. Look up meetings, meeting details, or a user's live meetings.
3. Create a new meeting or update an existing one.
4. Add a registrant to a meeting.
5. End a meeting or delete it.
6. Look up ended meeting instances or past participants.
7. Report the outcome to the user, including details of any error.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
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Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Add Meeting Registrant Create Meeting Delete Meeting End Meeting Look up Ended Meeting Instances Look up Live Meetings by User Stream Look up Meeting Details Look up Meetings Stream Look up Past Meeting Participants Stream Update Meeting
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Zoom Spoke

Integration Hub spokes

Zoom user management AI agent

This AI agent manages Zoom users. It creates, deletes, and disassociates users, updates user settings, and looks up users and user details.

Workflow

The agent helps the user manage Zoom user accounts.

1. Ask the user what they want to do and collect the details the action needs, such as the user.
2. Look up users or a user's details.
3. Create a new user.
4. Update a user's settings.
5. Confirm the user ID and delete or disassociate the user.
6. Report the outcome to the user, including details of any error.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Create User Delete User Disassociate User Look up User Details Look up Users Stream Update User Settings
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Related topics

Zoom Spoke

Integration Hub spokes

IT Operations Management

IT Operations Management AI agents

The following AI agents are available for IT Operations Management.

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Analyze potential impact AI agent

This agent analyzes the potential business and operational impact of a proposed change by identifying affected servers and services. The agent reviews the change request, performs impact analysis, and documents findings in work notes to support informed decision-making and effective mitigation strategies.

Workflow

The agent analyzes a change request to identify and document the potential impact on services and servers.

1. Validate that all prerequisites for the impact analysis are met before proceeding.
2. Retrieve the change request number from the current active page, or prompt you to provide it if unavailable.
3. Extract the affected server IDs from the change request.
4. Identify which services are potentially impacted by mapping affected servers to suggested services using the Service Mapping Candidate skill.
5. Retrieve a combined view of impacted servers and suggested services.
6. Perform a full impact analysis for each suggested service, including cascading effects, using the Service Mapping Candidates Impact skill.
7. Compile the analysis results and update the change request work notes with a consolidated summary.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Analyze potential impact prerequisites validator Extract Data from Change Request Get Impacting Servers Per Suggested Service Update Change Request Work Notes

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Configuration (continued)

Field	Description
	Flow Actions Get Full Impact Analysis of Each Suggested Service Get Impacted Servers and Suggested Services
Allowed user roles The specific user roles that can access this AI agent.	sn_change_write
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	service_mapping_ai_user, cmdb_read, itom_admin, snc_internal, snc_required_script_writer_permission, sn_bm_client.benchmark_data_viewer, sn_itom_license.reader
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Analyze Potential Impact

Learn more about IT Operations Management at IT Operations Management.

AWS CloudWatch API AI agent

This AI agent investigates AWS CloudWatch alarm firings end to end by querying alarm configuration, metric time series, log groups, ML anomaly detectors, and Logs Insights. It then synthesizes findings into a structured root cause analysis report with metric analysis, log evidence, and correlated service impact.

Workflow

1. Identify what to investigate.

   The agent uses either the provided CloudWatch alarm name and region or entity name and region.

2. Gather context about the resource and investigate metrics and logs.
3. Return findings, including a summary of probable causes, recommended next steps, and investigation notes.

For more information about configuring this AI agent, see Configure observability agents for ServiceNow Otto.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Analyze Log Group Get Alarm Details Get Log Groups Get Metric Data Get Resource Tags **Script** Lookup CMDB CI **Subflow** Query Logs
Allowed user roles The specific user roles that can access this AI agent.	evt_mgmt_operator
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	evt_mgmt_operator
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Analyze alert impact agentic workflow

For more information, see ITOM AIOps.

AWS CloudWatch MCP server AI agent

This AI agent automates AWS CloudWatch alert investigations by analyzing alarm details, querying affected resources, and retrieving CloudWatch metrics and logs across multiple strategies. It provides clear summaries with root cause analysis and actionable recommendations for resolution.

Workflow

1. Identify what to investigate.

   The agent uses a provided CloudWatch alarm name or identifies an active alarm associated with a provided entity.

2. Gather context about the alarm and investigate metrics and logs.
3. Return findings, including a summary of alarm history, probable causes, and recommended next steps.

For more information about configuring this AI agent, see Configure observability agents for ServiceNow Otto.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Model Context Protocol tools**

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Configuration (continued)

Field	Description
	Analyze Metric Cancel Log Insights Query Describe Log Groups Execute Log Insights Query Get Active Alarms Get Alarm History Get Log Insights Query Results Get Metric Metadata Get Recommended Metric Alarms Analyze Log Group Get Metric Data **Script** Lookup CMDB CI
Allowed user roles The specific user roles that can access this AI agent.	evt_mgmt_operator
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	evt_mgmt_operator
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Analyze alert impact agentic workflow

For more information, see ITOM AIOps.

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Azure Monitor MCP AI agent

This AI agent investigates Azure Monitor alerts by querying Log Analytics workspaces with KQL, retrieving platform metrics, and checking activity logs and resource health through Azure MCP tools. It returns structured findings to the parent agent.

Workflow

1. Identify what to investigate.

   The agent uses a provided alert instance ID and the Azure subscription ID.

2. Gather context about the alert and the affected resource, and investigate metrics or logs.
3. Return findings, including the probable cause, trend direction, and recommended actions.

For more information about configuring this AI agent, see Configure observability agents for ServiceNow Otto.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Model Context Protocol tools** Get Entity Health Get Resource Health Get VM Details List Activity Logs List Health Events List Metric Definitions List Tables List Workspaces Query Alert Details

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Configuration (continued)

Field	Description
	Query Metrics Query Resource Logs Query Workspace Logs **Script** Lookup CMDB CI
Allowed user roles The specific user roles that can access this AI agent.	evt_mgmt_operator
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	evt_mgmt_operator
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Analyze alert impact agentic workflow

For more information, see ITOM AIOps.

CSDM business application to infrastructure AI specialist

This AI specialist finds the best matching discovered service for each business application and creates the standard CSDM "Uses::Used by" relationship in the CI relationships table [cmdb_rel_ci].

Workflow

The specialist connects the CSDM business application to infrastructure.

1. Evaluate and rank search results. For each business application, the agent runs an AI semantic search against discovered services and receives up to 30 candidates, ordered by relevance score (0–1).
2. Candidates with a score of 0.3 or higher are automatically connected. The agent creates a "Uses::Used by" relationship in [cmdb_rel_ci]. Candidates with a score of 0.1–0.29 are saved

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to the staging table [sn_sm_gen_ai_ba_candidate_rel] for administrator review. Candidates below 0.1 are filtered out.

3. If the AI Search profile is unavailable, fall back to a keyword search using the CONTAINS operator on the service name field.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Agent Tool: Connect Business App to Application Service Agent Tool: Get Business Applications Agent Tool: Search Discovered Services by AI Record Connection Runs
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	service_mapping_ai_user, cmdb_read, itom_admin, snc_internal, snc_required_script_writer_permission, sn_bm_client.benchmark_data_viewer, sn_itom_license.reader
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about IT Operations Management at IT Operations Management.

Datadog APM MCP server AI agent

This AI agent queries Datadog APM observability data using the full suite of Datadog MCP server tools. It can answer questions about service health, distributed traces, triggered monitors, log analysis, incidents, SLO compliance, deployment events, and service dependencies.

Workflow

1. Identify what to investigate.

   The agent uses information about a Datadog alert or the name of a host, service, or application to determine what to investigate.

2. Query Datadog observability data that's relevant to the alert or entity.
3. Return findings, including a probable cause and recommended actions.

For more information about configuring this AI agent, see Configure observability agents for ServiceNow Otto.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Model Context Protocol tools** Get Datadog Dashboard

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Configuration (continued)

Field	Description
	Get Datadog Incident Get Datadog Metric Get Datadog Trace Search Datadog Dashboards Search Datadog Events Search Datadog Incidents Search Datadog Logs Search Datadog Monitors Search Datadog Service Dependencies Search Datadog Services Search Datadog SLOs Search Datadog Spans
Allowed user roles The specific user roles that can access this AI agent.	evt_mgmt_operator
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	evt_mgmt_operator
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Analyze alert impact agentic workflow

For more information, see ITOM AIOps.

Dynatrace MCP server AI agent

This agent investigates Dynatrace alerts by retrieving alert impact summaries and querying the Dynatrace API for problem details, entity enrichment, log analysis, and root cause theories.

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Workflow

1. Identify what to investigate.

   The agent uses a Dynatrace problem ID or a provided entity name to determine what to investigate.

2. Gather relevant problem details, entity information, spans, and logs from Dynatrace.
3. Return the findings, including a problem overview, key findings, and actionable next steps.

For more information about configuring this AI agent, see Configure observability agents for ServiceNow Otto.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Model Context Protocols** Data Analysis Agent DQL Explanation Agent Forecasting Agent Grail Query Agent Help Agent Kubernetes Agent Root Cause Agent Root Cause Details Agent Vulnerability Agent
Allowed user roles	evt_mgmt_operator

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	evt_mgmt_operator
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Analyze alert impact agentic workflow

For more information, see ITOM AIOps.

Gemini Cloud Assist A2A investigation AI agent

This AI agent investigates Google Cloud alerts by driving a Gemini Cloud Assist investigation through Google's A2A investigation endpoint. It starts an investigation, polls task status, and retrieves the structured investigation result with root-cause hypotheses and next steps.

Workflow

1. Identify what to investigate.

   The agent uses the sys_id of the provided Google Cloud alert to determine what to investigate.

2. Use Gemini Cloud Assist to investigate the alert and gather relevant information.
3. Return the findings, including root-cause hypotheses and recommended actions.

For more information about configuring this AI agent, see Configure observability agents for ServiceNow Otto.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Actions** Get GCA Investigation Result Get GCA Investigation Status Start GCA Investigation
Allowed user roles The specific user roles that can access this AI agent.	evt_mgmt_operator
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	evt_mgmt_operator
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Analyze alert impact agentic workflow

For more information, see ITOM AIOps.

Kentik analysis AI agent

This AI agent fetches the incident insights report for a Kentik alert.

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Workflow

1. Determine what information to retrieve based on the provided information.
2. Use the Get Kentik insights report tool.
3. Return the findings using the Kentik insights report output.

For more information about configuring this AI agent, see Configure observability agents for ServiceNow Otto.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Get Kentik insights report Alert impact summary
Allowed user roles The specific user roles that can access this AI agent.	evt_mgmt_operator
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	evt_mgmt_operator
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Analyze alert impact agentic workflow

For more information, see ITOM AIOps.

LogicMonitor API AI agent

This AI agent investigates LogicMonitor alerts and monitored entities, assesses entity health, and recommends next steps.

Workflow

1. Identify what to investigate.

   The agent uses a provided LogicMonitor alert or monitored entity.
2. Find the affected entity in LogicMonitor, and check its health, related alerts, and recent changes.
3. Return an assessment, including the probable cause and recommended actions.

For more information about configuring this AI agent, see Configure observability agents for ServiceNow Otto.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** LogicMonitor Connection Lookup LogicMonitor Get Alert Details

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Configuration (continued)

Field	Description
	LogicMonitor Get CMDB Service Association LogicMonitor Get Collector Health LogicMonitor Get Device Details LogicMonitor Get Metric LogicMonitor Get Process Detail LogicMonitor Get Recent Changes for CI LogicMonitor Get Related Entities LogicMonitor List Alerts LogicMonitor List DataSource Instances LogicMonitor List Device DataSources LogicMonitor List Devices LogicMonitor List SDTs
Allowed user roles The specific user roles that can access this AI agent.	evt_mgmt_operator
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	evt_mgmt_operator
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Analyze alert impact agentic workflow

For more information, see ITOM AIOps.

Network SME AI agent

This AI agent investigates network issues and recommends next steps.

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Workflow

1. Identify what to investigate.

   The agent uses a provided alert or network identifiers.

2. Request network data from the relevant vendor agents, such as SolarWinds or ThousandEyes.
3. Analyze the returned data to identify the likely cause of the network issue.
4. Return results, including the bottleneck, likely cause, and recommended next steps.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Retrieve alert metadata for network diagnosis
Allowed user roles The specific user roles that can access this AI agent.	evt_mgmt_operator
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	evt_mgmt_operator
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Analyze alert impact agentic workflow

For more information, see ITOM AIOps.

New Relic MCP server AI agent

This AI agent queries and interprets observability data from New Relic using the full suite of New Relic MCP server tools.

Workflow

The agent investigates a New Relic alert or answers a direct question using New Relic observability data.

1. Identify what to investigate.

   The agent uses a provided alert or assesses a conversational question.

2. Generate an alert insights report or query the relevant data in New Relic using the appropriate MCP tools.
3. Return the relevant information, such as entity health, service dependencies, log analysis, alert details and history, performance metrics, and change events.

For more information about configuring this AI agent, see Configure observability agents for ServiceNow Otto.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.

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Configuration (continued)

Field	Description
Tools	**Model Context Protocol tools** Analyze Deployment Impact Analyze Entity Logs Analyze Golden Metrics Analyze Kafka Metrics Analyze Threads Analyze Transactions Convert Time Period to Epoch Execute NRQL Query Generate Alert Insights Report Generate User Impact Report Get Dashboard Get Entity List Alert Conditions List Alert Policies List Available Accounts List Change Events List Dashboards List Entity Error Groups List Entity Types List Garbage Collection Metrics List Recent Issues List Recent Logs List Related Entities List Synthetic Monitors Natural Language to NRQL Search Entity by Tag Search Incidents
Allowed user roles	evt_mgmt_operator

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	evt_mgmt_operator
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Analyze alert impact agentic workflow

For more information, see ITOM AIOps.

Prometheus API AI agent

This AI agent analyzes and investigates Prometheus alerts and answers general Prometheus questions, surfacing infrastructure metrics through instant and range queries.

Workflow

1. Identify what to investigate.

   The agent starts from a Prometheus alert, from an entity name when the alert came from another vendor, or from a user's question.

2. Query Prometheus for the relevant alert details, metric behavior, and target health when investigating an alert.
3. Return the findings, including recommended actions and supporting evidence.

For more information about configuring this AI agent, see Configure observability agents for ServiceNow Otto.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Collect Alert Metadata Connection Lookup Prometheus Get Alerts Prometheus Get Rules Prometheus Get Targets Prometheus List Metrics for Entity Prometheus Query Instant Prometheus Query Range
Allowed user roles The specific user roles that can access this AI agent.	evt_mgmt_operator
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	evt_mgmt_operator
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Analyze alert impact agentic workflow

For more information, see ITOM AIOps.

Service map creation AI specialist

This AI specialist discovers service infrastructure from application service candidates using ML analysis, and then it maps and persists the full service topology in CMDB.

Workflow

The agent helps users complete tasks related to service map creation.

1. Call the Get ML Candidate Full Data tool with the candidate number. This returns candidate sys_id, candidate name, server list with host names, and IPs.
2. Call the Get Candidate Running Processes tool with the same candidate number. This returns the running process details, AFP groups, connection data, and key ports.
3. Perform a noise check. Skip candidates flagged as monitoring clients, security clients, or operating system processes.
4. Determine the suggested_name using this priority order: Service Fingerprints (SFPs) if the candidate matches an Application Service Fingerprint in the Discovery Content Library; strong process evidence if no fingerprint exists; technology inference otherwise.
5. Check for existing service topology. If a topology already exists for this candidate, skip creation.
6. Create and save the service topology. Service maps are set to non-operational by default to allow administrator review before activation.
7. Inform the user of all changes.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.

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Configuration (continued)

Field	Description
Tools	**Scripts** create_service_topology Get Candidate Running Processes Get ML Candidate Full Data Save Candidate Analysis save_run_record
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	service_mapping_ai_user, cmdb_read, itom_admin, snc_internal, snc_required_script_writer_permission, sn_bm_client.benchmark_data_viewer, sn_itom_license.reader
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about IT Operations Management at IT Operations Management.

SolarWinds analysis AI agent

This AI agent fetches the details related to a SolarWinds alert by executing SWQL queries against SolarWinds.

Workflow

1. Identify the entity to investigate.

   The agent uses a provided identifier such as a node name, IP address, or application name from a SolarWinds alert.

2. Find the entity in SolarWinds, and query its health, relevant metrics, and relevant alerts.
3. Return the findings, including recommended next steps.

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For more information about configuring this AI agent, see Configure observability agents for ServiceNow Otto.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Execute SolarWinds SWQL Query **File Upload** SolarWinds Query Guide
Allowed user roles The specific user roles that can access this AI agent.	evt_mgmt_operator
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	evt_mgmt_operator
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Analyze alert impact agentic workflow

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For more information, see ITOM AIOps.

Splunk MCP server AI agent

This AI agent investigates Splunk Cloud and compatible Splunk Enterprise alerts by querying Splunk platform data. It doesn't cover Splunk Observability Cloud.

Workflow

1. Identify what to investigate.

   The agent starts from the details of an alert, such as its Splunk search query.

2. Query Splunk to find the most affected entity, and explain the alert with event details, trends, and ownership data.
3. Return the findings, including root causes analysis and recommended actions.

For more information about configuring this AI agent, see Configure observability agents for ServiceNow Otto.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Model Context Protocol tools** Ask Splunk Question Explain SPL Generate SPL Get Index Info Get Indexes Get Knowledge Objects Get KV Store Collections Get Metadata

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Configuration (continued)

Field	Description
	Get Splunk Info Optimize SPL Run Saved Search Run SPL Query
Allowed user roles The specific user roles that can access this AI agent.	evt_mgmt_operator
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	evt_mgmt_operator
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Analyze alert impact agentic workflow

For more information, see ITOM AIOps.

SRE investigate AI agent

This AI agent coordinates investigation activities across multiple observability platforms by orchestrating tool-specific agents. It correlates findings, identifies probable root causes, and synthesizes comprehensive investigation reports.

Workflow

1. Identify what to investigate.

   The agent starts from an alert and a question about it, such as its impact, or from a question about a specific observability tool.

2. Invoke the vendor agents that are relevant to the alert source, such as Dynatrace, New Relic, Kentik, and Splunk, and correlate their findings.
3. Save the investigation report to the alert and display it.

For more information about the supported vendor agents, see Configure observability agents for ServiceNow Otto.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Retrieve a report of observability metadata from the em_alert record **Scripts** Find Vendors Referencing Entity Read SO Service Analysis Save GAI Insight Save SRE Analysis
Allowed user roles The specific user roles that can access this AI agent.	evt_mgmt_operator
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	evt_mgmt_operator, connection_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Analyze alert impact agentic workflow

For more information, see ITOM AIOps.

ThousandEyes MCP server AI agent

This AI agent investigates ThousandEyes tests by analyzing metrics, anomalies, network events, and outages. It returns probable causes and recommended next steps.

Workflow

1. Identify the test to investigate.

   The agent uses a provided test name or ID, along with optional alert context such as severity and trigger time.

2. Retrieve the test configuration, metrics, anomalies, and related network events and outages from ThousandEyes.
3. Return the findings, including information such as probable causes and recommended next steps.

For more information about configuring this AI agent, see Configure observability agents for ServiceNow Otto.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Model Context Protocol tools** Get Anomalies Get Event Details Get Metrics

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Configuration (continued)

Field	Description
	Get Path Visualization Get Test Details List Events List Tags List Tests Search Outages
Allowed user roles The specific user roles that can access this AI agent.	evt_mgmt_operator
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	evt_mgmt_operator
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Analyze alert impact agentic workflow

For more information, see ITOM AIOps.

IT Service Management

IT Service Management AI agents

The following AI agents are available for IT Service Management.

Additional incident context AI agent

This AI agent retrieves information beyond the incident itself and presents the output in a readable format. This agent is strictly read-only; it can only retrieve and present information. It cannot update, modify, or perform any write operations on any records (such as adding comments, changing fields, reassigning, resolving, or closing incidents).

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Workflow

The agent retrieves information such as the caller's hardware assets, the caller's recent incidents, similar resolved incidents, and on-call experts.

1. Analyze user request and understand intent.
2. Fetch relevant configuration and data.
3. Guide user through necessary steps or actions.
4. Complete the requested operation.
5. Provide confirmation and next steps.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Get callers hardware assets Get callers recent incidents Get on call experts Get similar resolved incidents
Allowed user roles The specific user roles that can access this AI agent.	itil
Data access roles The specific user identity roles that determine which data the AI agent	itil

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Incident assist

Learn more about IT Service Management at IT Service Management.

Agent client collector (ACC) diagnostic AI agent

This agent assists users in resolving ACC errors by providing suggestions based on the error codes found in the ACC Error Reports. It aims to help users resolve errors efficiently and effectively.

Workflow

The agent helps users resolve ACC errors.

1. Determine if the user is asking about errors from an ACC agent or a specific ACC error code.
2. If the user is asking about errors from an ACC agent, retrieve the ACC Error Report for the ACC agent.
3. If the user is asking about a specific ACC error code, retrieve the ACC Error Report for the error code.
4. Extract the error codes and suggestions from the retrieved ACC Error Report.
5. Use the appropriate response template to respond to the user.
6. Allow the user to ask any follow-up questions and try to answer them based on the information in the ACC Error Report, but do not display the output of the report.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** ACC Error Summary report retriever
Allowed user roles The specific user roles that can access this AI agent.	agent_client_collector_user, agent_client_collector_admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	agent_client_collector_user, agent_client_collector_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Agent Client Collector (ACC) Diagnostic

Learn more about IT Service Management at IT Service Management.

Categorize ITSM incident AI agent

This AI agent assigns the appropriate category and subcategory to an incident.

Workflow

1. Use the Fetch all data - Categorize ITSM incident AI agent tool to fetch incident details, available categories, and available subcategories.
2. Assign a category and subcategory.
3. Present the recommendation to the user.
4. Update the incident.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Fetch all data - Categorize ITSM incident AI agent Update incident
Allowed user roles The specific user roles that can access this AI agent.	itil
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	itsm.aia.worker access_analyzer_ai_user, actsub_user, agent_role_config_viewer, agent_workspace_user, app_service_user, canvas_user, certification, cmdb_ms_user, cmdb_query_builder, cmdb_query_builder_read, cmdb_read, contact_user, data_manager_user, dependency_views, email_client_template_read, email_composer, interaction_agent, itil, knowledge, notify_view, now_assist_panel_user, one_extend_viewer, pa_viewer, platform_ml_read, prompt_library_user, role_viewer, service_status_subscriber, service_viewer, snc_internal, snc_platform_rest_api_access, snc_required_script_writer_permission, sn_ace.ace_user, sn_aia.viewer, sn_ai_filter_assist.user, sn_ai_filter_tracker.user, sn_bm_client.benchmark_data_viewer, sn_change_read, sn_change_write, sn_cimaf.sn_cimaf_read, sn_cmdb_user, sn_comm_management.comm_plan_viewer, sn_data_kit.analyst, sn_dex_desktop.notification_template_admin, sn_diagram_builder.db_read, sn_gaf.data_viewer, sn_gaf.data_writer, sn_gd_guidance.guidance_user, sn_incident_read, sn_incident_write, sn_itam_recomm.recommendations_read, sn_itsm_aia.sn_aia_chg_conflict, sn_itsm_aia.sn_aia_chg_quality,

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Configuration (continued)

Field	Description
	sn_itsm_aia.sn_aia_chg_schedule, sn_itsm_contact_query, sn_mcp_client.viewer, sn_nb_action.next_best_action_user, sn_nowassist_admin.user, sn_now_canvas_ai.interactive_view_user, sn_pren.experience_issue_read, sn_problem_read, sn_problem_write, sn_prompt_assist.prompt_developer, sn_publications_recipients_list_user, sn_publications_recipients_user, sn_query_gen.user, sn_reacf.sn_remedial_action_read, sn_request_approver_read, sn_request_read, sn_request_write, sn_skill_builder.viewer, sn_sla_definition_query, sn_sow.it_agent_dashboard_user, sn_sow.sow_home, sn_sow.sow_list, sn_sow.sow_user, sn_sttrm_condition_read, sn_uib_collab.user, sn_uxc_gen_ai.sn_aia_sla_explain, survey_reader, task_editor, template_editor, template_read_global, tracked_file_reader, view_changer, viz_creator, workspace_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	• ITSM Agent Zero • Triage and categorize ITSM incident

Learn more about IT Service Management at IT Service Management.

Create change request AI agent (autonomous)

This AI agent creates structured change requests from conversational input by autonomously selecting the appropriate change model and template.

Workflow

1. Initiate the workflow when the user selects the **Create with otto** action from the change request list.
2. Request the user to describe the change in a single message, including all available details such as affected configuration items, proposed schedule, implementation details, and so on.
3. Autonomously draft the change request from the user-provided description without requesting additional confirmation or follow-up information.
4. Delegate to the change template and model suggestion child agent (Change template suggestion agent) to autonomously select the best-fit change template and model from the available inventory.
5. If no template matches with sufficient confidence, apply semantic search over past change requests from the user's assignment group. Identify the most relevant template based on frequency and relevance.
6. Provide a summary of the change request proposed with fields automatically populated from the user's input and selected template.

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7. User reviews the proposed change request details and either provides additional information or tells the agent to proceed.
8. Create the change_request record and return the created change request record number with a link to the record.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (true) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Resolve Primary CI before Change creation Resolve Assignment Group before Change creation Get change request columns Get Place holder fields and values from change templates Create new change request Set worknote on Change request **Sub-agents** Change template suggestion agent (child agent hand-off)
Allowed user roles The specific user roles that can access this AI agent.	itil, sn_change_write The sn_change_write only applies when the dependency plugin com.snc.itsm.roles.change_management is active.
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	itil, sn_change_write The sn_change_write only applies when the dependency plugin com.snc.itsm.roles.change_management is active.

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Not applicable.

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Change CI suggestion AI agent

This AI agent recommends a list of relevant configuration items (CIs) that can be added as Affected CIs to the current change request.

Workflow

1. Extract the current Change Request number and ask the user to confirm whether to proceed: `Do you need help in identifying configuration items for `{changeRequestNumber}`?`
2. If the user confirms, proceed to the next step; otherwise end the conversation.
3. Ask the user for details about the configuration items.
4. Launch the Get configuration items tool for change based on user input tool and pass the user-provided utterance from the previous step as input.
5. Present this tool's output to the user as a formatted list of CI suggestions.
6. Based on the user's response, launch the associate configuration items to change tool and pass the selectedSysId variable as an input.
7. Display the output to the user.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Associate configuration items to change Get configuration items for change Get configuration items for change based on user input Get context
Allowed user roles The specific user roles that can access this AI agent.	itil
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	itil, cmdb_read
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Suggest configuration items for a change request

Learn more about IT Service Management at IT Service Management.

Change CI suggestion AI agent (latest)

This AI agent autonomously identifies and populates both the primary configuration item (CI) and affected configuration items on a change request without requiring multiple user interactions.

Workflow

1. Get the current Change Request number from the active change record or from the use input.
2. Retrieve the change request context from its field values.
3. Analyze the change details to identify the Primary CI and Affected CI candidates.
4. Present the candidate CIs list to user for identifying a suitable Primary CI or Affected CIs.
5. Automatically update the change request record with the user-selected primary CI and affected CIs.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Get context Get configuration items for change Get configuration items for change based on user input Associate configuration items to change Check primary CI on change Update primary CI on change
Allowed user roles The specific user roles that can access this AI agent.	itil, sn_change_write, cmdb_read The sn_change_write only applies when the dependency plugin com.snc.itsm.roles.change_management is active.
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	itil, sn_change_write, cmdb_read The sn_change_write only applies when the dependency plugin com.snc.itsm.roles.change_management is active.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.

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Configuration (continued)

Field	Description
Used in agentic workflows	Not applicable.

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Change conflict assessor AI agent

This AI agent can assess conflicts for changes. This includes checking mandatory fields and trigger conflict detection, and updating worknotes.

Workflow

The agent shows users a summary of conflicts and impacted services and CIs.

1. Use the Get Change request information tool to retrieve information for the change request.
2. Check the change request for the configuration item field.
3. Check the change request for the planned start date and planned end date fields.
4. Show these values to the user.
5. Verify whether a conflict check has run for the change request. If yes, ask the user if they want to run it again. If no, then run it without asking.
6. Use the Get list of conflicts for the Change Request group by conflict type tool to find conflicts related to the change request.
7. Show results to the user.
8. Update worknotes if the user approves.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Check if conflict check has run for the Change

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Configuration (continued)

Field	Description
	Display Change's configuration item and planned start date and planned end date Display conflicts summary Display impacted services/CIs summary Get Change request information Get list of conflicts for the Change Request group by conflict type Get list of impacted services/CIs for the Change Request Run conflict detection for the Change Request with timeout Set Change Work Note Update Change request's planned start date and planned end date
Allowed user roles The specific user roles that can access this AI agent.	sn_itsm_aia.sn_aia_chg_conflict
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	itil, sn_change_write
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Assess conflicts for a change request

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Change outage assistant AI agent

This AI agent creates outage records for the change request based on the impacted CIs.

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Workflow

1. Extract the current change request number or ask the user to provide it.
2. Check if both Configuration Item and Affected CIs are missing from the change request. (If both are missing, stop execution and notify the user.)
3. Check if the change request already has an outage created and display it to the user.
4. Validate planned start and end dates.
5. If the user approves, create the outage; otherwise, stop.
6. Review CIs and impacted services with the user.
7. Display the final outage link.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Associate affected CIs to the outage Associate impacted CIs to the outage Create outage Get details of Change request Validate planned start and end date
Allowed user roles The specific user roles that can access this AI agent.	itil
Data access roles The specific user identity roles that	itil

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Configuration (continued)

Field	Description
determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Create outages for a change request

Learn more about IT Service Management at IT Service Management.

Change quality assessor AI agent

This AI agent provides suggestions to improve inputs for a change form.

Workflow

The agent assesses the quality of data in a change request and provides suggestions to improve the data.

1. Gather change request data from the provided change request number.
2. Find similar change requests.
3. Rate the value of the data in the change request.
4. Display the quality summary.
5. Update the fields that the user specifies.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Display quality summary Get All Change Request Data Get Similar Change Requests Record the quality summary of the Change Request Set Change Field Set Change Work Note Set chosen Change Fields
Allowed user roles The specific user roles that can access this AI agent.	sn_itsm_aia.sn_aia_chg_quality
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	itil, sn_change_write
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Assess quality of a Change Request

Learn more about IT Service Management at IT Service Management.

Change request plans AI agent

This AI agent helps change owners and approvers by drafting high-quality, context-aware change request content.

Workflow

The agent drafts implementation plans, backout plans, test plans, justifications, and risk & impact analyses.

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1. Fetch the change request details.
2. Generate all plans.
3. Present each plan individually, asking the user if they want to proceed.
4. Revise draft (if feedback provided).
5. Update change request record when approved.
6. Continue to the next plan until finished.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Generate Change request Plans Get current change request details Update plans to change request
Allowed user roles The specific user roles that can access this AI agent.	itil
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	itil
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Generate change request plans

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Change request plans AI agent (autonomous)

This AI agent autonomously drafts change plan fields during the readiness phase. Field population is governed by a resolved change policy to ensure consistent behavior without requiring user input.

Workflow

1. Autonomously retrieve the change request record and all available change policy documents.
2. Resolve the applicable change policy by matching the change model field (chg_model) against available policy definitions.
3. If no policy matches on change model, autonomously fall back to matching the change type field (chg_type) against policy definitions.
4. Determine whether a policy document is available for the resolved policy.
5. If a policy document is available, autonomously identify the plan fields defined in the POLICY_EXTRACTION_KEYS schema.
6. Populate only the identified plan fields with content generated based on the policy requirements.
7. If no policy document is available, autonomously apply default field-population logic to draft all plan fields: Implementation plan, Backout plan, Test plan, Justification, and Risk and impact analysis.
8. Update the change request with populated plan fields and return confirmation to the user in a single message.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Generate Change request Plans Get All Change Request Data Get Change Quality Policy Document Get current change request details Update plans to change request
Allowed user roles The specific user roles that can access this AI agent.	itil, sn_change_write The sn_change_write only applies when the dependency plugin com.snc.itsm.roles.change_management is active.
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	itil, sn_change_write The sn_change_write only applies when the dependency plugin com.snc.itsm.roles.change_management is active.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Not applicable.

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Change template suggestion AI agent (autonomous)

This AI agent identifies the most relevant change template and model for new change requests by analyzing request details and comparing them against available templates and historical data.

Workflow

This autonomous AI agent runs as part of the Create change request agent. The agent analyzes change request details and automatically selects the most appropriate change template and model from your organization's inventory.

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1. Autonomously retrieve the complete inventory of available change templates and models.
2. Analyze the change request details provided by the parent Create change request agent.
3. Apply large language model judgment to identify candidate templates based on relevance to the change request.
4. If a template with sufficient confidence is identified, autonomously select it as the best-fit template and return it to the parent agent.
5. If no template meets the confidence threshold, autonomously perform semantic search over past change requests created by members of the user's assignment group.
6. Rank semantic search results by combining two factors: frequency of past use and relevance to the current request, weighting each factor roughly equally.
7. Return the best-fit template identified through semantic search to the parent agent.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Get change models and templates Get template/model recommendation from Similar Changes from the assignment group
Allowed user roles The specific user roles that can access this AI agent.	itil, sn_change_write The sn_change_write only applies when the dependency plugin com.snc.itsm.roles.change_management is active.
Data access roles The specific user identity roles that determine which data the AI agent	itil, sn_change_write The sn_change_write only applies when the dependency plugin com.snc.itsm.roles.change_management is active.

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Create a change request AI agent

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Classify service and CI AI agent

This AI agent assigns the appropriate service and offering to an incident. It can also assign the appropriate configuration item.

Workflow

The agent helps users complete tasks related to classify service and ci.

1. Find candidates.
2. Choose recommendations.
3. Present recommendations to the user.
4. Update the incident if meaningful recommendations were found.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts**

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Configuration (continued)

Field	Description
	Find candidates Update incident
Allowed user roles The specific user roles that can access this AI agent.	itil, sn_service_desk_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	itsm.aia.worker, access_analyzer_ai_user, actsub_user, agent_role_config_viewer, agent_workspace_user, app_service_user, canvas_user, certification, cmdb_ms_user, cmdb_query_builder, cmdb_query_builder_read, cmdb_read, contact_user, data_manager_user, dependency_views, email_client_template_read, email_composer, interaction_agent, itil, knowledge, notify_view, now_assist_panel_user, one_extend_viewer, pa_viewer, platform_ml_read, prompt_library_user, role_viewer, service_status_subscriber, service_viewer, snc_internal, snc_platform_rest_api_access, snc_required_script_writer_permission, sn_ace.ace_user, sn_aia.viewer, sn_ai_filter_assist.user, sn_ai_filter_tracker.user, sn_bm_client.benchmark_data_viewer, sn_change_read, sn_change_write, sn_cimaf.sn_cimaf_read, sn_cmdb_user, sn_comm_management.comm_plan_viewer, sn_data_kit.analyst, sn_dex_desktop.notification_template_admin, sn_diagram_builder.db_read, sn_gaf.data_viewer, sn_gaf.data_writer, sn_gd_guidance.guidance_user, sn_incident_read, sn_incident_write, sn_itam_recomm.recommendations_read, sn_itsm_aia.sn_aia_chg_conflict, sn_itsm_aia.sn_aia_chg_quality, sn_itsm_aia.sn_aia_chg_schedule, sn_itsm_contact_query, sn_mcp_client.viewer, sn_nb_action.next_best_action_user, sn_nowassist_admin.user, sn_now_canvas_ai.interactive_view_user, sn_pren.experience_issue_read, sn_problem_read, sn_problem_write, sn_prompt_assist.prompt_developer, sn_publications_recipients_list_user, sn_publications_recipients_user, sn_query_gen.user, sn_reacf.sn_remedial_action_read, sn_request_approver_read, sn_request_read, sn_request_write, sn_skill_builder.viewer, sn_sla_definition_query, sn_sow.it_agent_dashboard_user, sn_sow.sow_home, sn_sow.sow_list, sn_sow.sow_user, sn_sttrm_condition_read, sn_uib_collab.user, sn_uxc_gen_ai.sn_aia_sla_explain, survey_reader, task_editor, template_editor, template_read_global, tracked_file_reader, view_changer, viz_creator, workspace_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.

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Configuration (continued)

Field	Description
Used in agentic workflows	• Triage and categorize ITSM incident • ITSM Agent Zero

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Create incident AI agent

Use this AI agent to log IT support requests. It responds to requests such as "create an incident," "raise an incident," "open an IT ticket," or "raise an IT support ticket."

Workflow

bv

This agent first attempts to resolve the problem with self-service solutions. If the problem persists, it drafts a structured IT support incident, confirms the details with the user for accuracy, and creates the official record for tracking.

1. Greet the user and gather information about the issue.
2. Validate and clarify the user's issue.
3. Create a search query based on the details gathered.
4. Use the search query as input for the Show Self-Service Options tool. This conversational tool handles the entire self-service process.
5. Evaluate the outcome. If the issue is solved, workflow is complete. If not, create an incident with the conversation history.
6. Confirm the details with the user.
7. Conclude the conversation based on the outcome.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.

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Configuration (continued)

Field	Description
Tools	**Conversational Topics** Create Incident Record Handle Similar Incidents Show Self-Service Options
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	itil
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Default VA Workflow

Learn more about IT Service Management at IT Service Management.

Use the Create incident AI agent

Use the AI agent incident creation workflow to report issues, review resolution plans, and automatically create incident records with duplicate detection.

Before you begin

Role required: none

Note: The AI agent executes the operations as an ITIL user.

Procedure

1. Open the Create Incident AI agent from one of the available contexts:
   - ServiceNow Otto panel
   - Employee Center
   - ServiceNow Otto for Virtual Agent
2. Describe the issue you're experiencing in the provided field.

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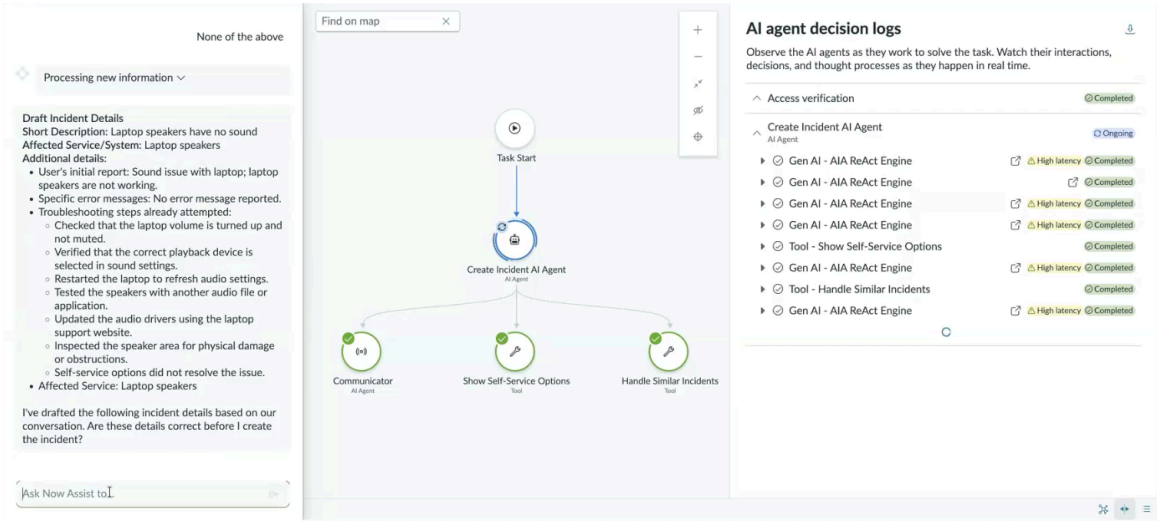
Provide details about the problem, including what you were trying to do, when the issue occurred, and any error messages or symptoms you observed.

3. Submit your issue description to the agent.

   The agent analyzes your input and generates a proposed resolution plan based on the issue description and knowledge base.

4. Review the resolution plan and select **Accept** or **Reject**.

   The agent displays a suggested resolution approach. If you accept the plan, the workflow proceeds to incident creation. If you reject it, you can provide additional guidance or take an alternative approach.



5. Wait for the agent to check for similar existing incidents.

   Note: The similar incidents must have the following conditions:

   - The incident must be active.
   - The caller must be the logged-in user.
   - The incident must have been created within the last 30 days.

   The agent queries the incident database to identify any duplicate or related incidents that might address the same issue. This duplicate detection helps prevent unnecessary incident creation and helps consolidate related issues.

6. Review the incident created by the agent.

   If no duplicates are found, the agent creates a new incident record with all relevant information from your issue description. The incident is ready for assignment to the appropriate support team and includes a complete audit trail of the workflow.

What to do next

Your incident is in the system and assigned to the appropriate team for investigation and resolution. Track the status through your ServiceNow portal or mobile app.

Create incident AI voice agent

This AI agent creates new incidents when the user explicitly mentions they want to create a new incident or report a new issue.

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Workflow

1. Check whether the caller already stated their issue during the initial routing or transfer.
2. If more context would help, ask up to two follow-up questions (one at a time).
3. Summarize the issue in one sentence and briefly state any follow-up answers received.
4. Create the incident and read the incident number back to the user and inform them they will receive an email with the details.
5. After confirming the incident number, say: "Is there anything else you'd like help with?"

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allowed user roles The specific user roles that can access this AI agent.	Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure a voice assistant using Assistant Designer.
Used in agentic workflows	Not applicable.

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DEX diagnosis AI agent

This AI agent specializes in structured root cause diagnosis of device and application performance issues through a step-by-step process. This agent aggregates device health metrics, event logs and historical incident data, then systematically evaluates each source to isolate relevant evidence.

Workflow

The agent does not perform remediation, but it supports IT support and operations teams by providing a high-confidence diagnosis, highlighting affected components, key data sources, and patterns—ensuring clarity and traceability in issue investigation.

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1. Use the Device diagnostic data collector tool to gather issue details, device specifications (OS, version, RAM, CPU, disk space), health metrics (all available categories), and device events (system and service events).
2. Use the Similar incidents retriever tool to find past incidents with related symptoms, affected devices, components, or resolution patterns.
3. Call the Zoom call diagnosis skill ONLY when the issue explicitly indicates Zoom application.
4. Review the collected data and keep only the sources that provide useful information.
5. From the remaining data, identify the most probable root cause with supporting evidence.
6. Present the diagnosis in a bulleted list and include the following: incident number (if available), device information (OS, version, model), root cause with explanation, supporting evidence (metrics, events, patterns), and the confidence level with justification. Use clear headers and structured sections for readability.
7. Display the diagnosis to the user before proceeding.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Device diagnostic data collector Similar incidents retriever **Generative AI skill** Zoom Call Diagnosis Data Collector
Allowed user roles The specific user roles that can access	sn_incident_write

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Configuration (continued)

Field	Description
this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	dex.incident.ai.worker access_analyzer_ai_user, action_designer, action_write_enabled, actsub_user, agent_client_collector_user, agent_role_config_viewer, agent_workspace_user, app_service_user, canvas_user, certification, cmdb_ms_user, cmdb_query_builder, cmdb_query_builder_read, cmdb_read, contact_user, data_manager_user, data_mapping_user, decision_table_admin, decision_table_reader, dependency_views, email_client_template_read, email_composer, fd_read_actions, fd_read_operations, fd_read_operations_all, flow_designer, flow_operator, flow_write_enabled, interaction_agent, itil, knowledge, mbplus_reader, notify_view, now_assist_panel_user, one_extend_viewer, openapi_admin, pa_viewer, personalize_decision_table_input, platform_ml_di.admin, platform_ml_read, prompt_library_user, report_user, role_viewer, sam_user, scan_user, service_status_subscriber, snc_platform_rest_api_access, sn_ace.ace_user, sn_aia.viewer, sn_ai_filter_assist.user, sn_ai_filter_tracker.user, sn_bm_client.benchmark_data_viewer, sn_change_read, sn_change_write, sn_cimaf.sn_cimaf_read, sn_cmdb_user, sn_comm_management.comm_plan_viewer, sn_conv_fa.conv_fa_designer, sn_data_kit.analyst, sn_dex.ai_user, sn_dex.engineer, sn_dex.service_desk_user, sn_dex.user, sn_dex_content.user, sn_dex_desktop.notification_template_admin, sn_dex_ms365.user, sn_dex_score.dashboard_user, sn_dex_zoom.user, sn_diagram_builder.db_read, sn_gaf.data_viewer, sn_gaf.data_writer, sn_gd_guidance.guidance_user, sn_incident_read, sn_incident_write, sn_itam_recomm.recommendations_read, sn_itsm_aia.sn_aia_chg_conflict, sn_itsm_aia.sn_aia_chg_quality, sn_itsm_aia.sn_aia_chg_schedule, sn_itsm_contact_query, sn_mcp_client.viewer, sn_nb_action.next_best_action_user, sn_nowassist_admin.user, sn_now_canvas_ai.interactive_view_user, sn_pren.experience_issue_read, sn_problem_read, sn_problem_write, sn_prompt_assist.prompt_developer, sn_publications_recipients_list_user, sn_publications_recipients_user, sn_query_gen.user, sn_reacf.sn_remedial_action_read, sn_request_approver_read, sn_request_read, sn_request_write, sn_skill_builder.viewer, sn_sla_definition_query, sn_sow.it_agent_dashboard_user, sn_sow.sow_home, sn_sow.sow_list, sn_sow.sow_user, sn_sttrm_condition_read, sn_sub_man.admin, sn_udc.basic_read, sn_uib_collab.user, sn_uxc_gen_ai.sn_aia_sla_explain, sn_workflow_studio.workflow_studio_read, survey_reader, task_editor, template_editor, template_read_global, tracked_file_reader, trigger_designer, trigger_designer_read, usage_admin, view_changer, viz_creator, workflow_ai_author, workspace_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.

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Configuration (continued)

Field	Description
Used in agentic workflows	DEX issue diagnosis and resolution workflow

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DEX remediation trigger AI agent

This AI agent receives a resolution plan, checks for remedial actions, and executes the supported ones on end-user devices (Windows OS and MacOS endpoints) to resolve common device and application issues. Remedial actions are concrete, executable fix steps such as restarting services, clearing cache, or cleaning up temporary files.

Workflow

Given an incident with a resolution plan, this agent requests end-user consent for applicable remedial actions and executes the approved ones on the device. It reports per-action status upon completion.

1. Call the Fetch AI supported remedial actions tool.
2. Retrieve and validate the resolution plan and identify AI-supported remedial actions.
3. Get user consent for remedial actions.
4. Execute remedial actions.
5. Return the execution summary in a human readable format and end workflow.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Fetch AI supported remedial actions **Subflow**

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Configuration (continued)

Field	Description
	Trigger remedial actions
Allowed user roles The specific user roles that can access this AI agent.	sn_dex.ai_user, sn_dex.engineer, sn_dex.service_desk_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_dex.engineer, sn_dex.service_desk_user, sn_dex.ai_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Not applicable.

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DEX resolution plan AI agent

This AI agent generates a resolution plan for the given issue based strictly on the root cause provided. The agent ensures all suggested steps are evidence-based, actionable, and aligned with the diagnosed root cause. No resolution is proposed outside these defined sources.

Workflow

The agent follows a prioritized sequence of approved sources: DEX resolutions (including remedial actions, self-help instructions), past incident resolutions, and knowledge base articles.

1. Retrieve the root cause of the issue and supporting data (incident number, device OS, failing component/metric). If both the root cause and device OS are missing, ask the user for input.
2. Use the Fetch remedial actions and self-help instructions tool to retrieve DEX resolutions.
3. Use the Similar incidents and knowledge articles retriever tool to search for relevant records.
4. Analyze the collected data and construct a resolution plan using DEX resolutions, past incidents, and knowledge articles.
5. From the remaining data, show up to three of the most relevant resolutions, prioritized in this order: remedial actions, self-help instructions, past incidents, and knowledge articles.
6. Display the resolution plan to the user.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Fetch remedial actions and self-help instructions Similar incidents and knowledge articles retriever Stamp resolution plan to incident worknotes
Allowed user roles The specific user roles that can access this AI agent.	sn_incident_write
Data access roles The specific user identity roles that determine which data the AI agent can access and what	dex.incident.ai.worker access_analyzer_ai_user, action_designer, action_write_enabled, actsub_user, agent_client_collector_user, agent_role_config_viewer, agent_workspace_user, app_service_user, canvas_user, certification, cmdb_ms_user, cmdb_query_builder, cmdb_query_builder_read, cmdb_read, contact_user, data_manager_user, data_mapping_user, decision_table_admin, decision_table_reader, dependency_views, email_client_template_read, email_composer, fd_read_actions, fd_read_operations, fd_read_operations_all, flow_designer, flow_operator, flow_write_enabled, interaction_agent, itil, knowledge, mbplus_reader, notify_view, now_assist_panel_user, one_extend_viewer, openapi_admin, pa_viewer, personalize_decision_table_input, platform_ml_di.admin, platform_ml_read, prompt_library_user, report_user, role_viewer, sam_user, scan_user, service_status_subscriber, snc_platform_rest_api_access, sn_ace.ace_user, sn_aia.viewer, sn_ai_filter_assist.user, sn_ai_filter_tracker.user, sn_bm_client.benchmark_data_viewer,

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Configuration (continued)

Field	Description
actions it can take.	sn_change_read, sn_change_write, sn_cimaf.sn_cimaf_read, sn_cmdb_user, sn_comm_management.comm_plan_viewer, sn_conv_fa.conv_fa_designer, sn_data_kit.analyst, sn_dex.ai_user, sn_dex.engineer, sn_dex.service_desk_user, sn_dex.user, sn_dex_content.user, sn_dex_desktop.notification_template_admin, sn_dex_ms365.user, sn_dex_score.dashboard_user, sn_dex_zoom.user, sn_diagram_builder.db_read, sn_gaf.data_viewer, sn_gaf.data_writer, sn_gd_guidance.guidance_user, sn_incident_read, sn_incident_write, sn_itam_recomm.recommendations_read, sn_itsm_aia.sn_aia_chg_conflict, sn_itsm_aia.sn_aia_chg_quality, sn_itsm_aia.sn_aia_chg_schedule, sn_itsm_contact_query, sn_mcp_client.viewer, sn_nb_action.next_best_action_user, sn_nowassist_admin.user, sn_now_canvas_ai.interactive_view_user, sn_pren.experience_issue_read, sn_problem_read, sn_problem_write, sn_prompt_assist.prompt_developer, sn_publications_recipients_list_user, sn_publications_recipients_user, sn_query_gen.user, sn_reacf.sn_remedial_action_read, sn_request_approver_read, sn_request_read, sn_request_write, sn_skill_builder.viewer, sn_sla_definition_query, sn_sow.it_agent_dashboard_user, sn_sow.sow_home, sn_sow.sow_list, sn_sow.sow_user, sn_sttrm_condition_read, sn_sub_man.admin, sn_udc.basic_read, sn_uib_collab.user, sn_uxc_gen_ai.sn_aia_sla_explain, sn_workflow_studio.workflow_studio_read, survey_reader, task_editor, template_editor, template_read_global, tracked_file_reader, trigger_designer, trigger_designer_read, usage_admin, view_changer, viz_creator, workflow_ai_author, workspace_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	DEX issue diagnosis and resolution workflow

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Incident category configuration AI agent

This AI agent orchestrates the complete lifecycle of incident category and subcategory configuration for the Choices [sys_choice] table. It supports three interaction modes: guided conversation, file upload (CSV/XLSX), and industry-based recommendations.

Workflow

The agent validates all inputs through dedicated validation tools, detecting duplicates, typos, and structural issues before any changes occur.

1. Greet user and ask if they want to create custom categories or see recommendations for their industry.
2. Depending on the answer, ask user for their industry.
3. Generate recommendations and present them to the user or prompt them for bulk upload.
4. Validate and add recommendations.

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5. Display: `What would you like to do next?`
6. Continue or end workflow.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Conversational topics** Bulk Category Importer Validate and Process Categories **Script** Database Manager **Flow action** Trigger Canvas Preview
Allowed user roles The specific user roles that can access this AI agent.	admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Incident context AI agent

This AI agent helps users answer questions related to a given incident using information from the incident record and its related records. This agent is strictly read-only — it can only retrieve and present information.

Workflow

The agent cannot update, modify, or perform any write operations on any records (such as adding comments, changing fields, reassigning, resolving, or closing incidents).

1. Derive incident number from user context or ask user for the number.
2. Use the Get incident details tool to analyze the incident details and rewrite the user's question by replacing references with actual details from the incident.
3. Use the Search across adjacent task records using expanded query tool to find answers that may not be directly linked to the incident itself, such as a system outage.
4. Validate the quality of information returned by the tools.
5. Communicate the results.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts**

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Configuration (continued)

Field	Description
	Extract details from related records Get details of Incident Get Records Search across adjacent task records using expanded query
Allowed user roles The specific user roles that can access this AI agent.	itil
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	itil
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Incident assist

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Incident knowledge article AI agent

This AI agent can resolve incidents by finding existing similar knowledge articles and attaching them to the incident. It can also create a knowledge article for the incident.

Workflow

1. Use the Resolve and fetch similar knowledge articles tool to retrieve similar knowledge articles.
2. If approved by the user, attach articles to the incident or create a new one.
3. If creating new, use the Generate knowledge article tool to generate a draft knowledge article.
4. If approved by the user, create the knowledge article and provide the hyperlink.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Attach knowledge article Create knowledge article Generate knowledge article Resolve and fetch similar knowledge articles
Allowed user roles The specific user roles that can access this AI agent.	itil
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	itil
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Wrap-up and resolve incident

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Incident known error article AI agent

This AI agent can find similar known error articles for an incident and attach them to the incident. It can also resolve the incident.

Workflow

1. Use the Fetch similar knowledge articles tool to retrieve similar known error articles. If none are found, ask the user to provide a known error article number.
2. If approved by the user, attach articles to the incident.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Attach known error article and resolve incident Fetch similar known error articles
Allowed user roles The specific user roles that can access this AI agent.	itil
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	itil
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Wrap-up and resolve incident

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Incident resolution details AI agent

This AI agent suggests resolution notes for an incident.

Workflow

When approved by the user, the agent updates the incident with resolution notes and the resolution code.

1. Generate resolution notes for the incident.
2. Display, revise, and finalize the resolution notes based on user feedback.
3. Display resolution codes and ask the user to choose one.
4. Decide the next step based on the selected resolution code.
5. If the incident is a duplicate, ask the user to provide the duplicate incident number.
6. Update resolution notes and resolution code.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Get resolution codes Generate resolution notes

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Configuration (continued)

Field	Description
	Update duplicate incident information Update resolution notes and code
Allowed user roles The specific user roles that can access this AI agent.	itil
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	itil
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Wrap-up and resolve incident

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Incident routing configuration AI agent

This AI agent creates, modifies, and deactivates assignment rules for incident routing.

Workflow

The agent provides end-to-end support, from rule activation and AI recommendations to manual rule creation and bulk changes, with a staged commit workflow that lets users preview before applying.

1. Greet and retrieve configuration status.
2. Display best practices.
3. Set up business rules if none are active.
4. Set up assignment rules if none are active.
5. Review and confirm with the user.
6. Commit changes.
7. Gather routing preferences from the user.
8. Generate and display routing recommendations.
9. Handle user selection and changes.
10. Preview and commit changes, if approved.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Generative AI skill** Incident Routing Rule Recommender **Scripts** Payload Manager Text to encoded query for incident routing agent **Flow action** Preview tool action
Allowed user roles The specific user roles that can access this AI agent.	admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Not applicable.

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ITSM incident resolution plan investigation AI agent

This AI agent gets incident details, reviews similar incidents and knowledge articles, and then generates an incident resolution plan.

Workflow

The agent generates an incident resolution plan and posts it in the incident work notes.

1. Get the details of the incident.
2. Find a list of similar incidents to understand how they were resolved.
3. Find a list of relevant knowledge articles, based on the short description of the incident.
4. Generate an incident resolution plan as a numbered list and add it to the incident's work notes.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Find Catalog item and add the URLs in the work notes ITSM incident resolution plan investigation AI agent - Fetch all data Add a resolution plan or failure message to incident's work notes
Allowed user roles	snc_internal

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	itil, sn_service_desk_agent
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Investigate and resolve ITSM incidents

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Link major incident or problem AI Agent

This AI agent automatically identifies and links the most relevant major incident or problem with an incident.

Workflow

The agent analyzes short descriptions, verifies contextual relevance, and updates the linkage while clearly presenting all tool responses to the fulfiller.

1. Use the Get Incident and relevant Problems tool to fetch incident details and relevant problems and major incidents.
2. Compare incident, problem, and major incident short descriptions to find a highly confident match that is contextually relevant to the incident. If no matches are found, end the workflow.
3. Link the problem and/or major incident to the incident.
4. Inform the user.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Get Incident and relevant major incidents and problems Set major incident or problem to the incident
Allowed user roles The specific user roles that can access this AI agent.	itil
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	itsm.aia.worker access_analyzer_ai_user, actsub_user, agent_role_config_viewer, agent_workspace_user, app_service_user, canvas_user, certification, cmdb_ms_user, cmdb_query_builder, cmdb_query_builder_read, cmdb_read, contact_user, data_manager_user, dependency_views, email_client_template_read, email_composer, interaction_agent, itil, knowledge, notify_view, now_assist_panel_user, one_extend_viewer, pa_viewer, platform_ml_read, prompt_library_user, role_viewer, service_status_subscriber, service_viewer, snc_internal, snc_platform_rest_api_access, snc_required_script_writer_permission, sn_ace.ace_user, sn_aia.viewer, sn_ai_filter_assist.user, sn_ai_filter_tracker.user, sn_bm_client.benchmark_data_viewer, sn_change_read, sn_change_write, sn_cimaf.sn_cimaf_read, sn_cmdb_user, sn_comm_management.comm_plan_viewer, sn_data_kit.analyst, sn_dex_desktop.notification_template_admin, sn_diagram_builder.db_read, sn_gaf.data_viewer, sn_gaf.data_writer, sn_gd_guidance.guidance_user, sn_incident_read, sn_incident_write, sn_itam_recomm.recommendations_read, sn_itsm_aia.sn_aia_chg_conflict, sn_itsm_aia.sn_aia_chg_quality, sn_itsm_aia.sn_aia_chg_schedule, sn_itsm_contact_query, sn_mcp_client.viewer, sn_nb_action.next_best_action_user, sn_nowassist_admin.user, sn_now_canvas_ai.interactive_view_user, sn_pren.experience_issue_read, sn_problem_read, sn_problem_write, sn_prompt_assist.prompt_developer, sn_publications_recipients_list_user, sn_publications_recipients_user,

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Configuration (continued)

Field	Description
	sn_query_gen.user, sn_reacf.sn_remedial_action_read, sn_request_approver_read, sn_request_read, sn_request_write, sn_skill_builder.viewer, sn_sla_definition_query, sn_sow.it_agent_dashboard_user, sn_sow.sow_home, sn_sow.sow_list, sn_sow.sow_user, sn_sttrm_condition_read, sn_uib_collab.user, sn_uxc_gen_ai.sn_aia_sla_explain, survey_reader, task_editor, template_editor, template_read_global, tracked_file_reader, view_changer, viz_creator, workspace_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Triage and categorize ITSM incident

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Manage ticket AI voice agent

This AI voice agent assists users with managing their active incidents and requested items.

Workflow

The agent is capable of fetching ticket details, adding a comment to a ticket, or escalating a ticket's urgency level.

1. Begin by asking the user to describe the ticket they would like to manage.
2. Fetch all the active tickets opened for the user, then from that list find the ticket(s) that best matches the user's description provided earlier and read out its number, short description and opened date.
3. Once you have narrowed down to one ticket, confirm the number and short description with the user, asking them "Is this the ticket you want to manage?".
4. When the user requests updates, use the add comment and escalate ticket tools as appropriate.
5. If a tool returns an error or a precondition is not met, notify the user and stop execution.
6. If the user is satisfied, close the conversation politely. If the user is not satisfied or requests a human, offer to transfer and end the conversation.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined

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Configuration (continued)

Field	Description
	in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allowed user roles The specific user roles that can access this AI agent.	Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure a voice assistant using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about IT Service Management at IT Service Management.

Microsoft 365 group membership AI agent

The agent helps users add or remove members of Microsoft 365 distribution list groups. It finds the group, validates the people to add or remove, confirms the action with the user, and records the request in an incident.

Workflow

The agent helps the user add or remove members of a Microsoft 365 distribution list group.

1. Enter a query in natural language such as "Add Abel to ITSM group" to retrieve the details and understand the request.
2. Ask the user for the group name or group email, if it was not already provided.
3. Look up the group, and if it isn't found, tell the user and offer to try another group name.
4. Confirm whether the user wants to add or remove members, and collect the names or email addresses.
5. Validate the names and email addresses, asking the user to correct any errors or choose between ambiguous matches.
6. Ask the user to explicitly confirm the add or remove action.
7. Create an incident if the user didn't provide one, and then start the process to add or remove the members.
8. Display a confirmation message with the results.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Create incident Get details of incident Look Up Group Start The Process Validate Names and Email Addresses
Allowed user roles The specific user roles that can access this AI agent.	Not defined.
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	IT Service Management AI agent collection Manage Microsoft 365 group members agentic workflow

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Password reset AI voice agent

This AI voice agent helps users reset their password during phone-based interactions.

Workflow

The agent sends a password reset link through email or SMS to ensure a successful reset.

1. Ensure you have the name of the password reset application. If not provided, ask the user to describe or name the application.
2. Call the application search tool with the provided name to retrieve possible matches.
3. If the tool returns multiple matches, ask clarifying questions.
4. Confirm the selected application and explicitly ask for the delivery method.
5. Send or read out the password reset link based on the confirmed method.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allowed user roles The specific user roles that can access this AI agent.	Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	public
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure a voice assistant using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about IT Service Management at IT Service Management.

Post incident review AI agent

This AI agent generates a post-incident review report for the user to review and revise after a major incident report.

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Workflow

A post-incident review (PIR) report is a comprehensive document created after a major incident or disruption has been resolved. Its purpose is to analyze what happened, understand the root causes, and assess the impact of the incident, while also providing actionable recommendations for preventing future occurrences. The report should contain 4 sections: Executive Summary section, Customer / Service Impact section, Detailed Technical Summary section, and Action items & Prevention section.

1. Collect the details about the major incident, including short description, description, assignment group, assigned to, category, subcategory, service, configuration item, resolution notes, business impact, and activities.
2. Collect child incidents and related records.
3. Generate a post-incident review report with four sections.
4. Collect feedback on the report from the user.
5. Update the incident record.
6. Acknowledge the result and conclude the conversation.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Fetch incident details Get child incident details Get related records Update post incident summary to major incident
Allowed user roles The specific user roles that can access this AI agent.	itil

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Configuration (continued)

Field	Description
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	itil, major_incident_manager, snc_required_script_writer_permission
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Post incident review report

Learn more about IT Service Management at IT Service Management.

Request catalog item AI voice agent

This AI voice agent assists users in finding and delivering catalog items. If the item is not categorized as software, then the catalog link is sent through approved channels such as email or SMS. If the item is software, this agent will help create the request.

Workflow

The agent operates only within approved channels and never creates, modifies, or deletes catalog items.

1. Ask the user to describe the catalog item.
2. Search for matching items.
3. If multiple matches, ask clarifying questions.
4. Confirm the selected item.
5. Determine item type:
   - If the item is software, proceed to request creation
   - If the item is not software, proceed to link delivery
6. If software item:
   - Collect any required inputs (if applicable)
   - Submit the catalog request on behalf of the user
   - Confirm submission to the user
7. If non-software item:
   - Confirm delivery channel
   - Send the catalog item link through the confirmed channel

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allowed user roles The specific user roles that can access this AI agent.	Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure a voice assistant using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about IT Service Management at IT Service Management.

Schedule change request AI agent

This AI agent schedules a change request.

Workflow

All dates contain the time.

1. Retrieve the planned start date and the planned end date from the change.
2. If the change did not have a planned start and end date, ask the user to provide them.
3. Retrieve the available schedule slots.
4. Schedule the change.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Report the conflicting schedules Retrieve the available schedule slots Retrieve the planned start date and the planned end date from the change. Schedule the change
Allowed user roles The specific user roles that can access this AI agent.	sn_itsm_aia.sn_aia_chg_schedule
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	itil, sn_change_write
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Schedule a change

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Standard change template proposal AI agent

Provided with a change request, this AI agent searches for similar changes and returns a list of similar changes to use for a proposal record.

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Workflow

When the user chooses the changes that are appropriate for the template, this agent generates the content for multiple fields and creates a proposal template record.

1. Ask for the change request number.
2. Fetch similar change requests.
3. Use the Fetch standard change mandatory fields tool to return the fields and value list of the selected changes.
4. Analyze the field values to create template values.
5. If the user approves, generate the template.
6. Use the template to create a change template proposal record.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Fetch similar changes Fetch standard change mandatory fields Standard change proposal record creator
Allowed user roles The specific user roles that can access this AI agent.	change_manager, itil
Data access roles The specific user identity roles that determine which data the AI agent	change_manager, itil

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Generate change template proposal record

Learn more about IT Service Management at IT Service Management.

Standard change template recommender AI agent

This AI agent helps users create and submit change requests. Invoke it whenever the user asks to log, create, submit, initiate, or help with a change record of any type (standard, routine, scheduled, maintenance, infrastructure, software, database, security, or any changes specific to IT service management).

Workflow

The agent guides users through the process of selecting a change type and providing appropriate options based on their selection. It retrieves historical template data, suggests templates, and generates links for creating changes.

1. Ask the user what kind of change they want to make: Standard, Normal, or Emergency.
2. For Normal or Emergency changes, generate the change link.
3. For a Standard change, ask the user to choose a template, then generate the change link.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Change request template catalog search tool Change template info gatherer tool Create change link creator
Allowed user roles The specific user roles that can access this AI agent.	itil, sn_change_write
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	itil, sn_change_write
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Change Creation Guide

Learn more about IT Service Management at IT Service Management.

Submit account unlock catalog AI voice agent

This AI voice agent helps users unlock accounts by invoking a tool call to submit an account-unlock catalog request.

Workflow

1. Make sure you have the name of the account that needs to be unlocked. If not provided, ask the user to provide it.
2. Confirm the correct account with the user and inform user that you will proceed to submit the unlock catalog request.
3. On confirmation, call the tool to create the unlock catalog request.
4. Always confirm with user before submitting.

Note: The agent must execute all steps in sequence and must not skip any step, even if it believes it already knows the information.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allowed user roles The specific user roles that can access this AI agent.	Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure a voice assistant using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about IT Service Management at IT Service Management.

Troubleshoot Outlook issue AI voice agent

This AI voice agent troubleshoots Microsoft Outlook issues. It also sends a troubleshooting article link to the user by email when requested.

Workflow

1. Greet the user and ask them if they need any help with Microsoft Outlook.
2. Fetch the KB articles related to user query and answer in a concise manner
3. Use the KB articles to answer the follow up questions.
4. If you are unable to answer any question, offer to transfer to an agent.
5. If they are satisfied and want no more details, politely end the conversation. If they are not satisfied, offer to transfer to an agent.
6. If they want to be transferred, do so and end the conversation.
7. If there are multiple steps, give each step one at a time and wait for the user to confirm they are ready for the next step.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allowed user roles The specific user roles that can access this AI agent.	Admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure a voice assistant using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about IT Service Management at IT Service Management.

Legal Service Delivery

Legal Service Delivery AI agents

The following AI agents are available for Legal Service Delivery.

Transfer legal request AI agent

This AI agent transfers a legal request to the predicted category.

Workflow

The agent helps users complete tasks related to transfer legal request.

1. Use the Transfer legal request tool to transfer the legal request to the predicted category.
2. End the current conversation.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Transfer legal request
Allowed user roles The specific user roles that can access this AI agent.	sn_lg_ops.request_fulfiller
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_lg_ops.request_fulfiller
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Triage legal requests

Learn more about Legal Service Delivery at Legal Service Delivery.

Operational Sustainability Management

Operational Sustainability Management AI agents

The following AI agents are available for Operational Sustainability Management.

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Calculation creation AI agent

This AI agent creates a calculated metric definition record using the formula passed in the input.

Workflow

The agent helps users complete tasks related to calculation creation.

1. If the final formula is empty, tell the user it can't be calculated.
2. With the formula and name given in the input context, create a calculated metric definition and show the response to the user.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Create Calculated metric definition
Allowed user roles The specific user roles that can access this AI agent.	sn_esg_gen_ai.cmd_agent_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_grc_metric.manager
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Generate carbon calculations for metrics

Learn more about Operational Sustainability Management at Operational Sustainability Management (formerly Environmental, Social, and Governance).

Calculation operand AI agent

This AI agent identifies and returns relevant metric definitions and emission factors from existing sources. It replaces generic references with precise metric definitions and emission factor names in the input formula.

Workflow

The agent helps users complete tasks related to calculation operand.

1. Use the formula stored in {emissions_formula} and copy it into ${emissions_formula_internal}. Store both values in memory.
2. Read the formula from left to right, consuming one sub-expression at a time.
3. Identify each unresolved element, one at a time, within the current sub-expression.
4. Search metric definitions and show results.
5. Search emission factor and show results.
6. Continue within the current sub-expression.
7. Continue to the next sub-expression.
8. When all sub-expressions are resolved, present the final {emissions_formula} without additional commentary.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Search retrievals** Get emission factors Get metric definition **Script** Replace selected choices in formula
Allowed user roles The specific user roles that can access this AI agent.	sn_esg_gen_ai.cmd_agent_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_esg.reader
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Generate carbon calculations for metrics

Learn more about Operational Sustainability Management at Operational Sustainability Management (formerly Environmental, Social, and Governance).

Operational Technology Manager (OTM)

Operational Technology Manager AI agents

The following AI agents are available for Operational Technology Manager.

OT Excel import task AI agent

The OT Excel import task AI agent imports Operational Technology (OT) device data from a spreadsheet into the Configuration Management Database (CMDB). The agent validates the imported records, creates remediation tasks for invalid records, and imports the valid records.

Workflow

The agent helps the user import OT devices from a spreadsheet into the CMDB.

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1. Create an OT Excel import task record and share a link to it with the user.
2. Ask the user to attach a spreadsheet of OT device data to the import task record, using the template available in the **Attachments** panel as a guide.
3. After the user confirms the spreadsheet is attached, process it into the SG OT Excel Stagings table.
4. Share any failure messages so that the user can correct and re-upload the spreadsheet.
5. Ask the user to wait until the import task state changes to **Staging import succeeded**.
6. After the user confirms, validate the staged records and report how many are valid, partially valid, and invalid.
7. If any records are invalid, offer to create remediation tasks for them.
8. If any records are valid or partially valid, ask whether to import them into the CMDB, and start the import if the user confirms.
9. Tell the user that the import runs in the background and that the task state changes to CMDB import complete when it finishes.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** [AIA Tool] CMDB Importer [AIA Tool] Excel Sheet Importer [AIA Tool] Import Task Link Generator [AIA Tool] Remediation Task Creator [AIA Tool] Staging Validator
Allowed user roles	Not defined.

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Import OT device spreadsheet into OT CMDB

Operational Technology Service Management (OTSM)

Operational Technology Service Management AI agents

The following AI agents are available for Operational Technology Service Management.

OT knowledge generator AI agent

This AI agent creates a KB Article from a resolved Operational Technology (OT) incident.

Workflow

1. Inform user that the KB article generation process has begun.
2. If the user has provided the sys_id of the incident, use the OT Knowledge generator tool to generate a KB article.
3. End the conversation regardless of the results.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Subflow** OT Knowledge generator
Allowed user roles The specific user roles that can access this AI agent.	sn_ot_incident_write
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_ot_incident_write
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Generating a KB article upon resolving an OT Incident

Learn more about Operational Technology at Operational Technology.

Sales CRM

Sales CRM AI agents

The following AI agents are available for Sales Customer Relationship Management (Sales CRM).

Sales Automation AI agents

The following AI agents are available for Sales Automation.

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Lead outreach AI agent

This AI agent sends outreach and follow-up emails to new leads on behalf of sales agents. It selects the email template based on how many emails the lead has already received, and disqualifies the lead when three emails go unanswered.

Workflow

The agent helps sales agents engage new leads by sending outreach and follow-up emails without asking for confirmation at each step.

1. Fetch the lead details and the emails already sent to the lead.
2. If the lead has received two or fewer emails, select the next email template in sequence, starting with the outreach email and followed by each follow-up email.
3. Personalize the email with the lead's name and the lead owner's name, and include any previously sent emails in chronological order.
4. Send the email to the lead.
5. Create a follow-up event for the next email.
6. Update the lead stage to Contacted if it isn't already set.
7. If the lead has received more than two emails without responding, work with other AI agents to disqualify the lead.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Record operations** Fetch email templates Fetch sent emails to lead **Scripts** Create follow up event for next email Fetch lead details Update the lead stage

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Configuration (continued)

Field	Description
	Subflows Send an email to lead
Allowed user roles The specific user roles that can access this AI agent.	sn_sales_common.sales_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Help nurture new leads

Learn more about Lead Management at Lead Management.

Appointment management AI agent

This AI agent manages appointments with leads on behalf of sales agents. It reads lead emails, checks the lead owner's availability, and either books an appointment or proposes two open time slots. It also cancels appointments when a lead asks and sends a confirmation email.

Workflow

The agent helps sales agents schedule or cancel appointments with leads based on the lead's email, without asking for confirmation at each step.

1. Read the lead's email to determine whether the lead wants to book or cancel an appointment, and identify any preferred date, time, or time zone.
2. Fetch the lead owner's available time for the requested period, and stop with a message to the user if no time is available.
3. If the lead requests a specific time and the lead owner is free for a 30-minute meeting, create a lead task and an appointment for that time.
4. Send the lead a confirmation email on behalf of the lead owner with the appointment time and time zone, and a note that a meeting invite follows.
5. If the requested time isn't available or the lead gives no specific time, send the lead an email on behalf of the lead owner that offers two available 30-minute slots.

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6. If the lead asks to cancel, cancel the upcoming appointment and send the lead a confirmation email, or ask for clarification if no upcoming appointment exists.
7. After canceling an appointment, work with other AI agents to disqualify the lead.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Get Lead Owner's Meeting Availability Validate if lead owner is available **Subflows** Cancel appointment Create lead task and appointment Send an email to lead
Allowed user roles The specific user roles that can access this AI agent.	sn_sales_common.sales_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Help nurture new leads

Learn more about Lead Management at Lead Management.

Lead disinterest AI agent

This AI agent handles lead disqualification and opt-out requests for sales agents. After the sales agent confirms, it cancels the lead's upcoming appointments, closes the related tasks, and disqualifies the lead.

Workflow

The agent helps sales agents disqualify leads that aren't interested or have opted out.

1. Share the lead details, a summary of the emails sent to the lead, and the reason for disqualification, if available.
2. Ask the user to confirm whether to disqualify the lead.
3. If the user confirms, cancel all upcoming appointments with the lead.
4. Close all tasks related to the lead.
5. Update the lead stage to Disqualified.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Cancel all tasks Update the lead stage

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Configuration (continued)

Field	Description
	Subflows Cancel all upcoming appointments
Allowed user roles The specific user roles that can access this AI agent.	sn_sales_common.sales_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Help nurture new leads

Learn more about Lead Management at Lead Management.

Inbound email AI agent

This AI agent analyzes the latest email that a lead sends in response to outreach and helps sales agents decide how to move forward. It classifies the response and then books a demo, disqualifies the lead, cancels the appointment, or drafts answers to the lead's questions.

Workflow

The agent helps sales agents respond to leads by analyzing the lead's latest email and taking the matching action without asking for confirmation at each step.

1. Fetch the lead details and update the lead stage to Nurturing if it isn't already set.
2. Fetch the latest email from the lead, and notify the user and stop if no email is found.
3. Classify the response as interest in booking or rescheduling a demo, not interested, cancellation of a scheduled demo, or additional questions when the intent is unclear.
4. If the lead wants to book or reschedule a demo, work with other AI agents to start the appointment booking.
5. If the lead isn't interested, work with other AI agents to disqualify the lead.
6. If the lead wants to cancel a scheduled demo without rescheduling, cancel the appointment.
7. If the lead has additional questions, prepare a response and show the questions and the response to the user.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Fetch latest email Fetch lead details Update the lead stage
Allowed user roles The specific user roles that can access this AI agent.	sn_sales_common.sales_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Help nurture new leads

Learn more about Lead Management at Lead Management.

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Opportunity AI agent

This AI agent helps the user read, create, update, and summarize opportunities and their related records, such as accounts, contacts, touchpoints, opportunity tasks, line items, and meetings. It previews changes to opportunities, accounts, contacts, and line items and makes them only after the user approves.

Workflow

The agent helps users manage opportunities and their related records through natural-language requests.

1. Identify the action the user wants to take and the record it applies to, and ask a clarifying question if the request is unclear or not supported.
2. Use the record the user names, or the record open in the workspace if the user doesn't name one.
3. Retrieve and present the matching records or an opportunity summary, showing the first 10 results when more exist.
4. When creating an opportunity, help the user choose a sales cycle type and a stage that belongs to it.
5. Preview changes to opportunities, accounts, contacts, and line items, and apply them only after the user approves.
6. Apply changes to touchpoints, opportunity tasks, competitors, associated contacts, and meetings directly.
7. Report the result, including the reason for any failure, and provide up to three next steps the user can take.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Opportunity Create Opportunity Lookup

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Configuration (continued)

Field	Description
	Opportunity Update
Allowed user roles The specific user roles that can access this AI agent.	• sn_sales_common.sales_agent • sn_sales_common.sales_restricted_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	• sn_sales_common.sales_agent • sn_sales_common.sales_restricted_agent
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Opportunity Agentic Workflow

Learn more about Opportunity Management at Opportunity Management.

To manage opportunity records, see Manage opportunity records using an AI interface.

Order Management AI agents

The following AI agents are available for Order Management.

Move order voice AI agent

This Sales Customer Relationship Management voice agent helps users relocate a telecom service to a new address by validating the consumer, verifying serviceability at the target location, and creating a move order.

Workflow

1. Confirm the user wants to move a telecom service to a new address, and extract any details already mentioned (current location, product offering, new address).
2. Verify the current user is a valid consumer in the system.
3. Fetch the consumer's services at their current location for the specified product offering.
4. Confirm the existing service location is valid.
5. Check if the target address already exists for the consumer. Create it if it doesn't exist.
6. Verify the product offering is available at the new location.

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7. Build the product offering list from the consumer's active services and create the move order with the current location, new location, and consumer details.
8. Inform the user of the move order number on success, or that creation failed, and ask if they need further help.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Check Serviceability Create Location For Consumer Create Move Order Fetch Consumer Location Fetch Consumer Service Validate Consumer
Allowed user roles The specific user roles that can access this AI agent.	sn_customerservice.consumer
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal, sn_customerservice_manager, sn_ind_tmt_orm.order_creator

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure a voice assistant using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about Sales Customer Relationship Management at Sales Customer Relationship Management.

Order enrichment AI agent

This Sales Customer Relationship Management agent identifies enrichment tasks for order line items and their children using historic data, confirms the task list with the user, and creates them.

Workflow

1. Fetch the details for the given top-level order line item and all its children.
2. For each order line item, check for existing historic enrichment tasks. If none exist, identify the available tasks instead.
3. Display the proposed tasks grouped by order line item. If rejected, let the user provide their own task list per line item, validate it, and confirm again (repeating until satisfied).
4. Once confirmed, create the enrichment tasks for each order line item.
5. Mark the trigger task as closed complete. If no tasks were created, reset all order line item states back to new.
6. Display a summary of all steps taken, including created task numbers grouped by order line item, or note that none were created.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Create Enrichment Tasks Fetch Top Order Line info. Find available Enrichment tasks for given specification Find historic enrichment tasks Update top OLI state back to new. Update Trigger task state. Validate task names
Allowed user roles The specific user roles that can access this AI agent.	sn_somt_gen_ai.sales_and_order_fulfillment_ai_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_ind_tmt_orm.order_fulfilment_agent, sn_gaf.data_writer
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Not defined.
Used in agentic workflows	Default VA Workflow

Learn more about Sales Customer Relationship Management at Sales Customer Relationship Management.

Order fallout AI Agent

This Sales Customer Relationship Management agent analyzes order task comments and work notes to detect issues matching known fallout types, creates fallout records for any matches, and summarizes the results.

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Workflow

1. Fetch the task details for the given order task number.
2. Get the list of recognized fallout types from the system.
3. Compare the work notes against available fallout types and create any matching fallouts that are identified.
4. Display a summary of all steps taken, including any created fallout numbers, or note that none were found.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Create validated and confirmed fallouts Find all available fallout types Find all notes for order task
Allowed user roles The specific user roles that can access this AI agent.	sn_somt_gen_ai.sales_and_order_fulfillment_ai_agent
Data access roles The specific	actsub_user, agent_schedule_user, agent_workspace_user, app_service_user, assignment_workbench, awa_agent, baseline_user, canvas_user, chat_admin, cmdb_ms_user, cmdb_query_builder, cmdb_query_builder_read, cmdb_read, data_manager_user, decision_table_reader, demand_user, dependency_views, document_management_user, email_client_template_read,

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Configuration (continued)

Field	Description
user identity roles that determine which data the AI agent can access and what actions it can take.	email_composer, fsm_skill_user, interaction_agent, inventory_user, it_demand_user, it_project_portfolio_user, it_project_user, knowledge, notify_view, now_assist_panel_user, personalize_form, planning_console_user, platform_ml_di.creation_agent, platform_ml_read, pps_resource, project_portfolio_user, project_user, prompt_library_user, quickactions_user, service_fulfiller, skill_user, sn_ai_filter_assist.user, sn_ai_filter_tracker.user, sn_apptmnt_booking.appointment_booking_user, sn_bm_client.benchmark_data_viewer, sn_change_read, sn_cmdb_user, sn_csm_case_types.service_definition_viewer, sn_csm_household.viewer, sn_csm_pricing.pricelist_viewer, sn_customerservice.case_viewer, sn_customerservice.consumer_agent, sn_customerservice.csm_workspace_user, sn_customerservice.customer_data_viewer, sn_customerservice_agent, sn_esm_agent, sn_fallout_mgmt.fallout_agent, sn_fallout_mgmt.fallout_creator, sn_fallout_mgmt.fallout_viewer, sn_gaf.data_viewer, sn_gaf.data_writer, sn_gd_guidance.guidance_user, sn_gf.goal_user, sn_gf.goal_user_read, sn_gf.strategy_planner, sn_gf.strategy_planner_read, sn_ind_tmt_orm.fulfillment_viewer, sn_ind_tmt_orm.fulfillment_viewer, sn_ind_tmt_orm.fulfillment_writer, sn_ind_tmt_orm.order_creator, sn_ind_tmt_orm.order_fulfilment_agent, sn_ind_tmt_orm.order_fulfilment_agent, sn_ind_tmt_orm.order_viewer, sn_itam_recomm.recommendations_read, sn_l2c_core.entity_mapping_viewer, sn_lookup_verify_user, sn_nb_action.next_best_action_user, sn_ord_qual_mgmt.alternate_proposal_create, sn_ord_qual_mgmt.alternate_proposal_read, sn_ord_qual_mgmt.alternate_proposal_write, sn_prd_invt.product_inventory_operations_read, sn_prd_invt.product_inventory_relationship_create, sn_prd_invt.product_inventory_relationship_read, sn_prd_invt.product_inventory_relationship_write, sn_prd_invt.product_inventory_viewer, sn_prd_pm.characteristics_viewer, sn_prd_pm.product_catalog_viewer, sn_prd_pm.product_model_characteristic_viewer, sn_pss_core.service_contract_viewer, sn_query_gen.user, sn_req_criteria.viewer, sn_service_org.customer_criteria_read, sn_service_org.service_criteria_read, sn_shn.editor, sn_shn.user, sn_sla_definition_read, sn_somt_gen_ai.sales_and_order_fulfillment_ai_agent, sn_sow.sow_home, sn_sow.sow_list, sn_sow.sow_user, sn_sttrm_condition_read, sn_templated_snip.template_snippet_reader, sn_tmt_core.inbound_queue_read, sn_tmt_core.outbound_request_read, sn_tmt_core.outbound_request_write, sn_udc.basic_read, sn_uib_collab.user, sn_uxc_gen_ai.platform_ai_image_processor, sn_uxc_gen_ai.platform_ai_record_mgmt, sn_workflow_studio.workflow_studio_read, survey_reader, task_activity_reader, task_activity_writer, task_editor, template_editor, template_read_global, territory_user, timecard_user, view_changer, wm_basic, wm_read, workspace_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Not defined.

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Configuration (continued)

Field	Description
Used in agentic workflows	Not applicable.

Learn more about Sales Customer Relationship Management at Sales Customer Relationship Management.

Order fulfillment AI agent

This Sales Customer Relationship Management agent identifies fulfillment tasks for a domain order by checking historic tasks from similar orders, confirms the task list with the user, and creates them.

Workflow

1. Fetch the details for the given domain order number.
2. Check for existing historic fulfillment tasks for the order and display any that are found.
3. Present the task list and ask the user to confirm. If rejected, let the user provide their own task list, validate it, and confirm again.
4. Create the fulfillment tasks in the system.
5. Update the trigger task status to completed.
6. Display a mandatory summary of all steps taken, including each created task's name and sys_id.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Create fulfillment tasks Fetch domain order record details.

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Configuration (continued)

Field	Description
	Find available fulfillment tasks for given specification Find historic fulfillment tasks Update trigger task state. Validate task names
Allowed user roles The specific user roles that can access this AI agent.	sn_somt_gen_ai.sales_and_order_fulfillment_ai_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_ind_tmt_orm.order_fulfilment_agent, sn_gaf.data_writer
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Not defined.
Used in agentic workflows	Not applicable.

Learn more about Sales Customer Relationship Management at Sales Customer Relationship Management.

Invoice dispute AI voice agent

This AI voice agent helps customers resolve discrepancies between invoiced quantities and received quantities by creating dispute cases.

Workflow

The agent scope is strictly limited to quantity disputes only. It must escalate to a live agent for other issues such as pricing issues, payment issues, tax questions, delivery problems, and billing address changes.

1. If the user requests help beyond the agent's capabilities or encounters repeated issues, always offer live agent support as option.
2. Extract all available information from the user's first statement (invoice number, product, date, quantity received).
3. Search with all available parameters to find the invoice. If multiple possible invoices are found, clarify with customer.

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4. Clarify with the customer which line on the invoice has the disputed quantity.
5. Create an invoice case.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Create invoice case Get invoice details Validate Invoice Line
Allowed user roles The specific user roles that can access this AI agent.	sn_customerservice.customer
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_customerservice.customer
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure a voice assistant using Assistant Designer.
Used in agentic workflows	Not applicable.

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Learn more about customer self-service via Business Portal at Customer self-service for Sales Customer Relationship Management.

Invoice dispute intake assistant AI agent

This AI agent helps requesters identify the correct invoice, confirm dispute details, and submit invoice disputes related to quantity issues. It guides users step by step through invoice identification, validation, and dispute submission to ensure a smooth and accurate experience. The agent also analyzes the sentiment of the user throughout the conversation.

Workflow

This agent can resolve quantity-related invoice disputes only. If you show frustration or ask for help beyond its capabilities, the agent offers a transfer to a live agent.

1. The agent checks the current page URL for an invoice number. If none is available, it looks up your invoices and asks which invoice you want to dispute.
2. The agent validates the invoice and asks which invoice line is in dispute.
3. The agent identifies the issue and captures the disputed quantity details.
4. The agent creates an invoice case and validates the dispute.
5. If the agent finds no quantity discrepancy, it offers you the option to upload a delivery ticket as proof or to connect with a live agent.
6. If you upload a delivery ticket, the agent processes it and checks whether it supports your disputed quantity. You can re-upload the delivery ticket up to three times.
7. When the dispute is validated, the agent offers you resolution options, such as a credit note or an order for the remaining quantity.
8. When you select a resolution option, the agent resolves the invoice case.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Create invoice case Get invoice details

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Configuration (continued)

Field	Description
	Process Delivery Ticket Resolve invoice dispute Validate and confirm invoice dispute Validate Invoice Line **Topic blocks** Upload Delivery Ticket **Conversational topics** Fetch the invoice number from the url and interaction id
Allowed user roles The specific user roles that can access this AI agent.	sn_customerservice.customer, sn_csm_invoice.agent, sn_otc.account_receivable_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	invoice.exception.aia actsub_user, agent_schedule_user, agent_workspace_user, app_service_user, assignment_workbench, canvas_user, chat_admin, cmdb_ms_user, cmdb_query_builder, cmdb_query_builder_read, cmdb_read, data_manager_user, decision_table_reader, dependency_views, email_client_template_read, email_composer, fsm_skill_user, interaction_agent, knowledge, notify_view, now_assist_panel_user, personalize_form, platform_ml_read, prompt_library_user, skill_user, sn_ai_filter_assist.user, sn_ai_filter_tracker.user, sn_bm_client.benchmark_data_viewer, sn_case_line.characteristic_creator, sn_case_line.characteristic_delete, sn_case_line.characteristic_viewer, sn_case_line.characteristic_writer, sn_change_read, sn_cmdb_user, sn_csm_case_types.service_definition_viewer, sn_csm_household.viewer, sn_csm_invoice.agent, sn_csm_invoice.creator, sn_csm_invoice.navigation_menu, sn_csm_invoice.viewer, sn_csm_invoice.writer, sn_csm_pricing.pricelist_viewer, sn_customerservice.csm_workspace_user, sn_customerservice.customer_data_viewer, sn_customerservice_agent, sn_esm_agent, sn_gaf.data_viewer, sn_gaf.data_writer, sn_gd_guidance.guidance_user, sn_ind_tmt_orm.fulfillment_viewer, sn_ind_tmt_orm.order_viewer, sn_l2c_core.entity_mapping_viewer, sn_lookup_verify_user, sn_nb_action.next_best_action_user, sn_ord_qual_mgmt.alternate_proposal_read, sn_otc.ar_invoice_viewer, sn_prd_invt.product_inventory_operations_read, sn_prd_invt.product_inventory_viewer, sn_prd_pm.characteristics_viewer, sn_prd_pm.product_catalog_viewer, sn_prd_pm.product_model_characteristic_viewer, sn_pss_core.service_contract_viewer, sn_query_gen.user, sn_req_criteria.viewer, sn_service_org.customer_criteria_read, sn_service_org.service_criteria_read,

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Configuration (continued)

Field	Description
	sn_shn.editor, sn_shn.user, sn_sow.sow_home, sn_sow.sow_list, sn_sow.sow_user, sn_sttrm_condition_read, sn_templated_snip.template_snippet_reader, sn_tmt_core.inbound_queue_read, sn_udc.basic_read, sn_uib_collab.user, sn_workflow_studio.workflow_studio_read, survey_reader, task_editor, template_editor, template_read_global, view_changer, workspace_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about customer self-service via Business Portal at Customer self-service for Sales Customer Relationship Management.

Invoice dispute support assistant AI agent

This agent helps users efficiently identify, review, and answer questions related to invoice disputes. It validates information, maintains data integrity, and answers questions regarding the invoice case.

Workflow

The agent can offer assistance to the user for resolving or closing invoice disputes and fetching similar invoice cases to help with invoice case resolution.

1. Identify and confirm the invoice number with the customer.
2. Use the Validate invoice case and fetch invoice tool to validate the invoice case number.
3. Provide the user with a list of options. These include finding similar cases, viewing invoice details, validating the invoice dispute, or closing the case. When closing the case, the user can issue a credit note for the missing quantity, place an order for the remaining quantity, or close the case as an invalid dispute.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Close invoice dispute Fetch similar invoice cases Validate invoice case and fetch invoice Validate invoice dispute **Conversational topics** Fetch invoice case number and interaction id
Allowed user roles The specific user roles that can access this AI agent.	sn_otc.account_receivable_agent, sn_csm_invoice.agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_otc.account_receivable_agent, sn_csm_invoice.agent
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Invoice Dispute Assist

Learn more about customer self-service via Business Portal at Customer self-service for Sales Customer Relationship Management.

Manage order operations AI agent

This AI agent helps customers change an order by requesting faster delivery, increasing quantities, changing the shipping address, or combining these changes. The agent checks

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inventory, delivery, and pricing, then resolves the case within a price threshold, creates a quote, or hands off to a specialist.

Workflow

The agent validates the order and the requested changes, checks whether the changes fit within the price threshold, and either resolves the case, creates a quote, or hands off to a specialist.

1. The agent retrieves your order and confirms the order number.
2. The agent identifies what you want to change and which order line the change applies to.
3. The agent collects the details for each change: a new shipping address, an increased quantity, or a faster delivery date. You can combine these changes in one request.
4. The agent confirms the changes with you and creates an order case.
5. The agent validates inventory, delivery, and location feasibility for the requested changes, shows you the results, and asks you to accept or decline each result.
6. If you accept all the changes, the agent checks the pricing. If the changes are within the standard pricing threshold, the agent resolves the case.
7. If the changes exceed the threshold, the agent asks whether to create a quote. If you agree and then accept the quote, the agent resolves the case with the quote.
8. If the changes can't be processed, or you decline the quote, the agent updates the case and offers to connect you with a live agent. The agent transfers you only after you confirm.
9. The agent summarizes the outcome and shares the case details with you.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Check availability and earliest delivery Check threshold for Quote Creation Create order case Get Customer Orders Tool

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Configuration (continued)

Field	Description
	Get Order Line Items Resolve Order Case and Quote Update Case Lines with Exception Results Validate Address Validate Order Exception Change Request **Subflows** Create Quote **Topic blocks** Fetch the order number from the url & interaction id
Allowed user roles The specific user roles that can access this AI agent.	sn_customerservice.customer
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	ord.exception.aia actsub_user, agent_schedule_user, agent_workspace_user, app_service_user, assignment_workbench, canvas_user, chat_admin, cmdb_ms_user, cmdb_query_builder, cmdb_query_builder_read, cmdb_read, data_manager_user, decision_table_reader, dependency_views, email_client_template_read, email_composer, fsm_skill_user, interaction_agent, knowledge, notify_view, now_assist_panel_user, personalize_form, platform_ml_read, prompt_library_user, skill_user, sn_ai_filter_assist.user, sn_ai_filter_tracker.user, sn_bm_client.benchmark_data_viewer, sn_case_line.characteristic_creator, sn_case_line.characteristic_delete, sn_case_line.characteristic_viewer, sn_case_line.characteristic_writer, sn_change_read, sn_cmdb_user, sn_csm_case_types.service_definition_viewer, sn_csm_household.viewer, sn_csm_pricing.pricelist_viewer, sn_customerservice.csm_workspace_user, sn_customerservice.customer_data_viewer, sn_customerservice_agent, sn_esm_agent, sn_gaf.data_viewer, sn_gaf.data_writer, sn_gd_guidance.guidance_user, sn_ind_tmt_orm.fulfillment_viewer, sn_ind_tmt_orm.order_viewer, sn_l2c_core.entity_mapping_viewer, sn_lookup_verify_user, sn_nb_action.next_best_action_user, sn_order_case.agent, sn_order_case.creator, sn_order_case.navigation_menu, sn_order_case.viewer, sn_order_case.writer, sn_ord_qual_mgmt.alternate_proposal_read, sn_prd_invt.product_inventory_operations_read, sn_prd_invt.product_inventory_viewer, sn_prd_pm.characteristics_viewer, sn_prd_pm.product_catalog_viewer, sn_prd_pm.product_model_characteristic_viewer, sn_pss_core.service_contract_viewer, sn_query_gen.user, sn_quote_mgmt_core.quote_writer, sn_req_criteria.viewer,

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Configuration (continued)

Field	Description
	sn_service_org.customer_criteria_read, sn_service_org.service_criteria_read, sn_shn.editor, sn_shn.user, sn_sow.sow_home, sn_sow.sow_list, sn_sow.sow_user, sn_sttrm_condition_read, sn_templated_snip.template_snippet_reader, sn_tmt_core.inbound_queue_read, sn_udc.basic_read, sn_uib_collab.user, sn_workflow_studio.workflow_studio_read, survey_reader, task_editor, template_editor, template_read_global, view_changer, workspace_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about customer self-service via Business Portal at Customer self-service for Sales Customer Relationship Management.

Order capture AI agent

The Order capture AI agent helps you create orders from quote lines or uploaded files, and manage, investigate, and update existing orders. For example, you can apply discounts, change quantities, fix shipping addresses, remove lines, create cases, and undo changes.

Workflow

The agent runs in three modes: Quote Ingest, File Upload Ingest, and Manage Order. It creates orders from quote lines or uploaded files, and it helps you investigate and update existing orders.

1. The agent detects the mode from your input: a quote starts Quote Ingest mode, an uploaded file starts File Upload Ingest mode, and an order number or open order starts Manage Order mode.
2. In Quote Ingest mode, the agent reads the quote lines, groups them into orders by account and any configured order-splitting rules, and creates the orders.
3. In File Upload Ingest mode, the agent extracts order data from the uploaded file, maps the file columns to order fields, and creates the orders in bulk.
4. During ingest, the agent records any line it can't resolve, such as an unknown product or account, as an item for you to resolve in Action Center.
5. After ingest, the agent gives you a summary of the created orders with a link to each order.
6. In Manage Order mode, the agent uses the currently opened order as context and shows you the actions available for the order's current state.
7. After you select an action, the agent validates the order and line-item data and applies the change, such as a bulk discount, a quantity update, a shipping address fix, a line removal, or a new case.
8. When an action is reversible, the agent offers to undo it.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Attach Order To Group bulk_apply_discount check_product_offering Compute Group Key Create All Orders From Run Create Header Followup Create Line Followup Create Order Header Create Order Line Create Orders From Run Create Single Order create_order_case create_order_line_case Extract Splitting Fields Fail Ingest Run Fetch actions available for the user from Order Assist-Action Selector Finalize Ingest Run find_account_by_name

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Configuration (continued)

Field	Description
	find_consumer_by_name find_quote_by_number find_similar_location Get agent settings Get Followup Issues Get Open Action Items Get Order Schema Fields Get Quote Lines Get Unresolved Issues get_order_followups Group line data Initialize Run Followups Mark Header Successful Mark Line Successful Offer to undo previous order action Parse Attachment Headers Prepare Reprocess Read Attachment Content Read Ingest Run Lines Record Correction Record Followup Correction Record Line Failure Reprocess Followup resolve_reference Save Column Mapping Start Ingest Run Suppress Followup undo_last_action Unsuppress Followup Update Action Item Error

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Configuration (continued)

Field	Description
	Update agent config Update Ingest Run Update Order Followup Update quantity for all lines Update Quote Work Note update_shipping_address Upload order splitting rules validate_account_sys_id **Subflows** Order Assist DocIntel **Record operations** order_number_from_order_sys_id order_sys_id_from_order_number remove_top_order_line_item verify_order_line_item **Capabilities** Extract information from documents
Allowed user roles The specific user roles that can access this AI agent.	• admin • sn_ind_tmt_orm.order_admin • sn_ind_tmt_orm.order_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	• admin • platform_ml_di.extraction_agent • sn_ind_tmt_orm.order_admin • sn_ind_tmt_orm.order_agent • sn_order_case.agent • sn_quote_mgmt_core.quote_writer • snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Assistance for orders

Learn more about Order Management at Order management.

Order exception AI voice agent

This AI voice agent helps customers change an order after they place it. Customers can request faster delivery, a higher quantity, or a different shipping location, in any combination, for one order line. The agent creates one case for the requested changes and can connect the customer to a live agent.

Workflow

The agent captures every change the customer asks for on one order line, validates new shipping locations, creates one case, and hands off to a live agent when it can't complete the request.

1. Listen to the customer's request and identify each change they want: faster delivery, a higher quantity, a different shipping location, or any combination of these.
2. Retrieve the order by product name, order number, or a list of the customer's recent orders, and confirm the order with the customer.
3. Retrieve the order line items and confirm the line to change. The agent handles one line per case.
4. Ask only for missing values, such as the new quantity, the required delivery date, or the new shipping location.
5. Validate a new shipping location and confirm the matching address with the customer.
6. Ask whether the customer wants to change anything else on the same line before submitting.
7. Read back all requested changes for a final confirmation, and create one order case for them.
8. Share the case number and a summary of the original and requested values.
9. End the conversation. If the customer asks for more changes after the case is created, or the agent can't complete the request after three attempts or a tool failure, transfer the customer to a live agent with the case and conversation summary.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for

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Configuration (continued)

Field	Description
	tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Check availability and earliest delivery Create order case Get Customer Orders Tool Get Order Line Items Validate Address Validate and get order details
Allowed user roles The specific user roles that can access this AI agent.	sn_customerservice.customer
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_customerservice.customer
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure a voice assistant using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about customer self-service via Business Portal at Customer self-service for Sales Customer Relationship Management.

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Telco order fulfilment template creation AI agent

This Sales Customer Relationship Management AI agent generates a task plan template using the provided specification and dependency JSON.

Workflow

The agent creates a task plan template for telecom order fulfillment based on a provided specification.

1. Retrieve and display the available order intent types.
2. Ask the user to select the required actions for the template, which can be multiple actions provided as a comma-separated list, and wait for their response.
3. Create the task plan record using the selected actions along with the specification, attachment, and task dependency information.
4. Display a summary of the created template, including the task number, number of tasks, and number of task dependencies.
5. Provide the confirmation URL and let the user know the template must be confirmed and published using that link.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Create Task Plan Record Fetch Order Intent Type
Allowed user roles The specific user roles that can access this AI agent.	sn_prd_pm.product_catalog_admin, sn_task_plan.admin
Data access roles	sn_prd_pm.product_catalog_admin, sn_task_plan.admin

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Configuration (continued)

Field	Description
The specific user identity roles that determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Design Telecom Order Fulfilment Template

Learn more at Sales Customer Relationship Management.

CPQ AI agents

The following AI agents are available for Configure, Price, Quote (CPQ).

Quote AI agent

This AI agent helps sales agents create, update, and finalize quotes. It validates products against the catalog, adds and configures line items, applies discounts, and generates the quote document. When started from an opportunity, it reads the opportunity line items and notes to build the quote without manual input.

Workflow

The agent helps sales agents build a complete quote from an opportunity or an account, from adding products through to the final quote document.

1. Ask for an opportunity number or account name if neither was provided.
2. Create the quote, and when it starts from an opportunity, bring in the opportunity line items and suggest more products based on the opportunity notes and comments.
3. Look up each requested product in the product catalog, and ask you to choose when there are several matches.
4. Configure configurable products using natural language requirements, and add other products to the quote as line items.
5. Apply line or quote discounts that you request or that your description of the deal suggests, after confirming the discount details with you.
6. Generate the quote document and share the link when no line item, configuration, or discount work is pending.
7. Send an email notification summarizing the quote to the sales agent.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow actions** AI product search Apply Quote Discount Create New Quote Create Quote Line Item Generate Quote PDF Get Opportunity details Get Quote details Lookup Product Deterministic Lookup Quote Line Notify Sales Rep via Email Update Quote Fields Update Quote Line **Scripts** trigger_discount_approval_workflow **Subflows** Call Config AI
Allowed user roles The specific user roles that can access this AI agent.	sn_qut_sum_skill.quote_ai

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Configuration (continued)

Field	Description
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_qut_sum_skill.quote_ai
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Quote agent workflow

Learn more about Quote Management at .

PRM AI agents

The following AI agents are available for Partner Relationship Management (PRM).

Service Exchange

Service Exchange AI agents

The following AI agents are available for Service Exchange.

Registration error monitor AI agent

This AI agent checks a registration number and connection against the Service Exchange error table, and then provides a detailed summary of any reported Service Exchange errors. This summary helps users or other AI agents make informed decisions and take appropriate action to resolve registration issues.

Workflow

The agent helps a user check a registration number and review any related Service Exchange errors.

1. Ask the user for the registration number to check, in the format REG followed by seven digits, for example REG0010010.
2. Look up the given registration number and connection in the Service Exchange error table.
3. Summarize any Service Exchange errors found for that registration number and connection.
4. Present the summary to the user so they can decide on next steps.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Find Company Show Service Exchange errors link Verify registration
Allowed user roles The specific user roles that can access this AI agent.	sn_sb.admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_sb.admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Service Exchange Onboarding

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Registration initiator AI agent

This AI agent initiates the registration process and manages its early stages, including creating the registration record.

Workflow

The agent helps initiate a new Service Exchange provider registration and manages its early stages.

1. Verify the provider count and check for any outstanding health issues before proceeding.
2. Collect and verify the provider's company, contact, and URL details.
3. Create the provider and registration records once the details are verified.
4. Run the Service Exchange Pre-Onboarding suite against the new registration.
5. Check the registration state and report the result, including a link to any related issues, to the user.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Create issue link Create provider Create registration Execute Service Exchange Pre-Onboarding suite Get provider name company Retrieve issues Show resolve health dashboard message Verify company contact url Verify provider company

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Configuration (continued)

Field	Description
	Verify provider count Verify registration Verify the Registration state
Allowed user roles The specific user roles that can access this AI agent.	sn_sb.admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_sb.admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Service Exchange Onboarding

Registration monitor AI agent

This AI agent monitors registration task state changes, validates system configurations, and posts audit results to work notes.

Workflow

The agent monitors a registration task's lifecycle events and posts audit results to its work notes.

1. Check the onboarding version and registration record associated with the task.
2. Verify the related settings record, transport queue record, and consumer configuration.
3. Validate the consumer-side registration settings and summarize the results.
4. Post a success or failure update to the registration task's work notes based on the audit outcome.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Post the Message on Registration Task Verify isOnboardingVersionV2OrAbove Verify Registration Record Verify Settings Record Verify the Consumer Config Verify Transport Queue record **Flow Action** Verify the Consumer settings
Allowed user roles The specific user roles that can access this AI agent.	sn_sb.admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_sb.admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Service Exchange Registration Monitor

Security Incident Response

Security Incident Response AI agents

The following AI agents are available for Security Incident Response.

EDR AI agent

This Security Incident Response agent retrieves host details or isolates a host associated with a security incident.

Workflow

1. Identify the configuration item (CI) from the security incident using hostname, IP address, or device identifier. If no CI is found, inform the user and stop. Run the get host details action. If the request fails, inform the user and stop.
2. Identify the CI and security incident from user input. If no CI is found, ask the user how to proceed. Run the isolate host action. If the request fails, ask the user how to proceed.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Subflows** Isolate host Run get host details tool

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Configuration (continued)

Field	Description
Allowed user roles The specific user roles that can access this AI agent.	sn_si.analyst
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_si.analyst
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Resolve security incident

Learn more about Security Incident Response at .

Exchange online integration handling AI agent

This Security Incident Response agent searches for and deletes emails related to a security incident.

Workflow

1. Run an email search based on the incident context. If no search criteria exist, ask the user how to proceed. Wait for user confirmation that the search is complete before fetching results.
2. Only available after a search has been performed. If the search returned no emails, stop. Otherwise, run the deletion, wait for user confirmation that it is complete, and fetch results.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and

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Configuration (continued)

Field	Description
	response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Delete email from server Fetch email deletion results Fetch email search results Search email on server
Allowed user roles The specific user roles that can access this AI agent.	sn_si.analyst
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_si.analyst
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Resolve security incident

Learn more about Security Incident Response at .

Observable analysis AI agent

This Security Incident Response agent performs threat lookups, observable enrichment, sighting searches, and block requests against observables in a security incident.

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Workflow

1. Retrieve the incident's observables (URLs, IPs, file hashes, email addresses, etc.). Run threat lookup, observable enrichment, or both as requested. Wait for the user to confirm that the capability execution is complete before fetching and displaying results.
2. Retrieve observables and run a sighting search to find internal and external sighting information. If the search times out, retrieve results after the user manually confirms completion.
3. Retrieve observables identified as malicious. If none exist, inform the user and stop. Run the block request and wait for user confirmation that execution is complete.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Fetch observables associated to security incident Retrieve capability execution results Run block request Run observable enrichment Run threat lookup **Subflow** Run sighting search tool
Allowed user roles The specific user roles that can access this AI agent.	sn_si.analyst
Data access roles	sn_si.analyst

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Configuration (continued)

Field	Description
The specific user identity roles that determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Resolve security incident

Learn more about Security Incident Response at .

Security incident activities handling AI agent

This Security Incident Response agent manages security incident core activities, ensuring efficient and effective handling of incidents, problems, change requests, and security incident response tasks. It is intended for use by security incident management teams.

Workflow

1. Generate a description for an incident, change request, problem, or response task. Prompts user to review and approve the content before creation. If a response task is created, collect the outcome from the user and log it.
2. Confirm recipient addresses, generate the subject and body, and present for user review and approval before sending.
3. Update the state as requested. No further action is taken.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Create related record Log user action Send email Update incident state
Allowed user roles The specific user roles that can access this AI agent.	sn_si.analyst
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_si.analyst
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Resolve security incident

Learn more about Security Incident Response at .

Security incident resolution AI agent

This Security Incident Response agent walks the user through resolving a security incident by generating and executing a resolution plan.

Workflow

1. Fetch the security incident details and resolution plan. End if already closed or resolved.
2. Summarize the incident's current state, including any resolution steps already completed, and show it to the user.
3. Present the resolution plan for user review. Iterate on revisions until the user approves.

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4. Execute each step in the approved plan in order. Falls back to other agents for steps it can't perform itself.
5. Confirm completion with the user. Only end when the user explicitly confirms no further actions are needed.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Fetch security incident details and resolution steps
Allowed user roles The specific user roles that can access this AI agent.	sn_si.analyst
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_si.analyst
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Resolve security incident

Learn more about Security Incident Response at .

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Security incident retrieval AI agent

This Security Incident Response agent searches for security incidents using filters and optionally summarizes individual incidents.

Workflow

1. Extract search filters from the user's request and confirm any ambiguous values.
2. Run the search and display results.
3. Offer to summarize a specific incident or modify the search filters. Summarization requires exactly one incident number.
4. Ask if the user needs anything else. Route out-of-scope requests to other agents.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Fetch security incident summary Lookup Security Incidents
Allowed user roles The specific user roles that can access this AI agent.	sn_si.manager
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_si.manager

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Analyze security operations metrics

Learn more about Security Incident Response at .

Security incident shift handover AI agent

This Security Incident Response agent adds a security incident to a shift handover report, walking the user through each section for review.

Workflow

1. Get a valid security incident number from the user if one is not provided.
2. Run the pre-processor to find active shift handover records for the user. If none exist, inform the user and end.
3. If multiple shift handover records exist, ask the user to select one.
4. Validate the selected handover record and generate its content. If validation fails, ask for a valid record number.
5. If the security incident is already in the report, inform the user and get confirmation before adding it again.
6. Walk through each section of the report. For each section, show the content, collect approval or revisions, and save to the database before moving to the next section.
7. After all sections are processed, show a summary of saved and skipped sections.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Pre-processor for shift handover Save section content to database Validate and generate shift handover content
Allowed user roles The specific user roles that can access this AI agent.	sn_si.manager, sn_si.analyst
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_si.basic, sn_escm_sh.shift_analyst
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Generate SIR Shift Handover Report

Learn more about Security Incident Response at .

Security incident wrap up generator AI agent

This Security Incident Response agent can close a security incident by performing all pre-closure validations. It can also generate close notes, generate post incident analysis, post work note, and update the state of the security incident to close it.

Workflow

1. If the user explicitly requests closing as a false positive, follow the short path. Otherwise, follow the full closure path.
2. Retrieve the incident details. If already closed or cancelled, inform the user and end.
3. If the user explicitly requests closing as a false positive, close the incident immediately and end.
4. If the user doesn't explicitly requests closing as a false positive, warn the user if open response tasks or mandatory assessments will be affected. Get approval before continuing.

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5. Produce a post-incident analysis, close notes, and a suggested close code. The user reviews and approves or revises each before proceeding.
6. Write the approved content to the record and confirm closure.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Close security incident as false positive Fetch security incident details Generate close notes for security incident Generate post incident analysis for security incident Update security incident closure information
Allowed user roles The specific user roles that can access this AI agent.	sn_si.analyst
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_si.analyst
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Wrap up security incident

Learn more about Security Incident Response at .

Security metrics analysis AI agent

This Security Incident Response agent calculates and analyzes security incident response metrics for an individual analyst or a team over a specified time range.

Workflow

1. Determine whether the user is asking about an individual analyst or a team (group), and extract the time range. Convert dates to GlideDate or GlideDateTime format.
2. Run the Calculation tool with the analyst or group name and date range. Results are displayed automatically.
3. Ask if the user wants a deeper look at a specific metric: security incident volume, MTTR, or MTTA. If accepted, run the Analysis tool for the selected metric.
4. If analysis completed successfully, ask if the user wants improvement suggestions. If accepted, run the recommend tool using the analysis results.
5. Ask if the user needs anything else. Route out-of-scope questions to other agents.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Analysis

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Configuration (continued)

Field	Description
	Calculation Recommend
Allowed user roles The specific user roles that can access this AI agent.	sn_si.manager
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_si.manager
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Analyze security operations metrics

Learn more about Security Incident Response at .

ServiceNow AI Platform

ServiceNow AI Platform AI agents

The following AI agents are available for ServiceNow AI Platform.

Access Analysis AI Agent

The Access Analysis Agent lets you ask whether a user, group, or role can access something on your ServiceNow instance. It uses guided, conversational workflows in the ServiceNow Otto® panel.

Access Analysis Agent overview

The agent evaluates whether a user, group, or role can access a table, record, field, Client Callable Script Include, UI page, AI agent, or Agentic Workflow. It returns one of three results:

Access Analysis Agent results

Result	What it means
Passed	The entity has access. The agent names the ACL (or ACLs) that grant it.
Blocked	The entity does not have access. The agent names the specific ACL, role, security attribute, or condition that's stopping it.

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Access Analysis Agent results (continued)

Result	What it means
Undefined	No ACL evaluated the operation at all, so the platform's default behavior applies. This is different from Blocked — there's no rule actively denying it, there's simply no rule granting it either.

The agent may ask clarifying questions before it evaluates anything. It never guesses at which record you meant.

Once enabled, the Access Analysis Agent supports:

- Reading the table, record, or user you're currently viewing so you can ask an access question right from that page without naming or navigating to it
- Evaluating whether a user can access a resource
- Evaluating whether a group can access a resource
- Evaluating whether a role can access a resource
- Answering questions that cover more than one operation on the same entity and resource in one response
- Evaluating access to AI agents and Agentic Workflows themselves, not just traditional tables and fields
- Saving completed evaluations so you can find and review them again later

Prerequisites and setup

Ensure the following requirements are met before using the AI agent:

- Access Analyzer is installed on your instance and active.
- The Access Analysis Agent is installed on your instance.
- AI Agent Studio is available on your instance.
- The Now Assist panel is available on your instance.
- You are signed in with a role that has access to the agent. For more information, see Required role below.

Required role

Required role: `access_analyzer_admin` or `user_admin`.

Unlike some Now Assist agents that are open to every session role, the Access Analysis Agent is gated behind two specific roles: `access_analyzer_admin` and `user_admin` roles. These roles keep the agent's use in line with who already has visibility into ACL structure and security configuration on your instance.

Within that gate, the agent evaluates access using the permissions your current session already holds when it looks up the underlying records. It does not escalate or borrow elevated privileges to answer your question.

Accessing the Access Analysis Agent

To confirm the agent is installed and see its configuration:

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1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Go to the **AI Agents** tab.
3. Select **Access Analysis Agent**.

To start using the agent day to day, open the Now Assist panel from the sidebar on any ServiceNow page and start a new interaction. See the procedures below for how to phrase your questions.

Evaluate whether a user, group, or role can access a resource

Use this operation to check whether users can access a table, record, field, Client Callable Script Include, UI page, AI agent, or Agentic Workflow.

1. Ask the agent your question, naming the user, group, or role and the resource you're asking about. For example:
   - "What can user ABC access?"
   - "Can user ABC access resource X?"
   - "Does the ITIL group have write access to changes?"
   - "What can the itil role do on the incident table?"
2. If the agent can't uniquely identify the entity or resource you named, it asks a clarifying question. If your question matches more than one type of entity, the agent lists each match with its type and asks you to confirm.
3. The agent returns a Passed, Blocked, or Undefined result, along with the specific ACL, role, security attribute, or condition that determined the outcome.

Note: You can ask about more than one type of access in the same question, for example both read and write access to the same resource, or a full breakdown of everything a role can do on a table.

Learn why an operation was blocked

Use this operation when you already know an operation is blocked and want the specific reason, rather than re-asking the original question.

1. After receiving a Blocked result, ask a follow-up like "Why is user ABC blocked from report_view on incidents?"
2. The agent identifies the specific ACL, data condition, security attribute, or role gap that caused the block and explains it in plain language.

Ask about access without leaving the page you're on

Use this operation to ask about access while viewing a record, list, or user, without typing out what you're asking about.

1. While viewing a record, list, or user page, open the ServiceNow Otto® panel. Ask your access question without naming a resource, for example: "Can user ABC access this?".
2. The agent uses the page you're viewing as the resource for the evaluation.

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Note: If you name a resource directly in your question, the agent uses that resource instead of the page you're viewing. Because the page you're on can change between questions, the agent runs a fresh evaluation rather than reusing an earlier answer, even if you ask what looks like the same question twice in one conversation.

Review a past evaluation

Use this operation to find an access evaluation you ran previously, instead of running it again.

1. Open the Now Assist panel.
2. Ask the agent to show your previous evaluations, or reference the user, group, or role from an earlier question.

The agent retrieves the saved result from your earlier evaluation.

AI Analytics Q and A AI agent

This AI agent answers natural language questions about AI Analytics. It covers KPI definitions, dashboard widgets, source tables, data flows, deflection log states and scenarios, the deflection and metric frameworks, and ServiceNow platform scripts.

Workflow

Use this agent for any question about AI Analytics metrics, dashboards, or underlying data architecture.

1. Receive the user's question and pass it to the Now Assist Analytics Q and A skill exactly as written, without paraphrasing.
2. Retrieve the skill's grounded answer, which draws from verified platform documentation covering metrics, dashboards, source tables, and scripts.
3. Present the skill's answer to the user exactly as returned, preserving all identifiers, links, and formatting without summarizing or rewording it.
4. If the skill returns no usable answer, respond that there is not enough information to answer accurately and direct the user to the documentation or their platform admin.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Generative AI skill** skill
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_na_analytics.viewer
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

AICT security analyzer AI agent

This AI agent generates context for a detected AI security event by aggregating asset, prompt, cross-threat, and correlation data. It then computes a confidence score from detection strength, event risk, and authorization signals.

Workflow

For all threats, the agent deterministically executes outcomes in a single finalization step: creating a security incident for critical severity findings with no open duplicate, saving a triage record capturing the full verdict and rationale, and triggering an AI insight for platform-wide visibility after the triage record is committed.

1. Retrieve the detected AI security event record and gather its full context, including the related asset, prompt, cross-threat indicators, and recent threat correlation.
2. If the event context indicates an error, finalize the analysis immediately with the error details and stop.
3. Calculate a confidence score using detection strength, event type risk, prompt authorization signals, and any cross-threat or correlation overrides.

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4. Finalize the analysis by determining severity and creating a security incident with no open duplicate. Save a triage record with the full rationale, and trigger an AI insight for platform-wide visibility.
5. If finalization fails, present the error and its details to the user.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Assess Threat Finalize Analysis
Allowed user roles The specific user roles that can access this AI agent.	sn_ai_governance.ai_steward
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_ai_governance.ai_steward
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Not applicable.

AICT AI asset description auto-populator AI agent

This AI agent generates and applies descriptions to AI assets using vendor, model, and manufacturer metadata.

Workflow

This autonomous agent processes AI assets missing descriptions, creates contextual descriptions based on their technical specifications, and directly updates the asset model without requiring human approval.

1. Receive the JSON objective containing an array of AI assets with vendor, model name, manufacturer, and category information.
2. For each asset, generate a professional description focusing on functional purpose and capabilities.
3. Batch all generated descriptions and apply them directly to the asset records via a single update operation.
4. Report the final status, including number of assets updated, skipped, and failed.
5. Return a summary of outcomes with before-and-after details for audit tracking.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Batch Update Asset Descriptions Report Agent Action Status

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Configuration (continued)

Field	Description
Allowed user roles The specific user roles that can access this AI agent.	Not defined.
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_generative_ai.data_steward
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

AICT deactivate dormant asset AI agent

This AI agent analyzes and retires dormant AI assets by running comprehensive analysis and creating offboarding change requests.

Workflow

This agent identifies single dormant AI assets, conducts impact analysis, generates offboarding recommendations, and creates a change request to remove the asset from governance without manual intervention.

1. Parse the JSON objective containing the dormant asset details, including asset ID, name, deployment date, and governance record.
2. Run comprehensive analysis on the asset to determine dependencies, impact, and retirement readiness.
3. Generate an offboarding plan detailing steps to retire the asset safely.
4. Create a change request to execute the retirement with all recommended actions and timeline.
5. Return a detailed outcome report with analysis results, change request ID, and confirmation status.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Analyze Unused Assets Report Agent Action Status Retire Asset
Allowed user roles The specific user roles that can access this AI agent.	Not defined.
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Default VA Workflow

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AICT life cycle task reminder AI agent

This AI agent sends automated email reminders to task owners for overdue and dormant life cycle tasks on high-priority AI assets.

Workflow

This agent runs automatically on a schedule or triggered event, identifies overdue assessment tasks across high-priority AI assets, and sends targeted email reminders to assigned task owners.

1. Collect all life cycle tasks from high-priority assets using the Query life cycle Tasks tool.
2. Filter tasks to identify overdue and dormant items based on due date and last activity.
3. For each overdue task, retrieve the task owner contact information and asset context.
4. Compose and send personalized email reminders including task details, asset name, and deadline.
5. Log all reminders sent and report delivery status.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Query life cycle Tasks for Asset Report Agent Action Status Send life cycle Task Reminder Emails
Allowed user roles The specific user roles that can access this AI agent.	Not defined.
Data access roles	sn_ai_governance.ai_steward

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Configuration (continued)

Field	Description
The specific user identity roles that determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

AICT outcome ranker AI agent

This AI agent ranks AI insight outcomes by relevance to each user persona based on their role and responsibilities.

Workflow

This autonomous agent receives persona descriptions and outcome metadata, determines personalized ranking for each outcome relative to user personas, and writes ranks to enable prioritized insight display.

1. Receive a JSON objective containing personas, outcomes, and their sys_ids.
2. Analyze each persona description to understand their role, priorities, and responsibilities.
3. For each outcome, understand its business value and impact based on its ID and description.
4. Rank all outcomes for each persona from most relevant (1) to least relevant (N).
5. Call Populate Outcome Ranks to write all persona-outcome ranks, then trigger prioritization recompute.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Populate Outcome Ranks Recompute Prioritized Insights
Allowed user roles The specific user roles that can access this AI agent.	Not defined.
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_generative_ai.data_steward
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Approval assistance AI agent

This AI agent handles all queries related to approval records for the current user.

Workflow

The agent retrieves and filters pending approvals, provides detailed information about requested items, generates evaluation checklists based on knowledge base articles, and supports approval and rejection actions including e-signature management.

1. Analyze the user's message to identify what they are trying to do.
2. Route the request directly to the step that matches the intended action:

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- Retrieve all pending approvals assigned to the user, applying any filters specified by the user.
- Fetch full details for a specific approval record, always retrieving the most current data.
- Generate and display a checklist evaluation for the approval, grouping criteria by status and providing reference article links.
- Prompt the user to choose an approval action, handle e-signature requirements if applicable, and confirm the result of the action.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Approval Processor Fetch approval record details Get list of approvals **Knowledge Graph** Approval User Knowledge Graph **Generative AI skill** Checklist Generation
Allowed user roles The specific user roles that can access this AI agent.	approver_user, sn_request_approver_read, snc_internal
Data access roles The specific user identity roles that determine which data the AI agent	Not defined.

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Not defined.
Used in agentic workflows	Not applicable.

Using the approval assistance AI agent

This AI agent that enables you to see your list of pending approvals, as well as see the details about your pending approvals. You can then approve or reject requests and tickets in ServiceNow Otto for Virtual Agent.

Roles required: approver_user, sn_request_approver_read, snc_internal

Note: Add the necessary roles to enable reading of other tables whose records go through the approval process. For example, you can add the sn_change_read role to read Change Request records.

The benefit of using the approval assistance AI agent is that you don't need to navigate to a specific page to approve your tickets. You can ask the AI agent about your pending approval requests and then tell the AI agent to approve or reject those approvals. The AI agent will ask follow-up questions and offer context-aware responses to simplify your experience.

Ask you administrator to configure the display fields and the knowledge base (KB) search fields to generate a Gen AI checklist to assist the approval assistance AI agent in making targeted decisions. The checklist uses KB articles and policies to assist the agent in decision making. The checklist fetches information from knowledge base articles about specific requester approval tickets. An approval_admin and admin role are required to configure the agent. For more information, see Configure Service Portal Approval Configuration record.

Note: Provide cross-scope privileges to the Requester Agents - Foundation plugin for tables whose records are restricted within the scope of an application. For more information, see Define cross-scope access to an application resource.

Prerequisites and setup

To use this AI agent, you must have Requester Agents - Foundation (version 3 of the standard plugin) installed on your instance, which is installed with ServiceNow Otto for Platform. You can get these plugins when you install any other ServiceNow Otto application, such as ServiceNow Otto for IT Service Management (ITSM).

The approval assistance AI agent displays data from the Approvals [sysapproval_approver] table. If the user has been assigned to approve a request, the approval record is shown.

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Sample prompts

After the agent has been activated in AI Agent Studio, enter phrases such as the following or similar queries to run the AI agent in Virtual Agent and the ServiceNow Otto panel.

- Can you give me a list of pending approvals?
- What are the pending approvals for time off requests?
- Show me a list of pending approval requests by priority.
- Give me details about my approval request?

Performing approval action on an approval record

The approval assistance AI agent shows approval requests that require an action on your part. After the approval information is provided by the agent, select **Approve** or **Reject** for a specific approval record, or type `Approve` or `Reject`. If you reject an approval request, then add a comment about the rejection reason.

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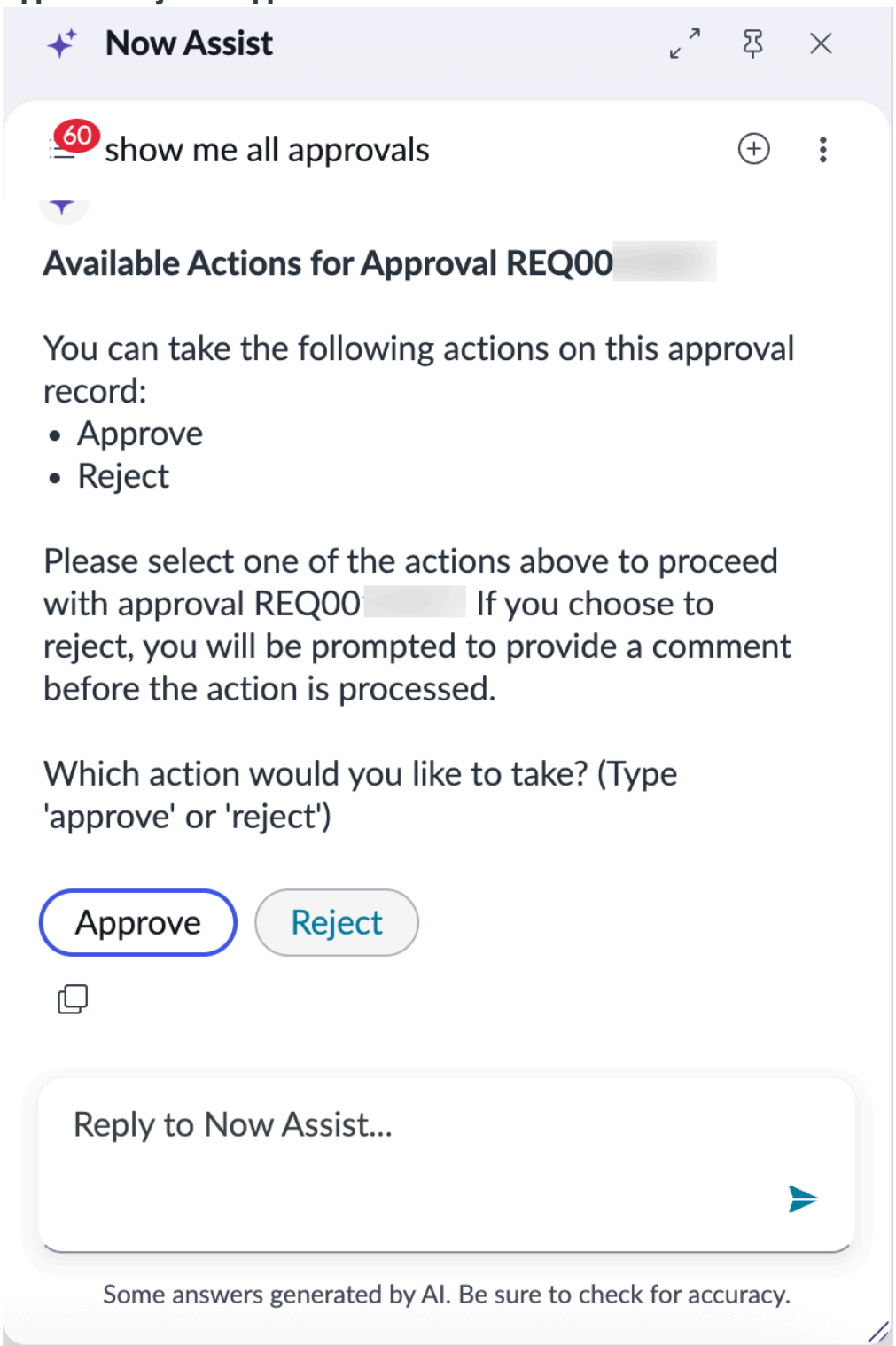
Approve or reject an approval record



Decomposition AI agent

This AI agent takes resolution steps as input, and then analyzes and breaks down each resolution step into a clear, structured set of smaller, actionable substeps. It then creates records based on user preference. This enables precise execution, improves task clarity, and supports automation and auditability of resolution workflows.

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Workflow

The agent retrieve table configuration, decompose the resolution plan into actionable substeps, create the records and to save the summary in the parent record. It takes resolution steps as input. It does not generate resolution steps on its own.

1. Retrieve the table action policy XML that defines which tables can be acted on autonomously and which require supervision.
2. Retrieve resolution steps from memory.
3. Decompose the steps.
4. Group actionable steps into autonomous and supervised categories. Proceed automatically with autonomous steps. For supervised steps, wait for user input before executing.
5. Finalize the execution set.
6. Create the record.
7. Save activity notes.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Create record Get actionable tables from skill config Get Fields from Table Save activity notes **Generative AI skill** Step Decomposer
Allowed user roles	sn_uxc_gen_ai.platform_ai_decomposition_agent

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_uxc_gen_ai.platform_ai_decomposition_agent, sn_hr_core.case_writer
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Generate resolution plans

Domain Separation AI agent

The Domain Visibility AI agent enables Domain Admins to manage user domain visibility using guided, conversational workflows in the ServiceNow Otto® panel.

Domain Separation AI agent overview

The agent performs validated operations on domain visibility data without requiring direct access to domain visibility tables.

Once enabled, the Domain Visibility agent exposes the following options to the admin:

- List all domain visibility for a user
- Add domain visibility for a user
- Remove domain visibility from a user

Note: The agent interacts directly with the `sys_user_visibility` table. All domain visibility operations (add, remove, list, query) are executed through this table. Admins do not need to open or configure the table manually.

Prerequisites and setup

Ensure the following requirements are met before using the AI agent:

- The Domain Separation plugin is installed on your instance and active. For more information, refer to Domain separation plugin.
- AI capabilities are enabled on the instance.
- You are signed in with a Domain Admin role.

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Role masking

Required role: Domain Admin.

AI agents use role masking to determine which users can access them. Ones installed with your applications have specific roles that come included with the application. If you select *`Users with specific roles`* for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an AI agent.

In the data access settings, you must also add the necessary roles to enable reading of the tables for the records you want to evaluate for readiness. For example, you can add the itil role to the AI agent's list of approved roles so that it can access Incident records.

Accessing the Issue Readiness AI agent

To access the AI agent:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Go to the **AI Agents** tab.
3. Select **Domain Visibility**.

Access the AI agent

1. Open the ServiceNow Otto panel.
2. Start a new interaction.
3. Enter the prompt, "domain visibility help."

The agent displays the available domain visibility operations and guides you through the selected task.

List all domain visibility for a user

Use this operation to view all domains a user can access.

1. Select **List domain visibility** from the agent's options.
2. Provide the name of the user whose domain visibility you want to view.

The agent retrieves all domain visibility entries associated with the user.

Add domain visibility for a user

Use this operation to grant a user visibility to a specific domain.

1. Select **Add domain visibility** from the agent's available options.
2. Provide the requested inputs:
   - **User name**
   - **Domain name**
3. The agent validates that the specified user and domain exist.
4. Confirm the user name and domain name and that you want to add the visibility for the user.

The agent adds visibility for the specified domain to the specified user.

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Note: You can verify this by checking the `sys_user_visibility` table.

Remove domain visibility from a user

Use this operation to revoke a user's visibility to a specific domain.

1. Select **Remove domain visibility** from the agent's available options.
2. Provide the requested inputs:
   - **User name**
   - **Domain name**
3. The agent validates that the specified user and domain exist and that the user currently has visibility to the specified domain.

   If no matching visibility exists, the agent reports that there is nothing to remove.
4. If visibility does exist, confirm the user name and domain name and that you want to remove the visibility for the user.

The agent removes visibility for the specified domain from the specified user.

Note: You can verify this by checking the `sys_user_visibility` table.

Error analysis and remediation AI agent

This AI agent is helps admins and operators investigate Error Framework error codes, analyze root causes, and execute preconfigured remediation actions.

Workflow

The agent helps admins and operators investigate and remediate errors within the ServiceNow Error Framework.

1. Determine whether the user's request is about investigating an error or remediating one. If the user is viewing an Error Framework page, automatically identify the relevant error code for context.
2. For investigation requests, retrieve and summarize matching errors in a compact table, or provide a deeper analysis of a specific error code, including root cause and business impact, when the user asks for it.
3. For remediation requests, gather full context on the error and select the specific action that best matches the root cause, or provide manual steps and state-management options if no automated action is available.
4. Present the proposed action to the user, including the error code, action, reason, and scope, and confirm before proceeding.
5. Execute the approved action, report the results and a tracking link, and suggest any related follow-up actions.
6. If a request falls outside the Error Framework, or asks for an unsupported destructive operation, let the user know and offer to help with a supported task instead.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Generative AI skill** ai_insights_skill **Scripts** execute_remediation_action get_errors_by_user_query get_errors_for_error_code get_error_code_data resolve_ef_page_context **Knowledge Graph** error_framework_schema
Allowed user roles The specific user roles that can access this AI agent.	error_framework.admin, error_framework.operator
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	error_framework.admin, error_framework.operator
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	• Error Analysis and Remediation Workflow • Pattern Diagnostic Workflow

Explain SLA AI agent

This agent explains Service Level Agreement (SLA) details to the user based on the provided task number. It retrieves the matching SLA using timer configurations, along with SLA breakdown details, task SLA information, and an SLA timeline summary.

Workflow

1. Retrieve the SLA task record.
2. Display a numbered list of questions the user can ask.
3. Use the appropriate tools to retrieve the exact answer and communicate them to the user.
4. Ask the user if they have other questions.
5. Repeat until the user requests to end the conversation.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow actions** Get Matching SLA Get SLA Breakdown

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Configuration (continued)

Field	Description
	Get SLA Timeline Get Task SLA details
Allowed user roles The specific user roles that can access this AI agent.	sn_uxc_gen_ai.sn_aia_sla_explain
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	itil
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Explain SLA

Image processor AI agent

This AI agent lets users upload image attachments and create task records by analyzing them. I

Workflow

The agent utilizes the document and visual insights AI agent to analyze the image, and the record management AI agent to create the record, and to copy the image attachment to the created record.

1. Call the Upload Image tool and ask the user to upload the image attachment.
2. Get a sys_id for the attachment.
3. Analyze the image.
4. Create a short description of the issue using concise, technical language that directly describes the problem.
5. Search knowledge articles using the short description.
6. Generate a record preview and show it to the user.
7. Once approved, create the record.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Create record and add attachment Determine Table name Determine Table Name From User Roles Get attachment sys id from media link **Search retrieval** Fetch KB articles **Conversational topic** Upload image
Allowed user roles The specific user roles that can access this AI agent.	sn_uxc_gen_ai.platform_ai_image_processor
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_uxc_gen_ai.platform_ai_image_processor
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Process images for new tasks

Issue readiness AI agent

This AI agent scans the record fields and context of a ticket so it can determine if it is ready for a fulfiller to work on it.

Workflow

1. Retrieve the record details, such as short description, description, activity stream, emails, approval, table name, and similar records.
2. Analyze task details, focusing on information added by fulfillers.
3. Analyze similar records.
4. If any of the following are true, mark the task as NOT READY:
   - A request or question (from a fulfiller) is detected and no clear response or resolution is found in the task record.
   - The approval field's value is "requested" (case-insensitive). (Values such as "not yet requested" or "not requested" don't block readiness.)
   - The task lacks information that is consistently present in similar records (if available) for the same type of request, and that missing information is relevant to fulfill the request (for example, missing steps, confirmations, or outcome).
   - The overall quality or clarity of the task data is poor, such as unclear context that would reasonably block progress.

For more information, see Using the issue readiness AI agent.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Create or update the record status Get the record data
Allowed user roles The specific user roles that can access this AI agent.	sn_uxc_gen_ai.platform_ai_issue_readiness
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_uxc_gen_ai.platform_ai_issue_readiness, sn_uxc_gen_ai.platform_ai_record_mgmt
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Using the issue readiness AI agent

This AI agent analyzes a record's information, determines whether all relevant information is present on the record, and then makes a decision about whether the task is ready for work.

Issue Readiness AI agent overview

Using the AI agent can help fulfillers focus on actionable work by reducing manual checks for missing supporting details or back-and-forth conversations. Instead of having to check whether tasks are waiting on pending approvals or unanswered questions, fulfillers can see what actionable work is available and prioritize it.

Prerequisites and setup

To use this AI agent, you must have the Requester Agents - Foundation plugin installed on your instance, which is installed with any other ServiceNow Otto application, such as ServiceNow Otto for IT Service Management (ITSM).

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Testing the Issue Readiness AI agent

You can manually test the AI agent execution on the Testing page of AI Agent Studio if you have the sn.aia_admin role and all other roles configured in the security controls. Select the AI agent, start a manual test, and use utterances in the Task field like the ones below.

Sample prompts

After the agent has been activated in AI Agent Studio, enter phrases such as the following or similar queries to run the AI agent in Virtual Agent, the ServiceNow Otto panel, or Microsoft Teams.

- Is INC001234 ready for work?
- Do I have enough details on CSM0001234 to start?

Issue trend analysis AI agent

This AI agent analyzes grouped task data from cases, incidents, problems, or other tables to identify recurring issues and root causes.

Workflow

The agent provides detailed, actionable recommendations through structured analysis.

1. Extract the record type from the user's input.
2. Pass the extracted record types to the Get Task Analysis Config tool.
3. Prompt the user for a timeframe.
4. Acknowledge and use the Compute Trend Analysis tool to analyze the information.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Conversational topic** Compute Trend Analysis **Scripts**

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Configuration (continued)

Field	Description
	Get Task Trends Config Get Time Gap
Allowed user roles The specific user roles that can access this AI agent.	sn_uxc_gen_ai.platform_ai_analyze_trnds
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_uxc_gen_ai.platform_ai_analyze_trnds
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Analyze task trends

Model provider configuration AI agent

This AI Agent helps administrators understand whether their configured third-party LLM providers use OEM (managed by ServiceNow) or bring-your-own-key integration.

Workflow

The agent does not perform update or write operations.

1. Analyze the user's request to determine what they need:
   - View the integration type for a specific LLM provider
   - View all LLM providers and their integration types
   - Explain the difference between OEM and bring-your-own-key integrations.
2. Display the response to the query.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** ViewManageIntegrationInfo
Allowed user roles The specific user roles that can access this AI agent.	sn_na_center.nac_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_na_center.nac_user, sn_na_center.nac_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Manage Model Provider Workflow

Next action recommendation AI agent

This AI agent identifies the optimal steps for resolving tasks by reviewing similar record details, related list record details, relevant knowledge articles, and web search results.

Workflow

The agent summarizes and presents to the user a step-by-step summarized resolution plan and derived action plan.

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1. Fetch the record details.
2. Fetch a list of similar records to understand how they were resolved.
3. Fetch a list of related records to find all records from related lists to provide additional context.
4. Fetch a list of relevant knowledge articles based on the short description of the task.
5. Analyze the issue and use the web search tool to provide additional resolution steps based on the web search results.
6. Generate the resolution steps.
7. Display results to the user.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Check Plan Action Required Get derived plan details Get record details Get Related List Record Details Get similar records Save activity notes WebSearch **Search retrieval** Get relevant knowledge articles
Allowed user roles	sn_uxc_gen_ai.platform_ai_next_best_action

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_uxc_gen_ai.platform_ai_next_best_action, sn_hr_core.case_writer
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	• Generate resolution plans • Resolve critical HR Case

Prioritize work AI agent

This AI agent retrieves user-assigned tasks, scoring them by priority using metadata and Service Level Agreement (SLA) data.

Workflow

The agent generates time-blocked work plans based on calendar availability, iterating with users until approval, and persisting finalized plans to the database.

1. Call the Get user tasks tool.
2. Prioritize the work using the Prioritize work tool.
3. Identify next steps.
4. Generate a work plan.
5. Return the results to the orchestrator.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Get user tasks Identify average completion time Plan work Prioritize work
Allowed user roles The specific user roles that can access this AI agent.	sn_uxc_gen_ai.platform_ai_work_planner
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_uxc_gen_ai.platform_ai_work_planner
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Generate my work plan

Problems investigation AI agent

This AI agent specializes in root cause identification, impact assessment, and resolution planning. It analyzes problem details, associated incidents, similar incidents, change requests, and affected configuration items to provide a structured and comprehensive analysis.

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Workflow

The agent provides a clear and actionable resolution plan.

1. Retrieve problem details with relevant incidents.
2. Generate root cause analysis with impact assessment and resolution plan.
3. Display the generated response to the user.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Get Problem Details **Conversational topic** Problems Investigation Analyzer
Allowed user roles The specific user roles that can access this AI agent.	sn_uxc_gen_ai.platform_ai_problem_investigator
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_uxc_gen_ai.platform_ai_problem_investigator
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Investigate problems

Record field value prediction AI agent

This AI agent can predict fields for an incoming record.

Workflow

The agent can also provide a summary and justification of the field predictions.

1. Get the record details.
2. Using the table and sys_id, determine if the task is ready to be processed.
3. With the user's input, use the Predict fields for a record or config tool to predict fields.
4. Predict fields on related list records only if a potential related list name is found.
5. Show predictions to the user.
6. Justify predicted fields if asked.
7. Update the record with predicted fields.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Get issue readiness state Get Related List Records

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Configuration (continued)

Field	Description
	Get Related Lists Get Similar Records Get the record metadata Predict fields for a record or config Save activity notes Summarize and Justify Update record details
Allowed user roles The specific user roles that can access this AI agent.	sn_uxc_gen_ai.platform_ai_field_predictor
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_uxc_gen_ai.platform_ai_field_predictor, itil, sn_hr_core.case_writer, sn_lg_ops.request_fulfiller
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	• Triage legal requests • Predict service and transfer HR Cases • Classify tasks • Universal Request Router

Record management AI agent

This AI agent can fetch, update, create a record, link a knowledge base (KB) article, and copy an attachment to a record with details provided by the user.

Workflow

1. Fetch the record details and display it to the user.
2. If the user approves, do the following as needed:

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- Update the record.
- Create a record.
- Copy an attachment to the record.
- Display attachment details.
- Link a KB article to the record.

3. Continue with the user as needed to solve the problem.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Knowledge graphs** User NLQ KG **Scripts** Attach Knowledge Article to Task Get Attachment Details Get Fields from Table Get Task Tables save activity notes Validate UI Policies **Subflows** Copy Attachment to Record Create the record Get the record meta data Get Related Lists Update the record details

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Configuration (continued)

Field	Description
	Update related records
Allowed user roles The specific user roles that can access this AI agent.	snc_internal, sn_uxc_gen_ai.platform_ai_record_mgmt
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_uxc_gen_ai.platform_ai_record_mgmt, itil
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	• Accelerate Complaint Case Handling • Process emails for tasks

Request status AI agent

This AI agent answers inquiries about existing tickets that were created by or are currently opened by the logged-in user. It should be triggered only when the user explicitly references an existing ticket (for example, by asking for ticket status, updates, comments, or history).

Workflow

The agent handles only tickets, incidents, tasks, or requests that were created or opened by the currently logged-in user. It does not access or manage items submitted by others. The agent doesn't create new requests.

1. Retrieve the list of tickets that were created or opened by the currently logged-in user.
2. Display ticket details, status, and available actions:
   - Add a comment to the ticket
   - Execute a ticket action
   - Add an attachment to the ticket
3. Perform the action and display confirmation to the user.

For more information, see Using the request status AI agent.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Conversational topic** Add attachment to the ticket **Scripts** Add comment to ticket Execute action Get actions for ticket Get last update or details on ticket Get list of tickets
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	nobody
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Default VA Workflow

Using the request status AI agent

This AI agent enables you to view your open tickets, check the status of tickets, and add comments through ServiceNow Otto for Virtual Agent, the ServiceNow Otto panel, or Microsoft Teams.

When you ask for the details of a request, you can perform any other ticket tasks configured by your administrator in the Standard Ticket configuration, such as reopening an incident, and resolving a ticket. You don't need to navigate to a specific page to view your tickets. The AI agent can ask follow-up questions and offer context-aware responses to simplify your experience.

You can upload a file as an attachment to an open ticket or incident to support a request action. For example, if you lose your identity card you may request a replacement using the request status AI agent. You may be asked to upload an email or document that has your manager's approval to get the replacement ID card. In the conversation, you just type, I need to attach a document to this incident or ticket. The AI agent then provides the **Click here to upload a file** option within the AI agent chat for you to upload an attachment to the ticket. You upload the manager approval and the service agent can then approve your request for a new ID.

The tools and triggers that are associated with the request status AI agent are provided by ServiceNow Otto applications. You can activate the AI agent by making triggers active and setting the display settings to include Virtual Agent. If you want to change this AI agent's instructions, you must duplicate it, adjust the settings to suit your specific needs, and activate the duplicated version of the AI agent instead.

Prerequisites and setup

To use this AI agent, you must have the Requester Agents - Foundation plugin installed on your instance, which is installed with any other ServiceNow Otto application, such as ServiceNow Otto for IT Service Management (ITSM).

To configure which actions are available, a user with the admin or sp_admin role can configure the Standard Ticket configuration for a table. In the Standard Ticket actions related list, you can add, change, or remove actions. All actions available from the Standard Ticket configuration can be used by the request status AI agent. See Configure actions for standard ticket page for more information.

To make the AI agent available for users, you must navigate to the **Toggle display** step of the guided setup in AI Agent Studio. Toggle Virtual Agent to `true` and select an assistant.

To make the AI agent available in Microsoft Teams, you must configure an assistant for ServiceNow Otto for Virtual Agent to use a Teams channel. See Display your assistant on a portal or channel for steps to enable Teams for your assistant. Then, in the request status AI agent guided setup in AI Agent Studio, select the assistant you configured for Microsoft Teams in the **Toggle display** step.

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Testing the request status AI agent

You can test the request status AI agent on the Testing page of AI Agent Studio if you have the sn.aia_admin role. Select the AI agent and use prompts in the **Task** field.

Sample prompts

After the agent has been activated in AI Agent Studio, enter phrases such as the following or similar queries to run the AI agent in Virtual Agent, the ServiceNow Otto panel, or Microsoft Teams.

- Can you list all open tickets I've created?
- What's the current status of my incident INC001?
- Add comment to INC001 "I need your help in fixing this request ASAP. Please prioritize this."
- Can you check the latest progress on my most recent request?
- When did I submit this ticket?
- Who is working on it?
- I want to add a comment to my ticket.
- I also want to add an attachment to my ticket.

Search Q&A AI agent

This agent searches available resources to answer user queries, serving as the fallback agent when other agents cannot handle a request.

Workflow

1. Classify the user's query and search across available resources (internal knowledge base, FAQs, external sources).
2. Display the results to the user. If results are ambiguous or insufficient, prompt for clarification and refine the search.
3. If no satisfactory answer is found, suggest alternative resources or escalate.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	Not defined.
Allowed user roles The specific user roles that can access this AI agent.	Not defined.
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

ServiceNow record navigator AI agent

This AI agent surfaces ServiceNow records as clickable navigation views. It handles retrieval-style queries ("show me open P1 incidents") and navigation-style commands ("take me to changes assigned to David").

Workflow

The agent turns a request to find or navigate to records into a clickable navigation view.

1. Rephrase the user's request as a retrieval query by stripping navigation language and reframing it as a request for matching record IDs.
2. Resolve the rephrased query against the knowledge graph to identify the matching records.
3. If the resolution fails, display the returned message to the user and stop.
4. If the resolution succeeds, pass the result directly to the navigation card so the user can click through to the records, without adding any additional text.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** KGNavigationResolver **Conversational Topic** NavigationButton
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	now_assist_panel_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Actionable Navigation

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Smart documents AI agent

This Document Management AI agent help users interact with document content by providing summaries, FAQs, and answers to their specific questions. It only works within the ServiceNow Document Viewer.

Workflow

1. Greet the user and display options:
   - Summarize the document
   - Generate frequently asked questions
   - Answer questions about the document
2. Execute the task.
3. Display the results and ask the user if they want to continue.
4. End the conversation when instructed.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Get answer from document
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent	Not defined.

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Survey analysis AI agent

This AI agent extracts and validates date ranges from user input, including natural language expressions. It analyzes survey data (such as questions, responses, and triggered records) to extract key metrics, identify trends, and deliver actionable insights for informed decision-making.

Workflow

1. Scan the entire user utterance for record type keywords.
2. Extract all record types that are mentioned.
3. Extract dates from the user input.
4. Call the Survey Analysis tool to handle the analysis.
5. Show the results to the user and end the conversation.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script**

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Configuration (continued)

Field	Description
	Get usecase config **Conversational topic** Survey Analysis
Allowed user roles The specific user roles that can access this AI agent.	sn_uxc_gen_ai.platform_ai_improve_services
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_uxc_gen_ai.platform_ai_improve_services
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Identify ways to improve service

Survey filling data collection AI agent

This AI agent collects data related to the case, incident, or request and the survey questions raised to collect feedback on it.

Workflow

1. Collect the data related to the case, incident, or request along with the survey question.
2. Return the response exactly as received, without any modification or reformatting.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and

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Configuration (continued)

Field	Description
	response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow action** Fetch details related to case/incident/request and survey questions
Allowed user roles The specific user roles that can access this AI agent.	sn_uxc_gen_ai.platform_ai_survey_response
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_uxc_gen_ai.platform_ai_survey_response
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Propose survey responses

Survey response suggestion AI agent

This AI agent suggests answers to questions in the survey by using details from case, incident, or request.

Workflow

Generate suggested answers to the survey questions using details of the case, incident, or request using the survey questions and the survey number as input.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Survey Answer Suggestion tool
Allowed user roles The specific user roles that can access this AI agent.	sn_uxc_gen_ai.platform_ai_survey_response
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_uxc_gen_ai.platform_ai_survey_response
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Propose survey responses

Troubleshooting AI agent

This AI agent triages an Automated Test Framework (ATF) test failure.

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Workflow

The agent analyzes how and why a test has failed and provided a detailed root cause analysis.

1. Fetch the test description and the traced metadata, client logs, and server logs.
2. Starting with probable metadata identify potential causes for the failure, such as errors, exceptions, or unexpected behavior.
3. Examine the test itself for any potential mistakes made while authoring it.
4. Provide a detailed root cause analysis.
5. Determine fixes the user can make.
6. Use the Format RCA tool to format and return the response to the user.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Describe test Format RCA Get logs Get traced metadata
Allowed user roles The specific user roles that can access this AI agent.	atf_triager
Data access roles The specific user identity roles that determine which data the AI agent	atf_triager

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Update work plan AI agent

This AI agent receives structured plan data from the orchestrator, constructs a valid JSON payload, and updates the finalized work plan in the database.

Workflow

The agent helps users complete tasks related to update work plan.

1. Receive the structured plan data from the orchestrator (tasks with all fields, including next_step).
2. Construct a JSON payload matching the exact database schema.
3. Validate the JSON syntax and schema compliance.
4. If validation fails, identify and repair issues.
5. Persist the plan to the database.
6. Retry up to 3 times on failure.
7. Return success or error status to orchestrator.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Persist Work Plan
Allowed user roles The specific user roles that can access this AI agent.	sn_uxc_gen_ai.platform_ai_work_planner
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_uxc_gen_ai.platform_ai_work_planner
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Generate my work plan

Web automation AI agent

This AI agent executes automated actions across any web page, enabling form filling, clicking, data extraction, and navigation tasks.

Workflow

1. Understand the user's goal. If critical details are missing (such as website or data values), ask the user to provide them.
2. Revise the plan until the user approves it.
3. Use the Web Automation tool to execute the plan.
4. If more information is needed, ask the user.
5. Show results to the user.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Desktop action** Web Automation Tool
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_aaa.web_agent_runtime
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Web Automation

Web research and recommendation AI agent

This AI agent resolves issues by analyzing the problem and generating resolution steps using web search tools.

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Workflow

The agent is intended for users who require assistance in troubleshooting and resolving technical or nontechnical issues.

1. Get record details for the given task, such as the description and short description.
2. Check whether search is enabled. If enabled, proceed to the next step; otherwise, end the workflow.
3. Analyze the description and use the Web search tool to find resolution steps.
4. Format and present the results to the user in HTML.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Search enabled **Web search** Use web search
Allowed user roles The specific user roles that can access this AI agent.	sn_uxc_gen_ai.platform_ai_web_search_recommender
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_uxc_gen_ai.platform_ai_web_search_recommender

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Work allocator AI agent

This AI agent automatically fetches backlog tickets, evaluates agent workloads and performance metrics, and assigns tickets to agents in a way that optimizes distribution and operational efficiency.

Workflow

The agent is designed for support team managers and operations leads.

1. Assign tickets to agents optimally for the assignment group indicated by the user's input.
2. Update the records with the ticket assignment.
3. Display the ticket assignments to the user in a readable format.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Optimal ticket assignment Update record details
Allowed user roles	snc_internal

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_uxc_gen_ai.platform_ai_work_allocator
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Help Optimize Team Productivity

Content Understanding AI agents

The following AI agents are available for Content Understanding.

Content insights AI agent

This AI agent processes and analyzes content in the Content Understanding application.

Workflow

The agent has three main capabilities.

1. Analyze the user's request and select the appropriate task:
   - Extract specific fields from documents using predefined configurations.
   - Analyze document content to answer specific user questions.
   - Provide concise summaries of document content.
2. Obtain the document either via user upload or a record number or sys_id.
3. Execute the task.
4. Return results to the user.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Search retrieval** Get Relevant DocIntel Task Definition **Subflow** Submit and Fetch Results **Scripts** Get table name from record number Retrieve attachments of a Glide record Trigger Document Viewer Canvas **Conversational topic** Upload Document
Allowed user roles The specific user roles that can access this AI agent.	platform_ml_di.creation_agent, platform_ml_di.admin, platform_ml_di.manager
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	platform_ml_di.creation_agent, platform_ml_di.admin, platform_ml_di.manager
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	• Conversational Contract Search and Insights • Process images for new tasks • Generate carbon calculations for metrics

Learn more about Content understanding at Content Understanding.

Knowledge Management AI agents

The following AI agents are available for Knowledge Management.

KB content consolidation AI agent

This AI agent detects duplicate articles in Knowledge Management.

Workflow

1. Inform the user that detection is in process.
2. Use the Find duplication tool to check for duplicates of the given article

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Find duplication
Allowed user roles	knowledge_admin, knowledge_manager

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	knowledge_admin, knowledge_manager
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about Knowledge Management at Knowledge Management.

KB content creation AI agent

This AI agent generates a knowledge article from a task record.

Workflow

1. Select a knowledge base.
2. Generate a knowledge article.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Gathering Prerequisites Generating Knowledge Article
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about Knowledge Management at Knowledge Management.

MID Server AI agents

The following AI agents are available for MID Server.

MID common AI agent

This AI agent helps users and support personnel to identify, analyze, and resolve MID Server issues.

Workflow

The agent retrieves data from error logs, collects necessary details from users, and provides actionable troubleshooting guidance sourced from official ServiceNow documentation.

1. Search support.servicenow.com and the ServiceNow documentation site.
2. Combine and summarize the results.

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3. Present the combined results in a clear format to user.
4. Fetch MID Server errors and warnings if the user requests it.
5. End workflow.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Fetch MID Server Details Fetch the top errors/warnings/exception Trigger log analysis tool **Web searches** Gather support information on site support.servicenow.com Gather product documentation info from site www.servicenow.com/docs/ **Subflow** Wait for log analysis to be executed
Allowed user roles The specific user roles that can access this AI agent.	sn_itom_mid_grdn.admin
Data access roles The specific user identity roles that determine which data the AI agent	sn_itom_mid_grdn.admin

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	MID Guardian

Learn more about MID Server management in MID Server.

MID keystore AI agent

This AI agent helps IT administrators diagnose and resolve MID Server keystore problems and manage MID Server health.

Workflow

The agent fetches MID Server and issue details, executes rekey and validation operations, provides step-by-step recovery instructions, and ensures the MID Server returns to a validated state.

1. Identify the keystore issue from the user prompt or from the issue table.
2. If the MID Server is up, walk the user through the rekeying process.
3. If the MID Server is down, walk the user through troubleshooting steps.
4. Validate the resolution.
5. If the user verifies that the issue is resolved, end execution. Otherwise, restart the process.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Fetch a MID server details Fetch keystore issues MID script retriever Rekey a MID server Validate/Invalidate a MID server **Subflows** Verify rekey completion Verify rekey trigger Verify validation completion
Allowed user roles The specific user roles that can access this AI agent.	sn_itom_mid_grdn.admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_itom_mid_grdn.admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Not defined.
Used in agentic workflows	MID Guardian

Learn more about MID Server management in MID Server.

MID network AI agent

This AI agent helps administrators and support personnel diagnose and resolve MID Server connectivity issues in a ServiceNow instance.

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Workflow

The agent scope is strictly limited to MID Server and instance connectivity. It does not troubleshoot MID connections to other devices or systems.

1. Inform the user that the MID Server must be able to connect to the ServiceNow instance URL for it to function properly.
2. Retrieve the current ServiceNow instance URL, if it is not already known, and prompt the user to select the operating system of the MID host.
3. Work with the user to determine whether there is any issue with connectivity to the instance, one command at a time.
4. When Test Network Reachability has passed, validate the user credentials and test connectivity.
5. If Test Network Reachability fails, check firewall settings.
6. Guide the user to validate OCSP connectivity and whether OCSP checks work for the URL.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Get instance url
Allowed user roles The specific user roles that can access this AI agent.	sn_itom_mid_grdn.admin
Data access roles The specific user identity roles that determine which data the AI agent	sn_itom_mid_grdn.admin

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	MID Guardian

Learn more about MID Server management in MID Server.

MID upgrade AI agent

This AI agent helps admins diagnose and resolve 'Upgrade Failed' issues on MID Servers by automating the identification, script deployment, error collection, and resolution workflow.

Workflow

The agent is designed for users managing MID Server health and upgrades in Windows and Linux environments.

1. Check if MID Server details are provided as input. Otherwise, use the Get MID Server Details tool to retrieve them.
2. If the user requests diagnostics, retrieve the script named 'Get-MIDUpgradeErrors' for the selected OS using the MID Script Retriever tool.
3. Execute the script.
4. Ask the user to provide the error output the diagnostic script generates.
5. Send the output to the Resolution Codes Tool for analysis.
6. Display the results to the user.
7. Confirm resolution or repeat analysis.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Error Resolution Lookup Get MID Server Details MID Script Retriever **Web searches** Gather product documentation info from site www.servicenow.com/docs/ Gather support information on site support.servicenow.com
Allowed user roles The specific user roles that can access this AI agent.	sn_itom_mid_grdn.admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_itom_mid_grdn.admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	MID Guardian

Learn more about MID Server management in MID Server.

Notifications AI agents

The following AI agents are available for Notifications.

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Email generator AI agent

This AI agent composes and sends emails (including new messages or replies) based on the provided context.

Workflow

The agent can either send the email or save it as a draft.

1. Based on the context provided, analyze the context and determine the intended action (either send email or save a draft).
2. Analyze the context to determine the type of the email: either New or Reply.
3. Verify that all required parameters corresponding to the determined action and type are explicitly present in the provided input or current conversation context. For example, recipient information and email sys_id.
4. Determine the primary goal and business-appropriate purpose for the email.
5. Construct the email.
6. Execute the final action with all inputs.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Save Email Draft Send Email
Allowed user roles The specific user roles that can access this AI agent.	snc_external, snc_internal
Data access roles The specific user identity roles that	email_generator_ai_user, sn_notif_agents.email_generator

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Configuration (continued)

Field	Description
determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Intent to Action

Learn more about Notifications in Notifications.

Intent executor AI agent

This AI agent executes admin-defined actions, such as workflows or creating reply responses based on matched intent.

Workflow

The agent cannot analyze or compare the intent, nor can it generate an email or email draft itself.

1. Find intent matches.
2. Extract values from input and create JSON.
3. Validate the execution payload JSON.
4. After successfully executing all subflow actions, fetch the email actions that match the intent or fetch the default email actions if there is no intent match.
5. Generate email.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Email Action Fetcher SubFlow Action Executor SubFlow Action Fetcher
Allowed user roles The specific user roles that can access this AI agent.	snc_external, snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_notif_agents.intent_executor
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Intent to Action

Learn more about Notifications in Notifications.

Intent identification AI agent

This AI agent analyzes and identifies the input email body intent. A list of admin-configured intents are compared with the input email body for a potential match.

Workflow

The agent fetches the email body using a given email sys_id.

1. Fetch the email body and execution context for the intent analysis and continue with the next step.
2. Check for malicious attempts, such as prompt injections.

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3. Analyze the input to determine the overall thread context and the latest sender's goal, which can represent either an actionable request, expression, statement, or interest. The email body can include a conversation or email thread involving multiple participants.
4. Perform intent analysis to evaluate whether a given input utterance semantically matches an intent from an admin-configured list.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Context Fetcher Intent Fetcher
Allowed user roles The specific user roles that can access this AI agent.	snc_internal, snc_external
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	intent_identification_ai_user, sn_notif_agents.notification_ai_reader
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Intent to Action

Learn more about Notifications in Notifications.

Notification AI agent

This AI agent creates or edits notification records through natural-language interaction.

Workflow

The agent determines whether the user intends to create or update a notification, extracts and validates the required inputs based on the rules defined in this specification, guides them through iterative refinement of the notification details when the user provides new information, presents the prepared configuration for confirmation, and creates/updates the notification record only after explicit user approval.

1. Acknowledge and restate the user requirement.
2. Parse the user prompt and extract all notification field values.
3. Validate and select the table the notification applies to.
4. Verify the recipients.
5. Use the Category and Template Resolver tool to fetch the resolved category and template.
6. Derive field values.
7. Display notification details.
8. Validate trigger criteria.
9. Process user response and regenerate notification summary.
10. Request user confirmation.
11. Create notification.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the

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Configuration (continued)

Field	Description
	sn_aia.ltm.enable_long_term_memory system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Category and Template Resolver Condition Generator Create Notification Fetch Agent Objective Fetch Similar Notifications Get Fields for Table Modify Notification Notification Event Resolver Notification Fetcher Notification Resolver Notification Table Resolver Recipients Resolver Update Agent Result
Allowed user roles The specific user roles that can access this AI agent.	notification_admin, admin
Data access roles The specific user identity roles that determine which data the AI agent can access	notification_generator_ai_user access_analyzer_ai_user, actsub_user, agent_role_config_viewer, agent_schedule_user, agent_workspace_user, approver_user, app_service_user, assignment_workbench, awa_agent, awa_integration_user, canvas_user, chat_admin, cmdb_ms_user, cmdb_query_builder, cmdb_query_builder_read, cmdb_read, contact_user, data_manager_user, decision_table_reader, dependency_views, doc_page_number_config_writer, doc_toc_config_writer, email_client_template_read, email_composer, fd_read_operations, flow_operator, fsm_skill_user, interaction_agent, knowledge, localization_editor, localization_requestor, notify_view, now_assist_panel_user, one_extend_viewer, pa_viewer, personalize_form, personalize_responses, platform_ml_di.creation_agent, platform_ml_di.extraction_agent, platform_ml_read, prompt_library_user, quickactions_user, report_user, role_viewer, skill_user, sla_admin, sla_manager, sn_ace.ace_user,

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Configuration (continued)

Field	Description
and what actions it can take.	sn_aia.viewer, sn_ai_filter_assist.user, sn_ai_filter_tracker.user, sn_ap_apm.reader, sn_ap_cm.admin, sn_ap_cm.agent, sn_ap_cm.agent, sn_ap_cm.requester, sn_ap_cm.requester, sn_ap_cm.task_owner, sn_ap_gen_ai.now_assist_fulfiller, sn_bm_client.benchmark_data_viewer, sn_change_read, sn_cmdb_user, sn_comm_management.comm_plan_viewer, sn_compliance.reader, sn_csm_case_types.service_definition_viewer, sn_csm_household.viewer, sn_csm_pricing.pricelist_viewer, sn_customerservice.consumer_agent, sn_customerservice.csm_workspace_user, sn_customerservice.customer_data_viewer, sn_customerservice_agent, sn_data_kit.analyst, sn_data_registry.reader, sn_dex_desktop.notification_template_admin, sn_diagram_builder.db_read sn_doc.reader, sn_doc.writer sn_docintel.extraction_agent, sn_esm_agent sn_fin.finance_user, sn_fin.procurement_user, sn_fsc_genai.now_assist_fulfiller sn_gaf.data_viewer, sn_gaf.data_writer sn_gd_guidance.guidance_user, sn_grc.business_user sn_grc.reader, sn_grc.user_hierarchy_reader, sn_grc_taxonomy.taxonomy_user, sn_grc_workspace.task_reader sn_grc_workspace.user, sn_incident_read sn_ind_tmt_orm.fulfillment_viewer, sn_ind_tmt_orm.order_viewer, sn_l2c_core.entity_mapping_viewer, sn_lg_cf_workspace.legal_workspace_user, sn_lg_gen_ai.legal_user sn_lg_gen_ai.request_fulfiller, sn_lg_ops.legal_report_viewer, sn_lg_ops.legal_sla_read, sn_lg_ops.legal_user, sn_lg_ops.request_fulfiller, sn_lookup_verify_user sn_mcp_client.viewer, sn_nb_action.next_best_action_user, sn_notif_agents.notification_generator, sn_nowassist_admin.user, sn_ord_qual_mgmt.alternate_proposal_read, sn_prd_invt.product_inventory_operations_read, sn_prd_invt.product_inventory_viewer, sn_prd_pm.characteristics_viewer, sn_prd_pm.product_catalog_viewer, sn_prd_pm.product_model_characteristic_viewer, sn_pren.experience_issue_read, sn_prompt_assist.prompt_developer, sn_pss_core.service_contract_viewer, sn_publications_recipients_list_user, sn_publications_recipients_user sn_query_gen.user, sn_query_gen.user, sn_request_read, sn_req_criteria.viewer, sn_service_org.customer_criteria_read, sn_service_org.service_criteria_read sn_shn.editor, sn_shn.user, sn_shop.invoice_owner, sn_shop.procurement_common_reader, sn_shop.shopper, sn_skill_builder.viewer, sn_sla_definition_query sn_slm.fulfiller, sn_smart_asmt.actor, sn_smart_asmt.assessment_reader, sn_smart_asmt.template_reader, sn_sow.it_agent_dashboard_user, sn_sow.sow_home, sn_sow.sow_list, sn_sow.sow_user, sn_sttrm_condition_read, sn_supplier_gen_ai.now_assist_fulfiller, sn_templated_snip.template_snippet_reader, sn_tmt_core.inbound_queue_read, sn_tprm_genai.nowassist_user sn_udc.basic_read, sn_uib_collab.user, sn_uni_req.universal_request_read, sn_uxc_gen_ai.platform_ai_field_predictor, sn_uxc_gen_ai.platform_ai_image_processor, sn_uxc_gen_ai.platform_ai_record_mgmt, sn_vdr_risk_asmt.vendor_assessment_reviewer, sn_workflow_studio.workflow_studio_read,sn_wsd_core.workplace_user, survey_reader task_editor, template_editor, template_editor_global, template_read_global, vendor_reader, view_changer, viz_creator workspace_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Default VA Workflow

Learn more about Notifications in Notifications.

Notification content AI agent

This AI agent prepares email notification templates and layouts. It begins by analyzing user input to understand the notification's content requirements and design expectations. Before generating any content, the agent searches for similar existing templates and presents the results to the user.

Workflow

The agent is strictly scoped to email notification template and layout creation only.

1. Perform content preparation and request analysis to build a clear understanding of the notification content to be created.
2. Find a default template.
3. Extract template and layout requirements
4. Select the email sections that are required for the user's request.
5. Select interaction elements that are required for the user's request.
6. Determine whether the email should be div-based, table-based, or a hybrid.
7. Select a design style.
8. Determine content and tone.
9. Determine layout requirements.
10. Identify all dynamic fields required for the template which are explicitly mentioned in content requirements or the user's request.
11. Summarize results and confirm with the user.
12. Generate the template and layout.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an

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Configuration (continued)

Field	Description
this AI agent	AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Fetch Resolved Template HTML Get Most Used Email Layout Mail Script Resolver Render canvas content Save Layout Save Template Template fetcher
Allowed user roles The specific user roles that can access this AI agent.	admin, notification_admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	notification_generator_ai_user access_analyzer_ai_user, actsub_user, agent_role_config_viewer, agent_schedule_user, agent_workspace_user, approver_user, app_service_user, assignment_workbench, awa_agent, awa_integration_user, canvas_user, chat_admin, cmdb_ms_user, cmdb_query_builder, cmdb_query_builder_read, cmdb_read, contact_user, data_manager_user, decision_table_reader, dependency_views, doc_page_number_config_writer, doc_toc_config_writer, email_client_template_read, email_composer, fd_read_operations, flow_operator, fsm_skill_user, interaction_agent, knowledge, localization_editor, localization_requestor, notify_view, now_assist_panel_user, one_extend_viewer, pa_viewer, personalize_form, personalize_responses, platform_ml_di.creation_agent, platform_ml_di.extraction_agent, platform_ml_read, prompt_library_user, quickactions_user, report_user, role_viewer, skill_user, sla_admin, sla_manager, sn_ace.ace_user, sn_aia.viewer, sn_ai_filter_assist.user, sn_ai_filter_tracker.user, sn_ap_apm.reader, sn_ap_cm.admin, sn_ap_cm.agent, sn_ap_cm.agent, sn_ap_cm.requester, sn_ap_cm.requester, sn_ap_cm.task_owner, sn_ap_gen_ai.now_assist_fulfiller, sn_bm_client.benchmark_data_viewer,

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Configuration (continued)

Field	Description
	sn_change_read, sn_cmdb_user, sn_comm_management.comm_plan_viewer, sn_compliance.reader, sn_csm_case_types.service_definition_viewer, sn_csm_household.viewer, sn_csm_pricing.pricelist_viewer, sn_customerservice.consumer_agent, sn_customerservice.csm_workspace_user, sn_customerservice.customer_data_viewer, sn_customerservice_agent, sn_data_kit.analyst, sn_data_registry.reader, sn_dex_desktop.notification_template_admin, sn_diagram_builder.db_read sn_doc.reader, sn_doc.writer sn_docintel.extraction_agent, sn_esm_agent sn_fin.finance_user, sn_fin.procurement_user, sn_fsc_genai.now_assist_fulfiller sn_gaf.data_viewer, sn_gaf.data_writer sn_gd_guidance.guidance_user, sn_grc.business_user sn_grc.reader, sn_grc.user_hierarchy_reader, sn_grc_taxonomy.taxonomy_user, sn_grc_workspace.task_reader sn_grc_workspace.user, sn_incident_read sn_ind_tmt_orm.fulfillment_viewer, sn_ind_tmt_orm.order_viewer, sn_l2c_core.entity_mapping_viewer, sn_lg_cf_workspace.legal_workspace_user, sn_lg_gen_ai.legal_user sn_lg_gen_ai.request_fulfiller, sn_lg_ops.legal_report_viewer, sn_lg_ops.legal_sla_read, sn_lg_ops.legal_user, sn_lg_ops.request_fulfiller, sn_lookup_verify_user sn_mcp_client.viewer, sn_nb_action.next_best_action_user, sn_notif_agents.notification_generator, sn_nowassist_admin.user, sn_ord_qual_mgmt.alternate_proposal_read, sn_prd_invt.product_inventory_operations_read, sn_prd_invt.product_inventory_viewer, sn_prd_pm.characteristics_viewer, sn_prd_pm.product_catalog_viewer, sn_prd_pm.product_model_characteristic_viewer, sn_pren.experience_issue_read, sn_prompt_assist.prompt_developer, sn_pss_core.service_contract_viewer, sn_publications_recipients_list_user, sn_publications_recipients_user sn_query_gen.user, sn_query_gen.user, sn_request_read, sn_req_criteria.viewer, sn_service_org.customer_criteria_read, sn_service_org.service_criteria_read sn_shn.editor, sn_shn.user, sn_shop.invoice_owner, sn_shop.procurement_common_reader, sn_shop.shopper, sn_skill_builder.viewer, sn_sla_definition_query sn_slm.fulfiller, sn_smart_asmt.actor, sn_smart_asmt.assessment_reader, sn_smart_asmt.template_reader, sn_sow.it_agent_dashboard_user, sn_sow.sow_home, sn_sow.sow_list, sn_sow.sow_user, sn_sttrm_condition_read, sn_supplier_gen_ai.now_assist_fulfiller, sn_templated_snip.template_snippet_reader, sn_tmt_core.inbound_queue_read, sn_tprm_genai.nowassist_user sn_udc.basic_read, sn_uib_collab.user, sn_uni_req.universal_request_read, sn_uxc_gen_ai.platform_ai_field_predictor, sn_uxc_gen_ai.platform_ai_image_processor, sn_uxc_gen_ai.platform_ai_record_mgmt, sn_vdr_risk_asmt.vendor_assessment_reviewer, sn_workflow_studio.workflow_studio_read,sn_wsd_core.workplace_user, survey_reader task_editor, template_editor, template_editor_global, template_read_global, vendor_reader, view_changer, viz_creator workspace_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Default VA Workflow

Learn more about Notifications in Notifications.

Setup Hub AI agents

The following AI agents are available for Setup Hub.

Group and roles assignment AI agent

This ServiceNow Otto for Setup AI agent provisions access by creating groups, adding users to a group, assigning roles to a group, and adding users to a role.

Workflow

The agent never creates or edits users or roles, and it never deletes or modifies any existing content.

1. Run the Fetch context tool and present choices to the user.
2. Execute assignments according to the prescribed guardrails.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Add users to a group Add users to a role Assign roles to a group Classify managers from users

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Configuration (continued)

Field	Description
	Create group Fetch context Lookup group information Lookup role details Lookup role-group mappings User role or group assignment completion validator **Generative AI skills** Discover roles for capability **Knowledge Graph** User Graph Entity Lookup
Allowed user roles The specific user roles that can access this AI agent.	sn_ia_config.ia_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about ServiceNow Otto for Setup at ServiceNow Otto for Setup.

IA operational data workflow AI agent

This ServiceNow Otto for Setup AI agent automates the configuration of data imports by handling the creation of data sources, import sets, and transform maps.

Workflow

The agent is designed for IT administrators and system integrators.

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1. Retrieve and parse execution context.
2. Check user role authorization for the table.
3. Determine the source selection.
4. Display recommended fields.
5. Upload and validate the file.
6. Import the file.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Agent Context Retriever Cache Transform Map Ref Check Has Role Check If Map Has Coalesce Get Import Config Incomplete Data Imports Orchestrator Execution Manager Process Import Transform Import Set Update Coalesce Field **Generative AI skill** IA Operational Data Coalesce Skill **Conversational topics** IAFileUploadAndValidator

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Configuration (continued)

Field	Description
	IAPreviewTransformMapView
Allowed user roles The specific user roles that can access this AI agent.	user_admin, import_admin, sn_ia_config.ia_user, sn_aia.viewer
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	user_admin, import_admin, sn_aia.viewer
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about ServiceNow Otto for Setup at ServiceNow Otto for Setup.

Implementation plan executor AI agent

This ServiceNow Otto for Setup AI agent is responsible for executing the implementation plan, carrying out each defined step, and ensuring the plan is completed as designed.

Workflow

1. Check if the implementationPlanSysId is provided by the user.
2. Use the Plan Fetcher tool to retrieve the user message and executionSteps for the provided implementationPlanSysId.
3. Execute the plan step by step.
4. Display results to the user.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Plan Fetcher Result Preview Displayer Step Executor
Allowed user roles The specific user roles that can access this AI agent.	sn_ia_config.ia_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about ServiceNow Otto for Setup at ServiceNow Otto for Setup.

Implementation plan generator AI agent

This ServiceNow Otto for Setup AI agent collects user input by asking configured questions, analyzing the full conversation to derive a precise technical intent, and then generating a step-by-step implementation plan.

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Workflow

1. Use the QuestionnaireFetcher tool with the provided sysId.
2. Iterate through the Main_Question_Queue one by one.
3. Present the final summary and request approval in a single interaction.
4. Generate the implementation plan.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Plan Generator and Saver QuestionnaireFetcher **Generative AI skill** RequirementsExtractorSmartIngestion
Allowed user roles The specific user roles that can access this AI agent.	sn_ia_config.ia_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about ServiceNow Otto for Setup at ServiceNow Otto for Setup.

Implementation plan manager AI agent

The implementation plan manager agent orchestrates an implementation by coordinating the plan generator and plan executor agents. It helps to ensure that your technical intent is converted into a clear plan and executed safely and correctly.

Workflow

1. Call the agent context retriever tool to get the questionnaire sysId, additional parameters, and conversation ID.
2. Invoke the Implementation plan generator AI agent and wait for it to return a plan sysId. If the user exits or the plan fails to generate, end the conversation without proceeding.
3. Invoke the Implementation plan executor AI agent, passing it the plan sysId and conversation ID, and wait for it to complete all steps.
4. Clear the same context/state variables again so nothing carries over into the next run.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.

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Configuration (continued)

Field	Description
Tools	**Script** Agent Context Retriever
Allowed user roles The specific user roles that can access this AI agent.	sn_ia_config.ia_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about ServiceNow Otto for Setup at ServiceNow Otto for Setup.

Initialize IA orchestrator AI agent

This ServiceNow Otto for Setup agent automatically triggers the appropriate Virtual Agent topic to streamline setup and onboarding for users on your ServiceNow instance.

Workflow

1. Use the trigger virtual agent tool, to trigger the virtual agent.
2. If the tool returns an error or fails unexpectedly, inform the user.
3. Never request, wait for, or infer inputs from the user.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Conversational topic** Trigger Virtual Agent
Allowed user roles The specific user roles that can access this AI agent.	sn_ia_config.ia_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Not defined.
Used in agentic workflows	Default VA Workflow

Learn more about ServiceNow Otto for Setup at ServiceNow Otto for Setup.

SLA management AI Agent

This ServiceNow Otto for Setup agent enables administrators to create and edit SLA definitions through a conversational interface. The agent guides you through SLA configuration, including setting target type (Resolution/Response), duration, table, schedule, start/pause/stop conditions, and flow associations.

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Workflow

1. Determine whether the admin wants to create an SLA or edit an existing one (asking if unclear).
2. Collect the target type (Resolution/Response), applicable table, classification (priority, type, model, or service), duration, and name, using existing SLAs and smart defaults to recommend values where possible.
3. Confirm which schedule applies and associate a notification/escalation flow.
4. Recommend and confirm start, pause, and stop conditions based on the SLA type.
5. Present a full summary of the configured SLA and get admin confirmation.
6. Save the SLA definition, handling any duplicate-configuration conflicts along the way.
7. Display a confirmation summarizing what was created or changed.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Agent Context Retriever Create Update SLA Definition Get SLA Data Text to encoded query generation Validate and Lookup SLA Field Inputs **Generative AI skill** Flow summariser
Allowed user roles The specific user roles that can access this AI agent.	sla_manager

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Configuration (continued)

Field	Description
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sla_manager, sn_query_gen.admin, fd_read_flows
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about ServiceNow Otto for Setup at ServiceNow Otto for Setup.

SSO configuration AI agent

This ServiceNow Otto for Setup AI agent guides administrators through secure Single Sign-On (SSO) setup for ServiceNow using SAML or OpenID Connect (OIDC). The agent collects and validates identity provider details, creates authentication configurations, and guides users through review, testing, and activation.

Workflow

1. Check whether the SSO plugin is installed and whether an active SSO configuration already exists. If the plugin isn't installed, offer to install it and monitor progress before continuing.
2. Identify whether the user wants SAML, OIDC, or generic SSO help; if unclear, ask them to choose. If an active configuration already exists, offer to deactivate it instead.
3. For SAML: request the metadata URL. For OIDC: collect the configuration name, client ID, and well-known configuration URL (client secret is handled separately, outside the conversation).
4. Create the SAML or OIDC Identity Provider record based on the provided information. Confirm success or display any errors for correction.
5. Present a link to the newly created record and ask the user to review and correct any fields before continuing.
6. Guide the user through testing the connection and confirm the test passed.
7. Ask whether this should be the default login method and apply that setting if so.
8. Explain ACR as a safety fallback and confirm whether it's been set up before proceeding.
9. Ask for confirmation, then activate the configuration.
10. Depending on earlier default/active selections, mark the configuration as primary automatically or ask for confirmation.
11. Ask the user to test login redirection in a private browser.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Activate SSO Configuration Create Login Link For OIDC Creation of OIDC using URL Creation of SAML record using the metadata URL Creation of SAML record using the metadata XML Deactivate SSO Configuration get activation status Get Active SSO Configurations Get SSO Setting Link Install sso plugin Set SSO identity provider as default Update SSO Config To Primary Update SSO Label **Generative AI skills** get knowledge Plugin installation and existing configuration check **Conversational topic** IADynamicChoicePickerGenerator
Allowed user roles	sn_ia_config.ia_user

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Default VA Workflow

Learn more about ServiceNow Otto for Setup at ServiceNow Otto for Setup.

Update set AI agent

This ServiceNow Otto for Setup AI agent helps administrators and developers upload, review, and commit XML update sets efficiently.

Workflow

1. Outline the steps that will run (upload, validate, retrieve, preview, conflict handling, commit) and wait for the user to confirm before starting.
2. Accept the XML file upload and retrieve its attachment details.
3. Check the uploaded file is a valid update set XML.
4. Pull the validated update set into the instance.
5. Run a preview to detect conflicts with existing configuration.
6. If conflicts exist, let the user review errors, then accept all, reject all, or resolve manually before rechecking.
7. Commit the update set and confirm success, or report a failure with retry/stop options.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Accept All Updates from Remote Check Update Set Commit Commit Update Set Get Attachment Details from record Get Preview Error Link Preview Update Set Reject All Updates from Remote Retrieve Update Set Validate Update Set **Conversational topic** Upload xml
Allowed user roles The specific user roles that can access this AI agent.	sn_ia_config.ia_user
Data access roles The specific user identity roles that determine which data the AI agent	admin

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about ServiceNow Otto for Setup at ServiceNow Otto for Setup.

ServiceNow Otto for Creator

ServiceNow Otto for Creator AI agents

The following AI agents are available for ServiceNow Otto for Creator.

Build Agent

This AI agent enables developers to create, edit, and deploy full-stack ServiceNow® applications to update sets that encompass both user interface and back-end components.

Important: Build Agent uses a different framework than other ServiceNow® AI agents. Review the following workflow and configuration settings for Build Agent. For more information, see Build Agent.

Workflow

You describe what to build or change in natural language, and Build Agent proposes, applies, tests, and builds the changes for your review. The workflow is the same in ServiceNow Studio and the ServiceNow IDE.

1. Based on the user's request, parse the requirements.
2. Propose the application and files to create or modify.
3. Display the proposed edits, diffs, and summaries, and pause for user approval.
4. Once approved, edit the code or metadata, or scaffold a new application.
5. Repeat until the requested metadata changes are complete.
6. When prompted, or after asking the user depending on the configuration, create and run Automated Test Framework (ATF) tests.
7. If tests fail, triage the failures and produce a regression test suite for monitoring app health.
8. Build the application.

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Configuration

Build Agent configuration

Configuration area	Description
Plugins	Plugins are required for Build Agent and vary by version. • For Build Agent (Trial/Free): `sn_glider` and `sn_build_agent` plugins. • For Build Agent (Premium): the `sn_now_creator` plugin, which contains the `sn_build_agent_pro` plugin.
Access	Build Agent is accessible in both ServiceNow Studio and the ServiceNow IDE.
Model context protocol (MCP) servers	Build Agent enables access to external tools and resources through standardized communication (MCP servers). For more information, see MCP connections and Build Agent and Connect Build Agent to a supported MCP server.
Tests	Test settings determine whether Build Agent and Autonomous Engineer generate and run Automated Test Framework (ATF) tests in conversations. • **Sync ATF tests with app**: Generates ATF tests when the agent creates an app, and keeps the tests synced when the app is edited. • **Run UI ATF tests**: Runs client-side and server-side UI ATF tests. This setting requires **Sync ATF tests with app** and is off by default because UI test runs are slower. For more information, see Configure auto test prompting and UI tests.
Custom instructions	Custom instructions control how Build Agent behaves during a session. • Rules are preloaded into every session automatically. Rules enforce consistent behavior, such as naming conventions or organizational standards. • Skills are available on demand when a user or the agent invokes them by name. Skills provide task-specific guidance, such as internal guidelines for a particular workflow pattern. The **Applies To** setting determines which sessions use an instruction: all sessions

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Build Agent configuration (continued)

Configuration area	Description
	on the instance, sessions within a specific application scope, or only the sessions of the user who created it. For more information, see Configure custom skills and rules.

Access roles

Build Agent uses the following existing roles for access control and feature masking.

sn_glider.admin

Users with this role have the following

- Access control lists (ACLs) on all Build Agent tables
- Read and write access on operational system properties
- Role masking for the Build Agent and Build Agent Preprocessor ServiceNow Otto skills

admin

Users with this role have read access on protected system properties, such as prompt limits and tier overrides.

Catalog AI agent

This ServiceNow Otto for Creator agent gathers, validates, and tracks all required inputs for a given Service Catalog item.

Workflow

The agent prompts the user for each variable, records and recalls previously provided information, identifies missing or inconsistent details, and then seeks user confirmation and submits a complete request.

1. Based on the user's request, find the catalog item.
2. Display auto-filled values and pause for user approval before collecting additional data.
3. Collect remaining variables one at a time.
4. Prepare the request for submission.
5. Display the request to the user and ask for confirmation.
6. Once approved, submit the request.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for

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Configuration (continued)

Field	Description
	tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Display Final Summary Display Request Card Fetch Catalog Details Open Catalog Form Submit Catalog Summary Evaluator
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	public
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about ServiceNow Otto for Creator at ServiceNow Otto for Creator.

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Module creator AI agent

This ServiceNow Otto for Creator agent Converts natural language requests into structured JSON definitions for ServiceNow application navigator modules.

Workflow

1. Parse the user's request to identify one or more modules to create, including module type, table, view, role, filter criteria, and other properties.
2. Determine whether each module is a modern (Next Experience) or legacy (Core UI) type based on keywords in the request.
3. Look up tables, views, roles, assessments, reports, map pages, or timeline pages as needed, but only when the user explicitly references a specific record by name. If not specified, output minimal JSON.
4. Convert any filter conditions to encoded query format using the Encoded Query Generator tool.
5. Generate a context-aware title for each module based on the table, filter, or user-specified name.
6. Output the final JSON array and call the Process Output tool.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Assessment Lookup Encoded Query Generator Map Pages Lookup Process Output Reports Lookup Role Lookup

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Configuration (continued)

Field	Description
	Table Lookup Timeline Pages Lookup View Lookup
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Not defined.
Used in agentic workflows	Not applicable.

Learn more about ServiceNow Otto for Creator at ServiceNow Otto for Creator.

Playbook activity context AI agent

This ServiceNow Otto for Creator agent helps users complete ServiceNow forms by fetching form fields, automatically matching pre-filled field values, and prompting for any missing required information. The agent saves the summary of what it has done.

Workflow

1. Pull the form's field definitions (formFields), including each field's type, label, constraints, and reference/choice details.
2. Extract the most relevant available data for each field, matching field type. Leave fields empty when no relevant data exists rather than guessing.
3. Compress or truncate any value that exceeds its field's character limit before assigning it.
4. Package all filled fields into the required schema, along with a summary of the activity and separate success/failure variants of that summary.
5. Execute the slot-filling script with the completed fields and summary.
6. If the JSON output is malformed (not if data is simply missing or wrong), regenerate it one time; otherwise accept the result as final.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Playbook Slot Filling Script
Allowed user roles The specific user roles that can access this AI agent.	playbook.agent_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Playbook Activity Assist

Learn more about ServiceNow Otto for Creator at ServiceNow Otto for Creator.

Playbook data gathering and processing AI agent

This ServiceNow Otto for Creator agent is a assistant that consolidates data gathering, processing, and slot-filling capabilities. It handles end-to-end playbook execution using a broad

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toolkit of retrieval, reasoning, and action-oriented functions. The agent also helps with tasks related to processing of files attached to instance records.

Workflow

1. Break the input into separate sub-objectives when it contains multiple distinct tasks; leave it as one task if it's already a single request.
2. Run the appropriate retrieval method for each sub-objective (search across records, structured knowledge lookups, knowledge article search, or web search), including chaining steps together when a task requires first finding related records, then pulling specific details from them.
3. For document/attachment requests, retrieve the attachment, generate a summary, and display it once complete.
4. Apply operations like validation, summarization, classification, translation, or extraction when the task calls for transforming already-retrieved data.
5. Merge all outputs into one response, or display "No results found" if the outcome is empty.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** AI Search Data Retriever Get results for QnA or Summarization task Knowledge articles retriever tool Knowledge Graph TextToResult API crawler Retrieve attachments of a Glide record Summarize attachments **Web search** Use web search

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Configuration (continued)

Field	Description
Allowed user roles The specific user roles that can access this AI agent.	playbook_agent_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Playbook Activity Assist

Learn more about ServiceNow Otto for Creator at ServiceNow Otto for Creator.

Release lifecycle documentation AI agent

This ServiceNow Otto for Creator agent generates release notes and update set descriptions in natural, human-friendly language for business stakeholders, within a maximum 4000 character limit.

Workflow

The release lifecycle documentation AI agent helps users complete tasks related to deploying changes to production.

1. Based on the user's request, parse the requirements.
2. Propose text for the release notes or update set description.
3. Display the proposed text and pause for user approval.
4. Update the relevant release notes or update set record.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Topic Block** Release Notes Generator
Allowed user roles The specific user roles that can access this AI agent.	update_set_admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	update_set_admin, 7edf53c0ff3132101bfbfffffffffcc
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about at App Engine Management Center at App Engine Management Center.

Theme Builder AI agent

This ServiceNow Otto for Creator agent assists in creating and managing themes for user interfaces. It is intended for use by UI/UX designers, developers, and anyone responsible for maintaining the visual consistency of their organization's digital properties.

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Workflow

1. Open the ServiceNow Otto® panel.
2. Start the theme creation workflow by prompting ServiceNow Otto® to create a theme.
3. Provide brand assets or manually select theme colors.
4. Review the AI-generated theme.
5. Create the theme and open it in Theme Builder for further customization and publishing.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Open theme builder tool
Allowed user roles The specific user roles that can access this AI agent.	ui_builder_admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	ui_builder_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Theme Creation Workflow

Learn more about ServiceNow Otto for Creator at ServiceNow Otto for Creator.

UI builder AI agent

This agent helps users edit pages and answer questions within the ServiceNow UI Builder editor.

Workflow

1. Get the user's request (or pick it up from the initial mission context).
2. If the user wants to make changes to their page, take control of the editor, perform the requested operations, return editor control, and summarize what changed.
3. If the user is asking a question, search product documentation and the component library, then present an answer.
4. Ask if the user has additional requests and repeat.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Add client state parameter Add component Add component event handler

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Configuration (continued)

Field	Description
	Answer questions with product documentation search Delete client state parameter Delete component Delete component event handler Get component definition Get list recipe Page analyzer Reacquire editor control Record page recipe Return editor control Search component library Update component input property Update component preset Update layout
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	ui_builder_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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ServiceNow Vault AI agents

ServiceNow Vault AI agents

The following AI agents are available for ServiceNow Vault.

Access Observer configuration manager AI agent

This ServiceNow Vault agent helps users to manage Access Observer configurations for specific fields

Workflow

1. Check the user has the security_admin role.
2. Identify which operation the user wants to perform, or present the five supported options:

Create

Collect a table and column. Validate that both exist and aren't blocked, collect start/end dates, then run through a series of checks before creating the Access Observer configuration. On success, direct the user to the **Summarize Access Observer logs** skill.

Delete

Collect table and column and show matching configurations. Prompt the user select one, and delete it.

Deactivate

Show all active configurations and have the user pick one from the list, then deactivate it.

Get/Fetch

Collect table and column. Retrieve and display all configurations for that specific combination.

List all

Retrieve and display all Access Observer configurations.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Check if a table is blocked Check if user has security_admin role Check table and column available Create Access Observer configuration Deactivate Access Observer configuration Delete Access Observer configuration Get Access Observer configuration Get all Access Observer configurations Get child tables recursively Get parent tables recursively Validate end date and time Validate time overlap Validate start date and time Get active AO configuration count and limit
Allowed user roles The specific user roles that can access this AI agent.	Not defined.
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_vault_console.vault_console_admin, security_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Access Observer configuration

Learn more about ServiceNow Vault at ServiceNow Vault.

Access validation for privacy advanced configurations AI agent

This ServiceNow Vault agent checks a user's access to manage privacy policy advanced configuration.

Workflow

1. Confirm that the required data channel name was provided.
2. Verify whether the current user has access to manage privacy advanced configurations for that data channel.
3. Pass a true/false permission result back to the calling workflow without displaying anything to the user.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Validate access to privacy policy advanced configuration
Allowed user roles The specific user roles that can access this AI agent.	data_kit_data_privacy_admin, virtual_agent_data_privacy_admin, now_assist_data_privacy_admin, data_privacy_admin
Data access roles	data_privacy_admin, now_assist_data_privacy_admin, data_kit_data_privacy_admin, virtual_agent_data_privacy_admin

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Configuration (continued)

Field	Description
The specific user identity roles that determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Create Data Privacy Advanced Configuration

Learn more about ServiceNow Vault at ServiceNow Vault.

Create Data Privacy advanced configuration AI agent

This ServiceNow Vault agent helps users fetch, create, activate, and link data privacy policy configurations across data channels.

Workflow

1. Execute one of six operations based on the task received from the workflow:
   - **Fetch active configuration**

     Look up the active data privacy policy configuration for a given data channel.
   - **Fetch data channels**

     Retrieve the list of all available data channels with their IDs.
   - **Create default Data Extraction configuration**

     Create a policy configuration for the data extraction channel using defaults.
   - **Create policy configuration**

     Create an advanced policy configuration with a user-provided name and data channel.
   - **Activate policy configuration**

     Activate an existing policy configuration (fully non-interactive, no user prompts).
   - **Generate configuration URL**

     Produce a link to view a specific policy configuration.
2. After any operation completes, hand the result back to the calling workflow.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Create data extraction configuration Create new advanced configuration in dp_configuration_domain_separated Generate data privacy policy configuration link Get all data channels Update privacy advanced configuration tool Fetch active data privacy policy configuration for data channel
Allowed user roles The specific user roles that can access this AI agent.	data_privacy_admin, virtual_agent_data_privacy_admin, data_kit_data_privacy_admin, now_assist_data_privacy_admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Create Data Privacy advanced configuration

Learn more about ServiceNow Vault at ServiceNow Vault.

Custom app recommendations AI agent

This ServiceNow Vault agent lists the custom apps on the instance, and shows recommendations along with the available protections for the selected apps.

Workflow

1. Verify the classification recommendations skill is active on the instance.
2. Retrieve all installed custom apps and present them for selection.
3. Analyze the selected app's data to identify columns that contain sensitive data needing classification, along with available protection options.
4. Present the recommendations to the user and get explicit confirmation before applying anything.
5. Process and apply the recommended data classifications, then display a summary of what was classified.
6. Provide a link to Vault so the user can set up data protections for the newly classified data.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Apply classification recommendations

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Configuration (continued)

Field	Description
	Get available protections Get classification recommendations skill status Get custom app id and classification recommendations Get list of custom apps Process classification recommendations **Conversational topics** Classification recommendation summary
Allowed user roles The specific user roles that can access this AI agent.	Not defined.
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_vault_console.vault_console_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Securing custom apps with Vault agents

Learn more about ServiceNow Vault at ServiceNow Vault.

Data Discovery policy and job manager AI agent

This ServiceNow Vault agent checks whether a given list of tables supports data discovery scanning. The agent then creates data discovery job policies using these tables, and creates discovery job policies and schedules and data discovery jobs using the created policy.

Workflow

1. Take a list of table names, validate each one for discovery scan support using the validation tool, and separate them into supported and unsupported groups.
2. Show the results and let the user add, remove, or replace tables. Re-validate after each edit until the user confirms the final list.

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3. Generate a policy name and create the policy using the supported tables and selected data patterns.
4. Gather the required inputs for a discovery job: scan type, trigger frequency, and the corresponding date/time parameters for the chosen frequency.
5. Confirm the collected details with the user, submit to the job scheduler tool, and display the created job's name and ID.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Check AI shared services usage entitlement Create Data Discovery policy Discovery Job scheduler tool Get available Discovery Data patterns Validate input table Discovery scan support
Allowed user roles The specific user roles that can access this AI agent.	sn_data_discovery.data_discovery_admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_data_discovery.data_discovery_admin

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Data discovery job scheduler workflow

Learn more about ServiceNow Vault at ServiceNow Vault.

Data Discovery recommendation AI agent

This ServiceNow Vault agent provides job info, findings, attributes, and related details for a list of tables provided. The agent also returns scan recommendations you can use to create policy and schedule the discovery job by another agent.

Workflow

The agent helps users complete tasks related to data discovery recommendation agent.

1. Take a list of instance table names from the user.
2. Check whether previous discovery jobs have run against those tables (standard or attachment scans).
3. Determine which data patterns have already been scanned and which remain unscanned across the provided tables.
4. Suggest an appropriate scan (Sample, Full, Incremental, or Attachment) based on whether previous jobs exist, data volume, and how frequently data changes.
5. Suggest daily, weekly, or monthly based on the previous job's run type.
6. Rate each table's risk based on the presence of PII patterns.
7. Display a single structured recommendation covering all provided tables: status, scanned/unscanned patterns, suggested scan type and frequency, sensitivity risk, and recommended next action.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Get Attachment Data Discovery insights for tables Get Discovery Insights for tables
Allowed user roles The specific user roles that can access this AI agent.	sn_data_discovery.data_discovery_admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_data_discovery.data_discovery_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Data discovery job scheduler workflow

Learn more about ServiceNow Vault at ServiceNow Vault.

Data Discovery util AI agent

This ServiceNow Vault agent assists data stewards in scheduling and managing data discovery jobs by verifying required roles, entitlements, and subscriptions. The agent categorizes discovered data patterns into compliance groups to support regulatory and security requirements. It also help user to add tags to data patterns on demand.

Workflow

1. Check the user's permissions. Stop if role or entitlement is missing, and note the subscription status either way.
2. Verify no active discovery job conflicts with the requested one. Stop if conflicts exist.

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3. Fetch all available data patterns and check which ones already have tags assigned, displaying them grouped by tag.
4. For patterns without tags, use the discovery grouping skill to recommend classifications across sensitive data categories.
5. Show tagged patterns first, then untagged patterns with their recommended categories.
6. Prompt the user to add patterns to existing categories, create custom categories, and assign patterns across multiple categories.
7. Offer to tag patterns so they're easier to find and assign in future discovery policies. Create tags as needed and associate patterns to them one by one.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Check if tag is available Create data pattern record tag Create label entry for data patterns Data Discovery AI services validation script Data Discovery conflicting job validation script Data Discovery entitlement validation script Data Discovery role validation script Get available data pattern tags Get available data patterns **Generative AI skills** Discovery data pattern grouping skill
Allowed user roles	sn_data_discovery.data_discovery_admin

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_data_discovery.data_discovery_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Data discovery job scheduler workflow

Learn more about ServiceNow Vault at ServiceNow Vault.

Data Discovery workflow lookup AI agent

This ServiceNow Vault agent receives provide recommendation for different tables associated with workflows, and identifies what kind of sensitive data can present in those tables such as PII,PFI,PCI,PHI,FCI.

Workflow

1. Determine whether the user provided specific workflow names, specific table names, or wants to process all workflows.
2. If workflow names were given, retrieve all active workflows from the instance and confirm the user's entries are valid. Ask one clarification question and values are invalid.
3. Either fetch tables associated with the validated workflows, or use the directly provided table names, pulling in associated tables as well.
4. Determine which sensitive data group classifications (PII, PHI, PFI, PCI, FCI) apply to each table.
5. Present the findings in a structured card format showing each table with its sensitive data classifications, grouped by workflow if workflows were the input.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Find available workflows in the instance **Web searches** Workflow table fetcher
Allowed user roles The specific user roles that can access this AI agent.	sn_data_discovery.data_discovery_admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_data_discovery.data_discovery_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Data discovery job scheduler workflow

Learn more about ServiceNow Vault at ServiceNow Vault.

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Data pattern list AI agent

This ServiceNow Vault agent helps users associate data patterns to an data privacy policy configuration. It retrieves the list of available data patterns, captures the user's selections, extracts the related sys_ids, assigns data patterns to data privacy policy configuration and validates it.

Workflow

1. Confirm a data privacy policy configuration ID was provided and verify it's valid; if either check fails, notify the user and stop.
2. Retrieve and present all available data patterns for the given policy configuration, and let the user select one or more.
3. Resolve the selected pattern names to their sys_ids and assign them to the policy configuration.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Data pattern assigner Verify config tool **Conversational topic** Data pattern list selector
Allowed user roles The specific user roles that can access this AI agent.	data_kit_data_privacy_admin, data_privacy_admin, now_assist_data_privacy_admin, virtual_agent_data_privacy_admin
Data access roles The specific user identity roles that	now_assist_data_privacy_admin, data_privacy_admin, virtual_agent_data_privacy_admin, data_kit_data_privacy_admin

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Configuration (continued)

Field	Description
determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	• Create Data Privacy Advanced Configuration • Default VA Workflow

Learn more about ServiceNow Vault at ServiceNow Vault.

DP record selector agent AI agent

This ServiceNow Vault agent fetches data using tools or topics to display list of choices related to the action.

Workflow

1. Execute one of two operations based on the task received from the workflow:
   - Fetch policies: Retrieve and display all available data privacy advanced configurations, let the user select one, and return the selected policy ID to the workflow.
   - Fetch edit options: Retrieve and display the available edit operations for a policy, let the user select one, and return the selection to the workflow.
2. After either operation, hand the result back to the calling workflow.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Fetch advanced DP policy **Conversational topics** Select a privacy advanced policy Select DP advanced policy edit options
Allowed user roles The specific user roles that can access this AI agent.	data_kit_data_privacy_admin, data_privacy_admin, virtual_agent_data_privacy_admin, now_assist_data_privacy_admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	data_privacy_admin, data_kit_data_privacy_admin, virtual_agent_data_privacy_admin, now_assist_data_privacy_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	• Edit Data Privacy Advanced Configuration • Default VA Workflow

Learn more about ServiceNow Vault at ServiceNow Vault.

Edit Data Privacy advanced configuration mapping AI agent

This ServiceNow Vault agent helps users complete tasks related to edit data privacy advanced configuration mapping agent.

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Workflow

1. Execute one of three operations based on the task received from the calling workflow or agent:
   - Change mapping: Update the existing pattern-technique mapping for the given policy.
   - Add mapping: Look up available patterns for the policy, let the user select one or more, and add them.
   - Remove mapping: Deactivate the pattern-technique mappings for the given policy.
2. After any operation completes (or if no policy ID was provided), hand control back to the caller.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Add pattern in DP advanced policy **Conversational topics** Deactivate data patterns Lookup patterns for DP advance policy edit Update DP advanced configuration mapping tool
Allowed user roles The specific user roles that can access this AI agent.	virtual_agent_data_privacy_admin, data_kit_data_privacy_admin, data_privacy_admin, now_assist_data_privacy_admin
Data access roles The specific user identity roles that determine which data the AI agent	now_assist_data_privacy_admin, data_privacy_admin, data_kit_data_privacy_admin, virtual_agent_data_privacy_admin

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	• Default VA Workflow • Edit Data Privacy Advanced Configuration • Create Data Privacy Advanced Configuration

Learn more about ServiceNow Vault at ServiceNow Vault.

Edit privacy advanced configuration AI agent

This ServiceNow Vault agent helps users complete tasks related to edit privacy advanced configuration agent.

Workflow

1. Check that a policy ID was provided.
2. Execute one of three operations based on the task received from the parent workflow:
   - Rename policy: Collect a new name from the user and update the policy.
   - Activate or deactivate policy: Look up the current active/inactive status, ask the user to confirm the toggle, and apply the change.
   - Check user domain: Verify whether the user is in the same domain as the policy and return the result to the workflow.
3. After any operation completes, hand control back to the parent "Edit Privacy Advanced Configuration Flow."

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Check user in same domain of the policy Update Privacy Advanced Configuration Tool **Record Operation** Lookup policy data
Allowed user roles The specific user roles that can access this AI agent.	data_kit_data_privacy_admin, virtual_agent_data_privacy_admin, data_privacy_admin, now_assist_data_privacy_admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	now_assist_data_privacy_admin, data_kit_data_privacy_admin, virtual_agent_data_privacy_admin, data_privacy_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	• Edit Data Privacy Advanced Configuration • Default VA Workflow

Learn more about ServiceNow Vault at ServiceNow Vault.

Summarize Access Observer logs AI agent

This ServiceNow Vault agent summarizes access observer logs and provides detailed breakdowns by caller type, users, and roles for specific table and column combinations.

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Workflow

1. Check the user has the security_admin role (required.)
2. Retrieve available table/column combinations that have Access Observer logs, display them with log counts, and let the user pick one.
3. Confirm logs exist for the selected table-column pair.
4. For each of the seven supported caller types (UI action, UI page, script include, scripted REST API, scheduled jobs, business rule, and unidentified sources). Retrieve the access logs and display a summary showing total accesses, users, roles, and caller sources.
5. Point the user to the **Field Encryption with Vault module** skill for encrypting the field and creating module access policies.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Check access log counts by caller type Check if user has security admin role Get Access Logs List available table and column combinations
Allowed user roles The specific user roles that can access this AI agent.	Not defined.
Data access roles The specific user identity roles that determine which data the AI agent	security_admin, sn_vault_console.vault_console_admin

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Summarize Access Observer logs

Learn more about ServiceNow Vault at ServiceNow Vault.

Vault crypto module manager AI agent

This ServiceNow Vault agent manages the Vault crypto module configuration and access policies. The agent handles encrypted field configurations for fields, and manages module access policies for roles.

Workflow

1. Check that the required roles (KMF admin/cryptographic manager and security_admin) are available (required) and whether Field Encryption Enterprise is installed (recommended).
2. Present the four supported operations and let the user choose one:

   Encrypt a field

   Collect the table and field name, validate both exist, check whether the field is already encrypted, and if not, encrypt it with the vault crypto module.

   Grant role access

   Collect a role name, check if it already has access, and if not, create a module access policy for that role.

   Check encryption status

   Collect a table and field name, validate both exist, and report whether the field is currently encrypted.

   List roles with access

3. Display the outcome (success, failure, or current status) and end execution.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Check if field is encrypted Check prerequisites Check table and field available Create module access policy for role Encrypt field with vault crypto module Get all roles with vault crypto module access
Allowed user roles The specific user roles that can access this AI agent.	Not defined.
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_vault_console.vault_console_admin, security_admin, sn_kmf.cryptographic_manager
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Field Encryption with Vault module

Learn more about ServiceNow Vault at ServiceNow Vault.

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Anonymization Policy Creation AI agent

The agent guides Data Privacy administrators through creating an anonymization policy. It captures the data channel, policy name, and data class, creates a draft policy, recommends anonymization techniques by data type, and then tries to publish the policy, explaining anything that must be fixed first.

Workflow

The agent helps the user create and publish a new anonymization policy.

1. Ask the user whether the policy anonymizes data tables or columns, or user-specific data.
2. Ask the user for a policy name and to select a data class from those available on the instance.
3. For data tables or columns, ask whether the policy should be active during cloning and, if so, the order in which it should run.
4. Summarize the captured details, let the user update any of them, and create the policy as an inactive draft after the user confirms.
5. Present the recommended anonymization techniques grouped by data type, walk the user through each data type, and save the assignments.
6. For user-specific data, ask the user to select a user reference column for each table that requires one.
7. Publish the policy, or explain what needs to be fixed and leave the policy as a draft.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Create Draft Anonymization Policy Get Bulk Technique Recommendations Get Child Table Options Get Data Patterns Get List of Data classes

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Configuration (continued)

Field	Description
	Get Primary Reference Columns Publish Policy Save Assigned Techniques Save User References Update Active Data Patterns Validate Technique for Data Type
Allowed user roles The specific user roles that can access this AI agent.	data_privacy_admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Data Privacy Anonymization Job Scheduler

Real Time Anonymization(RTA) Policy Configuration AI agent

The agent creates Real-Time Anonymization (RTA) policies that mask or anonymize sensitive column values as they're accessed. It guides the user through naming the policy, selecting the target columns to anonymize, and choosing any child tables that should inherit the same protection.

Workflow

The agent helps the user create a Real-Time Anonymization policy.

1. Ask the user for a policy name.
2. Fetch the available target columns and display them for the user to select, or inform the user if none are available.
3. Confirm the selected columns with the user.

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4. Fetch the child tables for the selected columns and ask the user which child tables should inherit the protection.
5. Create the RTA policy and display the result.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Create RTA policy Fetch available target columns Fetch child tables
Allowed user roles The specific user roles that can access this AI agent.	data_discovery_admin, data_privacy_admin, data_privacy_admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.

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Configuration (continued)

Field	Description
Used in agentic workflows	Realtime Anonymization(RTA) Policy Creation Agentic Workflow

Field Access Auditor AI agent

The agent retrieves the non-elevated user roles that have access to a table field, lets the user add or remove roles, and returns the finalized list of roles.

Workflow

The agent helps the user review and finalize the roles that have access to a field.

1. Confirm that the table name and field name were provided, and ask the user for any that are missing.
2. Retrieve the roles that currently have access to the field.
3. Display the roles and note that elevated roles aren't evaluated and must be granted access separately.
4. Ask whether the user wants to add or remove any roles, and update the list until the user confirms it.
5. Return the finalized list of roles to the calling agent or workflow.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Get Field Access Roles
Allowed user roles The specific user roles that can access this AI agent.	sn_vault_console.vault_console_admin

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Configuration (continued)

Field	Description
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Field Encryption and Auto Generate Access Policies

Anonymization Job Scheduler AI agent

The agent helps Data Privacy administrators schedule anonymization jobs against existing records by using a published anonymization policy. It checks for conflicting jobs, configures the job frequency, targets, and conditions, offers an optional dry run, and asks for explicit confirmation because starting a job is irreversible.

Workflow

The agent helps the user schedule an anonymization job that uses an existing anonymization policy.

1. Find the anonymization policies that are eligible to be scheduled, and ask the user to select one.
2. Load the fields that the selected policy can anonymize, and surface any warnings or child table requirements.
3. Check the policy for conflicts with other running jobs and inform the user of any conflicts.
4. Ask whether the user wants to run a dry run first, and if so, whether they want a sample or a detailed preview.
5. For a regular job, ask how often it should run and, optionally, the time window.
6. If the policy doesn't cover the whole data class, ask the user which users or groups the job should target.
7. Build the job record, confirm the saved details with the user, and share a direct link so that the user can open the job and start it.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Anonymization Job Builder Tool Anonymization Job Conflict Check Tool Anonymization Job Details Tool Anonymization Job Link Tool Anonymization Policy Lookup Tool Anonymization Policy Table Loader Tool Anonymization Target Lookup Tool
Allowed user roles The specific user roles that can access this AI agent.	data_privacy_clone_processor,data_privacy_processor
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Data Privacy Anonymization Job Scheduler

Real Time Anonymization(RTA) Validation AI agent

The agent confirms that Real-Time Anonymization (RTA) policy creation is supported for the user, and helps the user configure the tables and active data patterns that an RTA policy requires. The agent can add tables and add or remove active data patterns.

Workflow

The agent helps the user prepare the tables and data patterns needed to create a Real-Time Anonymization policy.

1. Confirm that the RTA feature is supported for the user.
2. Display the configured tables, or explain that at least one table is required.
3. Ask whether the user wants to add tables, validate that the requested tables are supported, and add them.
4. Display the active data patterns, or explain that at least one active data pattern is required.
5. Check the shared services usage entitlement, which is required for AI model-based data patterns.
6. Display the available data patterns grouped by type, and let the user add or remove multiple patterns at once.
7. Confirm that the tables and data patterns were added successfully.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.

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Configuration (continued)

Field	Description
Tools	**Script** Add active data pattern records Add target table records Check if shared service usage entitlement is available Delete active data pattern records Fetch active data patterns Realtime anonymization(RTA) feature support validation script Fetch taget table records Validate selected table is supported **Record operations** Fetch data paterns
Allowed user roles The specific user roles that can access this AI agent.	data_privacy_admin, data_discovery_admin, sn_data_discovery.data_discovery_admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Realtime Anonymization(RTA) Policy Creation Agentic Workflow

Real Time Anonymization(RTA) Test AI agent

The agent tests Real-Time Anonymization (RTA) by taking a text string from the user and returning the anonymized version.

Workflow

The agent helps the user see how Real-Time Anonymization treats sample text.

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1. Ask the user for the text string to test.
2. Anonymize the string.
3. Display the original string, the anonymized string, and the intermediate results.
4. Let the user repeat the test as many times as needed.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Real time anonymization(RTA) Test Script Tool
Allowed user roles The specific user roles that can access this AI agent.	data_discovery_admin,data_privacy_admin, sn_data_discovery.data_discovery_admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	Not defined.
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Realtime Anonymization(RTA) Policy Creation Agentic Workflow

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Software Asset Management

Software Asset Management AI agents

The following AI agents are available for Software Asset Management.

Microsoft license assignment AI agent

This Software Asset Management agent assigns a Microsoft license to a user for a given request item, handling integration profile selection, reservation order creation, and Entra ID group assignment.

Workflow

1. Run the Microsoft License Assignment tool with the request item number. If it returns an error, stop immediately.
2. If there are multiple integration profiles for Microsoft 365 available, prompt the user to select one and re-run the tool with the selection. If there is only one, the system automatically proceeds with that.
3. If licenses aren't currently available but entitlement details exist, offer to create a reservation order. Show the draft order for review and allow date adjustments (validated against the entitlement date range). Create the order in the ServiceNow instance, and inform the customer they must complete the order creation on the Microsoft portal.
4. Review existing Entra ID groups that carry the same license. If multiple groups are found, prompt the user to select one. If only one exists, use it automatically.
5. Assign the license to the user, including the selected group if applicable.
6. If there are no existing Entra ID groups, ServiceNow adds a license to the user at the user level. This applies if the customer is using user-level licensing rather than managing through Entra ID groups.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** AssignLicenseToUser

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Configuration (continued)

Field	Description
	Microsoft License Assignment ReviewExistingEntraIDGroups
Allowed user roles The specific user roles that can access this AI agent.	procurement_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	procurement_user, itil, now_assist_panel_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Help manage software requests

Learn more about Software Asset Management at Software Asset Management.

Software entitlement allocation AI agent

This Software Asset Management agent allocates software licenses for a request item, handling device selection when required.

Workflow

1. Run the license allocation tool with the request item number. If it returns an error, stop immediately.
2. If the allocation requires a device but multiple devices are found, prompt the user to select a device and re-run the allocation with the selected device. If no device is available, the flow ends.
3. If the request item is assigned to a user who doesn't have the required roles (ITIL, procurement_user), the flow ends.
4. If the request item is not approved, the flow ends.
5. If there are no available rights in the entitlement for license metrics Per User, Per Device, or User Subscription, the purchase order flow gets initiated.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Conversational topic** Get devices for a user topic **Script** License allocation
Allowed user roles The specific user roles that can access this AI agent.	procurement_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	procurement_user, itil, now_assist_panel_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Not defined.
Used in agentic workflows	Help manage software requests

Learn more about Software Asset Management at Software Asset Management.

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Software reclamation rule creation AI agent

This Software Asset Management agent analyzes software utilization and spend, then creates a reclamation rule based on user-approved criteria.

Workflow

1. Identify the target product. If no product ID is available in the agent's context, present available products for the user to select.
2. Fetch reclamation reclamation rule suggestions for the product. If a rule already exists, show the user a link to it and end the conversation.
3. Analyze utilization and spend data, then present the analysis alongside a draft reclamation rule for user review.
4. Collect feedback. The user can approve the draft, request changes (including reclamation type, thresholds, and other rule details), or cancel. Iterate until approved or cancelled.
5. Create the reclamation rule using the approved details.
6. If other existing reclamation rules lack a VIP exclusion condition, offer to update them. Only update if the user approves.
7. If software usage data collection is not set up, notify the user with a documentation link.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Create reclamation rule Get reclamation rule suggestions Update existing reclamation rules with VIP condition **Conversational topics** Get products for reclamation rule creation
Allowed user roles	sam_admin

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sam_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Create software reclamation rule Agentic workflow

Learn more about Software Asset Management at Software Asset Management.

Software removal candidate evaluation AI agent

This Software Asset Management agent identifies unused or underused software licenses and initiates reclamation after user confirmation.

Workflow

1. Identify the target product. If a Product ID is provided, use it directly. Otherwise, present available products for the user to select, optionally filtered by Publisher ID.
2. Fetch removal candidate analysis data for the selected product. If no data is found, inform the user and end.
3. Validate that the data supports reclamation. The checks differ based on software type (installed vs. subscription) but follow the same pattern: confirm recent usage or activity data exists, and confirm the ratio of removal candidates to total installations or subscriptions is within an acceptable range. If any check fails, inform the user with a specific reason and end.
4. Present the number of eligible removal candidates and ask the user to confirm reclamation. Only non-VIP users with notifications enabled are included.
5. Run the reclamation workflow and report the result. If successful and there are candidates stuck in "Awaiting Revocation" status for 60 days, flag them for review.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
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Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Find activity job status of the product Find removal candidates analysis Reclaim removal candidates **Conversational topic** Get products for removal candidate
Allowed user roles The specific user roles that can access this AI agent.	sam_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sam_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Evaluate software removal candidate Agentic workflow

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Learn more about Software Asset Management at Software Asset Management.

Sourcing and Procurement Operations

Sourcing and Procurement Operations AI agents

The following AI agents are available for Sourcing and Procurement Operations.

Procurement inquiry analysis AI agent

This Sourcing and Procurement Operations agent is an educational assistant for procurement and sourcing terminology questions. The agent scans policy manuals and help articles to deliver plain-language explanations of purchase orders, requisitions, sourcing requests, and procurement cases. It can connect users to a live agent if knowledge articles don't have sufficient information.

Workflow

1. When the user asks about policies, requisitions, sourcing processes, or supplier eligibility, search for relevant knowledge articles and present the information with a link to the source article.
2. If no knowledge article answers the question, try connecting to a live agent. If no live agent is available, redirect to the Employee Center as a last resort.
3. Ask if the user has additional questions and continue or exit accordingly.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Conversational topic** Connect to Live Agent **Script** Redirect to Employee Center **Search Retrieval** Get relevant knowledge articles
Allowed user roles	sn_spend_gen_ai.now_assist_requester

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_spend_gen_ai.now_assist_requester, sn_shop.shopper, sn_spend_psd.requestor
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Conversational intake for sourcing and procurement

Learn more about Sourcing and Procurement Operations at Sourcing and Procurement Operations.

Procurement product recommendation AI agent

This Sourcing and Procurement Operations agent can browse the catalog and create orders. The agent matches user requirements against available items, then routes to submission forms based on vendor status and dollar thresholds. Accepts and processes uploaded quote documents or SOW (Statement of Work) files to extract line items and pricing.

Workflow

1. Create a purchase request from the quote or statement of work was uploaded by the user.
2. Run recommendations for all requested products, then present them one product at a time as selectable options. Collect a selection or skip for each product before moving on.
3. Assemble the selected products with any available details and run the channel decision tool, which determines whether the request routes to purchasing or sourcing. Render an HTML plan for the user.
4. If the plan flags missing fields, ask the user to provide them, re-run the plan tool, and repeat until nothing is missing.
5. Present the plan and ask the user to submit or edit. Edits are applied by re-running the plan tool with the updates, then re-presenting the plan.
6. Ask about attachments, then submit via either the purchasing or sourcing tool based on whether the selected products have product IDs.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Conversational topics** Add or update attachment Quote or sow attachment **Script** Channel decision and plan creation Create a document task Create purchasing record Create sourcing record Created record from document Document type extractor Recommendation Show more results
Allowed user roles The specific user roles that can access this AI agent.	sn_spend_gen_ai.now_assist_requester
Data access roles The specific user identity roles that determine which data the AI agent	sn_spend_gen_ai.now_assist_requester, sn_shop.shopper

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Conversational intake for sourcing and procurement

Learn more about Sourcing and Procurement Operations at Sourcing and Procurement Operations.

Procurement request tracking AI agent

This Sourcing and Procurement Operations agent provides a summary of a procurement request. It can provide current status and next steps for the request.

Workflow

1. Parse the user's message to determine what they're looking for and whether they've provided a specific record number.
2. If no record number is provided, construct a query based on the user's intent and search for matching records. If nothing is found, rephrase the query and retry once before asking the user for more details.
3. Present the search results and ask the user to select one.
4. Run the summary tool against the selected record and the original question, display the result.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Get records data Record summary
Allowed user roles The specific user roles that can access this AI agent.	sn_spend_gen_ai.now_assist_requester
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_shop.shopper, sn_spend_gen_ai.now_assist_requester
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Conversational intake for sourcing and procurement

Learn more about Sourcing and Procurement Operations at Sourcing and Procurement Operations.

Spend categorization AI agent

This Sourcing and Procurement Operations agent predicts and populates product and spend categories in purchase requisition lines, reducing manual effort and improving data accuracy.

Workflow

1. Run category prediction and document extraction based on user provided ID
2. Identify whether the user wants to update product categories or spend categories.
3. Extract purchase header record numbers from the user's request, and optionally collect a reason for the update and a suggested category.
4. Run the validation tool to generate AI-suggested categories and present both AI and user suggestions as selectable options.
5. Let the user choose a category for each line item or skip individual lines.
6. Submit the selected categories to update the records.

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Configuration

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Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Category prediction Document extraction Spend category validation Update record
Allowed user roles The specific user roles that can access this AI agent.	sn_shop.procurement_specialist, sn_spend_gen_ai.now_assist_fulfiller
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_shop.procurement_specialist, sn_spend_gen_ai.now_assist_fulfiller
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

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Learn more about Sourcing and Procurement Operations at Sourcing and Procurement Operations.

Contract Optimization Opportunity Finder agent

This Sourcing and Procurement Operations agent analyzes supplier contracts to identify and create savings opportunities by analyzing price escalations, renewal caps, and payment terms. It can also answer follow-up questions about spend data, contracts, savings opportunities, pipeline projects, and savings calculations.

Workflow

1. When run as a scheduled job, use the ContractSpendAnalyzer tool to scan supplier contracts and create savings opportunities based on price escalations, renewal caps, and payment terms.
2. When a user creates a pipeline project from a savings opportunity, show pre-filled details, collect changes and priority, then run the Create Pipeline Project tool after confirmation.
3. Offer to generate a chat summary of the session and, if the user agrees, post it to the pipeline project's work notes.
4. For any other question about spend data, contracts, savings opportunities, pipeline projects, or savings calculations, run the SpendIntelligenceTool to answer.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** ContractSpendAnalyzer Create Pipeline Project SpendIntelligenceTool
Allowed user roles Specific user roles that can access this AI agent.	sn_spend_gen_ai.now_assist_fulfiller, sn_shop.procurement_specialist, sn_spend_mgmt.category_manager_admin

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Configuration (continued)

Field	Description
Data access roles Specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_spend_gen_ai.now_assist_fulfiller, sn_shop.procurement_specialist, sn_spend_mgmt.category_manager_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Savings Opportunity Discovery

Learn more about Sourcing and Procurement Operations at Sourcing and Procurement Operations.

Spend Optimization Opportunity Finder agent

This Sourcing and Procurement Operations agent compares on-contract and off-contract purchase order pricing to identify savings opportunities, quantifying the potential savings from redirecting off-contract spend to existing supplier contracts. It can also answer follow-up questions about spend data, contracts, savings opportunities, pipeline projects, and savings calculations.

Workflow

1. When run as a scheduled job, use the OffContractSpendAnalyzer tool to compare on-contract and off-contract purchase order pricing and create savings opportunities.
2. When a user creates a pipeline project from a savings opportunity, show pre-filled details, collect changes and priority, then run the Create Pipeline Project tool after confirmation.
3. Offer to generate a chat summary of the session and, if the user agrees, post it to the pipeline project's work notes.
4. For any other question about spend data, contracts, savings opportunities, pipeline projects, or savings calculations, run the SpendIntelligenceTool to answer.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.

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Configuration (continued)

Field	Description
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** OffContractSpendAnalyzer Create Pipeline Project SpendIntelligenceTool
Allowed user roles The specific user roles that can access this AI agent.	sn_spend_gen_ai.now_assist_fulfiller, sn_shop.procurement_specialist, sn_spend_mgmt.category_manager_admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_spend_gen_ai.now_assist_fulfiller, sn_shop.procurement_specialist, sn_spend_mgmt.category_manager_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Savings Opportunity Discovery

Learn more about Sourcing and Procurement Operations at Sourcing and Procurement Operations.

Supplier Optimization Opportunity Finder agent

This Sourcing and Procurement Operations agent analyzes spend data to identify supplier optimization opportunities across non-preferred supplier spend, unconsolidated spend, spend

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fragmentation, and supplier performance and risk. It can also answer follow-up questions about spend data, contracts, savings opportunities, pipeline projects, and savings calculations.

Workflow

1. When run as a scheduled job, use the SupplierSpendAnalyzer tool to scan for non-preferred supplier spend and unconsolidated spend, and create savings opportunities.
2. When a user creates a pipeline project from a savings opportunity, show pre-filled details, collect changes and priority, then run the Create Pipeline Project tool after confirmation.
3. Offer to generate a chat summary of the session and, if the user agrees, post it to the pipeline project's work notes.
4. For any other question about spend data, contracts, savings opportunities, pipeline projects, or savings calculations, run the SpendIntelligenceTool to answer.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** SupplierSpendAnalyzer Create Pipeline Project SpendIntelligenceTool
Allowed user roles The specific user roles that can access this AI agent.	sn_spend_gen_ai.now_assist_fulfiller, sn_shop.procurement_specialist, sn_spend_mgmt.category_manager_admin
Data access roles The specific user identity roles that determine which data the AI agent	sn_spend_gen_ai.now_assist_fulfiller, sn_shop.procurement_specialist, sn_spend_mgmt.category_manager_admin

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Savings Opportunity Discovery

Learn more about Sourcing and Procurement Operations at Sourcing and Procurement Operations.

Strategic Portfolio Management

Strategic Portfolio Management AI agents

The following AI agents are available for Strategic Portfolio Management.

Project eligibility analysis AI agent

This Strategic Portfolio Management agent performs checks for project and project task related requests. The agent analyzes requests to check impact on a project due to project task. It checks if the project summary email skill is enabled for the instance and whether the skill was enabled for a given project.

Workflow

1. Verify that the project summary email skill is enabled on the instance.
2. Retrieve the parent project information using the input task number.
3. Verify that the project manager has scheduled a project summary email for this project.
4. If both checks pass, hand off to the next agent to analyze the task's impact on the project. If either check fails, terminate the workflow.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting

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Configuration (continued)

Field	Description
	is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Check if project email insights skill is enabled **Scripts** Fetch Email insight configuration and check if critical update Get project details for a given task number
Allowed user roles The specific user roles that can access this AI agent.	project_manager
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	agent_role_config_viewer, agent_workspace_user, app_service_user, baseline_user, canvas_user, cmdb_ms_user, cmdb_query_builder, cmdb_query_builder_read, cmdb_read, currency_instance_report_admin, data_manager_user, decision_table_reader, demand_manager, demand_user, dependency_views, financial_mgmt_user, fiscal_calendar_user, idea_manager, interaction_agent, it_demand_manager, it_demand_user, it_project_manager, it_project_portfolio_user, it_project_user, notify_view, now_assist_panel_user, pa_viewer, planning_console_user, pps_resource, project_manager, project_portfolio_user, project_user, prompt_library_user, rate_model_user, report_group, report_user, resource_user, rm_doc_admin, rm_epic_admin, rm_release_scrum_admin, rm_scrum_task_admin, rm_sprint_admin, rm_story_admin, rm_task_admin, rm_test_admin, role_viewer, scrum_admin, scrum_user, skill_user, snc_internal, snc_required_script_writer_permission, sn_ace.ace_user, sn_ai_filter_assist.user, sn_ai_filter_tracker.user, sn_bm_client.benchmark_data_viewer, sn_change_read, sn_cmdb_user, sn_csm_household.viewer, sn_csm_pricing.pricelist_viewer, sn_customerservice.customer_data_viewer, sn_gf.goal_user, sn_gf.goal_user_read, sn_gf.strategy_planner, sn_gf.strategy_planner_read, sn_ind_tmt_orm.fulfillment_viewer, sn_ind_tmt_orm.order_viewer, sn_invst_pln.std_user, sn_invst_pln_investment_user, sn_invst_pln_v2.investment_user, sn_l2c_core.entity_mapping_viewer, sn_nowassist_admin.user, sn_ord_qual_mgmt.alternate_proposal_read, sn_prd_invt.product_inventory_operations_read, sn_prd_invt.product_inventory_viewer, sn_prd_pm.characteristics_viewer, sn_prd_pm.product_catalog_viewer, sn_prd_pm.product_model_characteristic_viewer,

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Configuration (continued)

Field	Description
	sn_pss_core.service_contract_viewer, sn_query_gen.user, sn_shn.user, sn_sow.sow_home, sn_sow.sow_list, sn_sow.sow_user, sn_spm_gen_ai.assist_user, sn_sttrm_condition_read, sn_tmt_core.inbound_queue_read, sn_udc.basic_read, sn_uib_collab.user, sn_workflow_studio.workflow_studio_read, survey_reader, task_editor, template_read_global, timecard_approver, timecard_user, timeline_user, view_changer, viz_creator, workspace_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Not defined.
Used in agentic workflows	Generate Project Summary

Learn more about Strategic Portfolio Management at Strategic Portfolio Management.

Project summarization AI agent

This Strategic Portfolio Management agent assists project managers to get a summary of the project. The agent helps in keeping their projects on track, by providing actionable and proactive updates on critical changes to projects. It also generates the project summaries.

Workflow

1. Produce project insights and update the status to the project manager.
2. Close without further interaction.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the

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Configuration (continued)

Field	Description
	sn_aia.ltm.enable_long_term_memory system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Subflow** Generates the project summary
Allowed user roles The specific user roles that can access this AI agent.	project_manager
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	agent_role_config_viewer, agent_workspace_user, app_service_user, baseline_user, canvas_user, cmdb_ms_user, cmdb_query_builder, cmdb_query_builder_read, cmdb_read, currency_instance_report_admin, data_manager_user, decision_table_reader, demand_manager, demand_user, dependency_views, financial_mgmt_user, fiscal_calendar_user, idea_manager, interaction_agent, it_demand_manager, it_demand_user, it_project_manager, it_project_portfolio_user, it_project_user, notify_view, now_assist_panel_user, pa_viewer, planning_console_user, pps_resource, project_manager, project_portfolio_user, project_user, prompt_library_user, rate_model_user, report_group, report_user, resource_user, rm_doc_admin, rm_epic_admin, rm_release_scrum_admin, rm_scrum_task_admin, rm_sprint_admin, rm_story_admin, rm_task_admin, rm_test_admin, role_viewer, scrum_admin, scrum_user, skill_user, snc_internal, snc_required_script_writer_permission, sn_ace.ace_user, sn_ai_filter_assist.user, sn_ai_filter_tracker.user, sn_bm_client.benchmark_data_viewer, sn_change_read, sn_cmdb_user, sn_csm_household.viewer, sn_csm_pricing.pricelist_viewer, sn_customerservice.customer_data_viewer, sn_gf.goal_user, sn_gf.goal_user_read, sn_gf.strategy_planner, sn_gf.strategy_planner_read, sn_ind_tmt_orm.fulfillment_viewer, sn_ind_tmt_orm.order_viewer, sn_invst_pln.std_user, sn_invst_pln_investment_user, sn_invst_pln_v2.investment_user, sn_l2c_core.entity_mapping_viewer, sn_nowassist_admin.user, sn_ord_qual_mgmt.alternate_proposal_read, sn_prd_invt.product_inventory_operations_read, sn_prd_invt.product_inventory_viewer, sn_prd_pm.characteristics_viewer, sn_prd_pm.product_catalog_viewer, sn_prd_pm.product_model_characteristic_viewer, sn_pss_core.service_contract_viewer, sn_query_gen.user, sn_shn.user, sn_sow.sow_home, sn_sow.sow_list, sn_sow.sow_user, sn_spm_gen_ai.assist_user, sn_sttrm_condition_read, sn_tmt_core.inbound_queue_read, sn_udc.basic_read, sn_uib_collab.user, sn_workflow_studio.workflow_studio_read, survey_reader, task_editor, template_read_global, timecard_approver, timecard_user, timeline_user, view_changer, viz_creator, workspace_user

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Configuration (continued)

Field	Description
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Not defined.
Used in agentic workflows	Generate Project Summary

Learn more about Strategic Portfolio Management at Strategic Portfolio Management.

Validate the work item and generate stories AI agent

This Strategic Portfolio Management agent transforms Enterprise Agile Planning work items (epics and features) into a set of well-formed, actionable user stories. It evaluates work items to verify that it contains sufficient information, and guides users through a structured validation process.

Workflow

1. Collect the work item number, description, and any additional context as needed (based on flags from the system), confirming with the user before saving each piece of information.
2. Produce user stories based on the validated work item and collected context.
3. Display the generated stories and offer refinement options: discard stories, combine or split them, adjust personas or metrics, or add new ones.
4. If the user chooses to refine, apply their changes, re-display the updated stories, and offer the same refine-or-save choice again. This loop continues until the user chooses to save.
5. Save the finalized stories to the system and give the user a navigation link to view them.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Refine Stories Save stories Validate and Generate Stories
Allowed user roles The specific user roles that can access this AI agent.	sn_apw_advanced.eap_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_apw_advanced.eap_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Create stories

Learn more about Strategic Portfolio Management at Strategic Portfolio Management.

Supplier Lifecycle Operations

Supplier Lifecycle Operations AI agents

The following AI agents are available for Supplier Lifecycle Operations.

Supplier data steward AI agent

This Supplier Lifecycle Operations agent manages supplier onboarding by verifying details, detecting duplicates, presenting scorecards for review, creating records, and updating case status.

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Workflow

1. Based on the case state, prompt the user for a case number (if details are needed), proceed directly to record creation, or handle duplicates.
2. Generate the supplier scorecard from web search results, highlighting key strengths, positive indicators, and potential risk signals. Wait for the user to select either **Reject onboarding** or **Continue onboarding**. The agent can't proceed until the user chooses.
3. If Craft is configured, use the Craft integration to generate a supplier scorecard that provides a comprehensive, normalized evaluation of the supplier's overall profile and associated risk factors. Wait for the user to select either **Reject onboarding** or **Continue onboarding**.
4. Present the duplicate records to the user and ask whether to continue. If yes, offer the option to correct the supplier's legal name, email, or both before proceeding. If the correction resolves the duplicate, continue to onboarding. If the correction triggers a rejection, stop. If the user declines to continue, proceed with rejection.
5. Run the verification and record creation tool using the supplier details.
6. Display one of six results: successful registration, halted by user decision, rejected due to validation failure, rejected for other reasons, rejected at the web search review, or rejected at the Craft review.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	• Script: Update Supplier Case Details • Flow action: Supplier craft analysis action • Web search: Supplier websearch analysis • Subflow: Verify and create records
Allowed user roles	sn_slm.owner, sn_supplier_gen_ai.now_assist_fulfiller

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_slm.owner, sn_supplier_gen_ai.now_assist_fulfiller
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about Supplier Lifecycle Operations at Supplier Lifecycle Operations.

Supplier data validator AI agent

This Supplier Lifecycle Operations agent takes a supplier case number and initiates the supplier banking task validation process. The validation process compares the bank account proof against the banking details provided by the supplier contact.

Workflow

1. Run the validation tool with the provided case number. The tool retrieves the supplier banking task details and initiates the validation process.
2. Display a message confirming that the validation process has started.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI

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Configuration (continued)

Field	Description
	Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Supplier banking task validation process
Allowed user roles The specific user roles that can access this AI agent.	sn_slm.owner, sn_supplier_gen_ai.now_assist_fulfiller
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_slm.owner, sn_supplier_gen_ai.now_assist_fulfiller
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about Supplier Lifecycle Operations at Supplier Lifecycle Operations.

Supplier document strategy generator agent

This Supplier Lifecycle Operations agent assists with supplier onboarding by retrieving the supplier's region and industry, then identifying customized onboarding tasks that meet compliance and regulatory requirements.

Workflow

1. Check whether the supplier's region and industry are already known. Ask for either or both if they are missing.
2. When both values are available, search all published knowledge base articles and extract the conformance and regulatory tasks from the articles relevant to the supplier's region and industry.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow action** Supplier task list generator from KB
Allowed user roles The specific user roles that can access this AI agent.	sn_supplier_gen_ai.now_assist_fulfiller, sn_slm.owner
Data access roles Specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_supplier_gen_ai.now_assist_fulfiller, sn_slm.owner
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about Supplier Lifecycle Operations at Supplier Lifecycle Operations.

Supplier approval AI agent

This Supplier Lifecycle Operations agent performs the supplier activation or supplier rejection tasks during supplier approval process.

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Workflow

1. Identify whether the request is for supplier activation or rejection.
2. Confirm with the user that they want to proceed. If the user declines, switch to the rejection path.
3. For an activation, set the supplier case status to Closed complete, and set **Onboarded** to Yes and **Active** to true on the supplier record.
4. For a rejection, ask the user for a rejection reason and set the supplier case status to Closed rejected.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Update supplier and supplier case status
Allowed user roles The specific user roles that can access this AI agent.	sn_supplier_gen_ai.now_assist_fulfiller, sn_slm.owner
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_supplier_gen_ai.now_assist_fulfiller, sn_slm.owner
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.

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Configuration (continued)

Field	Description
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

Learn more about Supplier Lifecycle Operations at Supplier Lifecycle Operations.

Telecom, Media and Tech AI agents

Telecommunications, Media and Technology AI agents

The following AI agents are available for Telecommunications, Media and Technology.

Billing account information collector AI agent

This Telecommunications, Media, and Technology (TMT) agent retrieves billing case and account details and communicates them to the user in a structured format.

Workflow

1. Fetch the billing inquiry case information using the case number already provided by the user.
2. Pull the case account number and account name from the case details, then present them to the user.
3. Fetch the billing account details using the case account information. If the billing account can't be found, ask the user to correct the case account number and retry.
4. Show the billing account details to the user.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.

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Configuration (continued)

Field	Description
Tools	**Script** Fetch Billing Account Details **Flow Action** Fetch Current Billing Inquiry Case Details
Allowed user roles The specific user roles that can access this AI agent.	sn_tmt_agentic_ai.telco_billing_inquiry_case_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_tmt_agentic_ai.telco_billing_inquiry_case_agent
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Not defined.
Used in agentic workflows	Help remediate bill issues

Learn more about Supplier Lifecycle Operations at Supplier Lifecycle Operations.

Billing invoice data collector AI agent

This Telecommunications, Media, and Technology (TMT) agent provides detailed information about invoices, validates amounts, and identifies high-amount line items for billing inquiries. The agent retrieves invoice history, communicates invoice and line item details to the user, and flags potential causes of high charges.

Workflow

1. Fetch the invoice history using the billing account number and extract the latest and previous invoices.
2. Show the user the key details for each invoice: number, amount, usage billed through, and credited amount.
3. If the latest invoice has a pending amount greater than zero, notify the user of the outstanding balance and due date.

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4. Fetch detailed line items for the latest invoice and present them to the user. If the line items can't be retrieved, inform the user and stop.
5. If the latest invoice amount is higher than the previous invoice, identify the line item responsible for the increase. Inform the user which item likely caused the higher bill. If the latest invoice is not higher, return control to the orchestrator.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Get high amount line item Get Invoice Details Get Invoice History
Allowed user roles The specific user roles that can access this AI agent.	sn_tmt_agentic_ai.telco_billing_inquiry_case_agent
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_tmt_agentic_ai.telco_billing_inquiry_case_agent
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Not defined.

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Configuration (continued)

Field	Description
Used in agentic workflows	Help remediate bill issues

Learn more about Supplier Lifecycle Operations at Supplier Lifecycle Operations.

Billing plan recommender AI agent

This Telecommunications, Media, and Technology (TMT) agent generates recommended service plans and updates the billing inquiry case work notes with the results. The agent helps to ensure a seamless recommendation process without requiring additional user input beyond initial confirmation.

Workflow

1. Retrieve plan recommendations based on the high usage line item code (not the case sold product code).
2. If no recommended plans are available, inform the user and stop.
3. Write the recommended plan and summary to the billing inquiry case record as a numbered, line-by-line work note entry.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Flow Action** Generate Recommended Service Plans **Script** Update work notes of Billing Inquiry Case with the Recommended Plans
Allowed user roles	sn_tmt_agentic_ai.telco_billing_inquiry_case_agent

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_tmt_agentic_ai.telco_billing_inquiry_case_agent
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Help remediate bill issues

Learn more about Supplier Lifecycle Operations at Supplier Lifecycle Operations.

Unified Security Exposure Management AI agents

Unified Security Exposure Management AI agents

The following AI agents are available for Unified Security Exposure Management.

VR data retrieval agent AI agent

This Unified Security Exposure Management agent answers questions about vulnerability response data by constructing and executing table queries.

Workflow

1. Introduce the agent's capabilities with example queries and ask how to help.
2. Prompt for a request, ask for clarification if anything is ambiguous or incomplete, and redirect if the request falls outside Vulnerability Response scope.
3. Call the search tool and return its response exactly as received.
4. Ask if the user wants to refine the query or run another search.
5. Continue the loop until the user says they're finished.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Search tool
Allowed user roles The specific user roles that can access this AI agent.	sn_vul.remediation_owner, sn_vul.app_sec_manager, sn_vul.vulnerability_admin, sn_vul.vulnerability_analyst
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_vul.remediation_owner, sn_vul.vulnerability_analyst, sn_vul.vulnerability_admin, sn_vul.app_sec_manager
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Retrieve VR data

Learn more about Unified Security Exposure Management at Unified Security Exposure Management (USEM).

Remediation compliance analysis AI agent

This Unified Security Exposure Management agent provides insights around remediation target compliance. It provides SLA or compliance statistics about remediation targets. The agent can

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break down these numbers by attributes such as severity, assignment group, or configuration class item class.

Workflow

1. Extract the target year, month (defaults to previous month), and grouping attribute (defaults to assignment group) for the user query.
2. Retrieve compliance statistics for the specified time period and grouping.
3. After presenting results, offer three additional options:

   Break down by CI class

   Re-run the statistics grouped by CI class instead of assignment group.

   Compare against another month

   Generate a side-by-side comparison of statistics between two months.

   Identify highs/lows

   Retrieve the full summary and extract which specific assignment groups or CI classes have the highest or lowest missed SLAs for a given severity.
4. Continue the follow-up loop until the user is finished or asks something outside this agent's scope (in which case, route to another agent).

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Generate comparison summary Get full summary Get remediation compliance statistics
Allowed user roles	sn_vul.vulnerability_analyst, sn_vul.vulnerability_admin

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Configuration (continued)

Field	Description
The specific user roles that can access this AI agent.	
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_vul_ai.read_rem_insights, sn_vul_ai.write_rem_insights
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.
Used in agentic workflows	Analyze vulnerability remediation status

Learn more about Unified Security Exposure Management at Unified Security Exposure Management (USEM).

Vulnerability exposure analysis AI agent

This Unified Security Exposure Management agent assesses vulnerability on business services or configuration items.

Workflow

1. Determine whether the user is asking about CISA Known Exploitable Vulnerabilities, specific CVE/vulnerability IDs, configuration item names, or business service names.
2. Call the matching tool based on the input type to retrieve vulnerability data, impact assessments, or CISA KEV information.
3. Display the findings, then offer to help with additional tasks:
   - Check CISA KEVs
   - Assess CVE impact
   - Evaluate vulnerabilities against a business service or CI
   - Provide more detail on a vulnerability
   - Create watch topics
4. Follow-up until the user indicates they're finished.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Analyze CVE impact Check for recent CISA KEVs Create a watch topic Get more information about a vulnerability Summarize business service vulnerabilities Summarize CI vulnerabilities
Allowed user roles The specific user roles that can access this AI agent.	sn_vul.vulnerability_analyst, sn_vul.vulnerability_admin
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_vul.read_all, cmdb_read, sn_vul.create_watch_topic
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Enable the AI agent for the ServiceNow Otto panel.

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Configuration (continued)

Field	Description
Used in agentic workflows	Assess vulnerability exposure

Learn more about Unified Security Exposure Management at Unified Security Exposure Management (USEM).

Workflow Data Fabric AI agents

Workflow Data Fabric AI agents

The following AI agents are available for Workflow Data Fabric.

Automation finder AI agent

This Workflow Data Fabric agent fetches automation records from tables on your instance. The agent discovers relevant automations for a specified asset, estimates cost and time savings, saves the discovered automations, and presents a value insights summary to the user.

Workflow

1. Pass the input JSON received from the data-collection agent to the automation discovery tool to find relevant automations.
2. For the first few discovered automations, run the saving estimator tool to calculate time and cost savings per run, then append those estimates to each automation's record.
3. Execute the discovered automations tool to persist the results and generate a summary.
4. Display the output under the title **Value Insights**, without listing individual automations or inventing additional content.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script**

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Configuration (continued)

Field	Description
	Automation Discovery **Topic** Discovered Automations **Generative AI skill** Saving Estimator
Allowed user roles The specific user roles that can access this AI agent.	Not defined.
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_ac.automation_technical_user
Triggers	sn_ac.automation_technical_user
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Automation Explorer

Learn more about Workflow Data Fabric at Build an automation with AI.

Automation table discovery AI agent

This Workflow Data Fabric agent collects asset, time, and scope inputs from the user and returns a structured JSON payload identifying the target execution tables for automation discovery.

Workflow

1. Prompt the user for an automation asset they want to analyze. Only six asset types are supported:
   - ServiceNow Flows
   - Subflows
   - Actions
   - Catalog Items
   - Playbooks
   - RPA Bots
2. Ask the user what time range to analyze.

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3. Ask which application scope(s) to search across.
4. Display a confirmation message summarizing the selections, then output a structured JSON payload for a downstream workflow to execute the actual search.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Questionnaire
Allowed user roles The specific user roles that can access this AI agent.	sn_ac.automation_technical_user
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	sn_ac.automation_technical_user
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Automation Explorer

Learn more about Workflow Data Fabric at Build an automation with AI.

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Workflow data fabric flow generation AI agent

This Workflow Data Fabric agent transforms a user's natural-language integration intent into a generated Workflow Studio flow.

Workflow

1. Get the target application scope from the user (required).
2. Determine what the user wants the flow to do, checking whether the trigger and actions are both clear enough to proceed.
3. If trigger or action details are too vague, ask 1-2 targeted questions.
4. Build an imperative prompt from the user's intent, derive a name and description, invoke the generation tool once, and return the Workflow Studio link exactly as provided.
5. If generation isn't possible, provide a direct link to Workflow Studio with context about what went wrong.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Check Flow Generation Skill Check User Flow Permissions Generate Flow From Intent Generate Workflow Studio Link Look up Scope
Allowed user roles The specific user roles that can access this AI agent.	wdf_builder, maint, wdf_operator
Data access roles	wdf_builder, wdf_operator

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Configuration (continued)

Field	Description
The specific user identity roles that determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Default VA Workflow

Learn more about Workflow Data Fabric at Build an automation with AI.

Workflow data fabric product knowledge AI agent

This Workflow Data Fabric agent retrieves and summarizes knowledge articles. The agent passes the user's query verbatim to the search tool, extracts factual content from matching articles, and produces a consolidated summary with references to source documents.

Workflow

1. Pass the user's query verbatim to the knowledge retrieval tool.
2. If articles are found, summarize key findings as concise bullet points and list sources with links to ServiceNow documentation.
3. If nothing is found, provide a link to the external content connectors page so they can verify the documentation source has been crawled and indexed on their instance.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Generate External Content Connectors Link **Search retrievals** Search Product Knowledge
Allowed user roles The specific user roles that can access this AI agent.	maint, wdf_builder, wdf_operator, connection_admin, wdf_consumer, df_data_steward
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	wdf_builder, wdf_consumer, wdf_operator, df_data_steward, connection_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Default VA Workflow

Learn more about Workflow Data Fabric at Build an automation with AI.

Workflow data fabric product recommendation AI agent

This Workflow Data Fabric agent evaluates integration requirements, data movement needs, communication flows, and automation objectives expressed in the user's prompt and determines the most suitable workflow data fabric product.

Workflow

1. Check whether the user has specified a source/target system and an integration objective or pattern, clarifying with targeted questions if needed.
2. Search the internal knowledge base.

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3. Identify a best-fit product plus up to two alternatives, with rationale and trade-offs for each.
4. Always show visible output: either a specific recommendation with alternatives, or (if context was insufficient) a general product list suggesting the user consult documentation or a solutions architect.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Search retrieval** Internal KB Recommendations
Allowed user roles The specific user roles that can access this AI agent.	connection_admin, wdf_operator, maint, df_data_steward, wdf_consumer, wdf_builder
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	wdf_builder, wdf_consumer, wdf_operator, df_data_steward, connection_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Default VA Workflow

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Learn more about Workflow Data Fabric at Build an automation with AI.

Workflow data fabric spoke asset discovery AI Agent

This Workflow Data Fabric agent finds specific flows, subflows, and actions inside a named spoke that fulfill a user's stated automation goal. This agent is triggered only when a user has identified a spoke and wants to explore what reusable assets it contains for their use case.

Workflow

1. Identify the likely spoke/integration and ask the user to confirm before searching.
2. Check whether both the spoke name and a clear purpose (what the user wants to accomplish) are present, and ask additional questions if not.
3. Search for flows and actions using both the spoke name and the user's stated intent as filters.
4. Present matched flows and actions grouped by type, noting which spoke/package each belongs to.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Fetch Spoke Assets
Allowed user roles The specific user roles that can access this AI agent.	maint, df_data_steward, wdf_operator, wdf_consumer, connection_admin, wdf_builder
Data access roles The specific user identity roles that determine which data the AI agent	wdf_builder, wdf_operator, df_data_steward, connection_admin, wdf_consumer

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Default VA Workflow

Learn more about Workflow Data Fabric at Build an automation with AI.

Workflow data fabric spoke install advisor AI Agent

This Workflow Data Fabric agent helps you search for available IntegrationHub spokes that aren't installed on the instance. This agent takes the your search query, retrieves matching non-installed spokes from the instance catalog, and returns a prioritized list of candidates with installation links.

Workflow

1. Identify a specific spoke or system name from the user's request (for example, Jira or Salesforce).
2. If the request is too vague, ask questions to narrow it down. If still unclear, direct them to their ServiceNow admin or the ServiceNow® Store.
3. Search for non-installed spokes matching the identified term, running the search exactly once.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by

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Configuration (continued)

Field	Description
	the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Fetch Uninstalled Spokes
Allowed user roles The specific user roles that can access this AI agent.	wdf_consumer, connection_admin, df_data_steward, maint, wdf_operator, wdf_builder
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	wdf_builder, wdf_consumer, wdf_operator, df_data_steward, connection_admin
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Default VA Workflow

Learn more about Workflow Data Fabric at Build an automation with AI.

Zero Copy Connector AI agents

Zero Copy Connector for ERP AI agents

The following AI agents are available for Zero Copy Connector for ERP.

ERP action invoker AI agent

This AI agent gathers user inputs for a specific operation in Zero Copy Connector for ERP.

Workflow

The AI agent generates mandatory and optional inputs, and waits for the user to supply values for the mandatory inputs before passing the formatted inputs to a tool to invoke an action script.

1. Ask the user to provide mandatory inputs using the `Retrieve Mandatory and Optional Inputs` tool.
2. Ask a single yes or no question if the user also wants to include optional inputs.
3. Pass the user input, the model ID, and the operation ID to a tool that invokes an action script. Then wait until the response is received from the flow action invocation.

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Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Invoke ERP Action Retrieve Mandatory and Optional Inputs
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Explore ERP models agentic workflow

For more information, see:

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- Explore ERP models agentic workflow
- ServiceNow Otto for Zero Copy Connector
- Zero Copy Connector for ERP

ERP data fetcher AI agent

This Zero Copy Connector for ERP AI agent retrieves information about relevant models and model operations. The AI agent currently supports Read operations.

Workflow

1. Clarify the user's intent.
2. Return the requested details, if available.
3. Generate the URL to navigate to the chosen operation.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Model Operation URL Generator **Knowledge Graph** ERP Knowledge Graph
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which	snc_internal

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Configuration (continued)

Field	Description
data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Explore ERP models agentic workflow

For more information, see:

- Explore ERP models agentic workflow
- ServiceNow Otto for Zero Copy Connector
- Zero Copy Connector for ERP

ERP output formatter AI agent

The Zero Copy Connector for ERP AI agent formats and refines the output from the ERP action invoker AI agent.

Workflow

The AI agent uses the Knowledge Graph to present data in a structured, organized format for users who need ERP data.

1. Evaluate the output from the ERP action invoker AI agent.
2. If the output is not empty, send it to the `Response Formatter` tool.
3. Show the results to the user.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.

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Configuration (continued)

Field	Description
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script** Response Formatter
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent can access and what actions it can take.	snc_internal
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Explore ERP models agentic workflow

For more information, see:

- Explore ERP models agentic workflow
- ServiceNow Otto for Zero Copy Connector
- Zero Copy Connector for ERP

OData service recommender AI agent

The OData service recommender AI agent identifies relevant OData services and endpoints. The AI agent can create a model for the identified service if a model does not already exist.

Workflow

1. Determine the type of request: read, create, or update only.
2. Verify that the request maps to exactly one SAP OData V2 service.
3. Check the internal SAP OData service catalog and attempt to match the user request against catalog entries using intent keywords and domain.

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4. Resolve the request, if possible.
5. If the request is broad or ambiguous, display refinement suggestions.
6. Validate the SAP OData V2 technical service name and begin discovery.
7. Generate the final response and execute.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *sn_aia.ltm.enable_long_term_memory* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Scripts** Existing model checker Model operation URL generator Read endpoints **Subflows** OData Service Checker Model Creator **Web search** Use web search
Allowed user roles The specific user roles that can access this AI agent.	snc_internal
Data access roles The specific user identity roles that determine which data the AI agent	sn_erp_integration.erp_ai_user, sn_erp_integration.erp_admin

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Configuration (continued)

Field	Description
can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Not applicable.

For more information, see:

-
- ServiceNow Otto for Zero Copy Connector
- Zero Copy Connector for ERP

ServiceNow Otto for Zero Copy Connector and Zero Copy Connector for ERP.

About AI agents and agentic workflows

AI agents and agentic workflows pursue a goal across multiple steps, planning and acting with limited human intervention to resolve an issue or complete a request. Where a generative AI skill completes one task on demand, an agentic workflow coordinates one or more agents to carry a process from start to finish.

An AI agent works toward a goal rather than performing a single action. Given an objective, an agent can reason about the steps required, use tools to gather information and act on your systems, and adjust its approach as conditions change. An agentic workflow brings one or more agents together to complete an entire process, so work that once required a person to coordinate each step can run with limited human intervention.

Why AI agents and agentic workflows matter

Agents extend generative AI from assisting with tasks to completing outcomes. Instead of returning a draft or a summary for a person to act on, an agentic workflow can interpret a request, retrieve what it needs from your knowledge bases and enterprise systems, perform the required actions, and report the result. This work shifts routine, multi-step effort away from your teams and lets them focus on the cases that need human judgment.

Because agents adapt to changing conditions, they suit processes that vary from one case to the next. An agent can respond to what it finds at each step rather than following a fixed script, which helps it stay focused on the objective even when the details differ.

AI agents compared with generative AI skills

Generative AI skills and AI agents address different kinds of work. A skill completes one bounded task when a user asks for it, then returns control to that user. An AI agent pursues a broader goal across several steps and can decide what to do next, which makes it suited to work that no single task can finish on its own.

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The two are complementary rather than competing. Skills provide focused capabilities, and agents coordinate capabilities and tools to move a process toward an outcome. Many agentic workflows draw on the same enterprise data and generative AI foundation that skills use, applied to a larger, multi-step goal.

When to use AI agents and agentic workflows

Choose an AI agent and an agentic workflow when an outcome depends on several coordinated steps, when decisions vary with conditions that you can't fully predict, or when the work spans multiple systems and would otherwise require a person to drive each step. Agentic workflows suit processes that you want to complete with limited human intervention while keeping oversight of the actions taken.

When the work is a single task that a person starts and reviews in the moment, such as summarizing or drafting, a generative AI skill is the more direct choice.

AI Agent Studio

Build and deploy autonomous AI agents that automate complex workflows. AI Agent Studio is your command center for creating, configuring, and deploying autonomous AI agents that learn your business processes and act on them. Configure agents that learn your processes and handle routine work at scale—while you stay in control and focus on strategic priorities.

Get started

Explore Learn what AI Agent Studio can offer for your organization and how it can automate complex workflows	Configure Set up AI Agent Studio and configure the agentic AI experience for your organization	Orchestrate and govern AI agents Create and manage your own custom AI agents to use in automating the complex workflows
Orchestrate and govern agentic workflows Create and manage your agentic workflows with planned instructions and triggers for executing your autonomous AI agents	Integrate external agents Create and manage external AI agents to connect with third-party agentic AI providers	Reference Look up the user roles, tables, and properties for AI agents and agentic workflows

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Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Note: We have controls in place to enable/disable the data collection and data processing.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

Explore AI Agent Studio

Create, manage, and test AI agents and agentic workflows in one centralized space to build self-executing solutions that help you achieve your business goals.

AI Agent Studio home page

With the AI Agent Studio, you can create, manage, and test AI agents and agentic workflows all in one place. To enable the agentic AI experience, you must first install AI agents. For installation steps, see Install ServiceNow Otto AI Agents.

The AI Agent Studio home page provides an overview of your agentic AI environment with recently edited items and a library of prebuilt automations. From the home page, you can access the library, which includes featured items, AI agents for tasks, and agentic workflows for processes.

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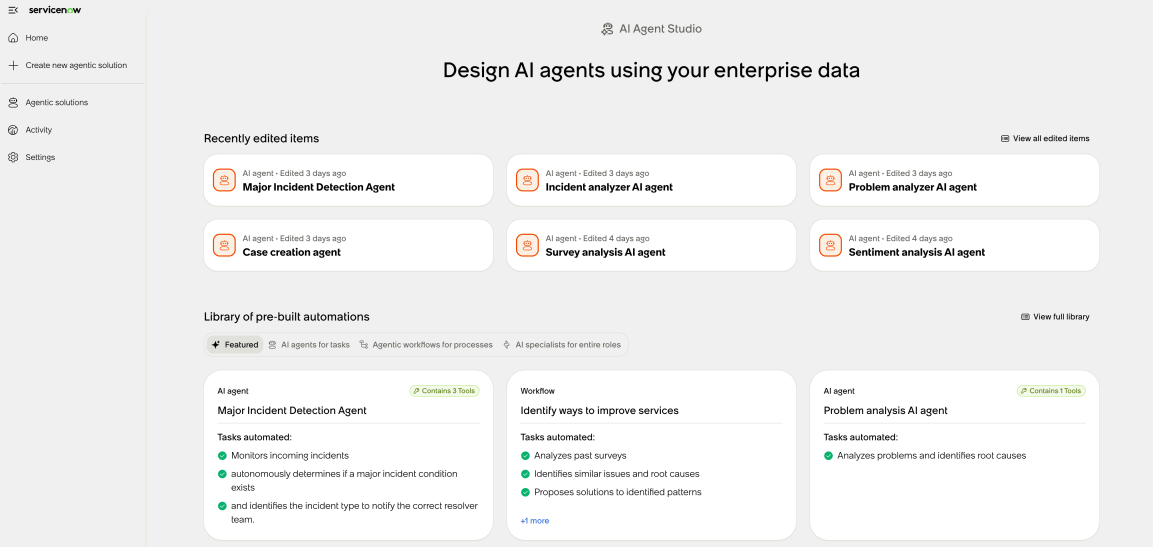

Automation opportunities

The AI Agent Studio home page also lists automation opportunities identified from your instance data, each with an estimated cost saving and time saving. You can use the list to decide which automations to build first.

Cost and time saving estimates are derived from the number of records analyzed for the opportunity, the average handling time for those records, and a standard labor rate. The figure is an annualized projection rather than a measured result, and it is rounded for display. Read the inputs before treating a figure as a business case: a large headline number usually reflects a high record volume rather than a large saving on any single record.

If you select **View all automation opportunities**, you can sort the list by column and filter it by estimated cost saving and estimated time saving.

Selecting an opportunity displays a preview that summarizes the AI agent, including a count of possible tools. This count is the number of tools the opportunity is expected to require, not the number that already exist on your instance. The preview also lists resolution steps for the task being automated. These are evidence that the task can be automated. They are not an implementation plan, and they are not the full AI agent instructions. You can edit the instructions during the build process.

Building from an opportunity opens the guided setup with the opportunity context applied.

Managing agentic workflows and AI agents

From the Agentic solutions section in AI Agent Studio, you can create, duplicate, or manage existing AI agents and agentic workflows. The Agentic solutions page contains tabs for **Recently edited**, **AI agents**, **Agentic workflows**, and **AI specialists**. You can customize the list view columns to display the information that matters most to you. Search and filter options enable you to quickly find the agentic AI assets you're looking for. By selecting the name of an AI agent or agentic workflow, you can open the guided setup to configure or reconfigure it.

The tabs are scoped by type: **AI agents** lists individual agents, **Agentic workflows** lists workflows, **AI specialists** lists role-level solutions, and **Recently edited** lists items you have opened or changed regardless of type.

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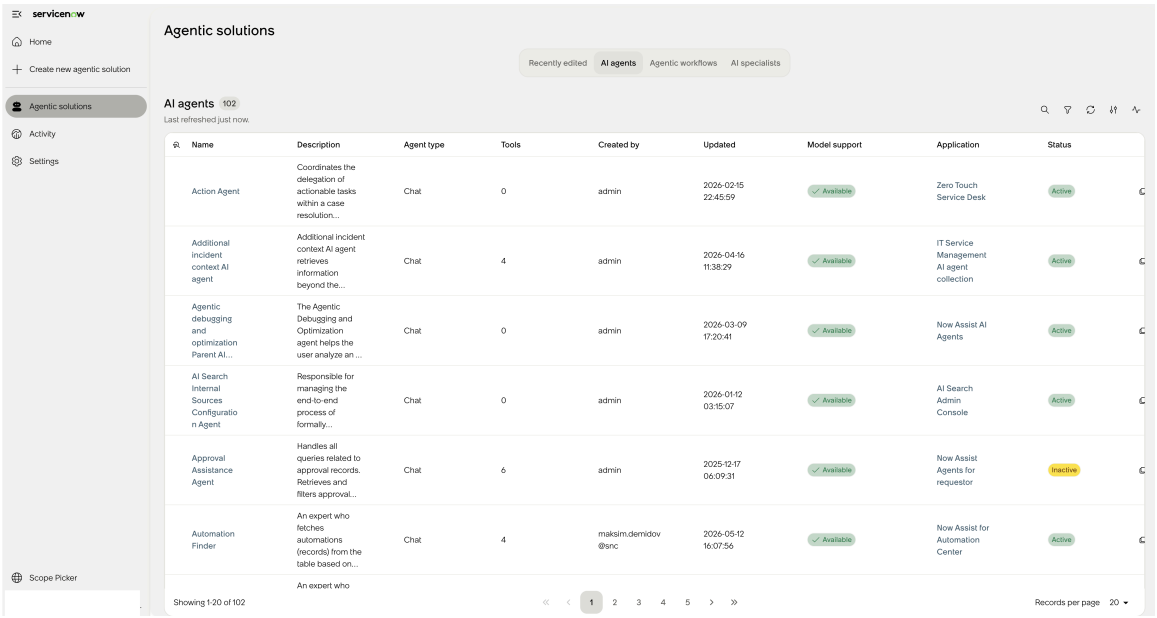
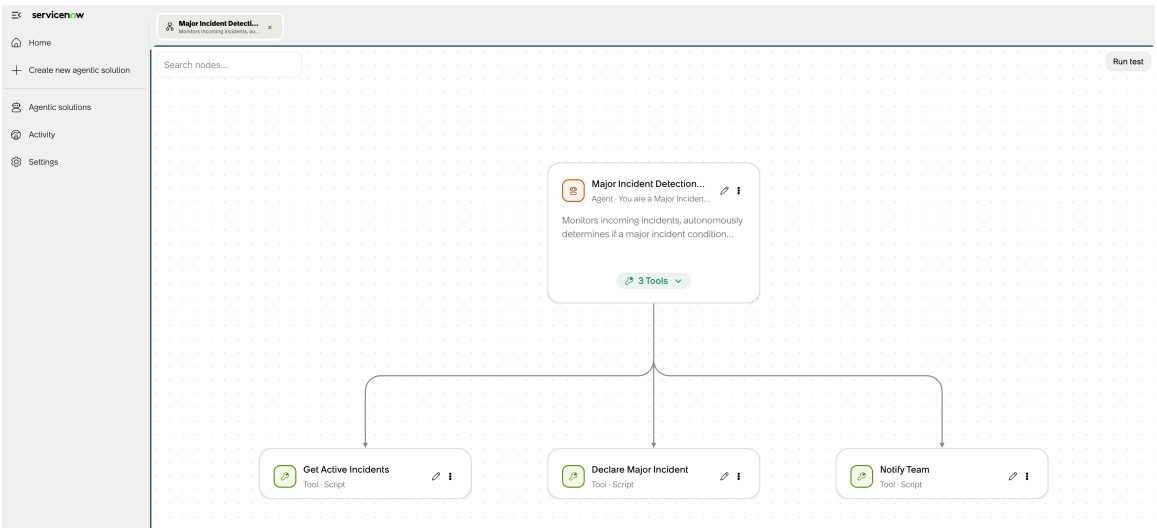


Node map view

When you select an AI agent or agentic workflow from the Agentic solutions list, the node map view opens. In the node map, you can see the structure of your agentic AI asset. For agentic workflows, the node map displays all the AI agents that make up the workflow. For AI agents, the node map displays all the tools configured for that agent.

From the node map, you can select the edit icon on any node to configure that agentic workflow, AI agent, or tool individually. You can also edit the name and description of your agentic AI asset by selecting the more options icon. You can also use the more options icon to add AI agents to agentic workflows and tools to AI agents to extend their capabilities.



Activity tracking

From the Activity section in AI Agent Studio, you can view execution logs for both AI agents and agentic workflows. On the activity page, you can track trends in how your agentic AI assets perform. You can filter executions and automated evaluations by various fields to analyze performance patterns. For comprehensive insights into AI agent and agentic workflow usage and performance, access the AI Agent Analytics dashboard.

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Runs that are still in progress, including queued test runs, appear here with their current status. Use this section to check which runs are still in progress.

Testing agentic AI

You can manually test individual AI agents and agentic workflows from their guided setup, or use automated evaluations to assess performance across multiple executions. Manual tests are suited to verifying that an AI agent or agentic workflow behaves as expected on a single test record. Automated evaluations are better at identifying underlying patterns and trends that might not be visible in individual executions.

An automated evaluation runs the asset against test scenarios you select and returns a result for each scenario plus an aggregate view across the run. Decide what you are measuring, and what score you would accept, before configuring one.

AI Agent Studio settings

From the Settings section in AI Agent Studio, you can configure AI Guardian and manage AI agent capabilities. The following settings are available:

- Offensiveness detection and Prompt injection protection
- Long-term memory for AI agents
- User facts and preferences for knowledge retention
- External AI agent settings for discoverability and communication
- Model provider configuration for large language model (LLM) selection

Configure AI Agent Studio

Configure AI agents, agentic workflows, and tools so that AI agents can plan and execute tasks using your record data and knowledge base content.

AI agents follow your instructions and act toward a specific goal by using the tools you configure for them. Using the context of your records and searchable content, AI agents plan and analyze tasks by combining business logic with instructions sent to large language models (LLMs), which suggest the next best action to take.

Note: Keep your record data and knowledge base up to date for best results.

Prerequisites

Before configuring AI agents, establish a clear plan to improve agent performance and result quality. A solid foundation minimizes redundant agents and maximizes the efficiency of existing ones.

- Identify the different kinds of tasks your agentic workflow must handle.
- Understand the general flow for your agentic workflow and agents.
- Prepare agentic tools with well-written descriptions.

Configurable elements

Use the following elements to instruct agentic workflows and AI agents within the framework.

Base plan

Instructions to the AI Agent Orchestrator for the initial planning procedure. Configured at the agentic workflow level.

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Role

A clear identity for the AI agent, comprising two elements:

Agent reasoning

When a role is added to each reasoning prompt, it gives the LLM a sense of identity for the content it generates.

Agent proficiency

An auto-generated, LLM-produced description of what an agent is capable of, derived from the role, instructions, and the descriptions of its assigned tools.

Instructions

Clear directives for the AI agent. Write instructions as a step-by-step algorithm that describes the operational flow the agent should follow.

Tool elements for agentic workflows

Each tool in an agentic workflow is defined by three elements: its functionality, its description, and its error messages.

Functionality

Functionality defines what an AI agent contributes to the agentic workflow. Configure each tool with a single, clearly scoped purpose. Multipurpose tools degrade agent performance for two reasons:

- They are harder for the AI Agent Orchestrator to reason through. When a tool can serve more than one purpose, the orchestrator must determine which purpose applies, which increases runtime.
- The tool description must account for every usage scenario, making it harder to write accurately and completely.

Note: Configure each tool as the solution to a single problem. Avoid tools that can operate in different modes.

Tool description

Tool descriptions are natural language statements that explain the utility a tool provides. Clear scope and limits help verify tools are selected for appropriate scenarios. A strong tool description includes all of the following:

- What the tool does.
- The specific agentic workflows and tasks where the tool applies.
- Scenarios where the tool is explicitly not useful, especially cases where an AI agent might incorrectly select it.
- Definitions of any terms used. For example, if a tool assigns a role to a user, explain what "role" means in the context of that instance.

Error messages

AI agents learn through trial and error. Error messages give an agent feedback on incorrect tool executions, helping it reach more valid conclusions in subsequent steps. Understanding where a tool can fail helps keep execution on track.

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Invoke Conversations with the AI Agent Background Channel

The AI Agent Background Channel lets you invoke AI agent or agentic workflow execution from the Workspace. Use it with the AI Agent Background Provider, which is based on the Custom Adapter Framework from Virtual Agent. For more information, see Configure a provider for your custom chat integration.

To add conversational capabilities to your own provider application and obtain a new inbound ID, create a channel identifier in the Provider Channel Identities table [sys_cs_provider_application]. For more information, see Create a channel identifier for your custom chat integration.

To start a conversation, trigger the flow using the `sn_aia.AiAgentRunttimeUtil().startAiAgentConversation(request)` API in the Script Include (sys_script_include) of the AIAgentBackgroundProvider, then select **Run Script**. When the script execution status shows **Success**, the conversation begins in the order of utterances defined in the script.

Conversations invoked for AI agent execution are logged in the Execution Plans [sn_aia_execution_plan] table. Open the conversation record to confirm the device type as **AI Agent Background**. Open the execution record to review the **Execution Tasks**, **Messages**, and **Tool Executions**.

You can also review the complete execution steps on the AI Agent Studio Testing page. Copy the execution plan record's sys_id and test it there. On the **Chat responses** tab, the AI agent decision logs show agent details and the tools used to resolve the issue.

Interactive and non-interactive execution modes

AI agents operate in one of the two execution modes, which determine how the agent handles fallback scenarios during execution.

Interactive

The AI agent reaches out to the user for information when a fallback occurs, then re-triggers the flow after receiving a response.

Non-interactive

The AI agent does not contact the user at any fallback stage. Instead, it uses a dynamic prompt approach through the ReAct layer, where the prompt adapts based on the execution mode. Fallback options don't collect user input. The output of the AI agent or agentic workflow is still presented to the user, and any execution failure displays a message in the Now Assist panel or Virtual Agent.

The execution mode is set in the **Execution Mode** field in the Execution Plans [sn_aia_execution_plan] table and is determined at runtime.AI agents and agentic workflows can run concurrently in the AI Agent Background Channel and in non-interactive mode. Background execution allows AI agents to operate alongside any chat panel, such as the Now Assist panel or Virtual Agent.

Multilingual support

AI agents support multiple languages to improve translation quality. You can:

- Tune system prompts for native-language translations.
- Implement dynamic translation strategies when native support is unavailable.
- Validate translation quality through automated and manual evaluations.

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AI Agent Studio skills migration

You can automatically migrate all AI Agent Studio skills from the on-glide execution path to the off-glide execution path by enabling the **Off-Glide Enabled** setting. This migrates skills to Mosaic.

1. Navigate to the OneExtend Capabilities [sys_one_extend_capability.list] table.
2. Find the Now Assist AI Agents application.
3. Set **Off-Glide Enabled** to **true**.
4. Select **Save**.

Install AI Agent Studio

Install Now Assist AI agents on your ServiceNow instance to enable the agentic AI experience.

Before you begin

To get started with AI agents, you must have:

- **License requirements**: A ServiceNow Pro Plus or Enterprise Plus license.

  Note: A Now Assist License is required. Now Assist AI Agents is available to all users who have Now Assist.

- **Instance requirements**: An instance on Australia Patch 1 or later.
- **Application requirements**: The following store applications and all the dependency applications must be installed and updated:
  - Now Assist for IT or HRSD (or other workflows).

    Note: AI agents aren't standalone applications that you can install directly. To enable AI agents on your instance, you must install and activate other Now Assist applications that include AI agents, such as ServiceNow Otto for IT Service Management (ITSM) or ServiceNow Otto for Customer Service Management (CSM).

  - Now Assist AI Agents store application
- AI Search enabled on your instance.
- The Now Assist panel must be turned on.

  Note: You can access AI agents in the Now Assist panel. To enable the Now Assist panel, see Turn on the Now Assist panel.

Role required: sn_aia.admin

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for and select a Now Assist application, such as ServiceNow Otto for IT Service Management (ITSM) or Now Assist for Platform.
3. Select **Install**.

Result

AI agents associated with the Now Assist application are installed on your instance.

What to do next

Assign the admin role

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Add the role `sn_aia.admin` to the user who will administer the AI Agent Studio, and then navigate to **All > AI Agent Studio > Overview**.

Access the AI Agent Studio

Navigate to **All > AI Agent Studio > Overview** in the AI Agent Studio application navigator where you can create and manage AI agents and agentic workflows.

Group Action Framework (GAF) is an optional way for AI agents to identify and access records using AI-generated indexes and clusters. GAF can be faster and more reliable than AI Search, the default, in some cases. If you want to set up GAF, which can be used instead of AI Search results for gathering related records, see Set up Group Action Framework.

Set up AI Agent Studio

The default (base system) AI agents provide preconfigured agentic workflows that address common business challenges across ServiceNow applications. Before activating the default AI agents, you must verify that your instance meets the prerequisites and complete the required configuration steps.

Before you begin

Role required: sn_aia_admin

About this task

Prerequisites

Platform version:

- Minimum: Yokohama Patch 1+ or Xanadu Patch 7+
- Recommended: Yokohama Patch 11 or Zurich Patch 5

Required plugins and store Apps

- Now Assist AI agents store app (version 6.0.17 or later as of December 2025)
- At least one Now Assist workflow plugin:
  - ServiceNow Otto for ITSM
  - ServiceNow Otto for HRSD
  - ServiceNow Otto for CSM
  - Now Assist for Security Operations
- Generative AI Controller plugin (minimum version 11.0.0)

Note: Select **Load demo data** during installation to access preconfigured examples.

Licensing Requirements

Now Assist Pro Plus or Enterprise entitlement

Required User Roles

- sn_aia.admin - Provides access to AI Agent Studio
- sn_nowassist_admin.nsa_admin - Enables Now Assist administration

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Procedure

1. Enable AI Search.
   a. Navigate to **AI Search** > **AI Search Status**.
   b. Verify that AI Search is enabled.
2. Enable Now Assist panel.
   a. Navigate to **Now Assist admin** > **Experiences**.
   b. Turn on the **Panel** option.
3. Access the AI Agent Studio.
   a. Navigate to **All** > **AI Agent Studio** > **Overview**.
   b. Review the available default (base system) agentic workflows.
4. Activate the default agentic workflows.
   a. Select the agentic workflow that you want to use from the available default workflows.
   b. Activate the workflow. The default workflows are set to read only and must be activated before use.

   The default (OOTB) agentic workflows include:

   - Generate resolution plans
   - Analyze incident trends
   - Classify tasks
   - Investigate IT problems
   - Process emails for tasks
5. Configure chat assistants.
   a. Navigate to **Conversational Interfaces** > **Assistants**.
   b. Determine which chat assistants can access your AI agents.
   c. Complete the configuration wizards for Now Assist panel (NAP) or Now Assist Virtual Agent (NAVA).
6. Configure LLM Connections (optional).

   If using external LLM providers instead of the default OpenAI GPT-4.1:

   a. Navigate to **Now Assist admin Console** > **Settings** > **Manage Integration**.
   b. Configure API credentials for your chosen LLM provider.

   Note: The default Orchestration layer uses OpenAI GPT-4.1 5.4 on ServiceNow-managed Azure servers.

7. Test the default AI agents.
   a. Navigate to **AI Agent Studio** > **Testing** > **Test AI reasoning**.
   b. Verify that the orchestrator canvas displays agent execution properly.
   c. Review AI agent decision logs to confirm interactions and thought processes are recorded.

Configure AI Agent Studio settings

Configure general settings for AI Agent Studio and agentic AI assets.

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Before you begin
Role required: sn_aia.admin

About this task
AI Agent Studio has multiple settings for your agentic AI assets and how they function within the ServiceNow AI ecosystem.

Procedure
1. Navigate to **All** > **AI Agent Studio** > **Settings**.
2. Enable AI Guardian.

   AI Guardian enables you to help protect against offensive content and prompt injection. You can choose whether to check for offensive content, or you can configure prompt injection detection in AI Admin Hub.
3. Set up long-term memory for agentic AI.

   Long-term memory allows agentic AI assets to remember user preferences or facts from previous interactions and use these memories for more focused conversations.
4. Configure external AI agent discoverability and contextual data.

   You can use third-party integrations to connect ServiceNow to other agentic AI systems. From the **Settings** page, you can choose whether you want to discover external agents or have your ServiceNow AI agents discoverable by others. You can also configure memory and data access for external AI agents.
5. Manage Model Contextual Protocol (MCP) servers.

   MCP servers can connect ServiceNow AI agents with external tools to perform additional tasks.
6. Select your large language model (LLM) provider.

   Choose which LLM model provider to use for all agentic AI assets on your instance.

   Note: Options for available LLM providers are configured with AI Control Tower.
7. **Optional:** Select **View legacy AI Agent Studio** to access the previous iteration of the AI Agent Studio UI.

Enable Now Assist Guardian in AI Agent Studio

Identify and block offensive messages that are sent by human agents automatically by enabling AI Guardian in AI agents. With this capability, you can help reduce your agentic workflow or test from being exposed to harmful content.

Before you begin
Role required: admin

About this task
The AI Guardian, which is a ServiceNow AI Platform capability in the Now Assist panel, is a set of guardrails that are designed to intercept and mitigate offensive, sensitive, or security-related issues that may arise during interactions with the Now Assist application.

For example, let's say that AI Guardian detects an offensive message in the execution plan of an agentic workflow. When you try to trigger the plan or test it, AI Guardian can step in to terminate the plan or test because it detected harmful content at the first step of the execution plan.

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For more information about the different guardrails, see Now Assist Guardian.

Procedure

1. Configure Offensiveness for AI agents.
   a. Navigate to **AI Agent Studio** > **SettingsSettings**.
   b. In the AI Guardian section, turn on the **Offensiveness detection** toggle to monitor and block offensive content in AI responses.
2. Configure Prompt Injection for AI agents.
   a. Navigate to **AI Agent Studio** > **SettingsSettings**.
   b. Select **Configure** against **Prompt Injection protection**.
   You're directed to the AI Admin Hub on your instance to configure the Prompt Injection.

   Note: For more information about configuring the Prompt Injection, see .

   When you configure the Prompt Injection for an agentic workflow by using the required instructions, the system is designed to detect the harmful content and block the conversation.

Set up long-term memory

Make AI agents remember your preference or facts from previous interactions and use memories for more focused conversations.

Before you begin

Role required: sn_aia.admin

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Settings** > **Long-term memory**.

   Note: Expand the Long-term memory section to see the user facts and preferences.

2. Configure the User facts and preferences.

Preferences	Value
Allow all AI agents to retain user information	The default value is **Allow**. **Note:** Selecting **Do not allow** disables the rest of the preferences for the Long-term memory configuration.
Allow all AI agents to apply their knowledge in conversations	The default value is **Allow**. You can select **Do not allow**, if you don't want to allow the AI agents to apply their knowledge in conversations.
Allow an LLM to identify categories of memories	The default value is **Allow**. You can select **Do not allow** if you don't want to allow an LLM to identify the memory categories.

3. To view the existing AI Agent memory categories, select **View**.

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For more information about creating long-term memory categories, see Create long-term memory category.

4. To view the AI agent category mappings select **View**.
   For more information about creating a category mapping, see . For more information about mapping a category to an AI agent, see Map Long-term memory category.
5. Configure Past executions outcomes by turning on the **Allow all AI agents to learn from last executions** using the toggle button.

Long-term memory categories

Long-term memory (LTM) categories define the types of semantic information that a Now Assist AI agent can learn and retain about users over time. You can add new categories and map them to specific agents to personalize agent responses based on accumulated user context.

Semantic memory in the AI agent Memories table (`sn_aia_memory_list`) is organized by LTM categories. Each category represents a distinct type of user-specific information, such as software preferences, workplace context, or communication style. By mapping categories to an agent, you control what the agent learns and retains across interactions.

How LTM categories work

When an agent executes, the platform evaluates the interaction for user-specific facts that match the agent's configured LTM categories. Matched facts are stored as semantic memory records in the AI Agent Memories [sn_aia_memory] table, scoped to the user and category. On subsequent interactions, the agent retrieves relevant semantic memories and uses them to personalize its responses without requiring the user to repeat context.

LTM categories are defined globally and can be mapped to one or more agents. An agent only learns and retrieves memories for the categories explicitly mapped to it.

Default LTM categories

The platform includes the following default LTM categories:

Software and tools

Captures information about applications, tools, and software configurations relevant to the user, such as operating system version or approved applications.

Work context

Captures facts about the user's role, department, location, and workplace preferences, such as remote work setup or team structure.

User preferences

Captures communication preferences and interaction style, such as preferred language, response format, or notification settings.

You can extend this list by creating custom categories suited to your organization's use cases.

How categories affect memory extraction

During memory extraction, the platform runs an LLM prompt that evaluates the agent interaction against the descriptions of each mapped LTM category. If the interaction contains information that matches a category, a semantic memory record is created or updated in the AI Agent Memories table with the following fields:

Category

The LTM category that the memory is associated with.

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User

The user whose interaction generated the memory.

Memory

The extracted user-specific fact, stored as a JSON object.

Type

Set to **Semantic** for category-based memories.

Semantic memories are retrieved at runtime using retrieval-augmented generation (RAG) and injected into the agent prompt to personalize the response for the current user.

Considerations

- Category descriptions directly influence LLM extraction quality. Use specific, unambiguous language to reduce false positives or missed extractions.
- Mapping too many categories to a single agent can increase extraction processing time. Map only the categories relevant to the agent's use case.
- To verify that semantic memories are being extracted, open the AI Agent Memories table and filter by **Type** = **Semantic** and the relevant agent or user.

Create long-term memory category

Add a long-term memory category to add it an AI agent while setting up long term memory

Before you begin

Role required: sn_aia.admin

Procedure

1. Navigate to **AI Agent Studio** > **Settings** > **Long-term memory**.
2. Select **View All** against View the existing categories of memories.
   You're directed to the AI Agent Memory Categories page.
3. Select **New**.
4. On the form, fill in the fields.

Field	Description
Name	A descriptive label for the category, such as `Hardware preferences` or `Accessibility needs`.
Description	A brief explanation of what type of user information this category captures. The description is used by the LLM extraction prompt to identify relevant facts during agent execution, so precise language improves extraction accuracy.

5. Select **Save**.
   After saving the record, the category is activated by default and is available to map to one or more AI agents.

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Map Long-term memory category

Map the created long-term memory category to the agents that should use it. Categories must be mapped individually to each agent; they are not applied globally by default.

Before you begin
Role required: sn_aia.admin

About this task
The mapping of LTM categories is done directly while creating an AI agent at the Define the specialty page.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **AI agents**.
2. Navigate to the Define the specialty page of an AI agent form.

   Note: You can add map the categories for a new or existing AI agent.

3. In the manage long-term memory section, select categories that you want to map to your AI agent.
   You will see the list of categories that were created in the AI Agent Memory Categories page.
   For more information, see .
4. Select **Save and continue**.

Result
The selected categories are mapped to your AI agent.

Select the LLM for AI agents and agentic workflows

Choose the large language model (LLM) service provider for Now Assist AI agents in AI Agent Studio.

Before you begin
Role required: sn_aia.admin

About this task
LLMs are part of the foundation of agentic AI. Different LLMs can provide slightly different performance and responses. You can select which LLM to use at a global level for agentic AI from the AI Agent Studio to help adjust the response quality to best fit your agentic workflows.

Note: If you already have agents built and you change the global LLM, then you must test the agents after making the change. You can test the models in the skill kit without changing the LLM provider for all AI skills. Outside of the Skill kit, skills use whichever provider is set as default for the AI AGent SKills group.

Depending on your region, you may have to consent to using a different service provider.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Settings** > **Model provider**.
2. Select **Configure** to be redirected to AI Admin Hub.
   You're directed to the AI Admin Hub Edit model provider page.

   For more information about managing a editing and customizing a model provider, see Manage model providers.
3. In the *Choose a default model provider* field, select from the following choices.

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- Now LLM Service
- AWS Claude
- Azure OpenAI
- Google Gemini

Note:

The new generative AI Config property records *sys_generative_ai_config* and *sys_generative_ai_prompt_config* have been introduced for the Azure OpenAI: gpt 5.4 model provider. Both the properties share a **definition** field that references the same *sys_one_extend_capability_definition* record, which identifies the LLM provider. The new prompt config records are set to **true** by default.

4. To use a different model provider:
   a. Navigate to the *sys_generative_ai_prompt* table.
   b. Filter and group by the relevant skill definition.
   c. Locate the record for the appropriate skill and provider.
   d. Set the preferred record as default.
5. Review the impacted AI agents.

   Certain AI agents may require specific model providers. Select the AI agents tab in the **Impact overview** section to see which AI agents are affected by any changes to the model provider.
6. Select **Save**.

Result
Your chosen LLM is used globally for all AI agents and agentic workflows.

Multiple conversations in Now Assist AI agents

Multiple active conversations enable live agents to maintain separate conversations for different records. You can preserve the context of multiple conversations and enable multiple AI agents to interact at the same time through the Now Assist panel.

Multiple conversations between live agents and AI agents overview

Once configured, live agents can interact with multiple AI agent conversations through the Now Assist panel.

Note: By default, the ServiceNow Otto panel currently supports only a single conversation and it is required for you to enable the multiple conversation support if you intend to use it

Enabling multiple conversations

You can enable multiple conversations on a ServiceNow instance in the Messaging Channels [sys_cs_channel.list] table by setting the value of the **Supports Multiple Conversations** field on the ServiceNow Otto panel record to **true**. If you don’t see this field, make sure you're in the Global scope and are using the **Default view**. If you still don't see the filed, you may have to add the filed to the table. By saving the record and refreshing the instance, you can see the multiple active conversations features in the ServiceNow Otto panel.

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Title for the conversation

With the multiple conversations feature enabled in the ServiceNow Otto panel, the first utterance from the live agent is set as the title for that conversation. For example, if the first utterance is `Explain change risk`, then Explain change risk is set as the title for that conversation in the ServiceNow Otto panel.

Starting a conversation

Start a new conversation by selecting the plus icon and choosing a topic. See the conversation list by selecting the All chats icon, to see the Active chats and Closed chats.

Unread chats on the conversation list

See the batch count of the unread chats on the conversation list icon. For example, if number 6 appears on the All chats icon, that means there's six unread conversations on the ServiceNow Otto panel.

Citations in Now Assist AI agents

Citations appear on the ServiceNow Otto panel when AI agents and agentic workflows provide summaries for similar incidents and knowledge articles.

You can enable citations for **Get relevant knowledge articles** and **Get similar incidents** on your ServiceNow instance.

Generating citations:

- Citations are generated by the LLM (Large Language Model), which use the information available to it.
- URLs can’t be generated by LLM if relevant information isn’t provided.
- LLMs need provide proper URLs for better results.
- Citation URLs return directly from the tool’s outputs.
- The LLM is instructed not to generate or assume citations if they aren’t present.

Note: Invalid or malformed URLs won’t be displayed to the user.

Citations with similar incidents and relevant knowledge articles appear in the Sources section of the AI Agent Studio Chat and on the Now Assist panel. Clickable links direct you to the incident or knowledge article.

You can hide citations for specific agentic workflows or AI agents where it’s necessary or confidential. For more information, see Disable citations in AI Agent Studio.

Disable citations in AI Agent Studio

Disable citations for specific agentic workflows or AI agents in AI Agent Studio where citations aren’t required or involve confidential information.

Before you begin
Role required: sn_aia_admin

About this task
By default, the citations are enabled for all agentic workflows and AI agents. The Agent Properties [sn_aia_property] table enables disabling citations at the agentic workflow or AI agent level. Create a record only when you want to disable citations for specific agentic workflows or AI agents when the **Output transformation strategy** field in the Agent tool record is set either to **Summary for Search Results** or **Verbose**.

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Note: All citations are generated by the LLM (Large Language Model), which uses the information available to it.

Procedure

1. Navigate to **All** > **System Definitions** > **Tables** and open the Agent Properties [sn_aia_property] table.
2. Select **New**.
3. On the form, fill in the fields.

Agent Property form

Field	Description
Name	Name for the agent property record used to hide citations for the agentic workflow or AI agent.
Value	Provide **false** as the value to hide the citations.
Target table	The table where the target agentic workflow or AI agent resides.
Target record	The record of the target agentic workflow or AI agent.
Application	The application scope for the agent property record: Now Assist AI agents.

4. Select **Submit**.

Result
Execute an AI agent or an agentic workflow for which you have disabled citations. You'll see the output without citations. See the following example for reference.

Follow-up conversations

AI agents continue with follow-up conversations after the AI agent execution is complete.

Before you begin
Role required: sn_aia_admin

About this task
When the [sn_aia.enable_follow_up] system property is set to **true** and if there is no record for the agentic workflow created in the Agent properties [sn_aia_property] table, then the AI agents continue with the `How else can I help you?` follow-up message after the agentic workflow execution.

The AI agent conversation doesn't get closed after the execution is complete by default. If you would like to override the follow-up behavior for your AI agents for a specific agentic workflow, you must create a record in the Agent Properties [sn_aia_property] table.

Procedure

1. Navigate to **All** > **System Definitions** > **Tables** and open the Agent Properties [sn_aia_property] table.
2. Select **New**.

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3. On the form, fill in the fields.

Agent Property form

Field	Description
Name	Name for the agent property record for the agentic workflow.For example, `follow_up_behaviour`
Value	Provide the following values as per the requirement: ○ **no_followup_close_conversation**: Closes the conversation after the use case is complete. ○ **no_followup_open_conversation**: Keeps the conversation open after the use case is complete.
Target table	The table where the target agentic workflow resides: Agentic workflows [sn_aia_use case] table.
Target record	The record of the target agentic workflow or AI agent.
Application	The application scope for the agent property record: Now Assist AI agents.

4. Select **Submit**.

Add recipients to usage spike, execution failure, and latency error email notifications

Add or change recipients to email notifications triggered by unexpected or undesired behavior in AI agent and agentic workflow executions.

Before you begin

Set your application scope to Now Assist AI Agents.

Role required: admin

About this task

There are different email notifications that can be configured: one for Assist usage spikes, one for failed AI agent executions, and two for latency errors.

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. In the *Name* field, search for `AI Agent`, and select the notification you want to edit.

   There are different Notifications records for the different sources of alert. If you want to change the recipients for all types of alerts, you must edit each of the Notification records individually.
3. Open the **Who will receive** tab.
4. Select the unlock icon for the type of recipient you want to add or change.

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To quickly add yourself to the list of recipients, select the Add me icon next to the *Users* field.

5. Select the users and groups you want to receive email alerts.

   If you select **Send to event creator**, the owner of the AI agent or agentic workflow that triggered the alert receives a notification.

   You can select **Exclude delegates** if you don't want delegated users to receive the notification. By default, delegates will receive notifications.

6. Update or save the record.

Result

The specified users or groups can now receive notifications for a specific triggered condition of AI agent or agentic workflow executions.

What to do next

Repeat for any other AI agent alert notifications you want to configure.

Implement access control in AI Agent Studio

Implement security in AI Agent Studio through access control lists (ACLs), user identities, and role filtering with the access control-based security measures in the agentic system.

Security for AI agents

Access controls for agentic AI on the ServiceNow AI Platform comprises the major aspects: determining which users can access agentic AI resources and what access each of those resources has once invoked. These aspects are controlled through three main components: access control lists (ACLs), user identities and role filtering. The interaction between these components at the agentic workflow, AI agent, and tool levels within AI Agent Studio influences their overall security and functionality.

Access Control Lists (ACLs)

The access control lists (ACLs) in AI agents determine which role(s) a user must have to be allowed to invoke an agentic workflow or an AI agent. ACLs must be configured individually for each agentic workflow, AI agent, external AI agent, and certain AI agent tools such as generative AI Skills, Flows, and Flow Actions.

ACLs configured in the AI Agent Studio for are role-based and of the Allow If type:

- **Allow-If**: Grants access to data or resources when any of the specified conditions in the ACL are met. Allow If ACLs don't prevent other ACLs from granting access to the same resource even if it that specific ACL itself doesn't grant access.
- **Deny-Unless**: Grants access only when the invoking user identity meets all the specified conditions. No other ACLs can override or grant access to that resource once a Deny Unless ACL is in place. This is available when configuring ACLS in the ACL [sys_security_acl] table and not in the AI Agent Studio.

There are three possible options for ACLs created in AI Agent Studio:

- *Any authenticated user*: Grants access to any user who is authenticated on the instance, regardless of the role.
- *Users with specified roles*: The default ACL option that requires you to select the specific roles required to invoke an AI agent or an agentic workflow.

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Note: As the ACLs are Allow If ACLs, any user with at least one of the roles will be able to invoke the AI agent or agentic workflow.

- *Public*: Grants access to all users, including guests who aren't signed in.

Note: Understand that this configuration should be used sparingly and only when needed.

Note:

- ACLs configured in AI Agent Studio only determine the roles required for users to invoke an agentic workflow or an AI agent. They don't determine the access that the agentic workflow or an AI agent has once it's invoked.
- For an agentic workflow or AI agent to successfully execute, the invoking user (or relevant AI user) must meet the criteria of all of the ACLs of any downstream components which have their own ACLs and are assigned to the agentic workflow or AI agent (even if the specific execution might not need to invoke all of those AI agents or tools). Therefore:
  - If there are conflicting security requirements between agentic workflows, AI agents, and AI agent tools, your agentic AI fails to execute.
  - The same occurs if the invoking user meets the criteria for some ACLs but not others. This includes components assigned to the agentic AI that might not be required for the specific execution.
- When configuring these security settings, consider all aspects of the agentic system-including the agentic workflow, AI agents, and tools.

User identities

After configuring the access control lists (ACLs), you must configure the User identity (also called as *Run as*) which the AI agent or agentic workflow will run as during execution.

After configuring the access control lists (ACLs), you must also configure the user identity (also called as Run as) which the AI agent or agentic workflow will run as during execution.

The user identity determines which user the AI agent or an agentic workflow operates as during execution, and therefore the data it can access and the actions it can take, depending on the roles assigned to the user identity.

Note: Each agentic workflow and AI agent has its own user identity configuration.

There are two possible user configurations to select from:

- **Dynamic user**: The user identity of the person or resource (automated trigger/agentic workflow/parent agent) which invokes the execution of an AI agent or an agentic workflow. The roles assigned to the agentic workflow or AI agent will change dynamically depending on the identity of the invoking user.

  Note: Dynamic user is the default user identity, and you can use the dynamic user unless there's a specific need that justifies an AI user.

- **AI user**: A dedicated user identity that the AI agent or an agentic workflow runs as during execution, which has assigned roles that remain consistent regardless of who or how the execution is invoked. For example, an AI agent or an agentic workflow may need to be run with elevated privileges that the dynamic user might not have. If configured as a dynamic user, the execution would fail. However, if the AI agent or agentic workflow is configured to run as an AI

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user that has the elevated roles assigned to it, the execution will succeed even when invoked by a user with lower privileges.

Note: If you don't have a suitable AI user but want to use the *AI user* identity, you must create a record on the User [sys_user] table. See Create a user and select *AI user* as the identity type.

Role filtering

Role filtering restricts the roles that AI agents can inherit from the invoking user to a subset of approved roles. This limits the capabilities of the agent, ensuring it can only use the roles that the builder of the AI agent has specifically permitted, even if the user possesses additional roles.

Role filtering only applies when the agent runs as a dynamic user — because the identity (and resulting roles) of the invoking user can't be known in advance. There could be situations in which high-privileged users invoke AI agents that should not run with high privileges. By applying role filtering, the builders of AI agents can make sure that their agents adhere to the Least Privilege Principle. Role filtering is not required when an AI agent runs as an AI user. Since the roles of the AI user are preconfigured and can (and should) be set to meet the needs of the specific AI agent – no additional filtering is required to conform to the Least Privilege Principle, which can be controlled entirely by the AI user configurations.

Deny by Default

The ServiceNow AI Platform enforces a deny-by-default ACL (Access Control Lists) configuration certain types of agentic components on newly activated instances. In earlier releases, these record types defaulted to allow access unless an ACL was configured for a specific record. In Australia release, newly activated instances start from a deny-by-default posture instead, so access has to be configured explicitly by creating an ACL for the specific record, rather than inherited through permissive defaults. This applies to any AI agents and agentic workflows that don't have an individual ACL configured, reducing unauthorized access risks.

The deny-by-default enforcement works as follows: The **Security Attribute** field value for AI Agent and agentic workflow on the Access Controls table [sys_security_acl] is set to **Never**, enforcing the deny behavior and leaving the **Decision Type** field value as is, that is, **Allow If**. This configuration verifies that if an AI component already has a primary ACL in place, access continues to be governed by that ACL. The backup (wild card) ACLs deny access only when no primary ACL is present. The old wildcard ACLs allow users with agents that predate the availability of access controls in agentic products to continue to run their agents, but that general guidelines is to implement deny by default in all instances. The replacement means that the AI agents and agentic workflows must have explicit ACL entries to operate. Without explicit ACLs, access is denied by default.

Note: The enforcement applies only to the newly activated instances. Any instances that are upgraded to Australia release from previous releases aren't automatically affected by this configuration change and the adoption of the deny-by-default ACL configuration will require admins to proactively opt in.

Security check on AI Agent Studio

To inform users about security checks on the agentic system, the platform provides the following notifications in the AI Agent Studio interface:

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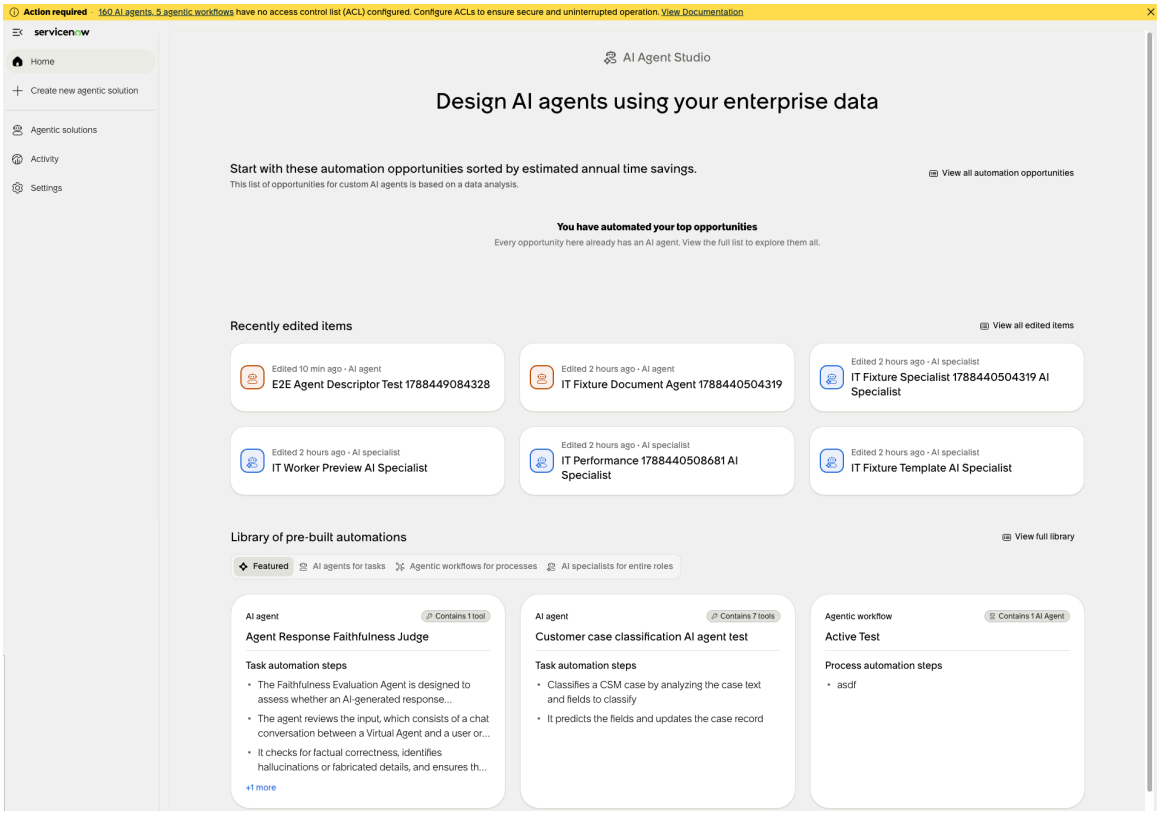
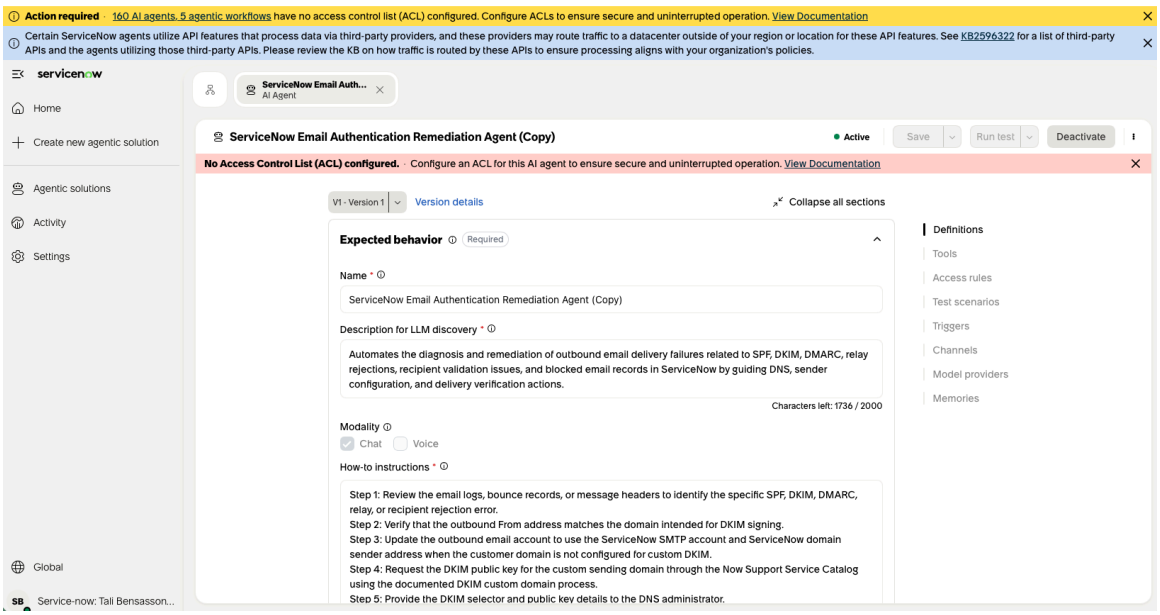
- AI Agent Studio Home page: The AI Agent Studio Home page displays a warning when AI agents or agentic workflows don't have explicit ACLs configured on the instance.



- AI Agent guided setup: The AI agent guided setup page displays a warning banner when that agent doesn't have the required ACLs configured.



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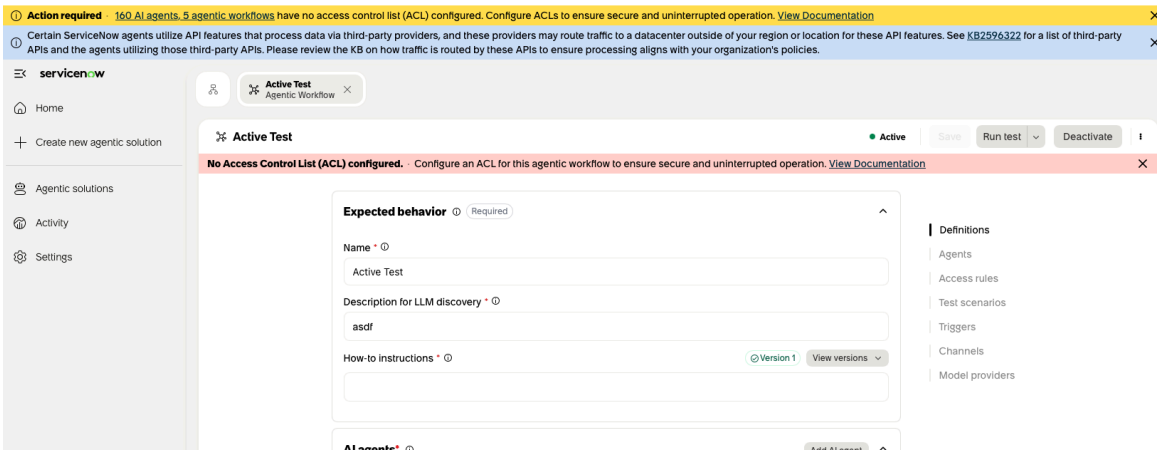
- Agentic workflow guided setup: The agentic workflow agent guided setup page displays a warning banner when that agentic workflow doesn't have the required ACLs configured.



Security mechanisms

Using ACLs, user identities, and role filtering together provides layered security for AI agents.

- ACLs prevent unauthorized users from reaching and invoking the agent.
- User identities verify the agent operates under the correct privilege scope at runtime, preventing escalation beyond what the assigned dynamic user permits.
- Role filtering verifies that agents can't take actions that exceed defined boundaries even when invoking use has that access.

A common source of confusion is assuming that ACLs define agent actions. They don't! ACLs determine who can invoke the agent. The scope of permissible agent actions are determined by the user identity and role filtering. Use the following summary to distinguish the mechanisms:

Distinguishing ACLS, user identities, and role filtering

Feature	ACLs	User identities	Role filtering
Controls	Who can access the agent	Which identity the agent acts as	What the agent can do
Applied to	Users, groups, and roles that invoke the agent	The user identity with which the agent executes at runtime	The agent's runtime execution context
Security purpose	Restricts agent discoverability and invocation	Determines privilege scope during execution	Restricts agent actions and data access

Distinguishing AI user and Dynamic user

Feature	AI user	Dynamic user
Definition	A predefined identity the agent runs as	The identity of the agent at runtime which is inherited from the invoking user.
Role filtering applies	No	Yes

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Distinguishing AI user and Dynamic user (continued)

Feature	AI user	Dynamic user
Roles used	Fixed to the AI user's assigned roles	Scoped down by role filtering
Identity source	Configured statically	Determined dynamically at runtime

Note: Configuring only one of these mechanisms leaves a gap in the agent's security posture. Therefore, it is necessary to configure the security mechanisms across the AI Agent Studio and other AI components such as generative AI Sills, Flows, and Flow Actions.

For more information, see Configure access controls across AI Agent Studio.

Configure access controls across AI Agent Studio

Configure access rules in AI Agent Studio for AI agents, agentic workflows, Model Context Protocol Servers, and external AI agents.

Before you begin

Role required: sn_aia.admin

About this task

Procedure

1. Configure security controls for an AI Agent.
   To configure access rules for an AI agent in AI Agent Studio, see Define access rules for an AI agent.
2. Configure security controls for an agentic workflow.
   To configure access rules controls for an agentic workflow, see Define access rules for an agentic workflow.
3. Configure security controls in Model Context Protocol Servers.
   To configure security controls in Model Context Protocol Servers, see Define security controls for MCP Servers.
4. Configure security controls in external AI agents.
   To configure access rules in external AI agents, see Create an external AI agent.

What to do next

You can use the Access Analyzer in the Test page chat window of an AI Agent, agentic workflow, and an external AI agent. Use it to troubleshoot tools when agent execution fails due to access denial. For more information, see Test access to an AI asset.

Related topics

Granular admin roles

Configuring user access and data permissions for agentic workflows

Test access to an AI asset

Verify whether a user has access to an agentic AI asset - AI agent and agentic workflow.

Before you begin

Role required: admin

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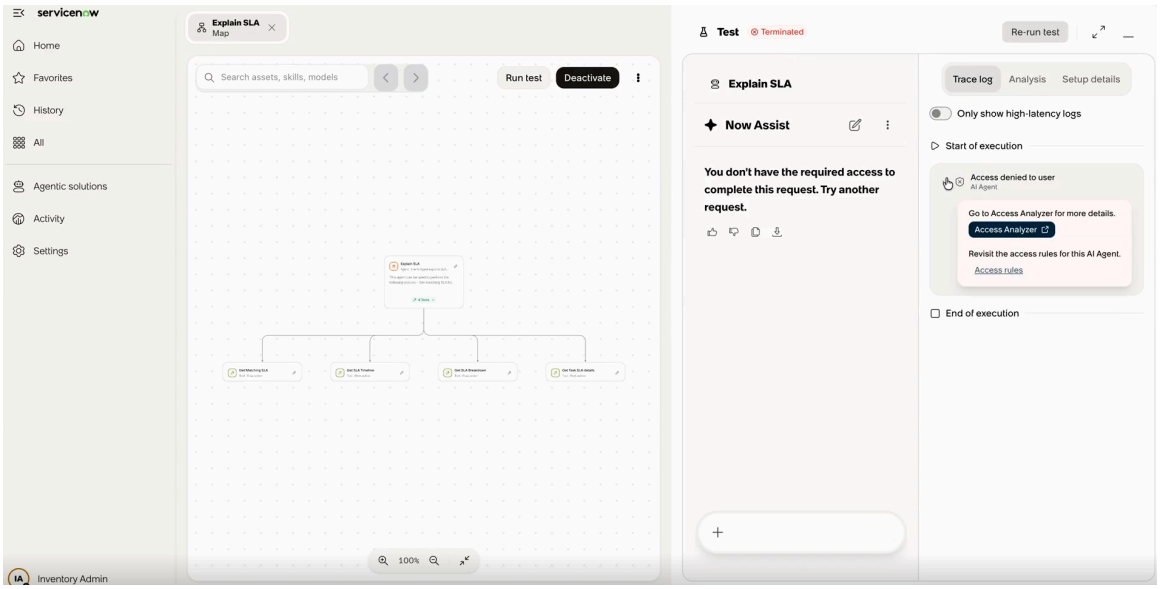
Procedure

1. Navigate to **All** > **AI Agent Studio** > **Agentic Solutions**.
2. Select an AI asset you want to test access to.
   You can test access to an AI agent and agentic workflow. Select one of them from the Agentic solution page.
3. In the node map view or guided setup, select **Run test**.
4. On the Run a test pop up, select **Single test** as the test type and choose a test objective from the auto-populated objectives.
5. Select **Run Single test**.
6. Review the test results.
   If there is a failed test due to ACL issues, you will see in the node map view, the reason for the failed test in the Chat window. In the Trace Log tab, you will see the test status along with the relevant links to understand more details about the failure:



- Select **Access Analyzer**: You can go to Access Analyzer for more details.

  This opens the Permission for Explain SLA page in Access Management, where you can see the access results for the executed AI asset.

- Select **Access rules**: You can revisit the access rules for the selected AI asset.

Create an AI agent

Create an AI agent in AI Agent Studio to solve problems for your users and coordinate with other AI agents in agentic workflows.

Before you begin

Role required: sn_aia.admin

About this task

In the ServiceNow agentic ecosystem, an AI agent is a set of large language model (LLM) instructions and tools that can perform specific tasks.

An AI agent can collaborate with other agents to achieve better results by using fewer LLM calls. AI agents can also request help or information from the user.

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There are three ways to create an AI agent. The following procedure describes the steps for the full guided setup. You complete every section yourself, from the definition through tools, security, triggers, channels, and memory. Use it when you already know what the agent must do and have intended prompts in mind.

You can also create an AI agent conversationally. You describe the agent, and Virtual Agent drafts the definition and displays suggested tools, which you then review and finish in the guided setup. Use it to get to a first draft quickly. You can create only AI agents with this method, not agentic workflows. For those instructions, see Create an AI agent conversationally.

The third way to build an AI agent is through an automation opportunity. When you build from the automation opportunities list, the identified automation context is applied to the AI agent. For those instructions, see Create an AI agent for an automation opportunity.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Home**.
2. Select **Create new agentic solution**, then select **New AI agent for a task**.
3. In the new AI Agent pop-up window, describe your AI agent and select **Next**.
   Alternatively, you can select **Skip** to open a new AI agent form.
4. Select **Create an agent from scratch** and select **Next**.

   To create an external AI agent instead, see Create an external AI agent.

5. Describe the purpose of the AI agent, then select **Check**.

   The LLM uses your description to generate suggested content for the general prompt of the AI agent. Confirm that your description names the goal, what starts the work, the records and tables involved, and the outcome that counts as done. For example, "Categorize incoming ITSM incidents by reading the short description and description, select the best-fit category and subcategory, and update the incident with a short rationale in the work notes."

   The LLM also uses the description to generate tool suggestions that help the AI agent achieve its goal.

   If other agentic solutions accomplish a goal similar to the one you describe, the check identifies them so you can edit a matching solution instead.

   You can skip this step by selecting **Skip**.

6. Review or draft the content in the *Expected behavior* section.

   You can edit any content that the LLM generates.

   The Orchestrator uses the description, role, and instructions when the AI agent is invoked, either alone or as part of an agentic workflow. This content gives the Orchestrator the context it requires to use the AI agent for its intended purpose.

   After making any changes to the AI agent in this guided setup, you can select **Save** to save your progress.

7. Add tools and information your AI agent can use to accomplish its goals.

   The tools give the AI agent the capabilities necessary to accomplish tasks. An AI agent requires tools to perform tasks.

   You can also add information sources, such as knowledge graphs, that the AI agent uses when making decisions.

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Information can reach an agent at run time in multiple ways. Knowledge graphs supply relationships between entities. Search retrieval tools retrieve content from defined sources. File upload tools give the agent specific documents.

8. Define the AI agent access rules.

   The security controls configure user access and data access to the AI agent. You can also set the discoverability of the AI agent by AI specialists or third parties.

9. Add test scenarios for evaluations.

   Automated evaluations of your AI agent require configured test scenarios to run against. You can add existing table records as scenarios or manually enter different test objectives to cover the full range of conditions your AI agent can encounter.

10. **Optional:** Add a trigger to automatically invoke your AI agent if a specified event occurs.

    (Optional) A trigger isn't required if your AI agent is used only in chats.

11. Determine how and where users can invoke your AI agent.

    To let users invoke the AI agent directly, add it to Virtual Agent chat assistants.

12. Set up long-term memory and active learning controls for your AI agent.

    AI agents can learn from previous interactions, if configured to do so. You can choose the categories of information from previous interactions that the AI agent uses when handling new requests.

13. Select **Save** to save your changes.

Result
Your AI agent has the context that the AI Agent Orchestrator requires and the tools to accomplish its intended tasks.

What to do next
You can test your AI agent on a record manually to see an example execution. You can also create an automated agentic evaluation to test the AI agent over repeated interactions. Automated evaluations can display optimization suggestions when LLM judges detect patterns behind low success rates.

To make your AI agent ready for use, select **Activate**.

Create an AI agent from an automation opportunity

Use automation opportunities identified on your instance to create AI agents in AI Agent Studio.

Before you begin
Role required: sn_aia.admin

About this task
Automation opportunities are determined by data available on your instance. Analysis of common task types with possible agentic AI solutions yields recommendations with estimated time and cost savings based on the records analyzed. Each opportunity shows a list of steps needed to resolve the task, demonstrating possible automation instructions. Each identified opportunity also provides an estimated number of tools necessary for the AI agent to complete those steps.

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Procedure

1. Navigate to **All** > **AI Agent Studio** > **Home**.
2. Select **View all automation opportunities**.
3. Check the list of automation opportunities, then select the one you'd like to create an AI agent to solve.

   The list can be filtered and sorted by column. By default, the list is sorted by estimated annual savings time.

   You can choose between the **List** or **Gallery** view to display the opportunities. Sorting is not available in the **Gallery** view.

   You can select **AI Agent Advisor** to be directed to the AI Admin Hub where you can review what tables are being monitored for automation opportunities. You can also add tables

4. Review the automation opportunity preview.

   For more information about the source of the automation opportunity, select **View sample issues**. You can see a list of records, including their number, short description, description, and the analysis of the root cause. You can select a record number to open that record in a new browser tab. When you're done, select **Back** to return to the automation opportunity preview.

   The steps listed in the **Resolution steps** section describe the process that can be automated. The actual prompt for the AI agent will be different than the text shown there.

   The number of tools identified is an estimation. The necessary tools may or may not already exist on your instance.

5. Select a modality for your AI agent, either **Chat** or **Voice**.
6. Select **Build AI Agent** to be redirected to the full setup process with the opportunity context applied.
7. Review the generated content for the AI agent and make modifications to suit your specific needs.

   AI generates the name, description, how-to instructions, and AI agent expertise. It also adds relevant tools if they're available. You may need to create more tools for your AI agent to fulfill all of the steps in the how-to instructions. Steps missing tools are identified in the **Tools** section under the list of currently applied tools.

8. Define the security controls for your AI agent.

   Specify which users can invoke the AI agent with the **Allowed users** dropdown. If you choose **Users with specific roles**, you can choose which roles are required to use the AI agent.

   Determine the data that your AI agent can access. AI agents that act as a **Dynamic user** have the same data access settings as the user who invoked the AI agent. If you set the user identity as an **AI user**, then the AI agent will have the same data access permissions as the chosen user record. AI users must have the type set to *AI*. Once you select an AI user, you can see which roles it has.

9. Review the test scenarios.

   Test scenarios are generated automatically as part of the applied opportunity context. They may take a few minutes to generate, so they won't appear right away. Once they're generated,

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they are added to the AI agent automatically. You can still edit test scenarios after they're generated.

You can add your own scenarios or remove unwanted generated ones.

10. **Optional:** Add a trigger to your AI agent.

    (Optional) If you only want your AI agent to be used in chats, you don't need to add a trigger.

11. Select which channels users can access your AI agent from.

    ServiceNow Otto is recommended.

12. **Optional:** Map long-term memory categories.

    (Optional) For more information about long-term memory, see Set up long-term memory.

13. Select **Save** to save all changes made to the AI agent.

Result

A new AI agent is built based on an identified automation opportunity.

Before activating your new AI agent, manually test your AI agent on sample records to confirm it behaves as expected. Select **Run test** to start. You can also evaluate an AI agent using your test scenarios to identify behavior patterns and possible optimizations. You can't run both a manual test and an evaluation at the same time.

When you're satisfied with the AI agent's performance, you can select **Activate** to make it available to users.

Define the expected behavior of an AI agent

In the guided setup for an AI agent, write a clear description defining your AI agent, its role, and the instructions it should perform to accomplish tasks.

Before you begin

You must either create an AI agent or edit an existing one to get to this step in the guided step. To learn how to get started creating an AI agent, see Create an AI agent. Otherwise, navigate to the AI Agent Studio and select the AI agent you want to define to enter the guided setup.

The name, description, modality, AI agent role, and instructions are all required. If the agent was drafted in a conversation, or created from an opportunity, these fields are pre-filled as a first draft. Treat pre-filled content as generated text to be reviewed, not as confirmed configuration.

Role required: sn_aia.admin

About this task

The first step of the guided setup enables you to define the fundamentals of the AI agent. The description, AI agent role, and instructions fields are used by the AI agent Orchestrator to understand how to use the AI agent, by itself or as part of an agentic workflow. Descriptions, AI agent roles, and instructions should be clear and well-defined. For guidelines for writing these fields, see Writing effectively for agentic AI. For an example AI agent, see Example AI agent.

Procedure

1. Verify the name and description summarize the main intention of the AI agent.

   If the name and description aren't clear or correct, the Orchestrator won't know how to wield the AI agent in context.

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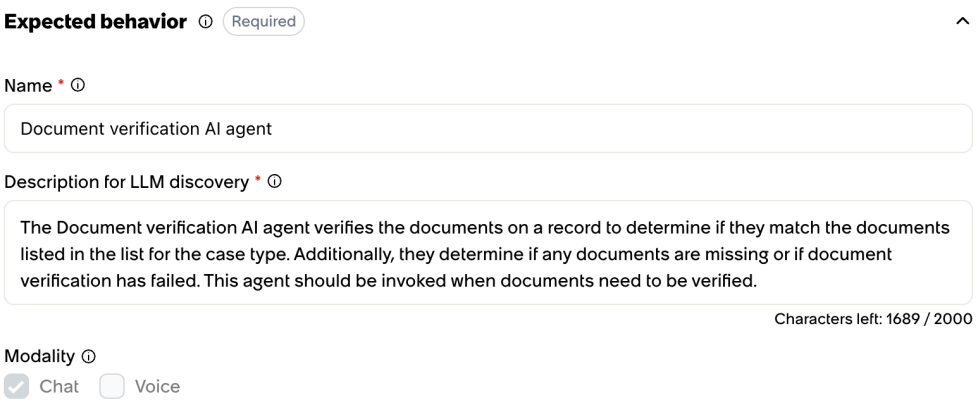
2. Check that the modality of the AI agent is correct.

   The *Chat* modality allows users to invoke the AI agent in Virtual Agent or as part of an agentic workflow in the ServiceNow Otto panel.

   An agent has one modality. Chat and Voice cannot both be applied to the same agent. If you need both channels, build one agent per modality. Selecting **Voice** also requires that a voice assistant already exists in Assistant Designer.

   See Create an AI voice agent for more information about creating AI agents with the *Voice* modality.



3. Review and refine instructions.

   The instructions are the most important element of the AI agent. While the name and description guide the AI agent Orchestrator to know when to invoke an AI agent, the instructions tell the Orchestrator what it does and how it will do tasks.

   You can create different versions of the AI agent instructions. After testing an AI agent or evaluating an AI agent, you can adjust the instructions and compare their performance. See Version control for agentic AI to learn more.

4. **Optional:** Confirm the AI agent's expertise.

   (Optional) The difference between the description and the agent role is that the agent role provides more detail about the function that the AI agent serves within a greater context. The

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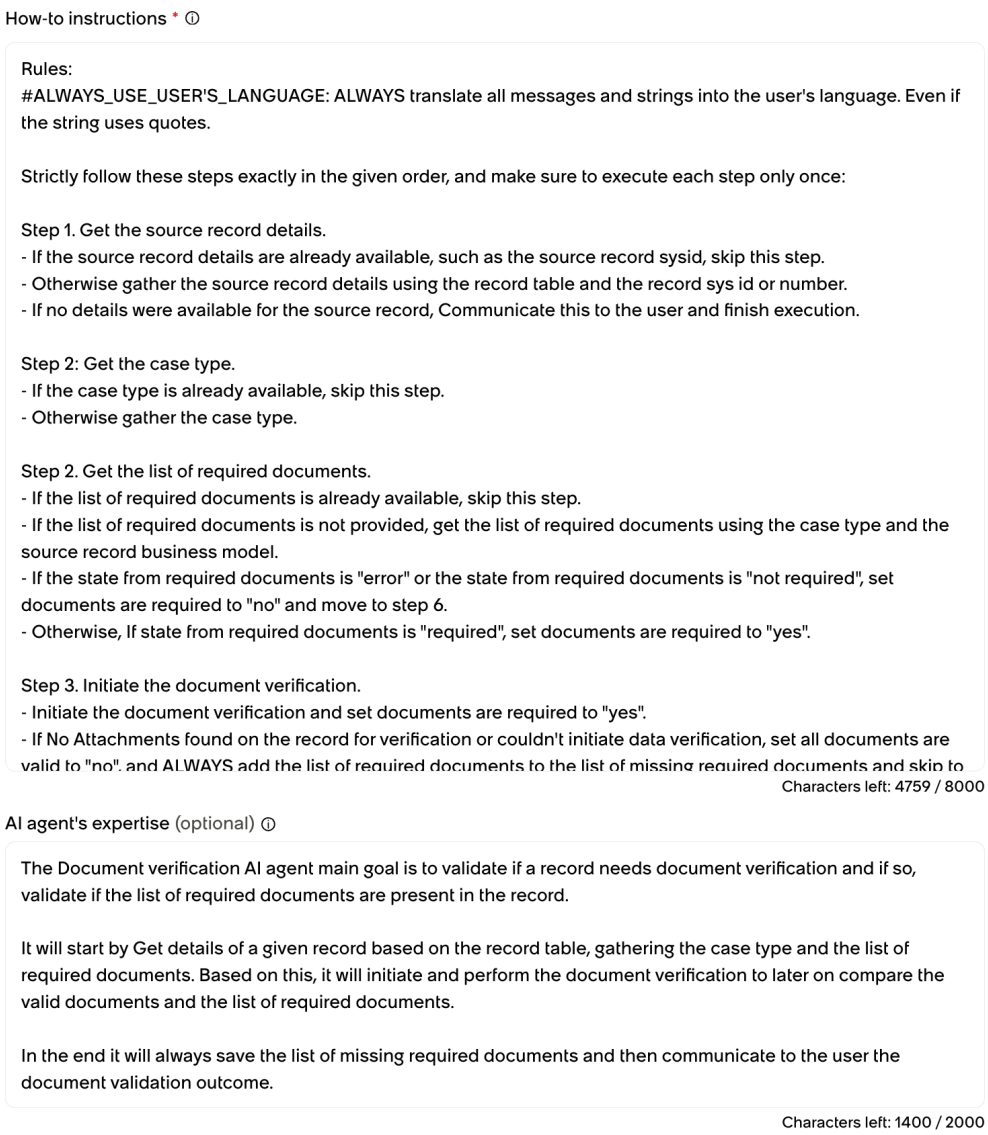
greater context may be as part of an agentic workflow, or it could be the specific function it serves in another type of work process.



Result

The fundamentals of your AI agent are defined so that the AI agent Orchestrator can use it.

What to do next

Scroll down to the next section of the guided setup, *Tools*, to add tools and information your AI agent can use.

Add tools and information to an AI agent

Add a tool to an AI agent to enable different functionalities and help your AI agents achieve their objectives.

Tool overview

Tools give your AI agents the capabilities they need to complete their tasks. When adding tools, think about how the AI agent will use them to achieve its objectives and how those tools will work together. Equipping your AI agents with the right tools helps ensure robust, high-quality performance.

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Consider the following guidelines when adding and creating tools:

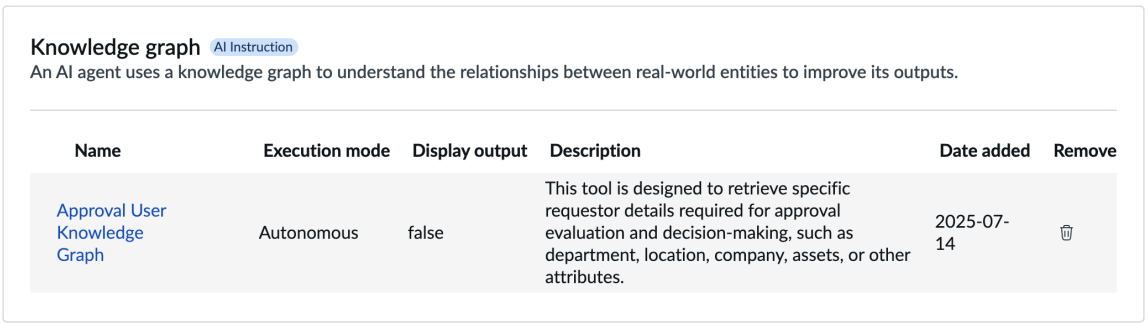
- Design tools to work together. Each AI agent should solve a specific, discrete task, and its tools should provide the capabilities needed to reach that goal.
- Write detailed tool descriptions. The AI agent uses tool descriptions to understand what each tool does. Clear, thorough descriptions give the AI agent the best chance to succeed.
- Plan for tool outputs when creating them. Use the tool description or output transformation strategy fields to explain how to process the tool outputs. For example, if a tool retrieves records from multiple tables, specify how to handle the large volume of results.

Note: If you select Google as your web search tool provider, the web search tool leverages Grounding with Google Search, offered under a Global Standard deployment. Because grounding isn't data resident, Google's global infrastructure routes traffic to a global datacenter for each web search request. This processing may be different than your data processing location chosen for your ServiceNow instance. Consider your organization's data policies before enabling AI agents that use Google web search tools.

After you add the tools to your AI agent, scroll down to the next step in the guided setup.

Knowledge graphs

You can also add Knowledge graphs in this step. Knowledge graphs provide the AI agent with information about relationships between real-world entities, which improves its outputs. For example, you could add a Knowledge Graph to an approval AI agent that maps users to their location, company, and department, helping the AI agent apply the correct approval process.



Supervised vs. autonomous execution mode for AI agents

Autonomous

The tool runs as soon as the agent selects it, with no prompt and no opportunity to intervene. Appropriate for read operations and low-consequence updates.

Supervised

The agent pauses and asks a person to approve the action before the tool runs. Nothing happens until someone responds, so a supervised tool in a background or unattended execution stalls rather than proceeds. Use it for anything that writes, deletes, contacts a customer, or spends budget.

Execution mode is set per tool and can be changed at any time in the guided setup. A mode set during a build conversation can be set after the initial draft. See Modify an AI agent.

You can reduce the risk of an AI agent executing unexpectedly by configuring its tools to run in supervised mode. Supervised mode means that tools use human oversight during execution. Use supervised mode to enhance security for agents that perform sensitive or critical actions.

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You can set the supervised execution mode when creating a tool in the AI agent guided setup. For example, select **Supervised** as the *Execution mode* when adding a catalog item tool. For reference, see Add a catalog item to an AI agent.

Add a generative AI skill tool to an AI agent

Add a generative AI skill to an AI agent to expand its capabilities with reusable operations and custom functionality.

Before you begin

If you want to add a custom skill to an AI agent, the skill must be published and activated in the . For more information on deploying custom skills, see Finalize and publish a custom skill and Activate a custom skill.

When an AI agent uses a skill as a tool, the user the AI agent is running as must pass the ACL of the skill. Ensure that the security configurations for the skill are met by the AI agent and agentic workflow. For more information on setting skill-level ACLs, see Configure access control lists for a skill.

Access failures at run time rather than on save. Tool calls fail and the trace log records an access error against the tool, not a configuration warning. When a tool fails for some users and not others, compare the invoking user roles against the ACL of the underlying skill first. If you manually test an agentic AI asset, it will flag access issues by the invoking user if there are any.

Role required: sn_aia.admin

About this task

A generative AI skill is a reusable operation that extends the capabilities of an AI agent. When adding a skill tool, you can configure its execution mode, output display, and processing messages to ensure the tool works effectively within your AI agent's workflow.

Procedure

1. In the Tools section, select **Add tools**, then **Create new tool**, then select **Skill**.
2. Select an AI skill from the **AI Skill** dropdown.

   The selected skill's name, description, and inputs are displayed automatically.
3. Describe how the AI agent should use the tool.

   Providing a description increases the likelihood that the AI agent calls the correct tool to accomplish its task.
4. Select an execution mode under **Execution mode**.

   Choose **Supervised** to require human oversight when the tool executes, or **Autonomous** to allow the tool to run without human intervention.
5. Toggle **Display output to users** to control whether the tool's output is shown to users.
6. If display output is enabled, select an output widget from the **Widget** dropdown.

   Widgets can only be used by assistants built in Premium Chat experiences. Select the widget type that best formats the tool's output for users.
7. Choose whether to display a refined widget message under **Display refined widget message**.
8. Expand the **Advanced settings** section to configure output transformation and processing messages.

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a. Select an output transformation format from the **Output transformation format** dropdown.

   Raw output data usually needs to be transformed into a format that is user-friendly and readable. You can also transform data into smaller formats to reduce the amount of data the AI agent needs to analyze. Transforming data involves tradeoffs between data completeness and latency.

   The available output transformation formats are:

   - *None*: Output data isn't changed into a different format and users will see raw data.
   - *Concise*: Output data is changed into the most minimal format for users, with less data for the AI agent to analyze.
   - *Verbose*: Output data is changed into a summary-like format for users, with slightly less data for the AI agent to analyze.
   - *Paraphrase*: Output data is changed into a format featuring direct statements for users, with no reduction in data.
   - *Custom*: Output data is changed into a format you specify (consider data loss and performance issues).

b. Write processing messages for users under **Write processing messages for users**.

   Describe the action that happens while the tool is running in the **In-progress message** field and the final action when the tool completes in the **Completion message** field. For example, users can see "Executing skill" when the tool is in progress and "Skill execution complete" when the tool is done.

Result
You have added a generative AI skill tool to your AI agent with the appropriate execution mode, output settings, and processing messages configured.

Add a catalog item tool to an AI agent

Add a catalog item to an AI agent in AI Agent Studio so that your users can access conversational catalog items.

Before you begin
Role required: sn_aia.admin

About this task
Catalog item tools allow AI agents to interact with service catalog items. When adding a catalog item tool, you can configure its execution mode, output display, and processing messages to ensure the tool works effectively within your AI agent's workflow.

Procedure
1. In the Tools section, select **Add tools**, then **Create new tool**, then select **Catalog item**.
2. Select the catalog item from the **Catalog item** dropdown.
3. Enter a name for the tool in the **Name** field.
4. Enter a detailed description of the tool in the **Description for this AI agent** field.

   A thorough description helps the AI agent understand what the tool does and when to use it.

5. Select an execution mode under **Execution mode**.

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Choose **Supervised** to require human oversight when the tool executes, or **Autonomous** to allow the tool to run without human intervention.

6. Toggle **Display output to users** to control whether the tool's output is shown to users.
7. Select an output widget from the **Widget** dropdown.

   Widgets can only be used by assistants built in Premium Chat experiences. Select the widget type that best formats the tool's output for users.

8. Expand the **Advanced settings** section to configure output transformation and processing messages.

   a. Select an output transformation format from the **Output transformation format** dropdown.

      Raw output data usually needs to be transformed into a format that is user-friendly and readable. You can also transform data into smaller formats to reduce the amount of data the AI agent needs to analyze. Transforming data involves tradeoffs between data completeness and latency.

      The available output transformation formats are:

      - *None*: Output data isn't changed into a different format and users will see raw data.
      - *Concise*: Output data is changed into the most minimal format for users, with less data for the AI agent to analyze.
      - *Verbose*: Output data is changed into a summary-like format for users, with slightly less data for the AI agent to analyze.
      - *Paraphrase*: Output data is changed into a format featuring direct statements for users, with no reduction in data.
      - *Custom*: Output data is changed into a format you specify (consider data loss and performance issues).

   b. Write processing messages for users under **Write processing messages for users**.

      Describe the action that happens while the tool is running in the **In-progress message** field and the final action when the tool completes in the **Completion message** field. For example, users can see "Requesting a service" when the tool is in progress and "Requested a service" when the tool is done.

Result
You have added a catalog item tool to your AI agent with the appropriate execution mode, output settings, and processing messages configured.

Add a conversational topic tool to an AI agent

Add a Virtual Agent topic to an AI agent in AI Agent Studio so that you can use conversations to get additional information from the user. For example, a conversational topic could be used to let a user select a date range for surveys.

Before you begin
Role required: sn_aia.admin

About this task
Conversational topic tools allow AI agents to utilize conversational topics. When adding a conversational topic tool, you can configure its execution mode, output display, and processing messages to ensure the tool works effectively within your AI agent's workflow.

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Procedure

1. In the Tools section, select **Add tools**, then **Create new tool**, then select **Conversational topic**.
2. Select the conversational topic from the **Conversational topic** dropdown.
3. Enter a name for the tool in the **Name** field.
4. Enter a detailed description of the tool in the **Description for this AI agent** field.

   A thorough description helps the AI agent understand what the tool does and when to use it.
5. Select an execution mode under **Execution mode**.

   Choose **Supervised** to require human oversight when the tool executes, or **Autonomous** to allow the tool to run without human intervention.
6. Toggle **Display output to users** to control whether the tool's output is shown to users.
7. Select an output widget from the **Widget** dropdown.

   Widgets can only be used by assistants built in Premium Chat experiences. Select the widget type that best formats the tool's output for users.
8. Expand the **Advanced settings** section to configure output transformation and processing messages.

   a. Select an output transformation format from the **Output transformation format** dropdown.

      Raw output data usually needs to be transformed into a format that is user-friendly and readable. You can also transform data into smaller formats to reduce the amount of data the AI agent needs to analyze. Transforming data involves tradeoffs between data completeness and latency.

      The available output transformation formats are:

      - *None*: Output data isn't changed into a different format and users will see raw data.
      - *Concise*: Output data is changed into the most minimal format for users, with less data for the AI agent to analyze.
      - *Verbose*: Output data is changed into a summary-like format for users, with slightly less data for the AI agent to analyze.
      - *Paraphrase*: Output data is changed into a format featuring direct statements for users, with no reduction in data.
      - *Custom*: Output data is changed into a format you specify (consider data loss and performance issues).

   b. Write processing messages for users under **Write processing messages for users**.

      Describe the action that happens while the tool is running in the **In-progress message** field and the final action when the tool completes in the **Completion message** field. For example, users can see "Requesting a service" when the tool is in progress and "Requested a service" when the tool is done.

Result

You have added a conversational topic tool to your AI agent with the appropriate execution mode, output settings, and processing messages configured.

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Add a deep research tool to an AI agent

Add a deep research tool to an AI agent so it can search multiple sources and provide answers with sources listed.

Before you begin

Role required: sn_aia.admin

About this task

Deep research tools allow AI agents to perform step-by-step investigation across multiple sources to synthesize clear, cited answers. When adding a deep research tool, you can configure its query, depth, knowledge sources, instructions, execution mode, output display, and processing messages to ensure the tool works effectively within your AI agent's workflow.

Procedure

1. In the Tools section, select **Add tools**, then **Create new tool**, then select **Deep research**.
2. Enter a name for the tool in the **Name** field.
3. Enter a detailed description of the tool in the **Description for this AI agent** field.

   A thorough description helps the AI agent understand what the tool does and when to use it.
4. Enter the deep research query in the **Query** field.
5. Select a depth level from the **Depth** dropdown.

   The depth determines how thoroughly the research investigation is conducted. The available depth levels are:

   - **Basic research**
   - **Standard research**
   - **Advanced research**
6. Add knowledge sources by selecting **+ Add** next to Knowledge sources.

   a. Select a search profile from the **Search profile** dropdown.

   b. Configure search sources under **Search sources**.

   c. Specify fields to be returned under **Fields to be returned**.

   d. Configure semantic indexed fields under **Semantic indexed fields**.

      Semantic indexed fields are fields that have been indexed to understand meaning and context. This allows the search to find results based on semantic similarity, so searches can match related concepts even if exact words don't appear.

   e. Select **Add** to add the knowledge source configuration.
7. Enter instructions in the **Instructions** field.

   Provide instructions for guiding the research process. These instructions help break down the research into smaller questions and guide how the final answer is created.
8. Select an execution mode under **Execution mode**.

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Choose **Supervised** to require human oversight when the tool executes, or **Autonomous** to allow the tool to run without human intervention.

9. Toggle **Display output to users** to control whether the tool's output is shown to users.
10. If display output is enabled, select an output widget from the **Widget** dropdown.

    Widgets can only be used by assistants built in Premium Chat experiences. Select the widget type that best formats the tool's output for users.

11. Choose whether to display a refined widget message under **Display refined widget message**.
12. Expand the **Advanced settings** section to configure output transformation and processing messages.

    a. Select an output transformation format from the **Output transformation format** dropdown.

    Raw output data usually needs to be transformed into a format that is user-friendly and readable. You can also transform data into smaller formats to reduce the amount of data the AI agent needs to analyze. Transforming data involves tradeoffs between data completeness and latency.

    The available output transformation formats are:

    - *None*: Output data isn't changed into a different format and users will see raw data.
    - *Concise*: Output data is changed into the most minimal format for users, with less data for the AI agent to analyze.
    - *Verbose*: Output data is changed into a summary-like format for users, with slightly less data for the AI agent to analyze.
    - *Paraphrase*: Output data is changed into a format featuring direct statements for users, with no reduction in data.
    - *Custom*: Output data is changed into a format you specify (consider data loss and performance issues).

    b. Write processing messages for users under **Write processing messages for users**.

    Describe the action that happens while the tool is running in the **In-progress message** field and the final action when the tool completes in the **Completion message** field. For example, users can see "Searching the knowledge base" when the tool is in progress and "Found results" when the tool is done.

Result

You have added a deep research tool to your AI agent with the appropriate query, depth, knowledge sources, execution mode, output settings, and processing messages configured.

Add a desktop action tool to an AI agent

Add a desktop action as a tool to an AI agent so that AI agents can automate tasks in desktop and web-based applications.

Before you begin

Familiarize yourself with desktop actions. For more information, see AI Desktop Actions documentation.

Role required: sn_aia.admin

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About this task

Desktop actions are tools that AI agents use to interact with web and desktop applications. An AI agent uses a desktop action to automate tasks in desktop-based or web-based applications on the end user's system. You can create a desktop action or add an existing one as a tool to your AI agent.

- Create a defined desktop action in the AI Desktop Actions client application on the Windows machine, then add it as a tool to an AI agent.
- Configure an adaptive desktop action in AI Agent Studio during AI agent tool configuration.

For more information about executing desktop actions, see Examples of executing desktop actions using AI agents.

Procedure

1. In the Tools section, select **Add tools**, then **Create new tool**, then select **Desktop action**.
2. Choose one of the following options.

Option	Description
An existing one	Option to add a previously created defined desktop action. Defined desktop actions are categorized into on-screen tasks and background tasks. ○ **On-screen tasks**: These actions help you simulate humans interacting with UI ele ments on your thick client applications, legacy systems, or SaaS applications with out APIs. These actions include clicking but tons, typing into text boxes, selecting from drop-down menus, and more. They encap sulate repeatable UI interactions, such as screens, anchors, and steps. You can cre ate, manage, and test your desktop actions in AI Desktop Actions. When you add an on-screen task desktop action, additional fields require configura tion. For more information, see Parameter mapping for defined desktop actions. ○ **Background tasks**: These actions include prebuilt connectors that enable your AI agents to interact with applications and sys tem components in the background. These connectors streamline automation by offer ing actions for common tasks, reducing the need for complex scripting. Each connec tor focuses on a specific application or sys tem area and provides a collection of relat ed methods. You can't create background tasks actions.
A new desktop action	Option to create a defined or adaptive desk top actions. For more information, see the next step.

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3. If creating a new desktop action, select how you want to create it.

Option	Description
Let AI determine the steps dynamically	Option to configure adaptive desktop actions that enable the AI agent to plan execution dy namically. Select the environment where these desktop actions run: ○ **Desktop applications**: AI agents run these desktop actions in the AI Desktop Actions client application on the macOS machine. For more information, see Adaptive desk top actions for desktop and web-based tasks. ⚠ **Warning:** This is a beta feature in this release. Functionality, behavior, and execution logic may change in subsequent releases. Test these desk top actions thoroughly in a test en vironment before deploying to pro duction. Report issues or feedback through your support channels. ○ **Web based applications**: AI agents run these desktop actions in the Google Chrome browser through a browser exten sion. For more information, see Adaptive desk top actions for web-based tasks.
Record a fixed sequence of steps	Option to configure defined desktop actions that are a fixed sequence of steps that are recorded in the AI Desktop Actions client ap plication on the Windows machine and then added as a tool to an AI agent.

4. Enter a name for the desktop action in the **Name** field.
5. Enter a detailed description of the desktop action in the **Tool description** field.

   A thorough description helps the AI agent interpret the tool purpose and when to use it. This description is sent to the language model.
6. In the **Navigation actions** field, add a list of precise steps that the AI agent must execute on the web or desktop applications.
7. In the **Time out** field, enter the maximum number of minutes an AI agent must try to execute desktop actions on web or desktop.
   The default value is 30 minutes.
8. Select an execution mode under **Execution mode**.

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Choose **Supervised** to require human input during execution, or **Autonomous** to allow the tool to run without human intervention.

9. Toggle **Display output** to control whether the tool's output is shown to users.
10. If display output is enabled, select an output widget from the **Widget** dropdown.

    Widgets can only be used by assistants built in Premium Chat experiences. Select the widget type that best formats the tool's output for users.

11. Choose whether widget transformation is required under **Requires widget transformation**.

    Select **Yes** if the tool's output needs to be transformed before it can be displayed by the widget.

12. Choose whether to display a refined widget message under **Display refined widget message**.
13. Expand the **Advanced settings** section to configure output transformation and processing messages.

    a. Select an output transformation format from the **Output transformation format** dropdown.

       Raw output data usually needs to be transformed into a format that is user-friendly and readable. You can also transform data into smaller formats to reduce the amount of data the AI agent needs to analyze. Transforming data involves tradeoffs between data completeness and latency.

       The available output transformation formats are:

       - *None*: Output data isn't changed into a different format and users will see raw data.
       - *Concise*: Output data is changed into the most minimal format for users, with less data for the AI agent to analyze.
       - *Verbose*: Output data is changed into a summary-like format for users, with slightly less data for the AI agent to analyze.
       - *Paraphrase*: Output data is changed into a format featuring direct statements for users, with no reduction in data.
       - *Custom*: Output data is changed into a format you specify (consider data loss and performance issues).

    b. Write processing messages for users under **Write processing messages for users**.

       Describe the action that happens while the tool is running in the **In-progress message** field and the final action when the tool completes in the **Completion message** field. For example, users can see "Requesting a service" when the tool is in progress and "Requested a service" when the tool is done.

Result

You have added a desktop action tool to your AI agent with the appropriate configuration, execution mode, output settings, and processing messages.

Parameter mapping for defined desktop actions

The Map parameters section appears when you configure an **On-screen task** desktop action with parameter inputs in AI Agent Studio. Map a parameter record to each step before saving the desktop action.

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Map parameters

Note: These fields appear only when you select an **On-screen task** desktop action configured with parameter inputs.

Field	Description
Step name	Name of the step configured to use a parameter.
Description	Description of the step configured to use a parameter.
Parameter record	The Desktop action parameter record the agent uses to retrieve the value for this step at execution time. Map a parameter record for every step before saving the desktop action. The same parameter record can map to multiple steps. Each step maps to one parameter record only.

Warning: If you update a desktop action after mapping its inputs in AI Agent Studio, the agent continues to use the previous mapping until you reopen the tool configuration and save it again. If you rename an input, the agent registers it as a new input and removes the existing mapping. Remap the renamed input before saving the desktop action.

Add a file upload tool to an AI agent

Upload files for analysis by an AI agent in AI Agent Studio to grant your AI agent access to specialized knowledge.

Before you begin

Role required: sn_aia.admin

About this task

File upload tools allow AI agents to access specialized knowledge from uploaded files. When adding a file upload tool, you can configure which files the AI agent has access to, its execution mode, output display, and processing messages to ensure the tool works effectively within your AI agent's workflow.

Attaching a document when building an AI agent conversationally only informs the draft configuration only. See Create an AI agent conversationally. You must add a file upload tool if you want the AI agent to access the file at run time.

Procedure

1. In the Tools section, select **Add tools**, then **Create new tool**, then select **File upload**.
2. Select **Attach file** or drag and drop to upload files.

   You can upload up to 5 files, with a maximum size of 5 MB each, in these formats: PDF, DOCX, TXT.

   Note: By giving AI agents access to these files, you're allowing users interacting with these AI agents to also see information in these files.

3. Enter a name for the tool in the **Name** field.
4. Enter a detailed description of the tool in the **Description for this AI agent** field.

   A thorough description helps the AI agent understand what the tool does and when to use it.

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5. Select an execution mode under **Execution mode**.

   Choose **Supervised** to require human oversight when the tool executes, or **Autonomous** to allow the tool to run without human intervention.

6. Toggle **Display output to users** to control whether the tool's output is shown to users.
7. If display output is enabled, select an output widget from the **Widget** dropdown.

   Widgets can only be used by assistants built in Premium Chat experiences. Select the widget type that best formats the tool's output for users.

8. Choose whether to display a refined widget message under **Display refined widget message**.
9. Expand the **Advanced settings** section to configure output transformation and processing messages.

   a. Select an output transformation format from the **Output transformation format** dropdown.

      Raw output data usually needs to be transformed into a format that is user-friendly and readable. You can also transform data into smaller formats to reduce the amount of data the AI agent needs to analyze. Transforming data involves tradeoffs between data completeness and latency.

      The available output transformation formats are:

      - *None*: Output data isn't changed into a different format and users will see raw data.
      - *Concise*: Output data is changed into the most minimal format for users, with less data for the AI agent to analyze.
      - *Verbose*: Output data is changed into a summary-like format for users, with slightly less data for the AI agent to analyze.
      - *Paraphrase*: Output data is changed into a format featuring direct statements for users, with no reduction in data.
      - *Custom*: Output data is changed into a format you specify (consider data loss and performance issues).

   b. Write processing messages for users under **Write processing messages for users**.

      Describe the action that happens while the tool is running in the **In-progress message** field and the final action when the tool completes in the **Completion message** field. For example, users can see "Analyzing files" when the tool is in progress and "Analysis complete" when the tool is done.

Result

You have added a file upload tool to your AI agent with the appropriate files, execution mode, output settings, and processing messages configured.

Add a flow action tool to an AI agent

Add a flow action to an AI agent in AI Agent Studio. Define the flow action to use it as a reusable operation in automating ServiceNow AI Platform features without having to write code.

Before you begin

When an AI agent uses a flow action tool, the user the AI agent is running as must pass the ACL of the flow action. Ensure that the security configurations for the flow action are met by the AI agent and agentic workflow. For more information, see Security for AI agents.

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Role required: sn_aia.admin

About this task

Flow action tools allow AI agents to execute flow actions as reusable operations. When adding a flow action tool, you can configure its execution mode, output display, and processing messages to ensure the tool works effectively within your AI agent's workflow.

Procedure

1. In the Tools section, select **Add tools**, then **Create new tool**, then select **Flow action**.
2. Select a flow action from the **Select flow action** dropdown.

   The selected flow action description and its inputs are displayed automatically.

   If a flow action's input type is unsupported, the flow action cannot be used by an AI agent. A warning will alert you if this is the case.
3. Enter a name for the tool in the **Name** field.
4. Enter a detailed description of the tool in the **Description for this AI agent** field.

   A thorough description helps the AI agent understand what the tool does and when to use it.
5. Select an execution mode under **Execution mode**.

   Choose **Supervised** to require human oversight when the tool executes, or **Autonomous** to allow the tool to run without human intervention.
6. Toggle **Display output to users** to control whether the tool's output is shown to users.
7. If display output is enabled, select an output widget from the **Widget** dropdown.

   Widgets can only be used by assistants built in Premium Chat experiences. Select the widget type that best formats the tool's output for users.
8. Choose whether to display a refined widget message under **Display refined widget message**.
9. Expand the **Advanced settings** section to configure output transformation and processing messages.

   a. Select an output transformation format from the **Output transformation format** dropdown.

      Raw output data usually needs to be transformed into a format that is user-friendly and readable. You can also transform data into smaller formats to reduce the amount of data the AI agent needs to analyze. Transforming data involves tradeoffs between data completeness and latency.

      The available output transformation formats are:

      - *None*: Output data isn't changed into a different format and users will see raw data.
      - *Concise*: Output data is changed into the most minimal format for users, with less data for the AI agent to analyze.
      - *Verbose*: Output data is changed into a summary-like format for users, with slightly less data for the AI agent to analyze.
      - *Paraphrase*: Output data is changed into a format featuring direct statements for users, with no reduction in data.
      - *Custom*: Output data is changed into a format you specify (consider data loss and performance issues).

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b. Write processing messages for users under **Write processing messages for users**.

   Describe the action that happens while the tool is running in the **In-progress message** field and the final action when the tool completes in the **Completion message** field. For example, users can see "Executing flow" when the tool is in progress and "Flow execution complete" when the tool is done.

Result
You have added a flow action tool to your AI agent with the appropriate execution mode, output settings, and processing messages configured.

Add a knowledge graph tool to an AI agent

Add a Knowledge Graph to an AI agent in AI Agent Studio that uses the structured and unstructured data from different ServiceNow records to enhance the performance of AI agents.

Before you begin
Role required: sn_aia.admin

About this task
A Knowledge Graph is a semantic layer that connects data, relationships, and context across your enterprise. It structures information as a graph of entities and their connections, transforming raw data into actionable knowledge. A Knowledge Graph allows AI agents to understand the relationships between real-world entities and retrieve insights, facts, and relationships directly to automate actions and improve accuracy. When adding a Knowledge Graph tool, you can configure its query instruction, conversation history, execution mode, output display, and processing messages to ensure the tool works effectively within your AI agent's workflow.

Procedure
1. In the Tools section, select **Add tools**, then **Create new tool**, then select **Knowledge graph**.
2. Select a Knowledge Graph from the **Select knowledge graph** dropdown.
3. Enter a name for the tool in the **Name** field.
4. Enter a detailed description of the tool in the **Description for this AI agent** field.

   A thorough description helps the AI agent understand what the tool does and when to use it.

5. Enter a query instruction in the **Query instruction** field.

   The query instruction should be a direct translation of the request into a search query without any added interpretations.

6. Toggle **Conversation history** to control whether the tool uses conversation history.
7. Select an execution mode under **Execution mode**.

   Choose **Supervised** to require human oversight when the tool executes, or **Autonomous** to allow the tool to run without human intervention.

8. Toggle **Display output to users** to control whether the tool's output is shown to users.
9. If display output is enabled, select an output widget from the **Widget** dropdown.

   Widgets can only be used by assistants built in Premium Chat experiences. Select the widget type that best formats the tool's output for users.

10. Choose whether to display a refined widget message under **Display refined widget message**.

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11. Expand the **Advanced settings** section to configure output transformation and processing messages.

    a. Select an output transformation format from the **Output transformation format** dropdown.

    Raw output data usually needs to be transformed into a format that is user-friendly and readable. You can also transform data into smaller formats to reduce the amount of data the AI agent needs to analyze. Transforming data involves tradeoffs between data completeness and latency.

    The available output transformation formats are:

    - *None*: Output data isn't changed into a different format and users will see raw data.
    - *Concise*: Output data is changed into the most minimal format for users, with less data for the AI agent to analyze.
    - *Verbose*: Output data is changed into a summary-like format for users, with slightly less data for the AI agent to analyze.
    - *Paraphrase*: Output data is changed into a format featuring direct statements for users, with no reduction in data.
    - *Custom*: Output data is changed into a format you specify (consider data loss and performance issues).

    b. Write processing messages for users under **Write processing messages for users**.

    Describe the action that happens while the tool is running in the **In-progress message** field and the final action when the tool completes in the **Completion message** field. For example, users can see "Querying knowledge graph" when the tool is in progress and "Query complete" when the tool is done.

Result
You have added a Knowledge Graph tool to your AI agent with the appropriate query instruction, execution mode, output settings, and processing messages configured.

Add a record operation tool to an AI agent

Add a record operation tool to an AI agent to enable it to perform record operations on tables in your instance.

Before you begin
Role required: sn_aia.admin

About this task
A record operation tool allows AI agents to perform operations on records in your ServiceNow instance. When adding a record operation tool, you can configure its table, operation, inputs, conditions, execution mode, output display, and processing messages to ensure the tool works effectively within your AI agent's workflow.

Procedure
1. In the Tools section, select **Add tools**, then **Create new tool**, then select **Record operation**.
2. Choose whether to add a new record operation or an existing one.

   If you want to use an existing one, select the name of the record operation in the **Select a record operation** dropdown.

3. Enter a name for the tool in the **Name** field.

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4. Enter a detailed description of the tool in the **Description for this AI agent** field.

   A thorough description helps the AI agent understand what the tool does and when to use it.

5. Select an execution mode under **Execution mode**.

   Choose **Supervised** to require human oversight when the tool executes, or **Autonomous** to allow the tool to run without human intervention.

6. Add inputs for the record operation under **Inputs**.

   Select **Add an input** to add each required input. For each input, enter the name and description.

   Input names and the field names they map to need to match exactly. A misspelled name is not caught on save. If a field is misspelled, operation fails at run time and appears in the trace log as a tool failure. Check names against the field labels on the table before testing.

7. Select the table from the **Table** dropdown.
8. Select an operation from the **Operation** dropdown.
9. Define conditions under **Conditions**.

   Defining conditions is required. You can add multiple condition groups using logical operators such as **and** or **or**.

10. Toggle **Display output to users** to control whether the tool's output is shown to users.
11. If display output is enabled, select an output widget from the **Widget** dropdown.

    Widgets can only be used by assistants built in Premium Chat experiences. Select the widget type that best formats the tool's output for users.

12. Expand the **Advanced settings** section to configure output transformation and processing messages.

    a. Select an output transformation format from the **Output transformation format** dropdown.

       Raw output data usually needs to be transformed into a format that is user-friendly and readable. You can also transform data into smaller formats to reduce the amount of data the AI agent needs to analyze. Transforming data involves tradeoffs between data completeness and latency.

       The available output transformation formats are:

       - *None*: Output data isn't changed into a different format and users will see raw data.
       - *Concise*: Output data is changed into the most minimal format for users, with less data for the AI agent to analyze.
       - *Verbose*: Output data is changed into a summary-like format for users, with slightly less data for the AI agent to analyze.
       - *Paraphrase*: Output data is changed into a format featuring direct statements for users, with no reduction in data.
       - *Custom*: Output data is changed into a format you specify (consider data loss and performance issues).

    b. Write processing messages for users under **Write processing messages for users**.

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Describe the action that happens while the tool is running in the **In-progress message** field and the final action when the tool completes in the **Completion message** field. For example, users can see "Executing operation" when the tool is in progress and "Operation complete" when the tool is done.

Result
You have added a record operation tool to your AI agent with the appropriate table, operation, conditions, execution mode, output settings, and processing messages configured.

Add a script tool to an AI agent

Add a script tool to an AI agent to enable it to execute custom scripts to perform specialized tasks.

Before you begin
Role required: sn_aia.admin

About this task
A script tool allows AI agents to execute custom scripts to perform specialized tasks. When adding a script tool, you can configure its script inputs, execution mode, output display, and processing messages. You can reference the scripts that come with AI agents associated with AI applications as examples to help you write custom scripts.

Procedure
1. In the Tools section, select **Add tools**, then **Create new tool**, then select **Script**.
2. Choose whether to create a new script or use an existing one.

   Select **A new script** to create a new script, or select **An existing one** to use a previously created script.
3. If you want to use an existing script, select the name of the script from the **Select a script** dropdown.

   The script's inputs and script content are populated automatically.
4. Add script inputs under **Script inputs**.

   Select **Add an input** to add each required input. For each input, enter the input name, description, and mark whether it is mandatory.
5. Write or edit the script in the **Script** field.

   Only string inputs are allowed. The script should return outputs as an object where the keys are understandable by the language model.

   Field names must match exactly. A typo in a variable or column name produces a run-time error that reads as a tool failure.

   Note: For improved security, use GlideRecordSecure instead of GlideRecord and addUserEncodedQuery() instead of addEncodedQuery().
6. Enter a name for the tool in the **Name** field.
7. Enter a detailed description of the tool in the **Description for this AI agent** field.

   A thorough description helps the AI agent understand what the tool does and when to use it.
8. Select an execution mode under **Execution mode**.

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Choose **Supervised** to require human oversight when the tool executes, or **Autonomous** to allow the tool to run without human intervention.

9. Toggle **Display output to users** to control whether the tool's output is shown to users.
10. If display output is enabled, select an output widget from the **Widget** dropdown.

    Widgets can only be used by assistants built in Premium Chat experiences. Select the widget type that best formats the tool's output for users.

11. Choose whether to display a refined widget message under **Display refined widget message**.
12. Expand the **Advanced settings** section to configure output transformation and processing messages.

    a. Select an output transformation format from the **Output transformation format** dropdown.

    Raw output data usually needs to be transformed into a format that is user-friendly and readable. You can also transform data into smaller formats to reduce the amount of data the AI agent needs to analyze. Transforming data involves tradeoffs between data completeness and latency.

    The available output transformation formats are:

    - *None*: Output data isn't changed into a different format and users will see raw data.
    - *Concise*: Output data is changed into the most minimal format for users, with less data for the AI agent to analyze.
    - *Verbose*: Output data is changed into a summary-like format for users, with slightly less data for the AI agent to analyze.
    - *Paraphrase*: Output data is changed into a format featuring direct statements for users, with no reduction in data.
    - *Custom*: Output data is changed into a format you specify (consider data loss and performance issues).

    b. Write processing messages for users under **Write processing messages for users**.

    Describe the action that happens while the tool is running in the **In-progress message** field and the final action when the tool completes in the **Completion message** field. For example, users can see "Executing script" when the tool is in progress and "Script execution complete" when the tool is done.

Result
You have added a script tool to your AI agent with the appropriate script inputs, execution mode, output settings, and processing messages configured.

Add a search retrieval tool to an AI agent

Add a search retrieval tool to an AI agent to enable it to retrieve and incorporate relevant information from defined sources.

Before you begin
Role required: sn_aia.admin

About this task
A search retrieval tool (RAG or retrieval-augmented generation) allows AI agents to retrieve and incorporate relevant information from defined sources. When adding a search retrieval tool, you

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can configure its search profile, sources, criteria, execution mode, output display, and processing messages to ensure the tool works effectively within your AI agent's workflow.

Procedure

1. In the Tools section, select **Add tools**, then **Create new tool**, then select **Search retrieval**.
2. Choose whether to create a new search retrieval or use an existing one.

   Select **A new search retrieval** to create a new search retrieval, or select **An existing one** to use a previously created search retrieval.
3. If you want to use an existing search retrieval, select the name from the dropdown.

   The search retrieval's name, tool description, search profile, search sources, and other settings are populated automatically.
4. Enter a name for the tool in the **Name** field.
5. Enter a detailed description of the tool in the **Description for this AI agent** field.

   A thorough description helps the AI agent understand what the tool does and when to use it.
6. Select a search profile from the **Search profile** dropdown.
7. Configure search sources under **Search sources**.

   Search sources appear after you select a search profile.
8. Enter the number of results to return in the **Results limit** field.
9. Select search criteria under **Search criteria**.

   Choose from **Semantic**, **Keyword**, or **Hybrid** search criteria.
10. Configure semantic indexes under **Semantic indexes** if applicable.
11. Enter a document matching threshold in the **Document matching threshold** field.
12. Select an execution mode under **Execution mode**.

    Choose **Supervised** to require human oversight when the tool executes, or **Autonomous** to allow the tool to run without human intervention.
13. Toggle **Display output to users** to control whether the tool's output is shown to users.
14. If display output is enabled, select an output widget from the **Widget** dropdown.

    Widgets can only be used by assistants built in Premium Chat experiences. Select the widget type that best formats the tool's output for users.
15. Choose whether to display a refined widget message under **Display refined widget message**.
16. Expand the **Advanced settings** section to configure output transformation and processing messages.

    a. Select an output transformation format from the **Output transformation format** dropdown.

       Raw output data usually needs to be transformed into a format that is user-friendly and readable. You can also transform data into smaller formats to reduce the amount of data the AI agent needs to analyze. Transforming data involves tradeoffs between data completeness and latency.

       The available output transformation formats are:

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- *None*: Output data isn't changed into a different format and users will see raw data.
- *Concise*: Output data is changed into the most minimal format for users, with less data for the AI agent to analyze.
- *Verbose*: Output data is changed into a summary-like format for users, with slightly less data for the AI agent to analyze.
- *Paraphrase*: Output data is changed into a format featuring direct statements for users, with no reduction in data.
- *Custom*: Output data is changed into a format you specify (consider data loss and performance issues).

b. Write processing messages for users under **Write processing messages for users**.

Describe the action that happens while the tool is running in the **In-progress message** field and the final action when the tool completes in the **Completion message** field. For example, users can see "Searching sources" when the tool is in progress and "Search complete" when the tool is done.

Result
You have added a search retrieval tool to your AI agent with the appropriate search profile, sources, criteria, execution mode, output settings, and processing messages configured.

Add a subflow tool to an AI agent

Add a subflow tool to an AI agent in AI Agent Studio. Subflows are reusable sequences of processing steps that can be called from within a flow.

Before you begin
When an AI agent uses a subflow tool, the user the AI agent is running as must pass the ACL of the subflow. Ensure that the security configurations for the subflow are met by the AI agent and agentic workflow. For more information, see Security for AI agents.

Role required: sn_aia.admin

About this task
A subflow tool allows AI agents to execute subflows as reusable operations. When adding a subflow tool, you can configure its execution mode, output display, and processing messages to ensure the tool works effectively within your AI agent's workflow.

Procedure
1. In the Tools section, select **Add tools**, then **Create new tool**, then select **Subflow**.
2. Select a subflow from the **Select subflow** dropdown.

   The selected subflow's inputs are displayed automatically.
3. Enter a name for the tool in the **Name** field.
4. Enter a detailed description of the tool in the **Description for this AI agent** field.

   A thorough description helps the AI agent understand what the tool does and when to use it.
5. Select an execution mode under **Execution mode**.

   Choose **Supervised** to require human oversight when the tool executes, or **Autonomous** to allow the tool to run without human intervention.

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6. Toggle **Display output to users** to control whether the tool's output is shown to users.
7. If display output is enabled, select an output widget from the **Widget** dropdown.

   Widgets can only be used by assistants built in Premium Chat experiences. Select the widget type that best formats the tool's output for users.
8. Choose whether to display a refined widget message under **Display refined widget message**.
9. Expand the **Advanced settings** section to configure output transformation and processing messages.

   a. Select an output transformation format from the **Output transformation format** dropdown.

      Raw output data usually needs to be transformed into a format that is user-friendly and readable. You can also transform data into smaller formats to reduce the amount of data the AI agent needs to analyze. Transforming data involves tradeoffs between data completeness and latency.

      The available output transformation formats are:

      - *None*: Output data isn't changed into a different format and users will see raw data.
      - *Concise*: Output data is changed into the most minimal format for users, with less data for the AI agent to analyze.
      - *Verbose*: Output data is changed into a summary-like format for users, with slightly less data for the AI agent to analyze.
      - *Paraphrase*: Output data is changed into a format featuring direct statements for users, with no reduction in data.
      - *Custom*: Output data is changed into a format you specify (consider data loss and performance issues).

   b. Write processing messages for users under **Write processing messages for users**.

      Describe the action that happens while the tool is running in the **In-progress message** field and the final action when the tool completes in the **Completion message** field. For example, users can see "Executing subflow" when the tool is in progress and "Subflow execution complete" when the tool is done.

Result
You have added a subflow tool to your AI agent with the appropriate execution mode, output settings, and processing messages configured.

Add a web search tool to an AI agent

Add a web search tool to an AI agent to enable it to search the web and retrieve relevant information.

Before you begin
Note: If you select Google as your web search tool provider, the web search tool leverages Grounding with Google Search, offered under a Global Standard deployment. Because grounding is not data resident, Google's global infrastructure routes traffic to a global data center for each web search request. This processing may be different than your data processing location chosen for your ServiceNow instance. Please consider your organization's data policies before adding a web search tool with Google as the provider.

Role required: sn_aia.admin

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About this task

A web search tool allows AI agents to search the web and retrieve relevant information. When adding a web search tool, you can configure its search parameters, execution mode, output display, and processing messages to ensure the tool works effectively within your AI agent's workflow.

Procedure

1. In the Tools section, select **Add tools**, then **Create new tool**, then select **Web search**.
2. Review the resource and provider information.

   The resource is set to Web Search and the provider is configured elsewhere and cannot be changed.

3. Review the inputs displayed under **Inputs**.

   The inputs are automatically populated based on the web search configuration.

4. Enter a name for the tool in the **Name** field.
5. Enter a detailed description of the tool in the **Description for this AI agent** field.

   A thorough description helps the AI agent understand what the tool does and when to use it.

6. Select an execution mode under **Execution mode**.

   Choose **Supervised** to require human oversight when the tool executes, or **Autonomous** to allow the tool to run without human intervention.

7. Toggle **Display output to users** to control whether the tool's output is shown to users.
8. If display output is enabled, select an output widget from the **Widget** dropdown.

   Widgets can only be used by assistants built in Premium Chat experiences. Select the widget type that best formats the tool's output for users.

9. Choose whether to display a refined widget message under **Display refined widget message**.
10. Expand the **Advanced settings** section to configure output transformation and processing messages.

    a. Select an output transformation format from the **Output transformation format** dropdown.

       Raw output data usually needs to be transformed into a format that is user-friendly and readable. You can also transform data into smaller formats to reduce the amount of data the AI agent needs to analyze. Transforming data involves tradeoffs between data completeness and latency.

       The available output transformation formats are:

       - *None*: Output data isn't changed into a different format and users will see raw data.
       - *Concise*: Output data is changed into the most minimal format for users, with less data for the AI agent to analyze.
       - *Verbose*: Output data is changed into a summary-like format for users, with slightly less data for the AI agent to analyze.

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- *Paraphrase*: Output data is changed into a format featuring direct statements for users, with no reduction in data.
- *Custom*: Output data is changed into a format you specify (consider data loss and performance issues).

b. Write processing messages for users under **Write processing messages for users**.

Describe the action that happens while the tool is running in the **In-progress message** field and the final action when the tool completes in the **Completion message** field. For example, users can see "Searching the web" when the tool is in progress and "Search complete" when the tool is done.

Result

You have added a web search tool to your AI agent with the appropriate execution mode, output settings, and processing messages configured.

Define access rules for an AI agent

Define security controls for an AI agent to determine which users can access it and what permissions they have.

Before you begin

Role required: sn_aia_admin

About this task

The Access rules section is divided into two parts: **Which users can access this AI agent (ACLs)** and **Which data this AI agent can access**. The former creates an ACL that determines who can discover or invoke the AI agent. The latter defines the data that the AI agent has access to once it's invoked.

See Security for AI agents for more information about creating ACLs and user identities for security for AI agents.

Procedure

1. Define user access by selecting an option from the **Allowed users** dropdown.

The dropdown menu options are:

- Users with specified roles
- Authenticated users
- Public

If you select *Users with specified roles*, you can select exactly which roles can access the AI agent.

AI agents installed with AI applications each require specific roles. To learn which roles needed for AI agents associated with ServiceNow Otto applications, consult the documentation for the AI agent or the agentic workflow that uses the AI agent.

Selecting *Public* means anyone who can reach the instance can invoke the agent. Use it only for agents that expose no record data. *Public* should be used sparingly.

An access control list (ACL) is generated based on the roles you select. Saving triggers the creation of an ACL for your AI agent. If you want to make changes later, you can return to the guided setup and change the options here. If you have the correct elevated role, you can also make edits directly on the ACL table.

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2. Select whether third-party AI agents can access the AI agent.

   If selected, only AI agents with the correct user access can invoke the AI agent.

3. Define data access by selecting a user identity type from the **Identity type** dropdown.

   The user identity determines what data the AI agent can read and write while it runs.

   The two options are *Dynamic user* and *AI user*. The dynamic user is the user invoking the AI agent or the dynamic user of the agentic workflow calling on the AI agent. An AI user is a dedicated user that has its own specified roles that allow access, which could be more than the dynamic user. Every invocation reads and writes with the AI user's roles regardless of who started it.

   If you do not have an AI user but want to use the *AI user* identity, you need to create a new record on the User table. See Create a user. Select *AI user* as the identity type.

   If you select *Dynamic user*, you can select the *Approved roles* that the AI agent runs with. By default, an AI agent runs as a dynamic user and has the roles of the invoking user. Select the approved roles to limit the data access that an AI agent could have. Role filtering must be applied for all AI agents and agentic workflows to run as dynamic users. If you don't select any roles, the agent inherits whatever roles the invoking user holds.

   To override the role filtering requirement for a specific agentic workflow or AI agent, admins with the correct elevated access can create an approved list of roles for a given agentic workflow or AI agent. Then, they can access that role filtering record in the Agent Access Role Configurations table [sys_agent_access_role_configuration], and select the **allow all roles** check box. Taking these steps deactivates the requirement for a role filtering approved roles list in AI Agent Studio, so the AI admin can return to AI Agent Studio and continue to configure the agentic workflow or AI agent without role filtering applied.

   Note: Role filtering should be applied as security best practice and adherence to the principle of least privilege. Overriding the role filtering requirement isn't recommended.

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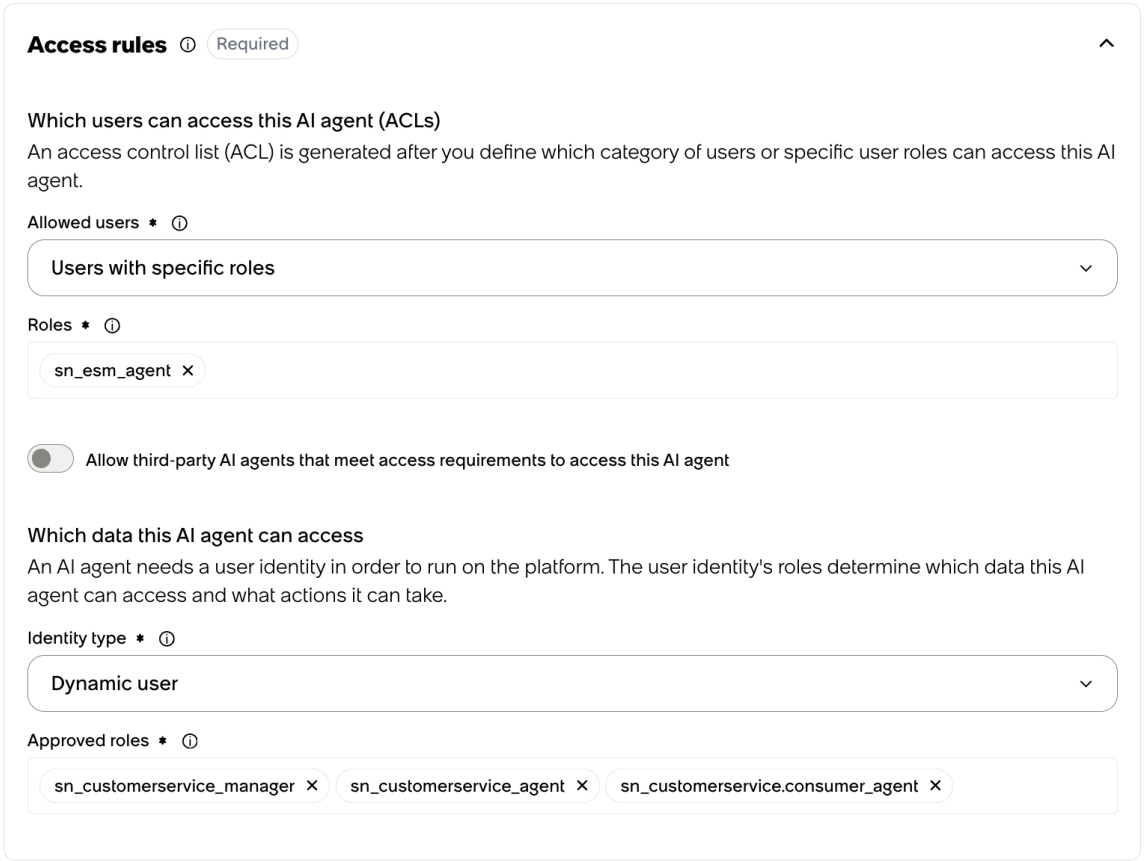
When testing an AI agent, run the AI agent with different roles to confirm that only the correct data is accessed for the user audience.



Result

You have created an ACL that determines who can discover and access your AI agent, and you have assigned a user identity (and role filtering, if relevant) to the AI agent to determine what data it can access.

What to do next

Scroll down to the next section of the guided setup, *Triggers*, to define specific conditions where the AI agent should run. Adding triggers is optional.

Add a trigger to an AI agent

In the guided setup for an AI agent, add triggers to run the AI agent automatically when certain conditions are met.

Before you begin

Role required: sn_aia.admin

About this task

Adding a trigger is optional. If you want your AI agent to be used only in chats, you don't need to add a trigger. Only add a trigger if you want to invoke the AI agent automatically when some event occurs. Triggers can be added, edited, and removed at any time, and an agent with no trigger can still be used in chat.

A trigger determines how often and how widely the agent runs, so scope the condition before activating it. A condition that matches a large set of records invokes the agent for each of them, and a scheduled trigger processes a capped number of records per run, ten by default. Test the agent manually against a single record that meets the condition first.

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If you don't want to add a trigger, skip to the next step, Select channels and messages.

Procedure

1. Select a trigger type from the dropdown.

   The trigger type determines when the AI agent will be invoked.

2. Enter details for the trigger.

   a. Enter a name for the trigger.

   b. Select the table on which the trigger will run.

   c. Define the conditions that must be met for the trigger to activate.

      You must define at least one condition to create a trigger.

   d. Enter the objective for the AI agent in the **Objective for this AI agent** field.

3. Define user identity and data access for the trigger.

   a. Choose how to define the user identity for this trigger.

      You can use an AI user identity, an existing table, or a new custom script. The user identity determines what data the AI agent can access when the trigger runs.

   b. Select the AI user identity.

      Note: This trigger runs as a type of user identity with roles and associated data access rules it can impose on the AI agent. Review the AI agent's access rules to prevent any rule conflicts or gaps.

4. Configure the trigger channel.

   a. Select where the AI agent will launch.

      You can choose to launch the AI agent in the ServiceNow Otto panel or Virtual Agent.

   b. Choose whether to show an alert to users by toggling **Show an alert to users**.

5. Select **Save**.

   If you choose a scheduled trigger, additional options are available, such as the day of the week and time when you want the trigger to run.

   Note: When running a scheduled trigger, not every record is included in the execution. By default, the value is 10. If you want to change this number, you must set the *sn_aia.max_scheduled_trigger_query* system property to a different value.

   If you choose an email trigger, the target emails must exist on the Reply [sys_reply] table. New emails aren't available as triggers.

6. Repeat the preceding steps for additional triggers.

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Result
You have added triggers to your AI agent to run it automatically under the specified conditions.

What to do next
Scroll down to the next section of the guided setup, *Channel and display*, to configure where the AI agent can be invoked and set processing messages.

Select channels and processing messages for an AI agent

In the guided setup for an AI agent, select whether to use it in the ServiceNow Otto panel or an Otto assistant.

Before you begin
Role required: sn_aia.admin

About this task
In this section of the AI agent guided setup, you configure where the AI agent can be invoked.

Procedure
1. Choose whether to allow users to invoke your AI agent in the ServiceNow Otto panel.
2. Choose whether to engage via Otto assistants by toggling **Otto assistants**.

   If enabled, you must select which chat assistants have access to the AI agent. You can edit assistants using Assistant Designer. If the list is empty, you may need to create a new assistant.

   Assistant Designer is where chat and voice assistants are configured. The list of options is populated from it, so an assistant that does not exist there can't be selected. If the list is empty, or if you are configuring a voice agent and no voice assistant is offered, create the assistant in Assistant Designer first and return to this step.

3. If you selected **Otto assistants** as a channel, set the AI agent's in-progress and completion messages.

   You can set an in-progress message, completion message, or both. If you don't want to use a specific type of message, unselect the toggle next to the message field.

   You can also use ServiceNow Otto to generate the messages for you by selecting **Generate messages**. You can change the messages after they're generated.

   This feature is only available for AI agents with the *Chat* modality.

4. Select **Save**.

Result
You have completed the channels section of the guided setup for creating an AI agent.

What to do next
Move to the next section, Manage memory.

Modify an AI agent

Modify an AI agent in AI Agent Studio to refine its performance, align with business goals, or enable it to perform new tasks.

Before you begin
Role required: sn_aia.admin

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About this task

You can make tweaks to your AI agent based on previous performance, refine it to better align with evolving business goals, or make major changes to enable it to perform entirely new tasks. This includes updating the definition and instructions, adjusting security controls, adding or removing triggers, modifying tools to provide more or better capabilities, and changing where and how the AI agent is invoked.

This is also where an agent drafted in a conversation can be revised and completed. Nothing set during a conversation is fixed. The definition, tools, execution modes, security controls, triggers, and channels can all be changed here.

The instructions field supports multiple versions within the same AI agent, allowing you to test different instructions and evaluate performance without losing previous versions. For more information, see Version control for AI agents and agentic workflows.

Procedure

1. Navigate to the **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the AI agent that you want to modify.
3. In the node view, select either the pencil edit icon or the more options icon.

   The first node contains the main configuration settings for the AI agent. The other nodes represent the tools that comprise the underlying architecture.

   The pencil edit icon directs you to the original guided setup for the AI agent. You can add tools in the guided setup, but you can't add child agents.

   If you want to add child agents, select the more options icon and select **Add child agent**. You can add an existing AI agent or create one from scratch. Choosing to add an AI agent from scratch opens a new tab with the guided setup for the AI agent. It will be added as a child agent to the AI agent you're modifying once it's saved.

   Select the more options icon, select **Add tool**, then select the type of tool you want to add to open a new tab with the tool guided setup. See Add a tool to an AI agent.
4. Define the AI agent's specialty.
5. Define access rules for the AI agent.
6. **Optional:** Add a trigger to automatically invoke your AI agent if a specified event occurs.
7. Configure where your AI agent can be invoked and set processing messages.
8. Set up long-term memory and active learning controls for your AI agent.

   AI agents can learn from previous interactions, if configured to do so. You can choose the categories of information that the AI agent should consider from its previous experiences when approaching new problems.
9. Select **Save** or **Run test** to save your changes.

Result

Your AI agent is modified and ready to use.

What to do next

You can test an execution of your AI agent manually or evaluate the AI agent using automated tests.

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Integrate external AI agents

Integrate external AI agents in AI Agent Studio to connect the ServiceNow AI Platform with third-party agentic AI providers as primary agents.

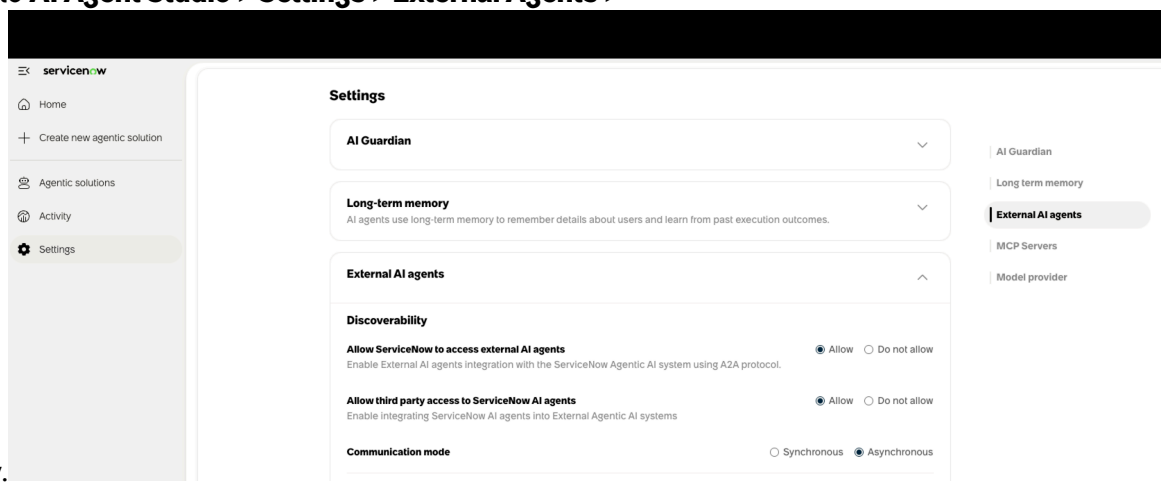
What are External Agents

External agents are the AI agents deployed on other platforms or ServiceNow instances that support A2A protocol. A2A is the only protocol we support for this functionality.

External agents operate independently and aren't managed directly by the ServiceNow AI Platform. Instead, they are invoked by ServiceNow agents through defined API contracts or messaging protocols, allowing two-way communication and task orchestration across system boundaries.

Discover External AI agents

You can enable external AI agents on the AI Agent Studio via the Settings page. Navigate to **AI Agent Studio** > **Settings** > **External Agents** > **Discoverability**.



- **Allow ServiceNow to access external AI agents**: The external AI agents can integrate with the ServiceNow agentic AI system using the A2A protocol, with the **Allow** radio button selected by default.

  To prevent external AI agents from being integrated with the ServiceNow agentic AI system using the A2A protocol, select **don't allow**.

- **Allow third-party access to ServiceNow AI agents**: The ServiceNow AI agents are configured by default for integration into external AI systems, with the **Allow** option selected by default.

  To prevent ServiceNow AI agents from being integrated into the external agentic AI system, select **don't allow**.

  > **Important:** You can integrate ServiceNow AI agents into other agentic AI systems, such as Google Cloud or Azure OpenAI.
  >
  > For information about setting up ServiceNow AI agents as secondary agents (acting as A2A server) for integrating into other agentic AI systems, see ServiceNow AI agents as secondary agents.

- **Communication mode**: Controls how external AI agents interact with the ServiceNow agentic AI system.

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You have two types of communication modes:

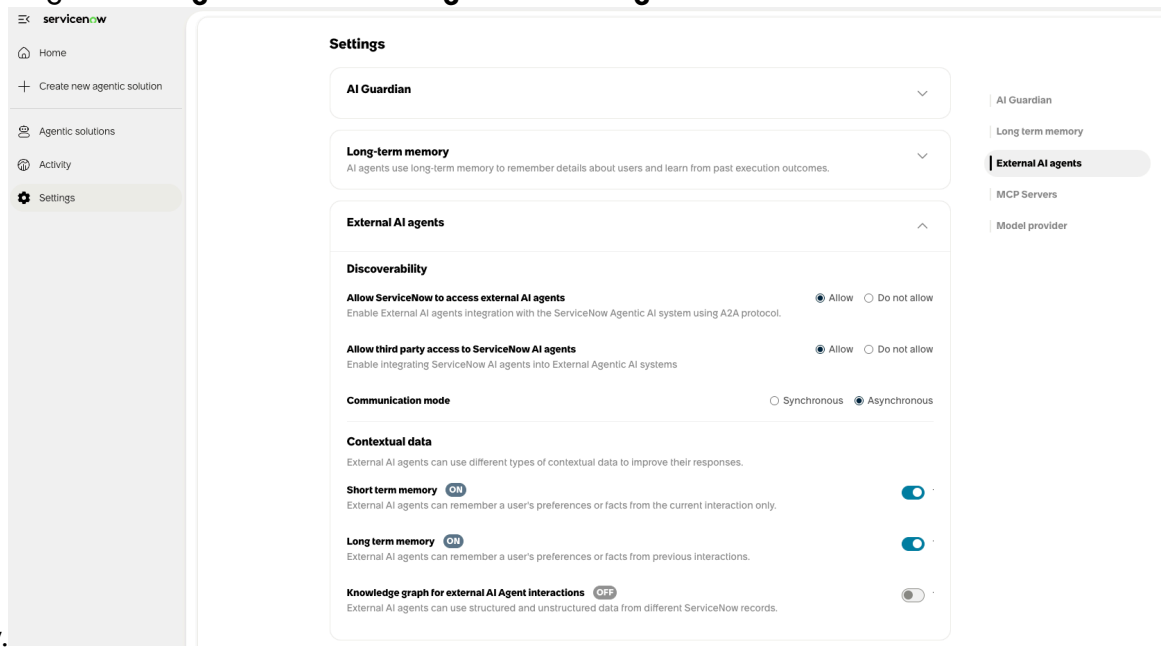
- **Synchronous**: The external AI agent waits for a response before proceeding. The communication is real-time and blocking — the agent pauses until ServiceNow returns a result.
- **Asynchronous**: The external AI agent does not wait for an immediate response. Communication is non-blocking — the agent can continue processing and handle ServiceNow responses when they are available, typically through callbacks or event-driven mechanisms. Asynchronous mode is the default communication mode.

When creating a new external AI agent in AI Agent Studio, you can connect your agent to the ServiceNow agentic AI system using the Agent2Agent (A2A) protocol integration. To do this, you must have a Connection & Credential alias record that connects to your agentic AI provider.

After connecting to the external AI agent, you can add details about its role and instructions to provide context for the AI Agent Orchestrator. Additional context helps differentiate your AI agent from other AI agents so that the AI Agent Orchestrator can decide about which agent to use.

Contextual data access for External AI agents

You can enable contextual data access for external AI agents to improve AI agent response during execution on the AI Agent Studio via the Settings page. Navigate to **AI Agent Studio** > **Settings** > **External Agents** > **Discoverability**.



- **Short-term memory**: Turn on the toggle to enable external AI agents remember your preferences or facts from the current interaction only. The toggle is turned on by default.
- **Long-term memory**: Turn on the toggle to enable external AI agents remember your preferences or facts from previous interaction. The toggle is turned on by default.
- **Knowledge graph for external AI agent interactions**: Turn on the toggle to enable external AI agents to use structured and unstructured data from different records across the ServiceNow AI Platform. The toggle is turned off by default.

Agent2Agent Protocol

Agent2Agent (A2A) is an open standard that enables cross-platform AI agent communication by associating each agent with an Agent Card containing provider information.

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Agent2Agent Protocol overview

The standard relies on every AI agent having an Agent Card associated with it. The Agent Card provides basic information for providers like the ServiceNow AI Platform, Microsoft Azure, and Google to use them.

Note: The supported A2A version for on-glide is v0.3 and the supported A2A version when Premium Chat is enabled is v1.

An AI agent's Agent Card uses standardized JSON to help different providers understand its capabilities. The Agent Card is accessed by a specific type of endpoint from a provider's server. Execution plans are communicated through an execution endpoint so that both the provider's server and the ServiceNow AI Platform can track what the external AI agent is doing.

See Create an external AI agent for instructions for using this protocol to create an AI agent.

Configuring A2A authentication

A2A connections require authorization from the source platform to execute on the ServiceNow AI Platform. Authentication is established by creating two Connection & Credential Alias and Connection records, one with an Agent Card endpoint and another with an execution endpoint.

Custom Headers for External Agent Configuration

When configuring external agents, you can pass custom HTTP headers to be included in the API calls to external endpoints. In the External Agent Configuration [sn_aia_external_agent_configuration] table, use the custom headers column to specify headers in JSON format. These headers are applied to all HTTP requests made by that agent during offline execution, regardless of the connection type (OAuth, API Key, or other). The configured headers are sent alongside the agent's authentication credentials and are useful for passing additional metadata or requirements that your external API expects.

Note: Custom headers apply only to the Premium Chat experience.

Configuration Properties

The following properties configure different aspects of how your agents can interact with the ServiceNow AI Platform.

External AI agent properties

Name	Description
sn_aia.external_agents.enabled	Set to `true` to enable external agent features
sn_aia.external_agents.parallel_conversations.enabled	Enables or disables multiple simultaneous conversations per user

Create an external AI agent

Create external AI agents in AI Agent Studio to connect the ServiceNow AI Platform with third-party agentic AI providers.

Before you begin
Role required: sn_aia.admin

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Procedure

1. Navigate to **All** > **AI Agent Studio** > **Home** > **Create new agentic solution** and select **New AI agent for a task**.
2. On the New AI Agent pop-up, select **Create an external agent instead**.
3. Discover and select an external AI agent through a provider.

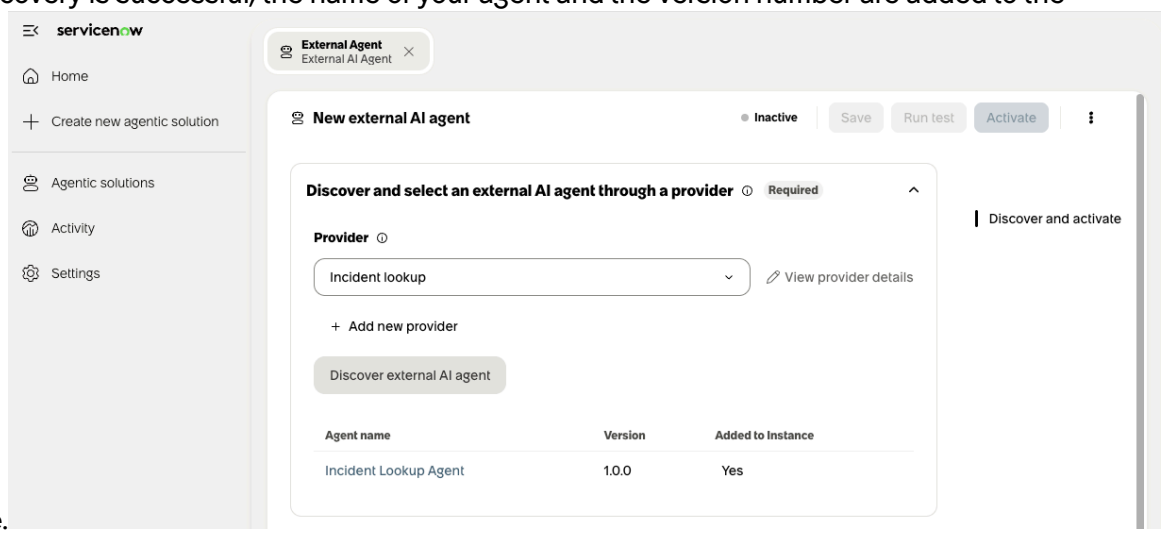
   a. On the New external AI agent form, select an AI agent provider from the **Provider** drop-down or add a provider.
   If you select a **Add new provider**, fill in the fields and select **Add**.

   Add provider form fields

Field	Description
Name	Name of the agentic AI provider.
Discovery type	
Agent card URL	The URL that points to the external AI agent's Agent Card. The URL should include `.well_known/agent_json`.
Advanced settings	
Connection and credential alias	Credentials to access your external AI agent's Agent Card. You can select an existing alias or create one.
Select Subflow	Subflow that establishes Agent2Agent protocol. The default subflow should handle the majority of cases, but you can also create your own.

   Note: Additionally, you can view and edit the provider details by selecting **View provider details**.

   b. Select **Discover external AI agent** to validate the connection to your external agent.
   If discovery is successful, the name of your agent and the version number are added to the page.



   c. Select the name of the agent to verify that the **Basic Info** and **Agent card** details.

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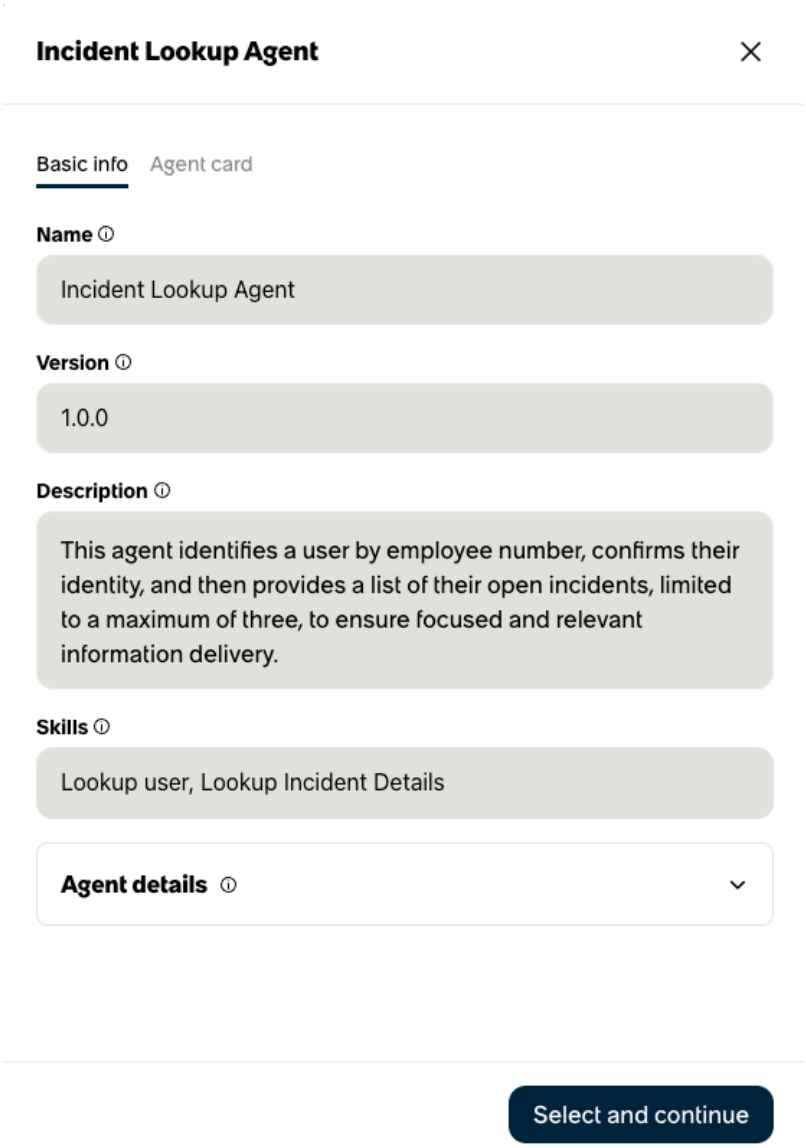

- The **Basic info** tab contains the *`Name`*, *`Version`*, *`Description`*, *`Skills`*, and **Agent details**.
- The **Agent card** tab shows the entire JSON for the agent.

d. Select **Save and continue**.

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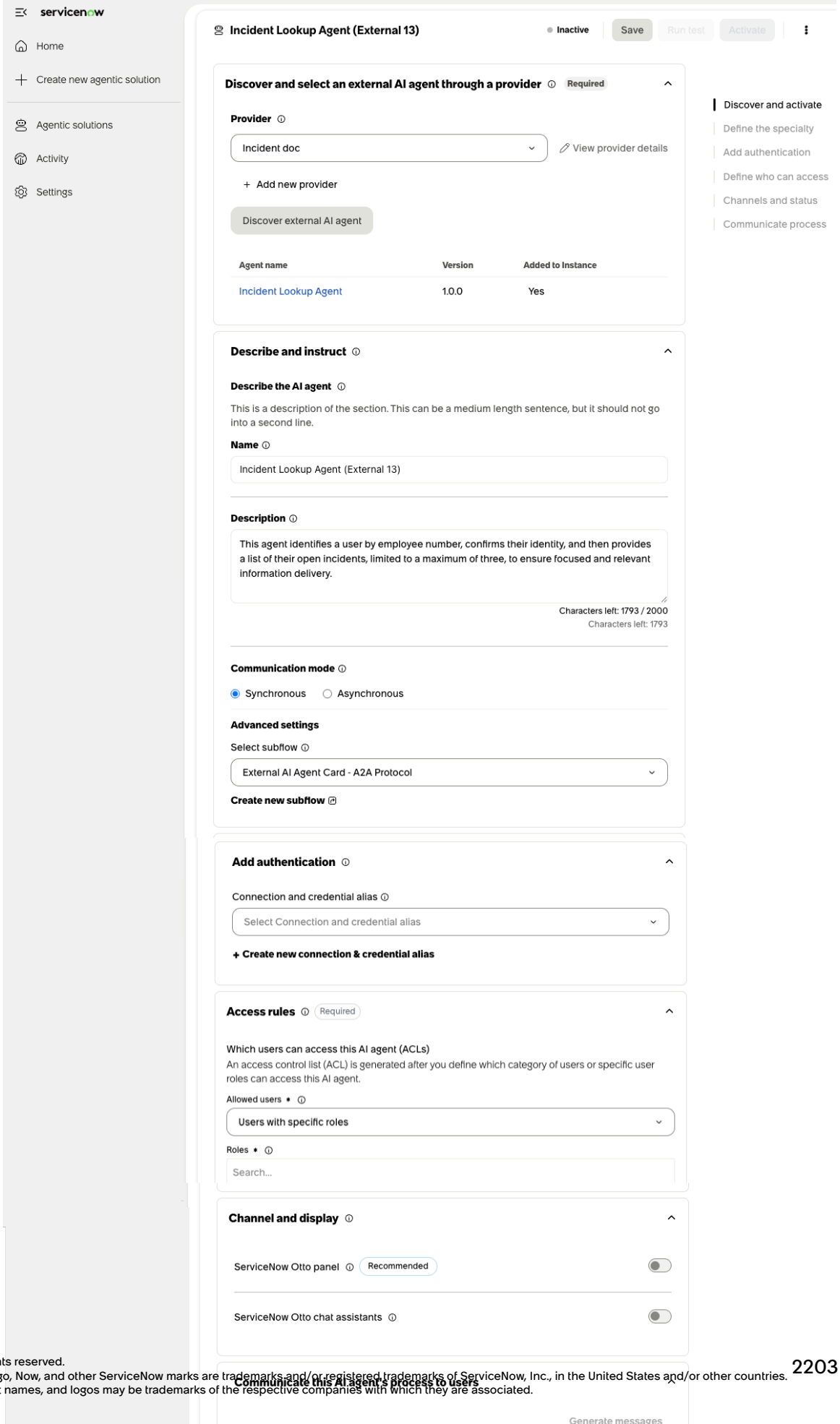
The guided setup for the selected external AI agent is now



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4. Describe and instruct the external AI agent by adding details for how it fits in the ServiceNow agentic system.

   Describe your external AI agent with a name and description. You must also select the communication mode for the external AI agent along with the subflow. You can leave your external AI agent description as it is, or you can add a longer description to help differentiate the agent from other external AI agents. This helps enable the external AI Agent Orchestrator to use your external AI agent more effectively.

   a. Verify the **Name** and **Description** to summarize the main intention of the external AI agent.

      Note: If the name and description aren't clear or correct, the Orchestrator won't know how to wield the external AI agent in context.

   b. Set your communication mode under **Communication mode** to one of the following:

      - **Synchronous**: ServiceNow Exchanges data with the external AI agent in real-time and waits for an immediate response. The synchronous mode is selected by default.
      - **Asynchronous**: ServiceNow exchanges data with the external AI agent and continues processing without waiting for an immediate response.

        Note: Asynchronous connection involves communication where the sender and receiver don't have to be active simultaneously unlike the synchronous communication mode.

        To establish asynchronous connection, you must obtain a callback URL for push notifications to function. Once you have obtained a callback URL, you must create a record on the External Agent Callback Registries [sn_aia_external_agent_callback_registry] table. Go to the table, select **New**, and enter the callback URL. Save the record.

        After saving the record, a Connection & Credential Alias [sys_alias] record is created for you. To add authentication, you can open the Connection record associated with the sys_alias record and add a credential to the *Credential* field. When the record is created, you can go back to the External Agent Callback Registry record you created and select **Verify URL** to test that the connection works as expected.

      Note: Some agents don’t support asynchronous communication.

   c. Select a subflow under **Advanced settings**.

      You can use either the default subflow; which is **External AI Agent Card - A2A Protocol**, or an existing subflow from the **Select subflow** drop-down, or create a subflow. The default subflow should work for the majority of cases.

5. Add authentication for an external AI agent using the connection and credential alias.

   Choose which credentials access your external AI agent's execution endpoint. You can select an existing alias or create one. If you create one, a modal displays with options for configuring an OAuth or API Key authentication.

   Note: For more information about the API Key credential, see A2A API Key credential behavior.

6. Configure access control lists (ACLs) for the external AI agent.

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Note: The ACLs determine who has access to discover and execute the AI agent. To learn more about the ACLs you can create in AI Agent Studio and how to add more advanced security configurations, see Implement access control in AI Agent Studio.

Important: This is a required step. If you have previously configured an external AI agent without creating an ACL, you must generate an ACL before you can make other modifications.

Define who can access the external AI agent

Field	Description
User access	The type of users whose access for the AI agent is defined by the following options: ○ **Any authenticated user**: Any user who is logged in can access the external AI agent. ○ **Users with specific roles**: Users that have at least one of the roles assigned to them can access the external AI agent. This option is the default. **Note:** If a user doesn't have access to an external AI agent or if the user doesn't have access to at least one of the external AI agents in the respective agentic workflow execution, then the whole execution aborts before the first external AI agent is initiated. ○ **Public**: Any user can access the external AI agent even without logging in. Use this option only when you want guests to be able to access the external AI agent. **Note:** Understand that this configuration should be used sparingly and only when needed.
Role	Assign one or more specific roles from the drop-down menu. **Note:** Selecting the role is possible only when you chose the **Users with specific roles** user access.

7. Select a display channel where your external AI agent can be discovered.

   ○ **ServiceNow Otto panel**: Users can discover and invoke this external AI agent from the ServiceNow Otto panel.

   ○ **ServiceNow Otto chat assistants**: Users can discover and invoke this external AI agent from the chat assistant.

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Note: Both the display options are turned off by default. Choose one or both as the channel display for your external AI agent.

8. Communicate the external AI agent's process to users.
   - **Context for the messages**: Describe what you external agent is set to do.
   - **In-progress message**: Choose processing messages to display to the user when the external AI agent is executing.

     For example, `Initiating AI agent` or `Processing record details`, or `An AI agent is looking into the request`.
   - **Completion message**: Provide a completion message to display to the user when an external AI agent is done executing.

     For example: `Identified next steps` or `Processed the record details`.
   - Select **Generate messages**.
9. Select **Activate**.

Result

Your external AI agent is configured with the context necessary for it to be used by the external AI Agent Orchestrator. It has the required information to accomplish its intended tasks.

What to do next

You can test your AI agent on a record manually to see an example execution. You can also create an automated agentic evaluation to test the AI agent over repeated interactions. Automated evaluations can recommend specific optimizations if the LLM judges find underlying patterns for low success rates.

Activate your AI agent and make it ready for use by selecting **Activate**.

Note: The status of the external AI agent is shown as **Inactive** until it is activated.

ServiceNow AI agents as secondary agents

Secondary agents are specialized AI agents that handle specific workflow tasks delegated by a primary agent or user. You can connect your ServiceNow agent to other agentic AI model providers using the Agent2Agent protocol.

Enable ServiceNow AI agents as secondary agents

You can enable ServiceNow AI agents as secondary agents to use on other AI platforms. To do so, navigate to **AI Agent Studio** > **Settings** >

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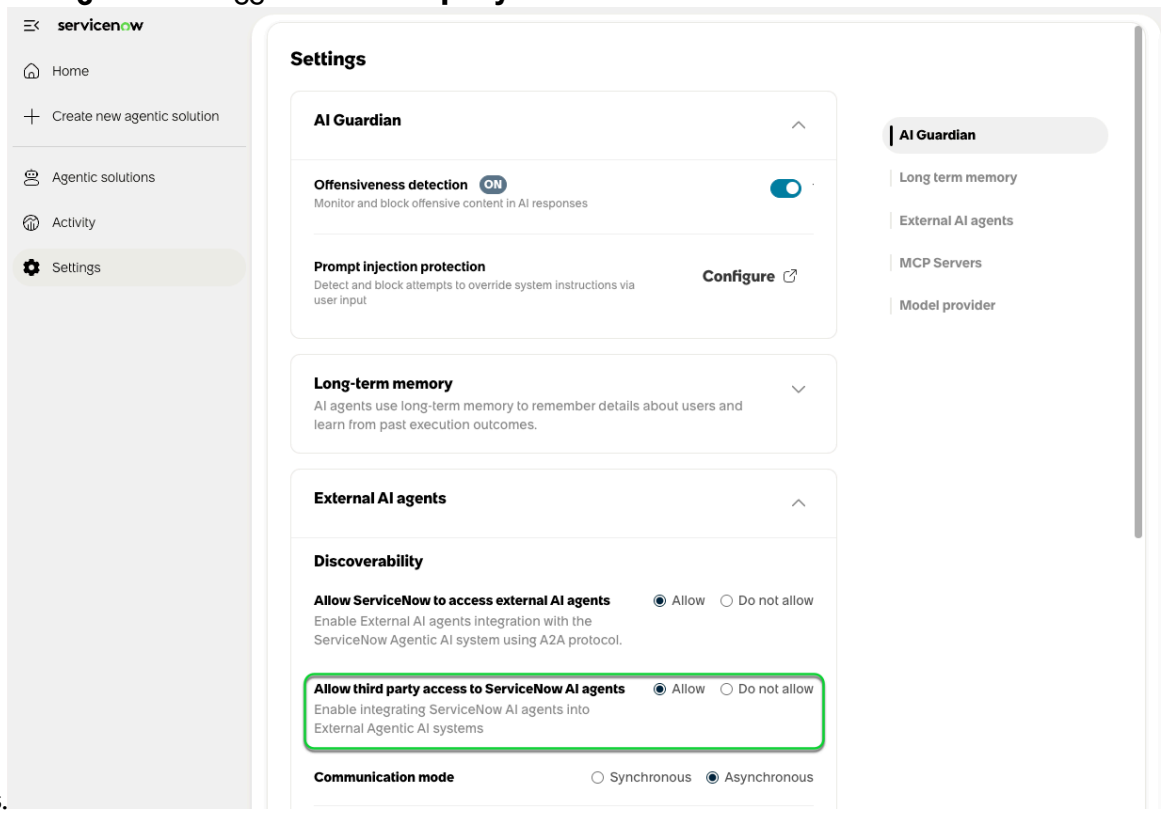
External AI agents and toggle **Allow third party access to ServiceNow AI agents**.



Secondary agents overview

After creating your AI agent in AI Agent Studio, you can point it to the Agent Card URL that is displayed for secondary agents. Admins can view, copy, and consume the URL for easy access. The endpoint to point the AI agent to Agent Card for the actual execution of the AI agent is in the `{{instance}}.service-now.com/api/sn_aia/a2a/v2/agent/id/{{agent-id}}` format.

You can use the same OAuth or API key for authenticating the agent discovery and the agent execution. For more information, see A2A API Key credential behavior.

To verify that your AI agent is running from the ServiceNow side, during a conversation with the AI agent, you can go to the *`Execution Plan [sn_aia_execution_plan]`* table. From the Execution Plan table, you can identify the execution plan based on the *`Objective`* field that contains the prompt from the conversation on the other platform.

For more information about setting up instructions for your ServiceNow AI agents as secondary agents (acting as A2A server), refer to Authentication for A2A - ServiceNow as Secondary Agent.

For more information about sample payloads for A2A with ServiceNow AI agent as Secondary agent, see Sample payloads for A2A.

Agent-to-UI (A2UI) protocol support for secondary agents

The A2UI protocol allows interactions that enable agents to drive UI workflows and receive structured responses from user interface surface with more advanced visual responses in external systems when connecting to ServiceNow agents. To enable the A2UI protocol, you must:

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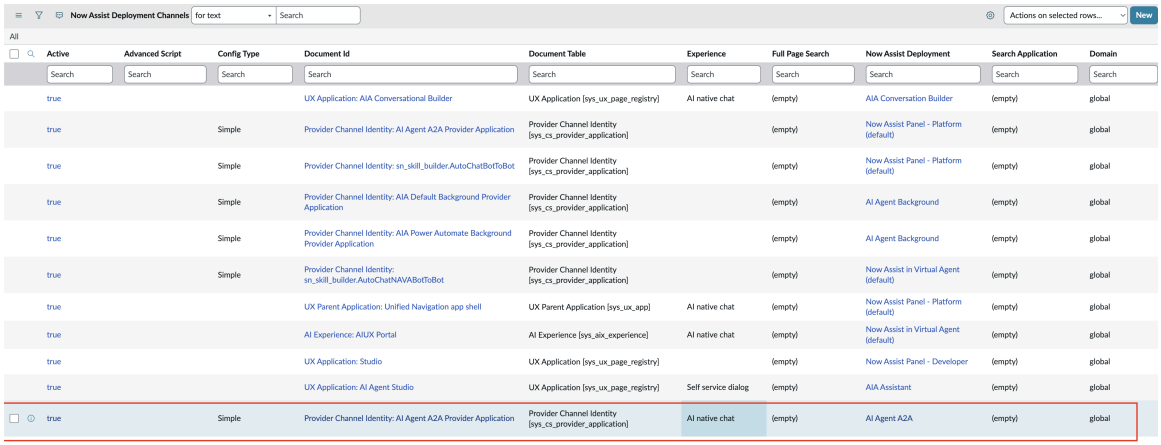
- Turn on the *sn_aia.external_agents.a2ui.enabled* system property to **true**, whose default value is **false**.
- Route the A2A deployment through off-glide experience. The A2UI responses can only be built on the off-glide path. Verify that the *sn_nowassist_va.show_ai_native_experience* system property to **true** and the A2A deployment record experience to **AI native** in the *sys_now_assist_deployment_channel*, as shown in the following image:



- Check the agent card. When you enable the system properties mentioned earlier, the card adds the extension under *capabilities.extensions*. If the property is enabled but the off-glide experience isn't setup, then the extension is left off the card without any warning. The only sign is an error in the log.
- Have the calling client request A2UI on each call. The client has to:
  - Send the header `X-A2A-Extensions`. For example, `https://a2ui.org/aa-extension/a2ui/v0.9`.

    Note: Only versions **0.9** is supported.

  - Include `application/json+a2ui` or `application/json` if it sets the `configuration.accpetedOutputModes`. Without one of those, the requests is rejected with `InvalidAccpetedOutputModes`.

    To get v1 when ServiceNow acts as primary agent, the premium chat should be enabled in the respective assistant this agent is being executed from. Refer to the Premium Chat experience article on how that can be enabled.

For more information about A2UI, see A2UI documentation.

Setting up A2A authentication for ServiceNow AI agents

Configure ServiceNow AI agents as secondary agents over the Agent2Agent (A2A) protocol by setting up authentication and enabling external agent interoperability.

Before you begin

Before you begin, verify the following requirements:

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- Platform version: Yokohama Patch 11+ (January 2026) or Zurich Patch 4+ (December 2025)
- Now Assist AI Agents 6.0.x or later (December 2025 release or newer)
- Administrator access to configure system settings and API policies

Role required: sn_aia.admin

Procedure

1. Enable external agent settings in AI Agent Studio.

a. Go to **All** > **AI Agent Studio** > **Settings**.

b. Under **External AI agents**, set the following properties to **Allow**:
- **Allow ServiceNow to access external AI agents**
- **Allow third party access to ServiceNow AI agents**

2. Create and configure a service account with appropriate roles.

a. Create a user in the User [Sys_User] table with the following settings:
- **Active**: **true**
- **Password needs reset**: **false**
- **Locked out**: **false**

b. Assign the following roles to the user:
- sn_aia.integration (recommended for basic runtime access)
- sn_aia.admin (for testing only – full write/create access)
- Any necessary application roles such as itil
- Integration roles: rest_service and snc_platform_rest_api_access

3. Select and configure the AI agent for external discovery.

a. Navigate to **All** > **AI Agent Studio** > **Agentic Solutions**.

b. Select the AI agent you want to configure.
Note the Sys_Id of the AI agent from the browser address bar or directly from the AI Agent [sn_aia_agent] table.

c. Enable **Allow third-party to access this AI agent**.
This makes the agent externally discoverable and sets the `External discoverable` property to true in the AI Agent Config record.

d. Select a display channel where your external AI agent can be discovered.
Under the Channel and display section of the external AI agent, select one or both the display options:
- **ServiceNow Otto panel**
- **ServiceNow Otto chat assistants**

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4. Configure the communication mode.

   a. Decide on your communication mode:

      - **Synchronous:** Use for testing with Postman or when you don't have a functional callback URL.
      - **Asynchronous:** Recommended for production for better user experience and performance. Requires a callback URL configured in the External Agent Callback Registry table.

   b. To set synchronous mode, go to **AI Agent Studio** > **Settings** > **External AI agents** > **Discoverability** and set the **Communication mode** to **Synchronous**.
   Alternatively, navigate to **All** > **Tables** > **Messaging Channels** > **AI Agent A2A Channel** and set **Synchronous** to **true**.

5. Create an OAuth application registry for external clients.

   a. Go to **System OAuth** > **Application Registry**.

   b. Select **New** and choose **Create an OAuth API endpoint for external clients**.

   c. Fill in the following fields:

      - **Name:** Enter a descriptive name (example: A2A OAuth External Agents)
      - **Client ID:** Auto-populated
      - **Client Secret:** Auto-generated upon saving

   d. Under **Auth Scopes**, add the `a2aauthscope` record.

   e. Save the Application Registry record.

6. Configure authentication profiles for OAuth or API key access

   a. Choose your authentication method: **OAuth 2.0** or **API Key**.

      - To configure OAuth 2.0:
        - Navigate to **System Web Services** > **API Access Policies** > **Inbound Authentication Profile** and select **New**.
        - Set **Type** to **OAuth** and select the OAuth entity you created in the previous step.
      - To configure API Key:
        - Navigate to **System Web Services** > **API Access Policies** > **Inbound Authentication Profiles**, select **New**.
        - Select **Create API Key authentication profiles** and set **Auth Parameter** to `x-sn-apikey`.

   b. For API Key authentication, go to **System Web Services** > **API Access Policies** > **REST API Key**, select **New**, and configure:

      - **User:** Select your service account
      - **Auth Scope:** a2authscope

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7. Add authentication profiles to the API access policy.
   a. Navigate to **System Web Services** > **API Access Policies** > **REST API Access Policies**.
   b. Select **AI Agent A2A API Access Policy**.
   c. Under **Inbound authentication profiles**, add your authentication profile (OAuth or API Key) to the list.
8. Test the A2A API configuration using your chosen authentication method.
   a. **API Key authentication**: Open Postman and create a GET request:
      - **Method:** GET
      - **URL:** `https://<your instance name>.service-now.com/api/sn_aia/a2a/id/<your AI Agent ID>/well_known/agent_json`
      - **Headers:** Add `x-sn-apikey: <your API key>`
   b. **OAuth 2.0 authentication**: In Postman, set **Auth Type** to **OAuth 2.0**, configure grant type and credentials, then select **Get New Access Token**.
   c. Send the request and verify a 200 OK response with the Agent Card payload returned for your AI Agent sys_id.
9. Configure external instance connectivity (for multi-instance setups).
   a. For API Key authentication on client instance, navigate to **IntegrationHub** > **Connections & Credential Aliases**.
   Create two connection aliases: one for Agent Card discovery and one for Agent Execution. For each, set the connection URL to the appropriate A2A endpoint on the server instance and configure a credential with header `x-sn-apikey`.
   b. For OAuth 2.0 authentication on client instance, create an outbound Application Registry in **System OAuth** > **Application Registry** using the same Client ID and Client Secret from the server instance.
   Create the appropriate connection aliases and OAuth 2.0 credentials in IntegrationHub.
   c. In AI Agent Studio on the client instance, navigate to **Create and manage** > **AI agents** and select **Add** > **External**.
   Choose **Agent2Agent (A2A) Protocol** and select your connection alias as the external provider.
10. Debug and validate your A2A implementation.
   a. Enable debug system properties to review logs during troubleshooting:
      - *`com.snc.platform.security.oauth.debug`*: **true**
      - *`glide.auth.debug.enabled`*: **true**
   b. Navigate to **Flow Designer** > **Flow Administration** > **Settings**.
   Set **Reporting** to **Trace** and **Logging** to **Debug** for sub-production environments only.
   c. Review the following tables to validate execution and connectivity:

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- Execution Plan [sn_aia_execution_plan]
- External Agent Execution History [sn_aia_external_agent_exec_history]

d. Verify that service account credentials are in good standing: Active status, password does not need reset, and account is not locked out.

Result

You have successfully configured ServiceNow AI agents as secondary agents over the A2A protocol. Your AI agents can now accept external requests from other systems using either OAuth 2.0 or API key authentication.

What to do next

After completing this setup, you can:

- Add your configured AI agents as external agents in other ServiceNow instances.
- Integrate your AI agents with third-party systems using the A2A protocol.
- Monitor agent execution and troubleshoot connectivity issues using the execution history tables.

A2A API Key credential behavior

Starting in Now Assist AI Agents 7.1.x, the header included in each A2A request is driven by the API Key credential record and it is not injected automatically by the flow action.

Starting in Now Assist AI Agents 7.1.x, A2A flow actions no longer inject an `Authorization: Bearer` header automatically. The header included in each request is now driven entirely by the API Key credential record bound to the external agent's Connection & Credential Alias.

OAuth-based external agents, and API Key endpoints whose existing credential record already aligns with the endpoint's expectations, are unaffected. You only need to act if your remote A2A endpoint requires a specific header name or a scheme prefix.

Resolve 401 or 403 errors after upgrade

If your A2A endpoint returns a 401 or 403 after upgrading, update the API Key credential record bound to your external agent.

1. Open the `api_key_credentials` record bound to your A2A external agent. Navigate to the record via the **Connection & Credential Alias** on the external-agent provider.
2. If the endpoint requires a specific header name (for example, `x-api-key` instead of `Authorization`), set the **API Key Header** (`api_key_header_name`) field to the header name the endpoint expects.
3. If the endpoint requires a scheme prefix on the value (for example, `Bearer` for Google A2A), include the prefix directly in the **API Key** (`api_key`) field value — for example, change `AIza...` to `Bearer AIza...`.

   Note: The **API Key Prefix** field is not currently applied by the A2A flow action; embed the scheme in the **API Key** value instead.

4. Save the record and re-test the external agent end-to-end.

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Wizard-created credential records

The wizard creates a working API Key credential record for most A2A endpoints. Only edit the credential record manually if your remote endpoint has specific requirements that the default credential does not satisfy.

- Custom header name (for example, `x-api-key`): Set the **API Key Header** (`api_key_header_name`) field to the header name the endpoint expects.
- Scheme prefix on the value (for example, `Bearer` for Google A2A): Include the prefix directly in the **API Key** field value — for example, `Bearer <your-key>`. Don't use the **API Key Prefix** field; it is not applied by the A2A flow action.

Modify an external AI agent

Modify an external AI agent in AI Agent Studio to refine its performance, align with business goals, or enable it to perform new tasks.

Before you begin

Role required: sn_aia.admin

About this task

You can make tweaks to your external AI agent based on previous performance. You can refine it to better align with evolving business goals or make major changes to enable it to perform entirely new tasks. This includes updating the definition and instructions, adjusting security controls, and adding or removing triggers. You can also modify tools to provide more or better capabilities and change where and how the external AI agent is invoked.

Procedure

1. Navigate to the **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the external AI agent that you want to modify.
3. In the node view, select either the pencil edit icon or the more options icon.

   The first node contains the main configuration settings for the external AI agent. The other nodes represent the tools that comprise the underlying architecture.

   The pencil edit icon directs you to the original guided setup, where you can edit sections and add tools.
4. Select **Save** or **Run test** to save your changes.

Result

Your external AI agent is modified and ready to use.

What to do next

You can test your external AI agent on a record manually to see an example execution.

Create an agentic workflow

Create an agentic workflow in AI Agent Studio to coordinate multiple AI agents and solve complex problems that require collaboration across specialized agents.

Before you begin

Role required: sn_aia.admin

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About this task

In the ServiceNow agentic ecosystem, an agentic workflow is a coordinated set of AI agents that work together to solve complex problems. While individual AI agents solve discrete tasks, an agentic workflow orchestrates multiple specialized agents to tackle larger, more complex objectives.

An agentic workflow uses the AI Agent Orchestrator to coordinate agents, delegate subtasks, and manage communication between agents to resolve the overall problem.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Home**.
2. Select **Create new agentic solution**, then select **New agentic workflow for a process**.
3. In the New Agentic Workflow pop-up window, describe your agentic workflow and select **Next**. Alternatively, you can select **Skip** to open a new agentic workflow form.
4. Select **Create a workflow from scratch** and select **Next**.
5. Describe the purpose of the agentic workflow, then select **Check**.

   A large language model (LLM) uses your description to generate suggested content for the general prompt of the agentic workflow. The LLM also uses the description to generate AI agent suggestions that help the agentic workflow achieve its goal.

   If other agentic solutions accomplish a goal similar to the one you describe, the check identifies them so you can edit a matching solution instead.

   You can skip this step by selecting **Skip**.
6. Review or draft the content in the *Expected behavior* section.

   You can edit any content that the LLM generates.

   The Orchestrator uses the description and instructions when the agentic workflow is invoked. This content gives the Orchestrator the context it requires to coordinate agents for the workflow's purpose.

   After making any changes to the agentic workflow in this guided setup, you can select **Save** to save your progress.
7. Add AI agents that work together within the agentic workflow.

   AI agents provide the specialized capabilities that the agentic workflow coordinates. The agentic workflow orchestrates these agents to solve complex problems collaboratively.
8. Define the agentic workflow access rules.

   The security controls configure user access and data access to the agentic workflow.
9. Add test scenarios for evaluations.

   Automated evaluations of your agentic workflow require configured test scenarios to run against. You can add existing table records as scenarios or manually enter different test objectives to cover the full range of conditions your agentic workflow can encounter.
10. **Optional:** Add a trigger to automatically invoke your agentic workflow if a specified event occurs.

    (Optional) A trigger isn't required if your agentic workflow is used only in chats.

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11. Determine how and where users can engage with your agentic workflow and set the processing messages.

    Agentic workflows can be invoked through Virtual Agent assistants, UI actions, or both. You can configure how the workflow communicates its progress to users.

12. Select **Save** to save your changes.

Result
Your agentic workflow has the AI agents and context that it requires to coordinate work across multiple specialized agents.

What to do next
To make your agentic workflow ready for use, select **Activate**.

You can test your agentic workflow manually to see an example execution. You can also create an automated agentic evaluation to test the agentic workflow over repeated interactions. Automated evaluations can display optimization suggestions when LLM judges detect patterns behind low success rates.

Define the expected behavior an agentic workflow

In the guided setup for an agentic workflow, write a clear description defining your agentic workflow and the instructions it should perform to orchestrate AI agents and accomplish complex tasks.

Before you begin
You must either create an agentic workflow or edit an existing one to get to this step in the guided setup. To learn how to get started creating an agentic workflow, see Create an agentic workflow. Otherwise, navigate to the AI Agent Studio and select the agentic workflow you want to define to enter the guided setup.

These fields may be blank or be filled in for you as a first draft as part of the new AI Agent Studio setup process.

Role required: sn_aia.admin

About this task
The first step of the guided setup enables you to define the fundamentals of the agentic workflow. The description and instructions fields are used by the AI agent Orchestrator to understand how to use the agentic workflow and coordinate its AI agents. Descriptions and instructions should be clear and well-defined. For guidelines for writing these fields, see Writing effectively for agentic AI. For an example agentic workflow, see Example agentic workflow.

Procedure

1. Verify or create the name and description of the agentic workflow for the LLM that summarize the main intention of the agentic workflow.

   If the name and description aren't clear or correct, the Orchestrator won't know how to use the agentic workflow in context.

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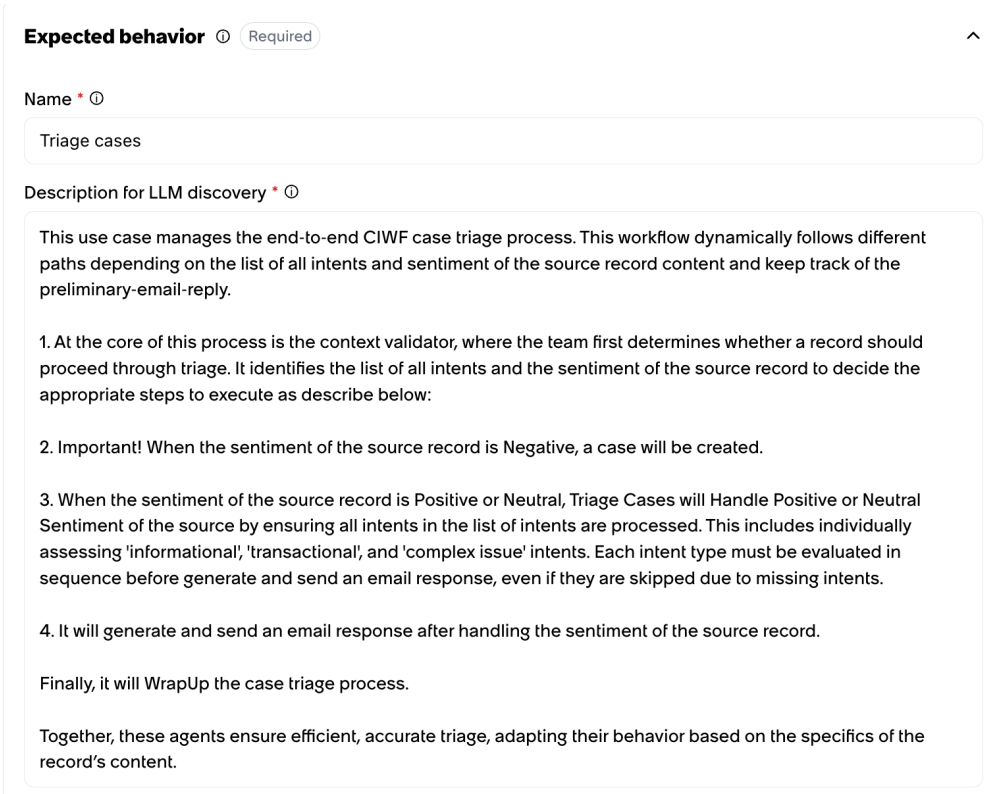

2. Review and refine the *How-to instructions*.

   The instructions are the most important element of the agentic workflow. They tell the Orchestrator what the workflow accomplishes and how it will coordinate AI agents to perform complex tasks.

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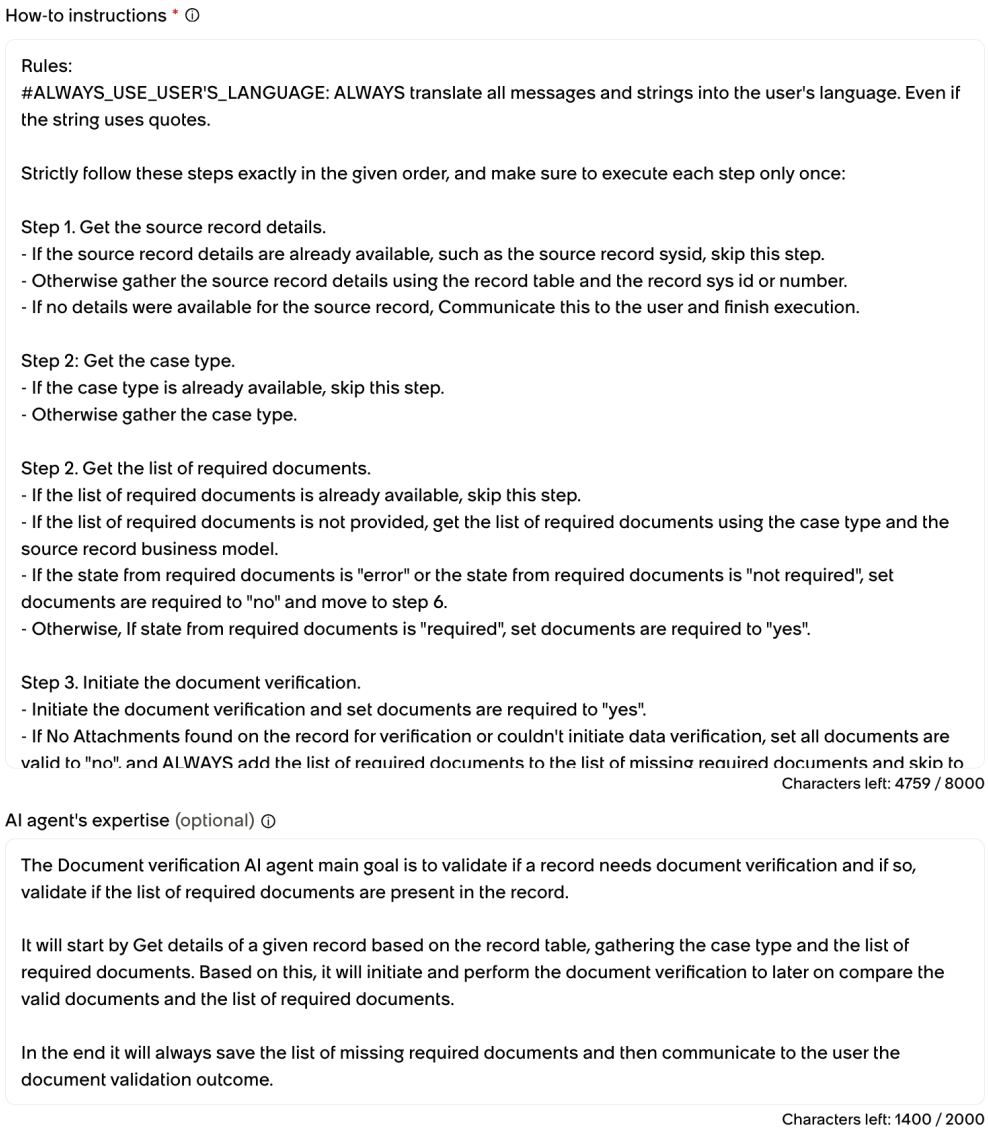
You can create different versions of the agentic workflow instructions. After testing an agentic workflow or evaluating an agentic workflow, you can adjust the instructions and compare their performance. See Version control for agentic AI to learn more.



Result

The fundamentals of your agentic workflow are defined so that the AI agent Orchestrator can use it.

What to do next

Scroll down to the next section of the guided setup, *AI Agents*, to add AI agents to your agentic workflow.

Add AI agents to an agentic workflow

Add AI agents to an agentic workflow so they can work together to accomplish complex tasks.

Before you begin

Role required: sn_aia.admin

About this task

AI agents are the core components of an agentic workflow. Each AI agent performs specialized tasks, and the agentic workflow coordinates them to solve complex problems collaboratively. You

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can create AI agents, add existing AI agents to your workflow, or allow the system to recommend AI agents based on your workflow's description and instructions.

Procedure

1. In the **Agents** section, select **Add Agents**.
2. Choose how you want to add AI agents:

   - Select **Create new agent** to create an AI agent. The AI agent guided setup opens in a new tab of AI Agent Studio. You can configure the new AI agent and return to the agentic workflow once you have saved it.

   - Select **Add existing agent** to add an AI agent that already exists. A modal opens where you can search for an AI agent by name or browse the list of available AI agents. Select the AI agent you want to add to the agentic workflow.

   - Select **Recommend agents** to let the system suggest AI agents. Based on your agentic workflow's description and instructions, the system automatically populates relevant and useful AI agents that would benefit your workflow.

   Once an AI agent is selected, it appears in the Agents section and can be removed by selecting the remove icon.

Result
You have added AI agents to your agentic workflow. The workflow now has the specialized agents it needs to accomplish complex tasks collaboratively.

What to do next
Scroll down to the next section of the guided setup to define security controls for your agentic workflow.

Define access rules for an agentic workflow

Define security controls for an agentic workflow to determine which users can access it and what permissions they have.

Before you begin
Role required: sn_aia_admin

About this task
The Access rules section is divided into two parts: **Which users can access this agentic workflow (ACLs)** and **Which data this agentic workflow can access**. The former creates an ACL that determines who can discover or invoke the agentic workflow. The latter defines the data that the agentic workflow has access to once it's invoked.

See Security for AI agents for more information about creating ACLs and user identities for security for AI agents.

Procedure

1. Define user access by selecting an option from the **Allowed users** dropdown.

   The dropdown menu options are:

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- Users with specified roles
- Authenticated users
- Public

If you select *Users with specified roles*, you can select exactly which roles can access the agentic workflow.

Agentic workflows installed with AI applications each require specific roles. To learn which roles needed for agentic workflows associated with ServiceNow Otto applications, consult the documentation for the agentic workflow.

Selecting *Public* means anyone who can reach the instance can invoke the agent. Use it only for agents that expose no record data. *Public* should be used sparingly.

An access control list (ACL) is generated based on the roles you select. Saving triggers the creation of an ACL for your agentic workflow. If you want to make changes later, you can return to the guided setup and change the options here. If you have the correct elevated role, you can also make edits directly on the ACL table.

2. Define data access by selecting a user identity type from the **Identity type** dropdown.

   The user identity determines what data the agentic workflow can read and write while it runs.

   The two options are *Dynamic user* and *AI user*. The dynamic user is the user invoking the agentic workflow or the dynamic user of the agentic workflow calling on the agentic workflow. An AI user is a dedicated user that has its own specified roles that allow access, which could be more than the dynamic user. Every invocation reads and writes with the AI user's roles regardless of who started it.

   If you do not have an AI user but want to use the *AI user* identity, you need to create a new record on the User table. See Create a user. Select *AI user* as the identity type.

   If you select *Dynamic user*, you can select the *Roles* that the agentic workflow runs with. By default, an agentic workflow runs as a dynamic user and has the roles of the invoking user. Select the approved roles to limit the data access that an agentic workflow could have. Role filtering must be applied for all agentic workflows and agentic workflows to run as dynamic users. If you don't select any roles, the agent inherits whatever roles the invoking user holds.

   To override the role filtering requirement for a specific agentic workflow or AI agent, admins with the correct elevated access can create an approved list of roles for a given agentic workflow. Then, they can access that role filtering record in the Agent Access Role Configurations table [sys_agent_access_role_configuration], and select the **allow all roles** check box. Taking these steps deactivates the requirement for a role filtering approved roles list in AI Agent Studio, so the AI admin can return to AI Agent Studio and continue to configure the agentic workflow or AI agent without role filtering applied.

   Note: Role filtering should be applied as security best practice and adherence to the principle of least privilege. Overriding the role filtering requirement isn't recommended.

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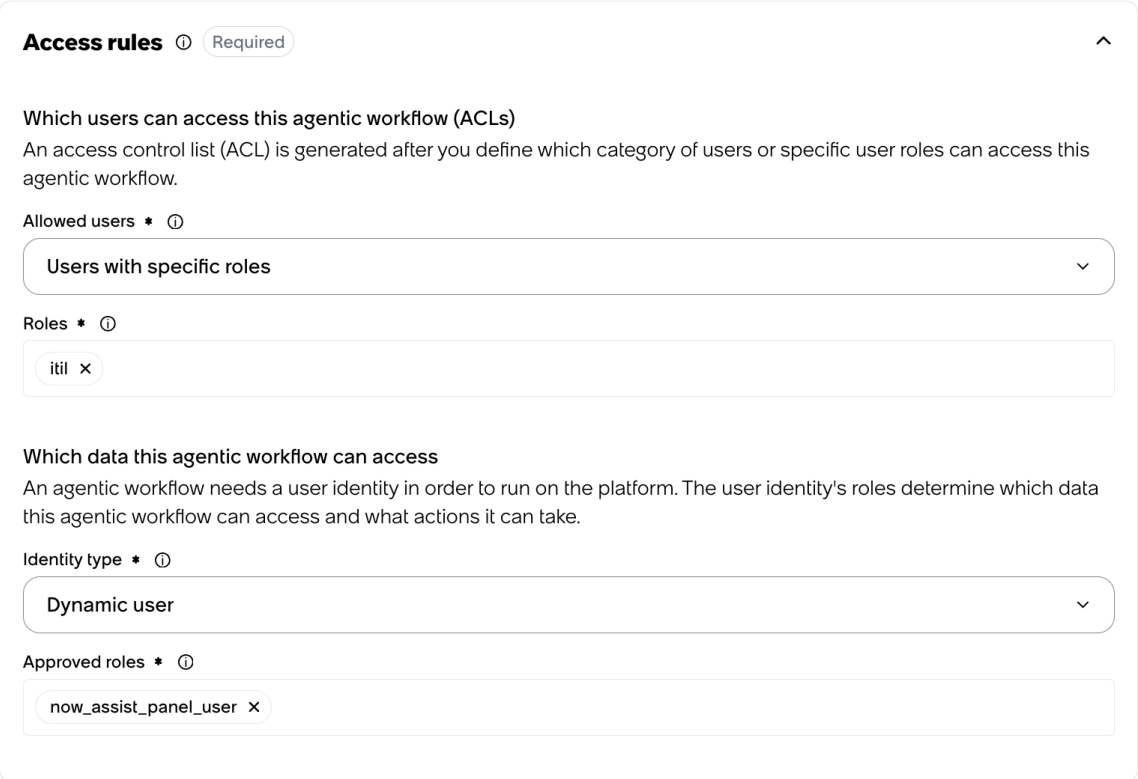
When testing an agentic workflow, run the agentic workflow with different roles to confirm that only the correct data is accessed for the user audience.



Result

You have created an ACL that determines who can discover and access your agentic workflow, and you have assigned a user identity (and role filtering, if relevant) to the agentic workflow to determine what data it can access.

What to do next

Scroll down to the next section of the guided setup, *Triggers*, to define specific conditions where the agentic workflow should run. Adding triggers is optional.

Add a trigger to an agentic workflow

In the guided setup for an agentic workflow, add triggers to run the agentic workflow automatically when certain conditions are met.

Before you begin

Role required: sn_aia.admin

About this task

Adding a trigger is optional. If you want your agentic workflow to be used only in chats, you don't need to add a trigger. Only add a trigger if you want to invoke the agentic workflow automatically when some event occurs.

If you don't want to add a trigger, skip to the next step, Configure where your agentic workflow can be invoked and set processing messages.

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Procedure

1. Select a trigger type from the dropdown.

   The trigger type determines when the agentic workflow will be invoked.

2. Enter details for the trigger.

   a. Enter a name for the trigger.

   b. Select the table on which the trigger will run.

   c. Define the conditions that must be met for the trigger to activate.

      You must define at least one condition to create a trigger.

   d. Enter the objective for the agentic workflow in the **Objective for this agentic workflow** field.

3. Define user identity and data access for the trigger.

   a. Choose how to define the user identity for this trigger.

      You can use an AI user identity, an existing table, or a new custom script. The user identity determines what data the agentic workflow can access when the trigger runs.

   b. Select the AI user identity.

      Note: This trigger runs as a type of user identity with roles and associated data access rules it can impose on the agentic workflow. Review the agentic workflow's access rules to prevent any rule conflicts or gaps.

4. Configure the trigger channel.

   a. Select where the agentic workflow will launch.

      You can choose to launch the agentic workflow in the ServiceNow Otto panel or Virtual Agent.

   b. Choose whether to show an alert to users by toggling **Show an alert to users**.

5. Select **Save**.

   If you choose a scheduled trigger, additional options are available, such as the day of the week and time when you want the trigger to run.

   Note: When running a scheduled trigger, not every record is included in the execution. By default, the value is 10. If you want to change this number, you must set the *sn_aia.max_scheduled_trigger_query* system property to a different value.

   If you choose an email trigger, the target emails must exist on the Reply [sys_reply] table. New emails aren't available as triggers.

6. Repeat the preceding steps for additional triggers.

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Result
You have added triggers to your agentic workflow to run it automatically under the specified conditions.

What to do next
Scroll down to the next section of the guided setup, *Channel and display*, to configure where the agentic workflow can be invoked and set processing messages.

Select channels for an agentic workflow

In the guided setup for an agentic workflow, configure where users can engage with the agentic workflow.

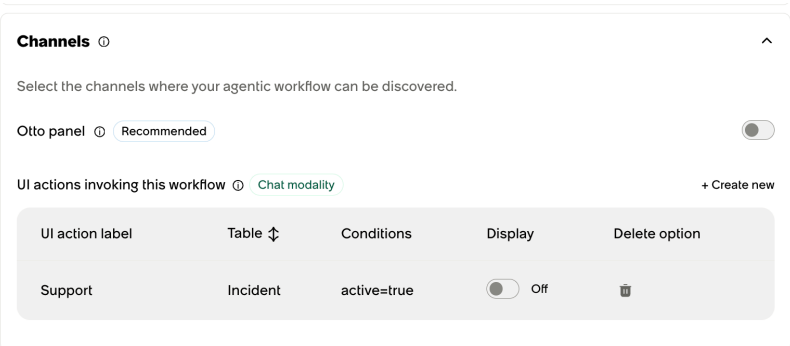
Before you begin
Role required: sn_aia.admin

About this task
In this section of the agentic workflow guided setup, you configure where the agentic workflow can be invoked.

Procedure
1. Choose whether to engage via Otto panel by toggling **Otto panel**.
2. To add UI actions, select **Create new** under **UI actions invoking this workflow**.

   A modal opens where you can configure the UI action.
3. Configure the UI action in the modal.
   a. Toggle **Active** to determine if the UI action is active.
   b. Enter a label for the UI action in the **UI action label** field.
   c. Select the table from the **Table** dropdown where the UI action will appear.
   d. Add conditions to filter under **Add conditions to filter**.

      You can build a filter by adding conditions that contain a field, operator, and value(s).
4. Select **Save**.



Result
You have completed the channels section of the guided setup for creating an agentic workflow.

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What to do next
You can save the agentic workflow by selecting **Save**, and you can test your agentic workflow by selecting **Run test**.

Modify an agentic workflow

Modify an agentic workflow in AI Agent Studio to refine its performance, align with business goals, or enable it to perform new tasks.

Before you begin
Role required: sn_aia.admin

About this task
You can make tweaks to your agentic workflow based on previous performance, refine it to better align with evolving business goals, or make major changes to enable it to perform entirely new tasks. This includes updating the workflow definition and instructions, adjusting security controls, adding or removing triggers, modifying AI agents to provide more or better capabilities, and changing where and how the agentic workflow is invoked.

The instructions field supports multiple versions within the same agentic workflow, allowing you to test different instructions and evaluate performance without losing previous versions. For more information, see Version control for AI agents and agentic workflows.

Procedure

1. Navigate to the **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the agentic workflow that you want to modify.
3. In the node view, select the first node of the agentic workflow.

   The first node contains the main configuration settings for the agentic workflow. The other nodes represent the individual agents that comprise the underlying architecture.
4. Review or create content in the *`Expected behavior`* section.
5. Add or modify AI agents that work together within the agentic workflow.
6. Define the agentic workflow access rules.
7. **Optional:** Add a trigger to automatically invoke your agentic workflow if a specified event occurs.
8. Determine how and where users can engage with your agentic workflow.
9. Select **Save** or **Run test** to save your changes.

Result
Your agentic workflow is modified and ready to use.

What to do next
You can test your agentic workflow manually or evaluate the agentic workflow using automated tests.

Manually test an agentic AI asset

Manually test an AI agent or agentic workflow to verify it functions as defined and achieves the desired objectives.

Before you begin
If you don't have the roles necessary to pass the ACLs of the agentic AI asset and all of its tools, you will be notified that you don't have the necessary access and the test won't execute. The trace log can redirect you to the **Access Analyzer** for additional details.

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Decide which records you will test against before you start. Identifiers like record numbers are not offered in the test dialog, and a test that refers to a record needs one that resolves on the instance. If your instance has no suitable records, you can load demo data.

Role required: sn_aia.admin and either admin or at least one role required by the ACL of the agentic AI asset being tested and each of the ACLs of its downstream components.

About this task

After you create an AI agent or agentic workflow, test it to verify the agentic AI asset functions as defined. A test shows what the agentic AI asset did, including which tools it called, in what order, and what it returned. There is no additional guidance on individual tests whether the agentic AI asset's behavior is intended and correct. You can run a manual test to evaluate the behavior of your agentic AI asset on a single test record, or you can run an automated evaluation to reveal patterns across multiple executions. See Evaluate an agentic AI asset for more details about running an automated evaluation.

You can access the test interface from the node map view or from the guided setup. During a test, you can view a chat session, examine node and card expansions that show different agents or tools within an agentic AI asset, review the trace log containing execution information, and analyze test details.

Procedure

1. Navigate to the **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the agentic AI asset you want to test.
3. In the node map view or guided setup, select **Run test**.
4. Select a test type: **Single test** or **Evaluation**.

   Single test provides a snapshot of agentic behavior on a single test record. **Evaluation** reveals patterns of behavior across multiple executions in an automated way. For more information about running an evaluation, see Evaluate an agentic AI asset.

   Note: You can't test and evaluate the same agentic AI asset at the same time.

5. Select the AI agent or agentic workflow you want to test from the dropdown.
6. In the **Version** dropdown, select the version you want to test.

   See Version control for AI agents and agentic workflows for more information about creating and managing versions.

7. Under **Objective for your test subject**, choose an objective or write your own.

   Describe what you want your agentic AI asset to accomplish. If the objective refers to a record, the identifier, such as name or number, has to be present on the instance. For example, "help me resolve incident INC0001234." If you invent a record that doesn't exist with that identifier, the run fails when the lookup returns nothing.

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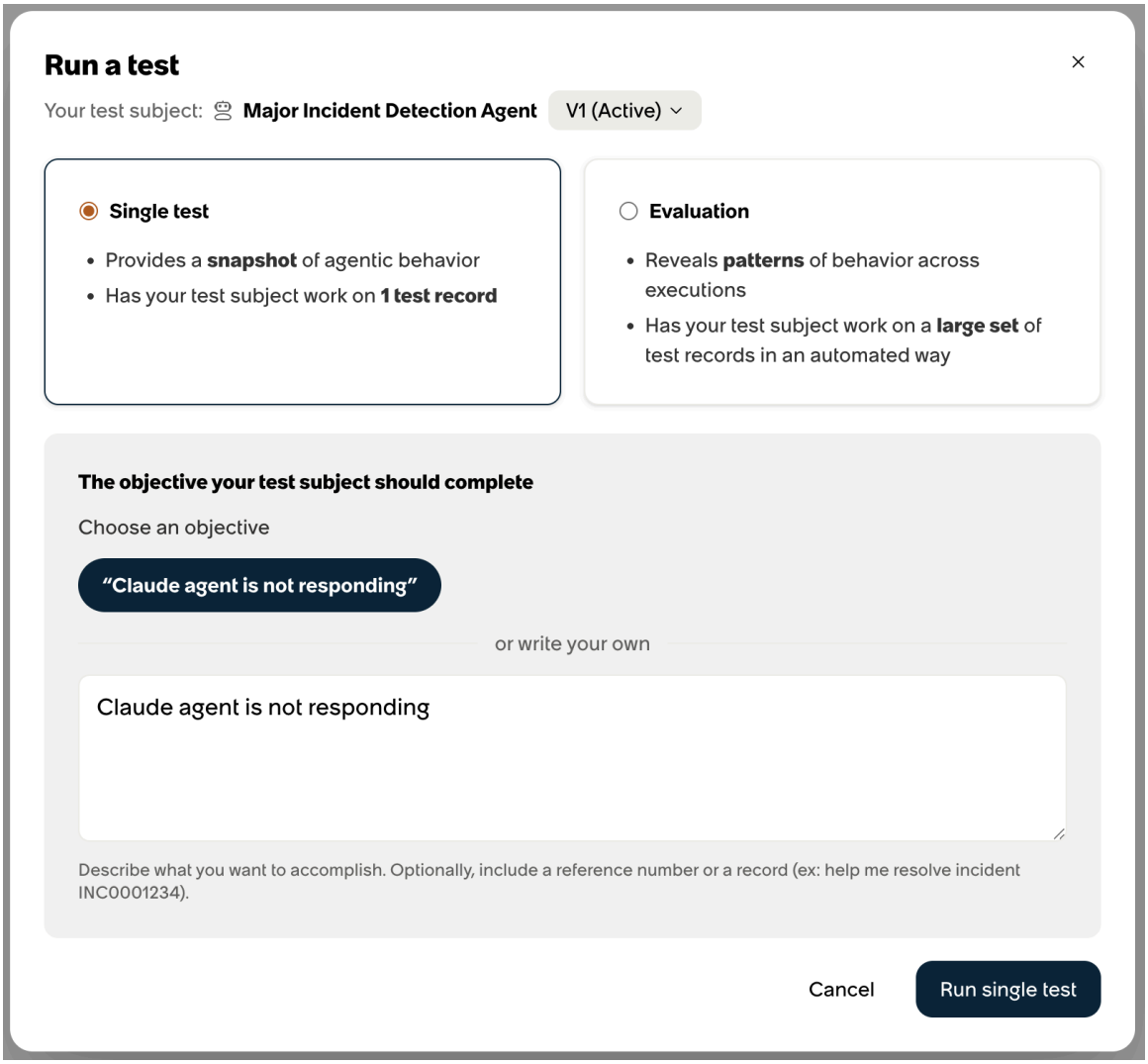
8. Select **Run single test**.



Result
Your agentic AI asset begins to execute the test autonomously to achieve the objective you specified.

Note: There is a pause between starting the test and the first output while the chat session initializes. On a busy instance, this can take a noticeable amount of time, during which the panel shows the session opening but no agent activity. Wait for the first message rather than restarting.

During the test, you can view and analyze the following information:

- A simulated chat session between the invoking user and the agentic AI asset.
- The node map showing the agents and tools involved in solving the objective. Nodes and cards expand to display different agents within an agentic AI asset or different tools within an agentic AI asset.
- The **Trace log** containing execution information about how the agentic AI asset processed the objective.

  The trace log lists each execution task, the messages exchanged, and every tool execution with its inputs and outputs. If there's a failure, read it backwards: find the first tool execution whose inputs or outputs are not what you expected. If you need the full record of an execution,

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open the run in the Execution Plans [sn_aia_execution_plan] table using the sys_id shown in **Test details**.

- The **Analysis** tab with insights into the execution.

  The Analysis tab summarizes the issues found in the run, tagged by severity, and offers fixes you can apply in context. Check it before working through the trace log by hand. Low-level problems such as a misspelled field or variable name are reported here.

- The **Test details** tab with specific information about the test run.

A run that reaches the end without an error means the agent executed and its tools returned. It does not necessarily mean that the agentic AI asset functioned as you intended. A run can also end having worked around tool errors, which still reads as a completed run. Judge the outcome from the detail rather than the status.

You can restart the testing process at any time by selecting **Run test**.

A test run stays open until you end it. While a test is running, any other tests or evaluations are blocked. Close the test panel and start a new run to clear the state, and check the **Activity** section if you're unsure whether an earlier run is still open.

Create test scenarios for an agentic AI asset

Create different scenarios to evaluate your agentic AI asset's performance across multiple executions.

Before you begin

If you're going to use existing table records for your test scenarios, the table should have at least 10 records.

Role required: sn_aia.admin

Procedure

1. Navigate to the **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the agentic AI asset you want to create test scenarios for.

   After selecting an agentic AI asset, you're directed to the node map view that shows the components, such as AI agents or tools.

3. Select the pencil icon to open the guided setup for the agentic AI asset.
4. Scroll to the **Test scenarios** section, then select **Add scenarios**.
5. Select an input method.

Input method	Description
Table records	Select records from an existing table to test against. You can use table fields as variables when you craft your test objective. Continue to the next step.
Manual entry	Write your own test objectives without using table records. You won't be able to include variables.

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Input method	Description
	Note: If you select **Manual entry**, skip the next three steps and go straight to **Craft a test objective**.

6. Select the table that contains the records you want to use.
7. Select records to test your agentic AI asset against.

   For the most thorough and effective testing, you should choose many records that cover a wide range of scenarios your agentic AI asset can encounter.

   You can search for specific records by selecting the magnifying glass icon or select **Filter** to narrow down the types of records on the table to those that fulfill certain criteria.
8. Select the maximum number of records to include.

   The default is 100. If more records match your criteria than the maximum you set, the extras are excluded from the test scenarios.
9. Craft a test objective.

   The test objective is a starting phrase or user utterance for triggering the agentic AI asset.

   If you're using table records, you can select **Insert related columns** to include table fields as variables. You can use variables to use the same test objective on multiple records.

   If you're creating scenarios manually, each scenario will need its own test objective.
10. **Optional:** Add tags for the scenarios.

    (Optional) You can assign multiple types of scenarios to the same agentic AI asset. Use tags to make it easier to choose which test scenarios work best for your automated evaluation.

Result
Your agentic AI asset has test scenarios that can be used for automated evaluations.

What to do next
Add new scenarios to your agentic AI asset, such as ones on different tables, select **Run test** then **Evaluation** to use the scenarios in an automated evaluation. See Launch an automated evaluation for the full process details.

Launch an automated evaluation of an agentic AI asset

Evaluate your agentic AI asset's performance against defined scenarios to identify issues and opportunities for improvement.

Before you begin
Role required: sn_aia.admin

About this task
Evaluations use test scenarios, or saved objectives that you can reuse for a single test or select for an evaluation. Scenarios carry the objective text, but they don't carry live record identifiers, like a record name or number. Scenarios that refer to a record need one that is actually on the instance at run time.

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Scenarios have to exist before an evaluation can be configured against them, and they can also be created from the test scenario selection in a single test. Where the evaluation configuration screen offers no way to create one, create it in the library first and then return.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the agentic AI asset you want to evaluate.

   After selecting an agentic AI asset, you're directed to the node map view that shows the components, such as AI agents or tools.
3. Select **Run test**, then select **Evaluation**.
4. Select your test scenarios.

   If you must create test scenarios for the agentic AI asset, select **test scenarios** to be redirected to the guided setup for the agentic AI asset. The **Test scenarios** section displays all of the possible scenarios generated for that specific agentic AI asset. For more information about creating test scenarios, see Create test scenarios for an agentic AI asset.

   You can select test scenarios by tags. If you want to organize your test scenarios by tag, you can add or remove tags from the **Test scenarios** section in the agentic AI asset guided setup.

   If you have more test scenarios than your specified *`Maximum number of records`*, the additional ones won't be included in the test.

   The **Example of objectives** lists the test objectives of the scenarios you have chosen. If you don't see certain fields you want to include, update the test scenarios with the desired variables in the agentic AI asset guided setup.
5. Select your metrics to calculate.

   `Overall task completion evaluation` is selected by default. Calculating multiple metrics at once can give you a better picture of overall performance.

   Custom metrics aren't supported in evaluations started in AI Agent Studio.
6. Select whether you want to automatically generate insights and optimization suggestions.

   Evaluation run results includes detailed information about the performance of the agentic AI asset across all selected metrics. Selecting this option gives you additional analysis of identified issues and offers suggested prompt changes to address them. Insight generation and optimization suggestions add to the time required for an evaluation to complete.

   You can also trigger this process from the evaluation run's results page later.
7. Select **Run evaluation**.

Result

Your agentic AI asset is evaluated against your chosen metrics on the test scenarios you have configured.

What to do next

You can track the evaluation's progress through the test scenarios. When the evaluation is complete, you can view the results page for performance breakdowns overall and by specific test scenarios.

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Duplicate an agentic AI asset

Duplicate an agentic AI asset to create an identical copy that you can fine-tune with distinct instructions and tools.

Before you begin
Role required: sn_aia.admin

About this task
Duplicate agentic AI assets to create an identical copy of an existing agent or agentic workflow. Duplicating allows you to reuse asset configurations without affecting the original asset. The duplicated asset cannot have the same name as an existing agentic AI asset.

Note: For AI agents, the duplicated AI agent uses the same tools as the original agent. Modifying the agent tools in the duplicated AI agent affects the agent tools in the original AI agent. To use the tools in a duplicated AI agent, you can either use the duplicated agent tools without making changes or add a new tool.

Procedure

1. Navigate to the **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the **AI agents** or **Agentic workflows** tab.
3. Scroll horizontally to view the duplicate icon on the far right of the agentic AI asset row.
4. Select the duplicate icon for the agentic AI asset you want to duplicate.
5. In the confirmation modal, select **Duplicate**.

Result
You have duplicated the agentic AI asset. The duplicated asset appears in the list and you can now fine-tune it with distinct instructions and tools by following the agentic AI asset configuration guided setup.

Deactivate an agentic AI asset

Deactivate an AI agent or agentic workflow to stop it from running.

Before you begin
Role required: sn_aia.admin

About this task
Deactivate an agentic AI asset when you want to stop it from running. Once deactivated, the agentic AI asset will no longer execute or be available for use.

You can reactivate the agentic AI asset at any time.

Instead of deactivating an entire agentic AI asset, you can create a new version of the instructions and use that instead. You can change versions at any time should you want to. For more information, see Version control for AI agents and agentic workflows.

Procedure

1. Navigate to the **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the **AI agents** or **Agentic workflows** tab.
3. Select the agentic AI asset you want to deactivate.
4. In the node view, select the first node of the AI specialist.

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The first node contains the main configuration settings for the AI specialist. The other nodes represent the individual agents that comprise the underlying architecture and aren't required to view the AI specialist's performance.

5. Select the **Deactivate** button.
6. In the confirmation modal, select **Deactivate** again to confirm.

Result
Your agentic AI asset is deactivated and will no longer run or be available for use.

ServiceNow Otto AI agents reference

Find more information about user roles, tables, and the different properties that are installed in ServiceNow Otto AI agents.

AI agents roles

The following roles are installed with ServiceNow Otto AI agents with a compatible ServiceNow Otto application.

Roles required to configure or monitor AI agents

Role	Description
AI Agent admin [sn_aia.admin]	Administrator of the application. A user with the sn_aia_admin role can create, read, update, and delete records.
AI Agent Viewer [sn_aia.viewer]	Read-only access to the application. A user with the sn_aia_viewer role has read and report access on all tables. **Note:** The sn_aia.admin and the sn_aia.viewer roles should not be given to the same user. If a user has both roles, then AI Agent Studio will only be accessible in read-only mode for that user.
agent_role_config_admin	With this role, user can access and modify Agent role configurations with AI Agent admin [sn_aia_admin] being the parent role.
agent_role_config_viewer	Can view the Agent role configurations with AI Agent Viewer [sn_aia_viewer] being the parent role.
itil_admin or itil	Access to ITSM tables and workflows. Agents working with incident, Request, Change, Problem, CMDB records.
knowledge_admin	Access to Knowledge Management tables and tools - Knowledge agents; KB article retrieval tools.

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Roles required to configure or monitor AI agents (continued)

Role	Description
Custom role (e.g., custom_table.admin)	Access to custom tables and fields. Agents accessing tables outside ITSM, Knowledge, or other standard modules.
snc_internal	Overly permissive system role, use only if agent requires true system-level privileges (rare). **Note:** Don't use as fallback.

Note: The roles can be assigned manually through the user record directly. For the assigned roles to take effect, logout and login back to the application.

AI agents system properties

The following are system properties that define default values and behavior.

System properties to use for configuring AI agents

Property	Description
glide.ai_record_activity.validation.feature.enabled	Enables UI validation for agentic AI and skills at the instance level. If this feature is enabled, then any UI validation, such as required fields, must be met before the AI process is completed. The following properties are context-specific gates that determine where validation is done when the feature is enabled: • glide.ai_record_activity.ai_detection.nap.enabled: ServiceNow Otto panel executions • glide.ai_record_activity.ai_detection.skill.enabled: generative AI skill execution with UI actions or in Virtual Agent • glide.ai_record_activity.ai_agent.validation.enabled: agentic AI-initiated record updates with UI actions or in Virtual Agent If you want to enable these gates of the UI validation feature, you must create the system property and set the value to *true*. You don't need to enable this feature for individual skills or agentic AI assets.
sn_aia.agent_llm_provider	Defines the (large language model) LLM service provider for AI agents. Default value: **azure_openai**.

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System properties to use for configuring AI agents (continued)

Property	Description
sn_aia.agent_tool_supported_data_types	Defines a comma-separated list of supported data types for tools that are used by agents for IntegrationHub spoke. Each value corresponds to the name field of records in the Field classes table [sys_glide_object].
sn_aia.analytics_dashboard_sysid	Provides the sys_id for the AI Agents Analytics dashboard. read_roles: sn_aia.admin and sn_aia.viewer
sn_aia.continuous_communicator_output_limit	Defines the maximum number of continuous outputs that the AI Agent Orchestrator can trigger to show to users. Default value: **3**
sn_aia.continuous_tool_execution_limit	Defines the maximum consecutive number of uses for the same tool. Default value: **7**
sn_aia.enable_usecase_tool_execution_mode_override	Executes running agentic workflows fully autonomously, overriding any non-automated tools in the agentic workflow. Default value: **false**
sn_aia.ltm.category.auto_create	Enables AI-generated categories if no matching categories exist. Default value: **false**
sn_aia.ltm.enable_long_term_memory	Enables long-term memory for AI agents. All previous user interactions are used as context for the LLM. Default value: **false**
sn_aia.maximum_agent_tools	Defines the maximum number of tools that can be assigned to an AI agent. Default value: **20**
sn_aia.max_scheduled_trigger_query	Defines how many records are processed when a scheduled trigger is detected. Default value: **10** Write_role: admin
sn_aia.mid_skill_switch_enabled	Enables mid-skill switching. Default value: **false**

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System properties to use for configuring AI agents (continued)

Property	Description
sn_aia.react_failure_retry_max_limit	Defines the maximum number of retries in case of an execution failure. Default value: **3**
sn_nowassist_va.router_redirect_va_agentic	Determines AI agent discovery in Virtual Agent. If set to *NEVER*, Virtual Agent continues Q&A without any agentic AI. Default: *ROUTER_DECISION*
com.glide.cs.dynamic.capability.timeout	Defines the Timeout for AIA Proficiency Descriptor. Default value: **180**. Write_role: admin.
sn_aia.enable_follow_up	Enables users to continue the conversation with follow-ups after the agentic workflow execution is complete. Default value: **true**.
sn_aia.follow_up_message	Defines a follow-up message sent after execution is completed. Default Value: **How otherwise can I help you?**
sn_aia.allow_context_sharing	Enables the sharing of short-term memory, allowing context to persist across execution within the same conversation. Default Value: **true**
sn_aia.agent_strategy_choice_enabled	Enables to show the LLM reasoning strategy in the agent setup screen. Default Value: **false**
sn_aia.context_sharing_strategy	This property defines the strategy to use for storing short-term memory for an execution. Default Value: **summarise**
sn_aia.enable_agent_tool_input_value_overrides	Enables you to override the agent tool description. Default Value: **true**.
sn_aia.follow_up_qna_failure_limit	Defines the limit to exit execution if the number of consecutive questions and answers aren't available in the follow-up.

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System properties to use for configuring AI agents (continued)

Property	Description
	Default value: **1**.
sn_aia.ltm.use_memory_for_ai_agent	Enables long-term memory for AI agent interactions. When enabled, stored user memories are utilized in AI agent interactions. Default value: **true.**
sn_aia.quick_mode_failure_retry_max_limit	Defines maximum limit for retries in case of a failure in Quick Mode execution. Default value: **3**.
sn_aia.user_context_data	Defines a comma-separated list of user context data to be used with AI Agents. The list is used to pick the data available from knowledge graph API: getUserContext. List of available user information: • profile • manager • reportees • assets The user information can also be customized by overriding the method `getUserContext` via `UserContextUtil`. If customized, the property must define the comma separated list of keys generated by the customized `getUserContext` method. Default value: **profile**.
sn_aia.external_agents.enabled	Set to `true` to enable external agent features
sn_aia.external_agents.parallel_conversations.enabled	Enables or disables multiple simultaneous conversations per user
sn_mcp_client.cursor.max_iterations	Specifies the maximum number of cursor-based pagination iterations to perform when fetching MCP tools. Helps prevent excessive looping or API calls during data retrieval. **Note:** Set this value to 0 to disable pagination iteration limits.
com.glide.agentic_processes_view.enabled	Enables the in-product experience for agentic workflows in the AI Workflows panel. Verify

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System properties to use for configuring AI agents (continued)

Property	Description
	that this is set to `true` if you plan on using UI actions to run agentic workflows.
sys_generative_ai_prompt_config	References a config record via the generative AI Config field.

Global properties used for episodic memory or agent learning

System property	Description
sn_aia.enable_episodic_memory	Enables episodic memory. When enabled, episodic memories from past interactions are collected and stored in sn_aia_memory and utilized in future interactions to enhance the overall experience Default value: **true**. .
sn_aia.enable_memory_limit	Maximum number of episodic memories to inject into prompt when an agent is invoked. **Note:** The maximum number of values allowed is less than or equal to 5.
sn_aia.use_episodic_memory_for_ai_agent	Enables episodic memory injection for AI agent interactions. When enabled, stored user memories are utilized in AI agent interactions. Default value: **true**.

Properties on the Agent Properties table

The following properties are on the Agent Properties [sn_aia_property] table. These properties affect different AI agent behaviors.

General properties on the Agent Properties table

Name	Description	Default value
alert.assist_spike_hours_to_check	Time interval, in hours, between running the scheduled job that checks for spikes in assist usage	3
alert.assist_spike_usage_percentage_threshold	Percentage increase required from	0.5 (50%)

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General properties on the Agent Properties table (continued)

Name	Description	Default value
	previous job results to trigger the spike in assist usage notification	
alert.assist_spike_usage_threshold	Minimum number of assists to trigger the spike in assist usage notification	5000
alert.consecutive_error_count	Consecutive number of latency errors to trigger the latency notification	3
alert.llm_latency_threshold	Time taken, in seconds, for the LLM to respond before sending a latency error	10
alert.tool_latency_threshold	Time taken, in seconds, for a tool to finish executing before sending a latency error	300
enable_agent_tool_input_value_overrides	Determines whether tool input values can be overriden by the AI agent or other tools for use by another tool	false

execution_task.latency_thresholds	Determines thresholds on LLM and tool execution times and response	<pre>{
		"llm": {
		"timeBoundaries": [
		5000,
		10000</pre>

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General properties on the Agent Properties table (continued)

Name	Description	Default value

	tokens/ character counts for tool calling	<pre>],
		    "tokenLimit":
		500
		  },
		  "tool": {
		
		"timeBoundaries": [
		      200000,
		      300000
		    ],
		
		"outputCharLimit":
		10000
		  }
		}</pre>

follow_up_behaviour	Actions to take by the agentic workflow after it has finished executing. Each record applies to only one agentic workflow.	no_followup_close_conversation
show_citations	Determines whether agentic AI-generated responses in ServiceNow Otto panel or in Virtual Agent add citations for their output.	false
mcp_guardian_check	Determines whether AI Guardian runs on MCP tool executions.	You can enable guardian check for MCP Client when the value is set to **true**. The default value is **false**.

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General properties on the Agent Properties table (continued)

Name	Description	Default value
	Note: To enable guardian check for MCP Client, ensure that you enable AI Guardian on **AI Agent Studio** > **Settings** page.	
kill_switch.mode	Controls how the feature responds to a detected breach.	warn_only Other values include: • off • enforce
kill_switch.consecutive_windows_duration	The total look back span.	4320
kill_switch.max_fires_per_window	Fires per record that mark it as breaching.	5
kill_switch.min_distinct_records	Breaching records needed for the window to count as runaway.	25
kill_switch.window_size	Length of one observation window.	1440

The following properties are used to detect and avoid infinite recursion or execution loops. If you reach the max executions that match the query within the time window, any new executions matching the query will abort. You can adjust these values if you want to lower the threshold for detecting recursion.

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Recursive check properties on the Agent Properties table

recursive_check.create_max_executions	Maximum number of matching executions creating records	50
recursive_check.create_time_window	Time window, in minutes, for checking for matching executions creating records	15
recursive_check.query_for_create_record	Query for the fields of execution plans to create records to check if executions are repeating	objective={objective}^agent={agent}^ORusecase={usec
recursive_check.query_for_update_record	Query for the fields of execution plans to update records to check if executions are repeating	related_task_record={related_task_record}^objective={o
recursive_check.update_max_executions	Maximum number of matching executions updating a record	5
recursive_check.update_time_window	Time window, in minutes, for checking	15

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Recursive check properties on the Agent Properties table

(continued)

	for matching execution updates

AI agents tables installed

The following tables are installed so AI agents work as expected:

Tables used for configuring AI agents

Table	Description
Agentic workflows [sn_aia_usecase]	List of configured agentic workflows.
AI Agents [sn_aia_agent]	List of configured AI agents.
Tools [sn_aia_tool]	List of tools used by an AI agent.
Strategies [sn_aia_strategy]	List of strategies used by an AI agent.
Teams [sn_aia_team]	Team that is a group of listed agents.
Team members [sn_aia_team_member]	List of teams mapped to an agent.
Agent Tools [sn_aia_agent_tool_m2m]	List of tools mapped to an AI agent.
AIA Trigger Configurations [sn_aia_trigger_configuration]	List of triggers created for an agentic workflow.
Execution Tasks [sn_aia_execution_task]	List of tasks by execution plan ID.
Messages [/sn_aia_message]	List of messages recorded in AI agent conversations to and from the human users.
Tools Executions [sn_aia_tools_execution]	List of tools executed by the plan ID. **Note:** The records in the Tools Executions table expire and is set to unavailable after a period of 13 months.
Execution Plans [sn_aia_execution_plan]	List of plan executions by conversation ID.
Agent Tools [sn_aia_agent_tool_m2m]	List of tools and maximum automatic executions.
AI Agent configs [sn_aia_agent_config]	List of active AI agents configured for the proficiency that they'll be used in.
Agent properties [sn_aia_property]	Various properties that affect AI agent behavior.
Gen AI Metadata M2M [sn_aia_gen_ai_m2m]	List of Gen AI metadata and the maximum automatic executions.Maintains the mapping between sn_aia_execution_task and Gen AI log metadata.

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Tables used for configuring AI agents (continued)

Table	Description
	If two large language model (LLM) calls are made to the sn_aia_execution_task, then the sn_aia_gen_ai_m2m table has two records.
Report metrics [sn_aia_report_metric]	List of the report metrics.
Agent Access Role Configurations [sys_agent_access_role_configuration]	List of agent access roles. You can also create agent access roles from this table.
generative AI Configurations [sys_generative_ai_config]	Record that points to the actual model.
Invocation Sources [sn_aia_invocation_source]	Functions as a registry of entry points and helps track and define the different contexts or surfaces from which an AI agent can be invoked or triggered.
generative AI Log [sys_generative_ai_log]	Used for logging and auditing generative AI activity.

Tables used for Group Action Framework

See **Group Action Framework** *for more information.*

Table	Description
GAF record group [sn_gaf_record_group]	Stores the output of the grouping skill. Each record represents a cluster of related records. You can open each record group record to discover which records were included within the cluster.
GAF record group detail [sn_gaf_record_group_detail]	Contains the individual records that belong to each group GAF record group. You can also find if a record is marked to act as a representative of the cluster on these records.
GAF action strategy result [sn_gaf_action_strategy_result]	Holds the results of the Action Strategy skill, which selects representative records from each group for downstream processing.
GAF action mapper results [sn_gaf_action_mapper_result]	Stores the output of the Mapper skill, which maps new records to existing clusters.
GAF action reducer results [sn_gaf_action_reducer_result]	Stores the result of the Action Reducer skill. The results include insights for entire clusters. For example, how to resolve incidents similar to those gathered in a cluster.

Domain Separation AI agent

The Domain Visibility AI agent enables Domain Admins to manage user domain visibility using guided, conversational workflows in the ServiceNow Otto® panel.

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Domain Separation AI agent overview

The agent performs validated operations on domain visibility data without requiring direct access to domain visibility tables.

Once enabled, the Domain Visibility agent exposes the following options to the admin:

- List all domain visibility for a user
- Add domain visibility for a user
- Remove domain visibility from a user

Note: The agent interacts directly with the `sys_user_visibility` table. All domain visibility operations (add, remove, list, query) are executed through this table. Admins do not need to open or configure the table manually.

Prerequisites and setup

Ensure the following requirements are met before using the AI agent:

- The Domain Separation plugin is installed on your instance and active. For more information, refer to Domain separation plugin.
- AI capabilities are enabled on the instance.
- You are signed in with a Domain Admin role.

Role masking

Required role: Domain Admin.

AI agents use role masking to determine which users can access them. Ones installed with your applications have specific roles that come included with the application. If you select *`Users with specific roles`* for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an AI agent.

In the data access settings, you must also add the necessary roles to enable reading of the tables for the records you want to evaluate for readiness. For example, you can add the itil role to the AI agent's list of approved roles so that it can access Incident records.

Accessing the Issue Readiness AI agent

To access the AI agent:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Go to the **AI Agents** tab.
3. Select **Domain Visibility**.

Access the AI agent

1. Open the ServiceNow Otto panel.
2. Start a new interaction.
3. Enter the prompt, "domain visibility help."

The agent displays the available domain visibility operations and guides you through the selected task.

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List all domain visibility for a user

Use this operation to view all domains a user can access.

1. Select **List domain visibility** from the agent's options.
2. Provide the name of the user whose domain visibility you want to view.

The agent retrieves all domain visibility entries associated with the user.

Add domain visibility for a user

Use this operation to grant a user visibility to a specific domain.

1. Select **Add domain visibility** from the agent's available options.
2. Provide the requested inputs:
   - **User name**
   - **Domain name**
3. The agent validates that the specified user and domain exist.
4. Confirm the user name and domain name and that you want to add the visibility for the user.

The agent adds visibility for the specified domain to the specified user.

Note: You can verify this by checking the `sys_user_visibility` table.

Remove domain visibility from a user

Use this operation to revoke a user's visibility to a specific domain.

1. Select **Remove domain visibility** from the agent's available options.
2. Provide the requested inputs:
   - **User name**
   - **Domain name**
3. The agent validates that the specified user and domain exist and that the user currently has visibility to the specified domain.

   If no matching visibility exists, the agent reports that there is nothing to remove.
4. If visibility does exist, confirm the user name and domain name and that you want to remove the visibility for the user.

The agent removes visibility for the specified domain from the specified user.

Note: You can verify this by checking the `sys_user_visibility` table.

Troubleshooting agentic AI manual testing failures

When testing an agentic AI asset in AI Agent Studio, there are a few common errors that can be addressed before you test again.

Most failures in a first manual test of an agentic AI asset can be traced to issues with configuration. The run may complete, a tool reports an error in the trace, and nothing in the testing panel names the cause. Check for the following errors before attempting to adjust prompts.

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Misspelled inputs, fields, or variable names

Names are matched exactly and are not validated when you save an agentic AI asset, so the failure appears only at run time as a tool error. Check the name against the field label on the table.

Records or other identifiers in the objective that don't exist

Record identifiers that don't exist on the instance fail the lookup and end the objective early. Confirm the record exists before looking for a fault in the agentic AI asset.

Inconsistent access to subcomponents

Check whether all of the components of the agentic AI asset have the same ACL requirements. A tool whose ACL the running identity cannot pass may fail for some users and not others. Compare the invoking user roles against what the tool requires. Run tests as different users to verify the security constraints you've added.

Incorrect tool calling

Multipurpose or loosely described tools can lead the Orchestrator to select the wrong tool. Give each tool a single purpose. Tool descriptions should also include when it does not apply.

Troubleshoot AI agents

Use this troubleshooting guide to resolve issues with AI agents' roles, testing procedures, silent failure diagnosis and reference resources.

Required roles assignments

Role assignments control access to AI Agent Studio and determine what tables and tools an agent or an agentic workflow can access.

Each agent comes with predefined user and data roles by default that can be modified by the customer. It is important to understand the difference between these roles, as an AI agent may not function correctly if it lacks the appropriate user or data role assigned. For more information about the default AI agent roles, see the ServiceNow AI agents library.

Note: If the customer alters the default user or data roles, it may lead to issues with the agent's functionality and execution.

Some of the individual ServiceNow AI Platform AI agent roles include:

ServiceNow AI Platform AI agent roles

AI agent	Role or Condition
Issue readiness	sn_uxc_gen_ai.platform_ai_issue_readiness
Request status	LoggedIn=true^ORAllowUnauthRolelessAcl=true
Domain separation	domain_admin
Access analyzer agent	access_analyzer_admin OR user_admin

To identify the roles currently assigned to:

- AI agents: Navigate to **All** > **AI Agent Studio** > **Agentic Solutions**.
- Select an AI agent, and navigate to the **Access rules** section.

For more information, see Define access rules for an AI agent.

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- Agentic workflows: Navigate to **All** > **AI Agent Studio** > **Agentic solutions** > **.**
- Select an agentic workflow, and navigate to the **Access rules** section.

For more information, see Define access rules for an agentic workflow.

Diagnose AI agents' failures

Test agents and workflows

Test your all your AI agents and agentic workflows to make sure they have the correct access. When an AI agent role does not have required resource access, verify that the agent is assigned the correct role. Verify the role has resource access records for all required tables and confirm that role filtering does not override the resource access.

Supporting tables for diagnosing AI agent's failures:

- generative AI Log [sys_generative_ai_log] table: The primary resource for diagnosing AI agent failures is the generative AI Log [sys_generative_ai_log] table. The table logs agentic execution details, errors, and state transitions that help diagnose role-related failures, permission and workflow issues.
- generative AI Configurations [sys_generative_ai_config] table: Contains configuration records for AI agents; useful for validating that agent setups are correct before testing failures.
- AI Agent memory [sn_aia_memory] table: Contains the agent memory state and helps test memory-related failures or edge cases.
- AI Agent [sn_aia_agent] table: Verify agent definitions during failure scenarios.

Important: Silent failures that return no values may indicate an underlying access error. You might have access to the agentic workflow, but the AI agent within the workflow may lack necessary permissions. Always test all underlying AI agents individually, not just the workflow, to catch permission gaps that your own access level might mask.

To manually test an agentic AI asset, see Manually test an agentic AI asset.

Review logs

Use these columns in the generative AI Log [sys_generative_ai_log] table to identify root causes of AI agent and agentic workflow failures. The table records all generative AI activity within your ServiceNow instance, including AI agent invocations, model responses, performance metrics, and errors.

Common issues include:

- Permission and ACL failures
- Model endpoint unavailability
- Token limit exhaustion
- Skill or action failures
- Performance degradation

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Columns from generative AI Log [sys_generative_ai_log] table used for troubleshooting AI agents

Column name	Troubleshooting use
user_role	Shows what role the agent has; compare to what's required
error_message	Direct indication of permission versus natural-language mismatch
permission_denied	Boolean flag to quickly filter permission failures
table_name	Target table the agent was accessing when it failed
operation_type	Type of operation attempted: `read`, `write`, `execute`, `query`
action	Shows exactly which step failed (e.g. "update_incident", "create_change", "query_table")
execution_log	Full context; shows agent's reasoning before failure
acl_rule	References the specific ACL that denied access

Additional resources

Use the following documentation resources for more information:

- Granular admin roles: Configuring user access and data permissions for agentic workflows
- Access control: Implement access control in AI Agent Studio.
- Access Analyzer: Test access to an AI asset.
- Manually testing user access to an agentic AI asset: Manually test an agentic AI asset.
- Agent library: ServiceNow AI agents library.
- Knowledge base: AI agent advanced scenarios and runtime issues playbook.
- AI Agents FAQ and Troubleshooting.
- Access control Security enhancements for AI agents and Skill Kit.
- Common solutions for ServiceNow AI Agent, MCP Server, and AI Agent Fabric.
- Accessing AI Agent Studio after upgrading the ServiceNow Otto AI Agents plugin.

Troubleshoot external AI agents

Use this troubleshooting guide to resolve issues with External AI agents' roles, testing procedures, failure diagnosis and reference resources.

Prerequisites for External AI agents

The following plugins, versions, and roles are apply for external AI agents:

- Application version: ServiceNow Otto AI Agents v6.0.x+.
- Platform version: Zurich Patch 4+ or Yokohama Patch 11+.

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- Enable external agent interoperability (AI Agent Studio → Settings):
  - Set the *sn_aia.external_agents.enabled* to **true** (ServiceNow can call external agents).
  - Set the *sn_aia.internal_agents.enabled_external* system property to **true** (External agents can call ServiceNow AI Agents).
- Service account & roles for inbound A2A calls: sn_aia.integration (runtime) or sn_aia_admin (testing), plus rest_service and snc_platform_rest_api_access.
- AI Agent activation & discoverability: Ensure the agent is active and enable the AI agent for discovery (sets External discoverable on sn_aia_agent_config).

Autonomous mode

You must enable the autonomous mode for executing External AI agents. Using the Supervised execution mode runs with human interaction or intervention as opposed to an agent interaction and needs the autonomous mode to be set up. For more information, see Add tools and information to an AI agent.

The asynchronous mode is not supported for external AI agents in AI Agent Studio. Change the communication mode to the Synchronous mode while onboarding the external agents and enable push notifications.

Review logs for external agents

You can retrieve tool logs using the sn_aia_external_agent_exec_history table and to access the full conversation history via the task/get method, enable the **Display output** in tool settings.

Additional resources

Use the following documentation resources for more information:

- Enable MCP and A2A protocol: Enable MCP and A2A for your agentic workflows.
- AI Agents and 3rd-party integrations.
- Setting up A2A authentication for ServiceNow AI agents
- Sample payloads for A2A - ServiceNow as secondary Agent
- AI Agents FAQ and Troubleshooting
- Troubleshooting AI Agents
- External AI agents in ServiceNow via A2A - ServiceNow as primary agent
- AI skill support in MCP Server Console
- Troubleshooting RaptorDB

Model Context Protocol Client

The ServiceNow Model Context Protocol Client (MCP Client) allows you to access the Model Context Protocol tools hosted externally and published via an MCP Server in the ServiceNow AI Agent Studio.

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Get started

Explore

Learn how MCP Client allows you to access the MCP tools in AI Agent Studio.

Configure

Configure the MCP Client in AI Agent Studio.

Add MCP Servers

Add MCP Servers in AI Agent Studio

Reference

Learn more about the user roles, tables, and properties in MCP Client

Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

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Note: We have controls in place to enable/disable the data collection and data processing.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

Exploring Model Context Protocol Client

The Model Context Protocol (MCP) is a standardized client-server protocol that enables AI applications to discover and interact seamlessly with external tools, data sources, and services. MCP facilitates communication between an AI host application (like AI Agent Studio), an MCP Client embedded in the host, and one or more MCP Servers that expose specific capabilities such as tools.

Model Context Protocol Client terminology

- **MCP Host**: The AI application environment where the tasks are initiated.
- **MCP Client**: Manages communication between the host and the MCP Servers, handling the requests and responses.

  The MCP Client architecture enables AI agents to extend their capabilities by invoking external systems dynamically, enabling tasks like accessing APIs, databases, or file systems in a standardized way.
- **MCP Server**: Provides external functionalities by exposing tools for AI agents to use.
- **MCP Tools**: The external tools exposed by the MCP Servers to be used by AI agents.

Why use MCP Tools

MCP tools enable seamless integration to:

- Connect your AI agent with a wide variety of external tools with minimal setup.
- Add multiple MCP tools to an AI agent to perform a broader range of tasks.
- Review and edit tool input parameters as needed before saving.

Configuring Model Context Protocol Client

Configure the MCP Client to execute agentic workflows with AI agents and mapped tools.

Configuring MCP Client enables you to:

- Incorporate external tools in AI agents built on ServiceNow.
- Access tools offered on external MCP Servers.
- Integrate MCP Client with the AI Agent Studio.

By setting up MCP Servers, AI agents in your environment can leverage external tools efficiently, enhancing their ability to perform complex tasks with up-to-date information.

Install Model Context Protocol Client

Install the MCP Client application on your ServiceNow instance to enable using the tools from the MCP Server Console in AI agents.

Before you begin

Verify that you:

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- Install the AI Agent Studio plugin [com.snc.sn_aia] and the Generative AI Controller plugin [com.sn.generative.ai] to use Model Context Protocol Client.
- Enable the MCP tool experience in your instance by setting the *sn_aia.enable_mcp_tool* system property to **true**.

Note: ServiceNow supports Protocol version 2025-03-26 of the MCP Server Console for MCP Client.

Role required: sn_mcp_client.admin

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for Model Context Protocol Client plugin [sn_mcp_client].
3. Select **Install**.

Adding an MCP Server Console in AI Agent Studio

An MCP Server Console hosts the APIs and tools required by an AI application. It receives and processes calls from MCP Clients to govern ingress traffic and promote secure access to tools. Adding an MCP Server Console in the AI Agent Studio helps you to leverage the Model Context Protocol as a tool in the ServiceNow agentic AI system.

Connecting an MCP Server Console with the AI Agent Studio simplifies the integration process, making it easier to discover and invoke services. This connection enhances security and governance, providing a streamlined setup experience for administrators.

Adding an MCP Server Console requires you to add an MCP Server Console in the AI Agent Studio. You can add an MCP Server Console with one of the following authentication options:

1. **OAuth 2.1**: Helps add an MCP Server Console with an authentication code. For more information, see Add an MCP Server with OAuth 2.1.
2. **API Key**: Helps add an MCP Server Console with an API Key. For more information, see Add an MCP Server with API Key.
3. **Others**: Helps add an MCP Server Console in a manual way by selecting a Connection and Credential Alias record. For more information, see Add an MCP Server with Connection and Credential Alias.

Note: You must authenticate the users with the MCP Server Console to add the MCP tool to an AI agent and without prior authentication, you can't add the MCP Server Console.

Add an MCP server with OAuth 2.1

Add an MCP server with OAuth 2.1 in the AI Agent Studio.

Before you begin

Role required: sn_mcp_client.admin

About this task

OAuth is the standard method to authenticate MCP servers. If your MCP server supports it, choose OAuth 2.1 as the authentication method.

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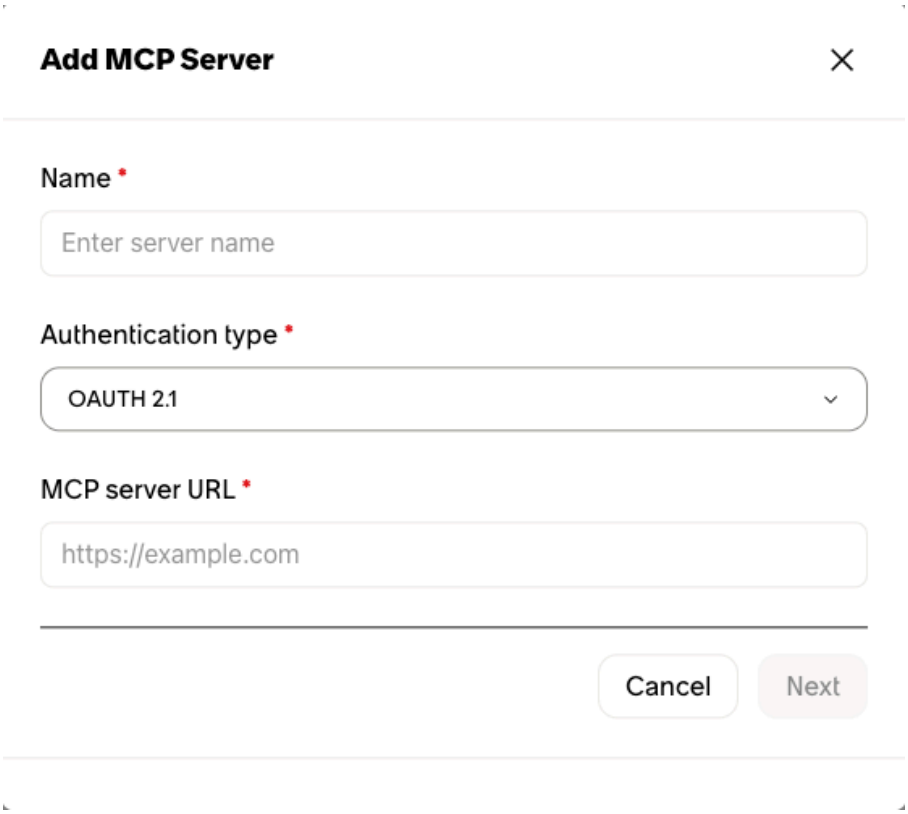
Procedure

1. Navigate to **All** > **AI Agent Studio** > **Settings** > **Manage Model Contextual Protocol (MCP) Servers**.
2. Select **View** against **MCP Servers**.
3. On the Model Context Protocol Server page, select **New**.
4. On the Add MCP Server Console form, enter a name and the web address for your MCP server.
5. In the **Authentication Type** field, select **OAUTH 2.1**.



6. Select **Next**.
   The form extends with the registration details.
7. On the form, fill in the fields.

Note:

- If your MCP server doesn't support dynamic client registration, register the OAuth client for AI agents manually. Update the client details in AI Agent Studio.
- The manual registration doesn't auto-populate the field data and must be manually provided.

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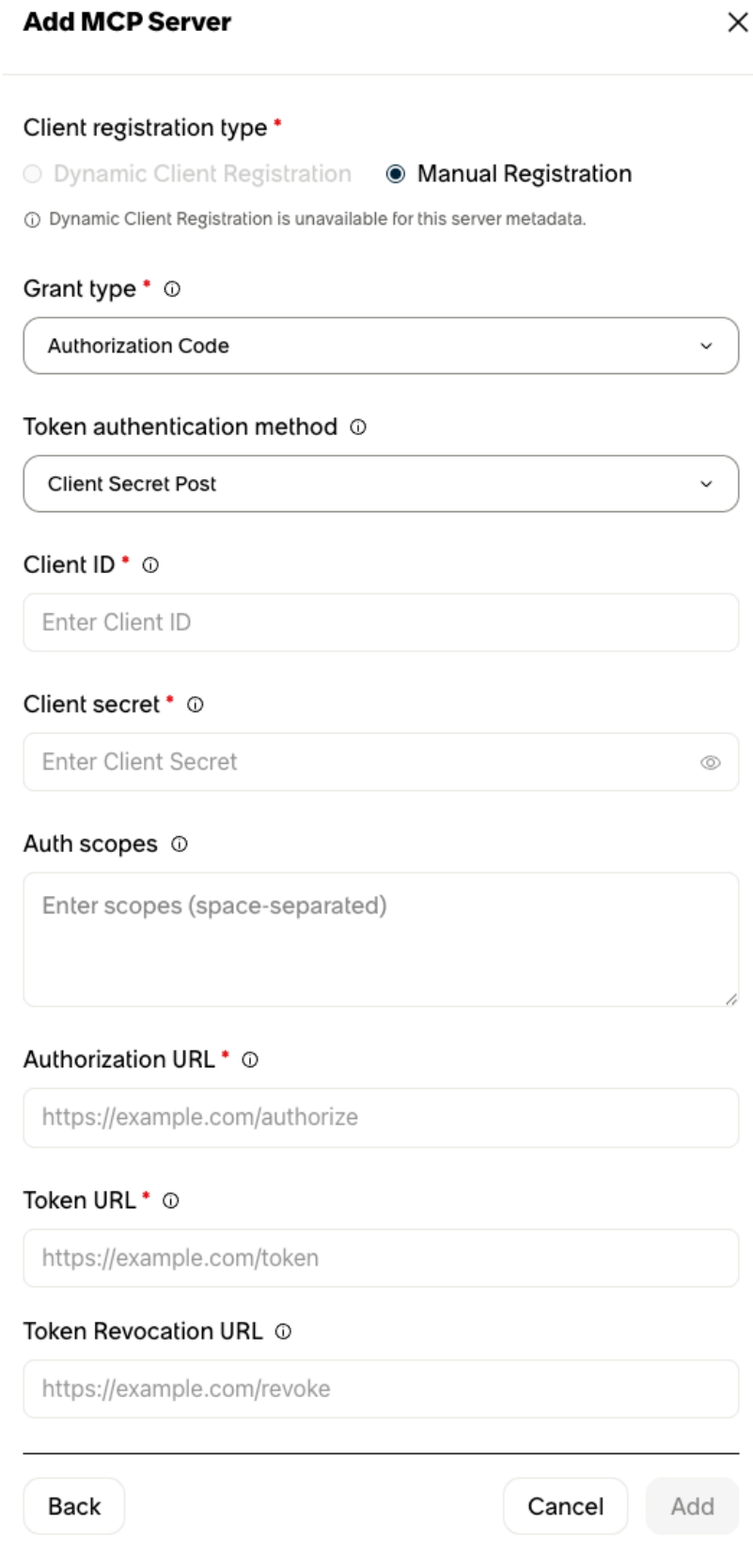

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Manual Registration form

Field	Description
Grant Type	How you want to obtain an access token when accessing protected resources. The following options are available: ○ **Authorization Code**: A system-generated code used for granting access to an application or resource. ○ **Client Credentials**: An access token provided by the administrator to access the application directly.
Token Authentication Method	Method using which the client credentials are sent when requesting tokens from the Authorization server. You can one of the two options: ○ **Client Secret Basic** ○ **Client Secret Post**
Client ID	Unique ID for authentication and authorization purposes.
Client Secret	Unique credentials used for authentication.
Auth Scopes	Specific permissions for an application. **Note:** The Auth scopes must be comma-separated values.
Authorization URL	Web address of your server to direct authorization.
Token URL	Web address containing the token.
Token Revocation URL	Web address to revoke the previously provided token.

8. Select **Add**.
   You're redirected to the Model Context Protocol Server Console record to authenticate the MCP server for adding an MCP tool to an AI agent.

   Note: On the Model Context Protocol Server Console record, you will see a warning that server requires authentication.

9. Select **Save** and continue to complete filling the Server details, Access rules, and Tools.
10. Verify the Server details.
    The Server name, Connection Alias, and Application fields are auto-populated with the information from previous steps. Additionally, you can provide a description for the server.
11. Define Security controls for the MCP Servers.
    For more information, see Define security controls for MCP Servers.
12. Define the Tools for the Model Context Protocol Sever.

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You can configure the MCP tools in the Assistant Designer. For more information see .

13. Select **Authenticate** to request a new token.
14. In the third-party authorization page, select **Authorize**.

> **Note:** When OAuth access or refresh tokens aren't available, you must authenticate the OAuth configuration on the MCP server record to add it as an AI agent tool.

Add an MCP Server with API Key

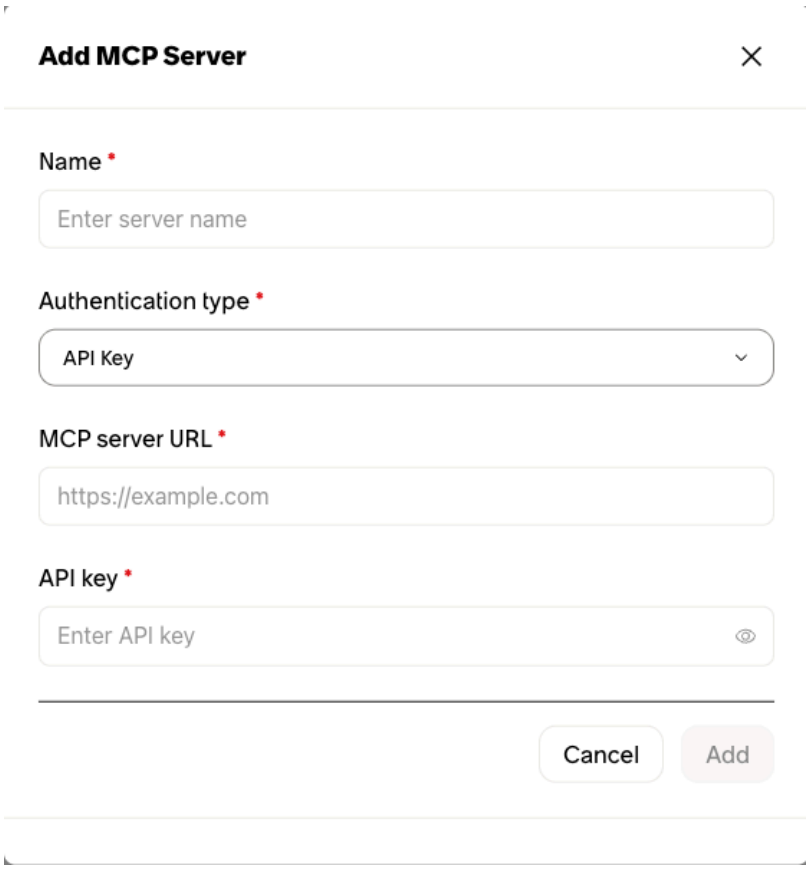
Add an MCP Server with an API Key in the AI Agent Studio.

Before you begin

Role required: sn_mcp_client.admin

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Settings** > **Manage Model Contextual Protocol (MCP) Servers**.
2. Select **View** against **MCP Servers**.
3. On the Model Context Protocol Server page, select **New**.
4. On the form, fill in the fields.



Add API Key MCP Server

Field	Description
Name	Name for your MCP Server.

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Field	Description
Authentication Type	The authentication type with which you want to add your MCP Server. Select **API Key**.
MCP Server URL	The web address of your MCP Server.
API Key	A unique code or password to identify and authenticate the user or application when accessing the API. **Note:** The API Key adds a Connection alias dynamically at runtime and maps with the MCP Server.

5. Select **Add**.
   You're redirected to the Model Context Protocol Server Console record to complete the Server details, Access rules, and Tools information.
6. Verify the Server details.
   The Server name, Connection Alias, and Application fields are auto-populated with the information from previous steps. Additionally, you can provide a description for the server.
7. Define Security controls for the MCP Servers.
   For more information, see Define security controls for MCP Servers.
8. Define the Tools for the Model Context Protocol Sever.
   You can configure the MCP tools in the Assistant Designer. For more information see .
9. Select **Save**.

Result

An MCP Server Console with API Key authentication gets created with the name you provided and appears in the list of MCP Servers.

Add an MCP Server with Connection and Credential Alias

Add an MCP Server by selecting a Connection and Credential Alias record.

Before you begin

- Role required: sn_mcp_client.admin
- Verify that you have a Connection and Credential alias record created before adding an MCP Server with Others as the option.

  For more information, see Create a Connection & Credential alias.

About this task

To use authentication methods not supported in MCP Server, use the Connection and Credential Alias method. Create the alias manually and then update it in the MCP Server. For OAuth-based authentication, first create the OAuth entity profile. Then create the Connection and Credential Alias. For other authentication methods like API Key, Basic Auth, AWS Credentials, or SSH Credentials, create the connection and credential alias directly.

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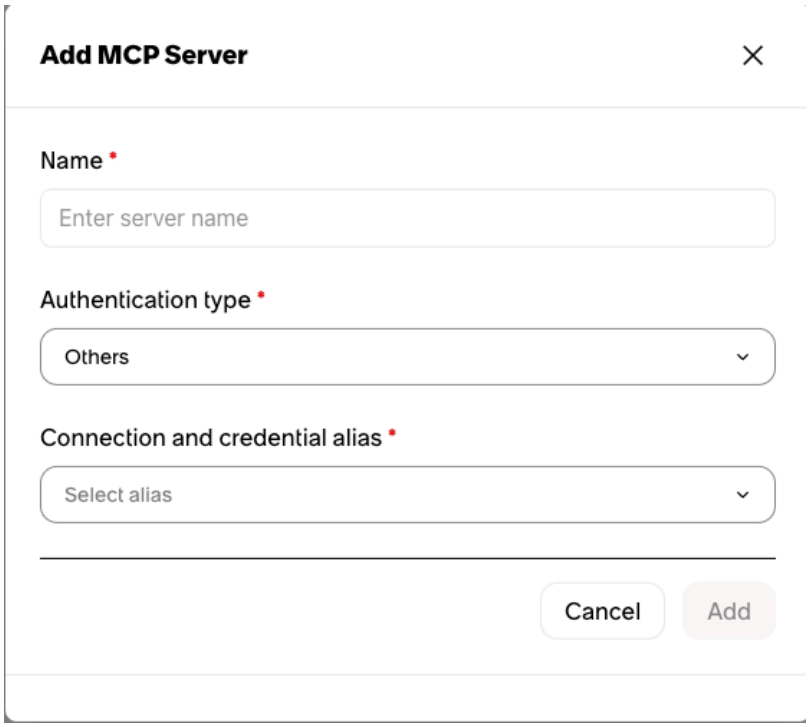
Procedure

1. Navigate to **All** > **AI Agent Studio** > **Settings** > **Manage Model Contextual Protocol (MCP) Servers**.
2. Select **View** against **MCP Servers**.
3. On the Model Context Protocol Server page, select **New**.
4. On the form, fill in the fields.



Add MCP Server

Field	Description
Name	Name for your MCP Server.
Authentication Type	The authentication type with which you want to add your MCP Server. Select **Others**.
Connection and credential alias	Select a Connection and credential alias record to map with your MCP Server.

5. Select **Add**.
   You're redirected to the Model Context Protocol Server Console record to authenticate the MCP server for adding an MCP tool to an AI agent.
6. Select **Save** and continue to complete filling the Server details, Access rules, and Tools.
7. Verify the Server details.
   The Server name, Connection Alias, and Application fields are auto-populated with the information from previous steps. Additionally, you can provide a description for the server.
8. Define Security controls for the MCP Servers.
   For more information, see Define security controls for MCP Servers.
9. Define the Tools for the Model Context Protocol Sever.

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You can configure the MCP tools in the Assistant Designer. For more information see .

10. Select **Save**.

> **Note:** On the Model Context Protocol Server Console record, you will see a warning that server requires authentication. Authenticate the MCP Server if you see the message requiring it.

Result
An MCP Server with the name you provided appears in the list of MCP Servers.

Define security controls for MCP Servers

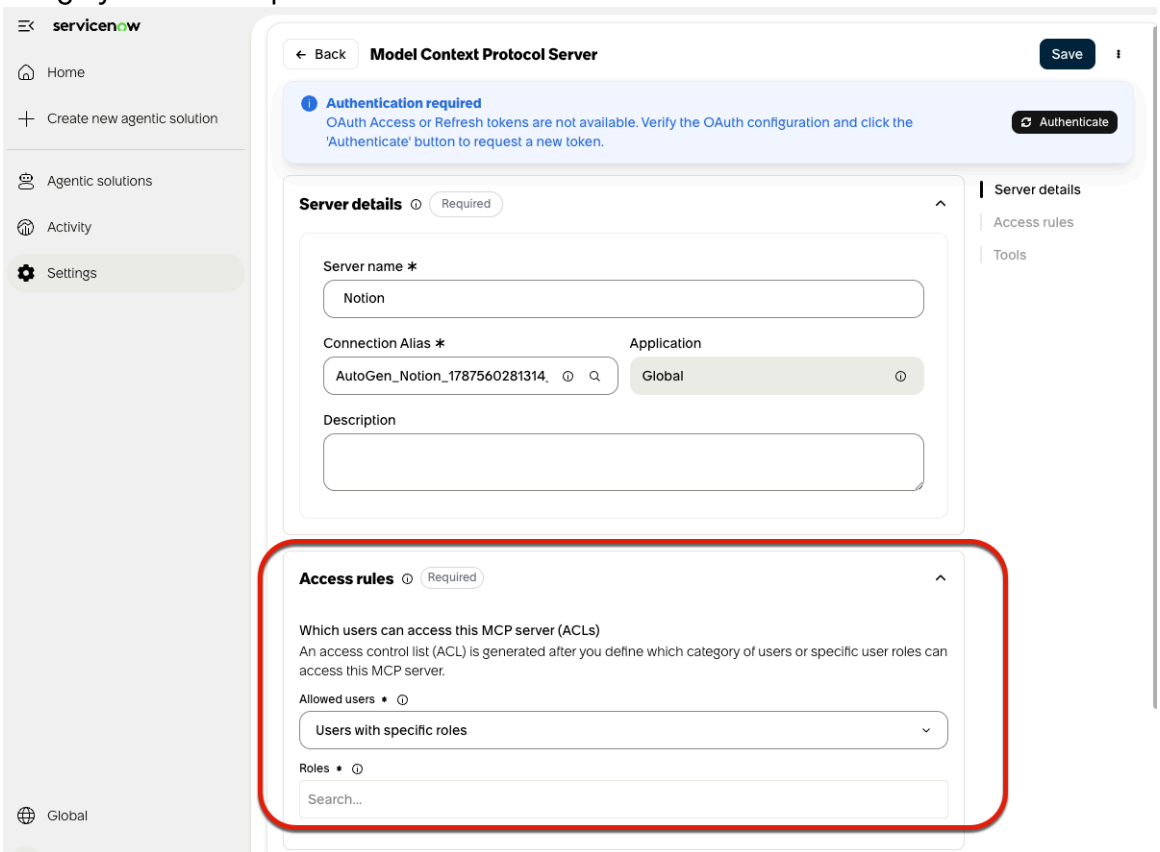
Define security controls for an MCP Servers to determine which users can access it and what permissions they have.

Before you begin
Role required: sn_mcp_client.admin

About this task
The security control applies only when MCP server is added to an Assistant and when a user tries to invoke the respective MCP server from that Assistant. For adding to AI Agent, this ACL won't be applied and automatically agent ACLs are applied for the agent normally.

Procedure
1. Open a Model Context Protocol Server and navigate to Access rules.

   You can select which users can access this MCP server via ACLs. The access control list (ACL) is generated after you define which category of users or specific user roles can access this MCP server.



2. Select the users from the **Allowed users** drop down.

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There are three possible options for ACLs created in AI Agent Studio:

- *Any authenticated user*: Grants access to any user who is authenticated on the instance, regardless of the role.
- *Users with specified roles*: The default ACL option that requires you to select the specific roles required to invoke an AI agent or an agentic workflow. If you select this option, you will be able to add roles in the **Roles** field.

  Note: As the ACLs are Allow If ACLs, any user with at least one of the roles will be able to define specific roles that the users must have to discover and interact with this AI agent.

- *Public*: Grants access to all users, including guests who aren't signed in.

  Note: Understand that this configuration should be used sparingly and only when needed.

3. Select **Save**.

View tools on the MCP server

You can view the list of tools a connected MCP server exposes on the server's details view in the AI Agent Studio.

Before you begin
Role required: admin

About this task

- The MCP server detail view shows the tools the server exposes, each with tool name and description.
- A tool count for the server is displayed.
- The view is read-only - no add, edit, or remove capabilities are available.
- The view is reachable from the server record without opening an agent or an Assistant (ServiceNow Otto panel or ServiceNow Otto for Virtual Agent).
- View the long tool descriptions.

Procedure

1. Open a Model Context Protocol Server and navigate to the Tools section of the record. You will see the list of all the tools that the MCP server supports.
2. Select the refresh icon to refresh the list if the MCP server updates their tools.
3. Use the **Search** field to search for a particular tool associated with the MCP server or to just see what's available.

   Note: The tools shown in the list are the ones that can be configured in the Assistant to allow, block, or run in supervised mode.

Add an MCP server tool to an AI agent

Add an MCP tool to an AI agent in the AI Agent Studio so that your users can access the MCP server.

Before you begin
Role required: sn_aia.admin

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Procedure

1. Navigate to **All** > *AI Agent Studio* > **Agentic Solutions**.
2. On the Agentic solutions page, open the **AI agents** tab and select an AI agent.
3. In the Tools section, select **+Add tool**, select **Create new tool**, and then select **MCP Server tool**.
4. In the Add a Model Context Protocol tool page, select an MCP server from the **Select Model Context Provider server** drop down.
5. Select a tool for the MCP server from the **Select tool** drop down.
6. Define the tool settings which are used only by the selected AI agent.
   - **Name**: The name is auto-populated from the Select tool field. You can also change the name if you would like to.
   - **Description for this AI agent**: Provide a description that covers the tool's purpose, exact input rules, what the tool returns, and how this AI agent should use outputs.

     Note: This description is critical because the AI agent uses it to invoke the tool. Testing shows details of actual tool usage.

7. Select an execution mode under **Execution mode**.

   Choose **Supervised** to require human oversight when the tool executes, or **Autonomous** to allow the tool to run without human intervention.

8. Toggle **Display output** to control whether the tool's output is shown to users.
9. Select an output widget from the **Widget** drop down.

   Widgets can only be used by assistants built in Premium Chat experiences. Select the widget type that best formats the tool's output for users.

10. Display the refined widget message.
    Select **Yes** if you would like a refined widget message.
11. Expand the **Advanced settings** section to configure output transformation and processing messages.

    a. Select an output transformation format from the **Output transformation format** drop down.

    Raw output data usually needs to be transformed into a format that is user-friendly and readable. You can also transform data into smaller formats to reduce the amount of data the AI agent needs to analyze. Transforming data involves tradeoffs between data completeness and latency.

    The available output transformation formats are:

    - *None*: Output data isn't changed into a different format and users will see raw data.
    - *Concise*: Output data is changed into the most minimal format for users, with less data for the AI agent to analyze.
    - *Verbose*: Output data is changed into a summary-like format for users, with slightly less data for the AI agent to analyze.

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- *Paraphrase*: Output data is changed into a format featuring direct statements for users, with no reduction in data.
- *Custom*: Output data is changed into a format you specify (consider data loss and performance issues).

12. Generate or write processing message for users under **Tool processing messages for users**.

    Describe the action that happens while the tool is running in the **In-progress message** field and the final action when the tool completes in the **Completion message** field. For example, users can see "Requesting a service" when the tool is in progress and "Requested a service" when the tool is done.

13. Select **Save**.

What to do next

You can test your AI agent on a record manually to see an example execution. You can also create an automated agentic evaluation to test the AI agent over repeated interactions. Automated evaluations can recommend specific optimizations if the LLM judges find underlying patterns for low success rates.

Activate your AI agent and make it ready for use by selecting **Activate**.

Note: The status of the external AI agent is shown as **Inactive** until it is activated.

Model Context Protocol Client reference

Find more information about user roles, tables, and the different properties that are installed with the Model Context Protocol Client application.

MCP Client Roles

The following roles are installed with the Model Context Protocol Client plugin [sn_mcp_client].

Roles used in MCP Client

Role	Description
MCP Client Admin [sn_mcp_client.admin]	Administrator of the application. A user with the sn_mcp-client.admin role can create, read, update, and delete records. **Note:** The sn_aia.admin role contains the sn_mcp_client.admin role, a role inheritance on plugin activation.
MCP Client Viewer [sn_mcp_client.viewer]	Read-only access to the application. A user with the sn_mcp_client.viewer role has read and report access on all tables. **Note:** The sn_aia.viewer role contains the sn_mcp_client.viewer role, a role inheritance on plugin activation.

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MCP Client system properties

The following system properties are installed with the Model Context Protocol Client plugin [sn_mcp_client].

System properties used for configuring MCP Client

System property	Description
sn_aia.enable_mcp_tool	Enables access to the MCP Client tool on your ServiceNow instance. Default value: **true**

MCP Client tables

The following tables are installed by default with the installation of the Model Context Protocol Client plugin [sn_mcp_client].

Tables used for configuring MCP Client

Table	Description
MCP Execution Logs [sn_mcp_execution_logs]	Lists the request and response, the method (tool call or tool list) that was carried out along with the mapped session. The execution logs table also helps to debug and shows if there are any errors.
MCP Client Server Session Mappings[sn_mcp_client_server_session_mapping]	Lists the sessions mapped to the server based on the capabilities support.
Model Context Protocol Severs [sn_mcp_server]	Lists the MCP Servers.

AI Agent Studio (legacy)

The ServiceNow® AI agents are entities that mimic human-like intelligence by using large language models (LLMs). AI agents can perform tasks that range from simple automated responses to complex problem solving. By using AI agents, you can reduce the workloads of your live agents and help increase their productivity.

https://player.vimeo.com/video/1164069631?h=c5eed6a89e&badge=0&autopause=0&player_id=0&app_id=58479

Learn more about the concepts behind AI agents and how they can help fit your specific business needs.

Get started

Select a tile to get started with AI agents.

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Explore Learn more about AI agents and AI Agent Studio	Configure Configure the agentic AI experience in AI Agent Studio	Create an AI agent Create your own custom AI agents with advanced multi-agent reasoning frameworks
Create an agentic workflow Create your agentic workflows with planned instructions and triggers	Reference Learn more about the user roles, tables, and properties for AI agents	

There might be AI agents installed on your instance that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

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Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal .

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

For more information, see the Now Assist documentation.

Explore AI agents

Learn how the AI agents enhance live agent productivity by mimicking human-like intelligence to manage tasks ranging from automated responses to complex problem solving.

AI agents overview

AI agents are virtual agents within the ServiceNow AI Platform ecosystem. They can perform specific tasks and functions, often using natural language instead of traditional code.

AI agents can perform the following tasks:

- Analyze data.
- Retrieve information from knowledge bases and enterprise systems.
- Execute automated actions.
- Collaborate with other agents to resolve issues or accomplish requests.

Example:#Imagine you need to reset your password. Multiple AI agents might be involved:

1. One agent understands the request.
2. Another verifies your account details.
3. A third agent conducts a security check.
4. A fourth agent resets the password and notifies you.

agentic AI framework

AI Agent Studio overview

The AI Agent Studio enables you to create, manage, and test AI agents and agentic workflows in a unified environment.

agentic system

The ServiceNow AI Platform's agentic system uses AI agents, orchestrated by an Orchestrator, to execute Agentic workflows.

AI agents

On the ServiceNow AI Platform agentic system, an AI agent contains a set of large language model (LLM) instructions with the tools to accomplish tasks.

agentic workflow

Agentic workflows are smart, context-aware, automated processes designed and executed by AI agents. They represent dynamic, human-like processes where specialized AI agents collaborate to accomplish complex goals. Here are a few key characteristics of Agentic workflows:

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- **Autonomous**: Operate independently without constant human intervention.
- **Adaptive**: Adjust to changing situations and business needs.
- **Collaborative**: Work together to complete complex tasks.
- **Intelligent**: Use large language models and business data to make informed decisions.

orchestrator

The AI agent Orchestrator is a central management system that coordinates AI agents to verify they collaborate effectively to complete complex workflows.

For more information, see Understand AI agents.

Guided Setup

The guided setup process in the helps you configure your AI Agent triggers, data sources, and display locations based on your specific business needs.

ServiceNow Otto panel

The ServiceNow Otto panel is a user-facing interface, commonly accessed through the context menu or chat interfaces. It provides quick access to agents' capabilities and enhances productivity by summarizing records, creating content, and analyzing alerts.

Tools

Tools equip your AI agents with the necessary capabilities to complete their tasks. Adding a tool to an AI agent enables various functionalities and helps the AI agents achieve their objectives.

How to put AI agents to work

AI agents can use a variety of tools, such as web searches, record operations, and flows, to work on agentic workflows that you define.

Navigate to **All** > **AI Agent Studio** > **Overview** > **Get an overview of what to expect** and select **View steps** to see how you can successfully put your AI agents to work.

1. Create an agentic workflow: agentic workflows define the problem and situation that you want your AI agents to work on. Without an agentic workflow, your agents don’t know when or what to work on.
2. Create AI agents: AI agents use tools to execute tasks. Consider the tasks needed to solve the agentic workflow you created. Create one or more agents to execute those tasks.
3. Test the agentic workflow: See how your AI agents perform. Make adjustments to either the agentic workflow or AI agents. Test until everything’s working the way you want.
4. Deploy: Put your AI agents to work across your organization.

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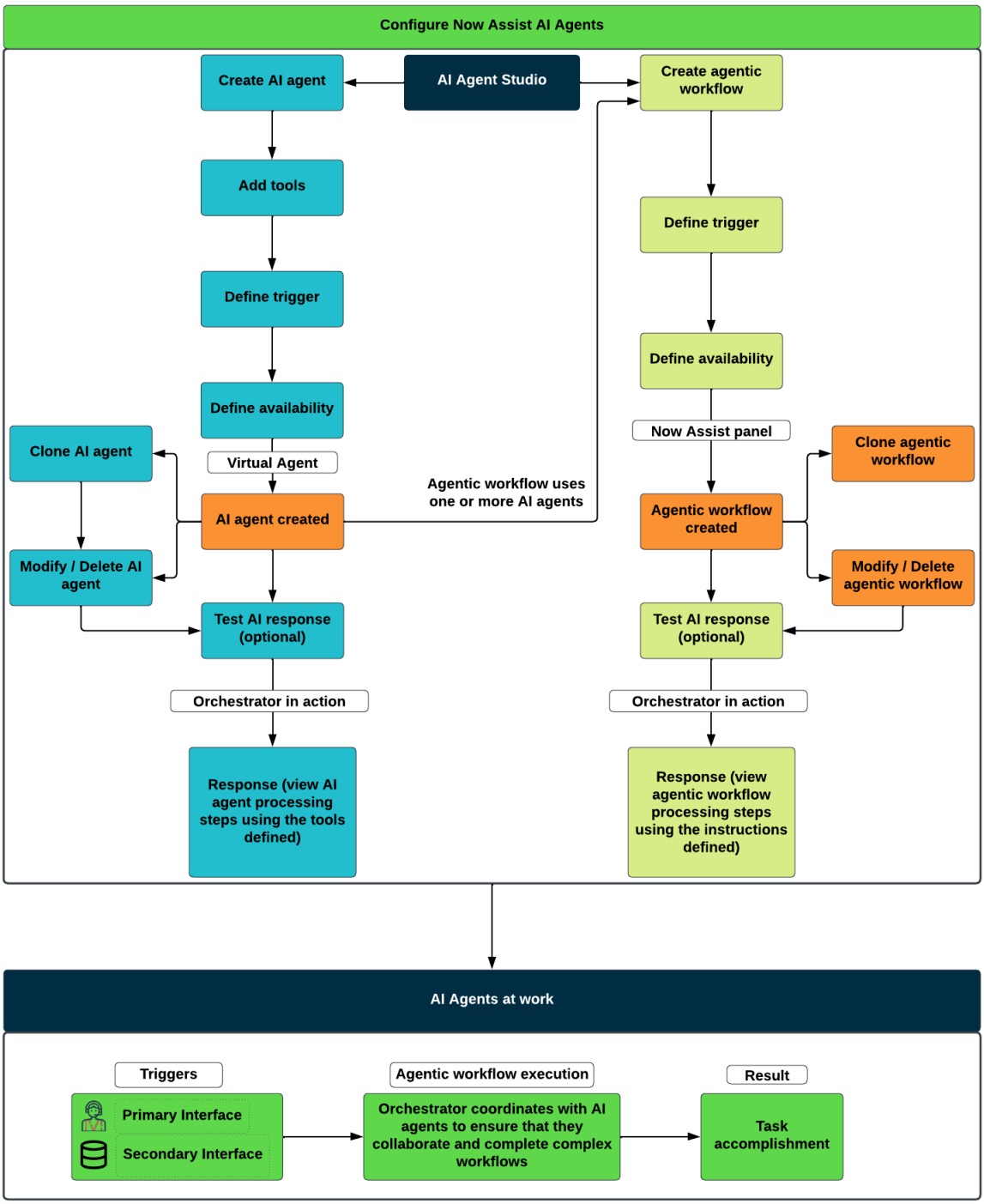
AI agents configuration and execution



agentic AI has two components: AI agents and agentic workflows. By using the guided setup in AI Agent Studio, you create AI agents and workflows, add tools or define triggers, and define the availability or display location. After they're created, you can duplicate, modify, and test them in AI Agent Studio.

In run time, triggers in the primary and secondary interfaces cause agentic workflow execution, where one or more AI agents execute the plan with the help of the AI agent Orchestrator to

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accomplish the task. After agentic workflow execution, the output appears in the ServiceNow Otto panel. To learn more about an AI agent Orchestrator is, see the Understand AI agents.

AI Agent Studio overview

Create, manage, or test AI agents and agentic workflows so that you can create self-executing workflows to help you achieve your business goals.

https://player.vimeo.com/video/1096896405?h=81ff7b3861&badge=0&autopause=0&player_id=0&app_id=58479

AI Agent Studio homepage

With the AI Agent Studio application, you can create, manage, or test AI agents and agentic workflows all in one place. To enable the agentic AI experience, you must first install AI agents. For more information, see Install ServiceNow Otto AI Agents.

The Overview page has three sections where you can find the information that you must understand, begin, and continue developing AI agents and agentic workflows. When you first go to the AI Agent Studio, tour points are available to guide you through the experience.

In the Ready-made agentic workflows and AI agents section, you can find the templates and ready-made AI agents and agentic workflows that you can incorporate as-is or in custom workflows that you create. You can even explore more templates to find the ones that best fit your needs.

In the Recent agentic workflows and AI agents activity section, you can find the agentic workflows or AI agents that have been created or configured most recently. On both List views, you can create, duplicate, or delete agentic workflows or AI agents. The tab also includes a link to the AI Agents Dashboard where you can review the details about AI agent usage and performance.

The third section is a card to open a modal with a journey checklist that describes the steps to incorporate the AI agents into your workflows successfully and a video that provides an overview of the AI agents and workflows to get you started. Select **View steps** to open this section.

The following example shows the Overview page of AI Agent Studio.

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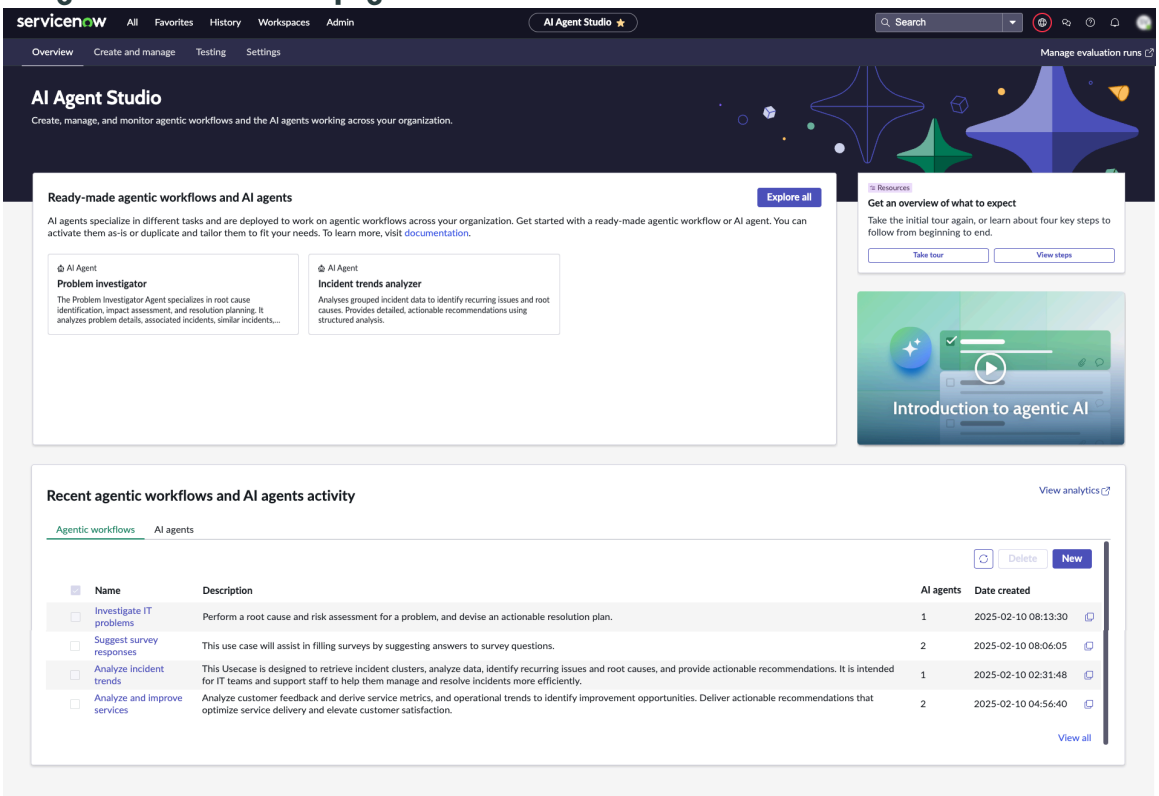
AI Agent Studio overview page

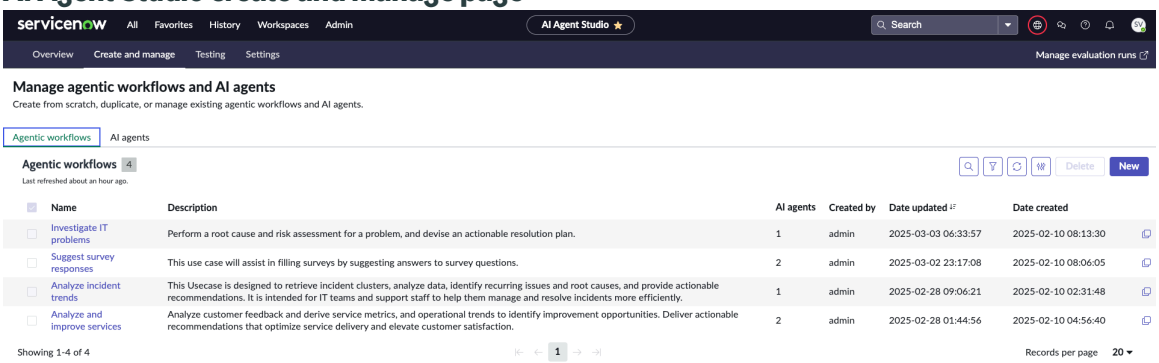


Managing agentic workflows and AI agents

From the AI Agent Studio Create and manage page, you can create, duplicate, or manage the existing agentic workflows and AI agents. This page has two tabs, one for agentic workflows and one for AI agents. You can edit the columns of the List view to change what information is displayed. You can also search or filter the Lists to find the agentic workflows and AI agents that you're looking for quickly. By selecting the name of the agentic workflow or AI agent, you can open Guided Setup to configure or reconfigure the agentic workflow or AI agent.

The following example shows the AI Agent Studio create and manage page after several applications are installed.

AI Agent Studio create and manage page



agentic AI activity

The activity page contains execution logs for both agentic workflows and AI agents. The list allows you to filter based on various fields, including the version. For more information on creating multiple versions of the *`List of steps`* field, see Version control for AI agents and agentic workflows.

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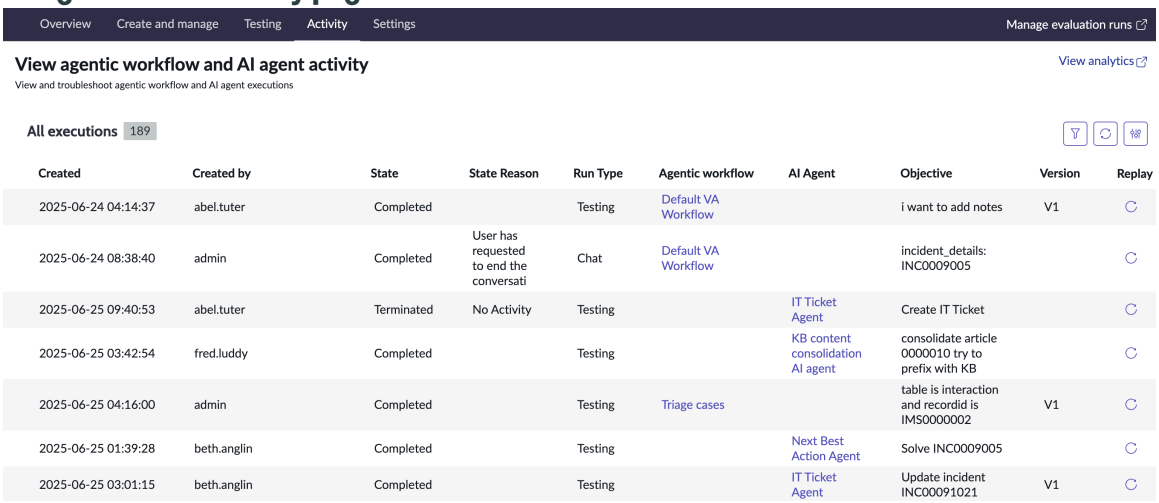
The following example shows several execution logs in AI Agent Studio.

AI Agent Studio activity page



Created	Created by	State	State Reason	Run Type	Agentic workflow	AI Agent	Objective	Version	Replay
2025-06-24 04:14:37	abel.tuter	Completed		Testing	Default VA Workflow		i want to add notes	V1	
2025-06-24 08:38:40	admin	Completed	User has requested to end the conversati	Chat	Default VA Workflow		incident_details: INC0009005		
2025-06-25 09:40:53	abel.tuter	Terminated	No Activity	Testing		IT Ticket Agent	Create IT Ticket		
2025-06-25 03:42:54	fred.luddy	Completed		Testing		KB content consolidation AI agent	consolidate article 0000010 try to prefix with KB		
2025-06-25 04:16:00	admin	Completed		Testing	Triage cases		table is interaction and recordid is IMS0000002	V1	
2025-06-25 01:39:28	beth.anglin	Completed		Testing		Next Best Action Agent	Solve INC0009005		
2025-06-25 03:01:15	beth.anglin	Completed		Testing		IT Ticket Agent	Update incident INC00091021	V1	

Testing agentic AI

From the AI Agent Studio testing page, you can review the different tests your AI agents and agentic workflows, both manual and automated. You can test the performance of your agentic AI by simulating a single execution manually, or you can use automated agentic evaluations for testing multiple executions. Single tests are best for evaluating whether the AI agent or agentic workflow does what you expect it to. Agentic evaluations are better at finding underlying patterns and trends that may not be noticeable one execution at a time.

Note: The testing feature does not support the ServiceNow Otto panel assistance for live agent interactions. To connect to a live agent, use Virtual Agent instead. Otherwise, during live agent chat sessions, requester and agent users may be logged out unexpectedly due to sessions expiring prematurely.

There are two types of manual tests you can do: *AI agent or agentic workflow* to test execution or *Test access* to test security controls. You can view your executed tests in the two tabs of the testing page. For manual execution tests, you can select the reply button to repeat the test. You can open the full details page of an automated test by selecting the test's name in the list in the *Automated* tab.

The following example shows the inputs for a Generate Resolution Plan agentic workflow testing setup of AI Agent Studio.

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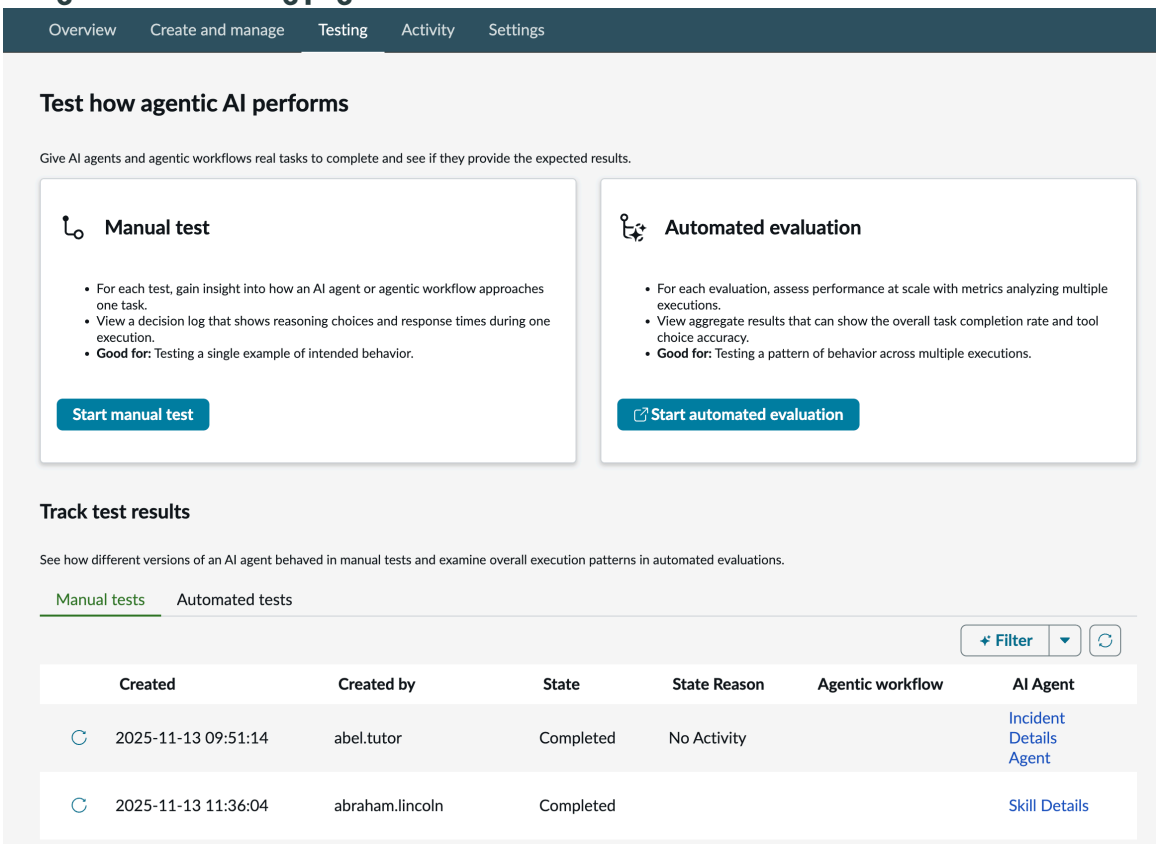
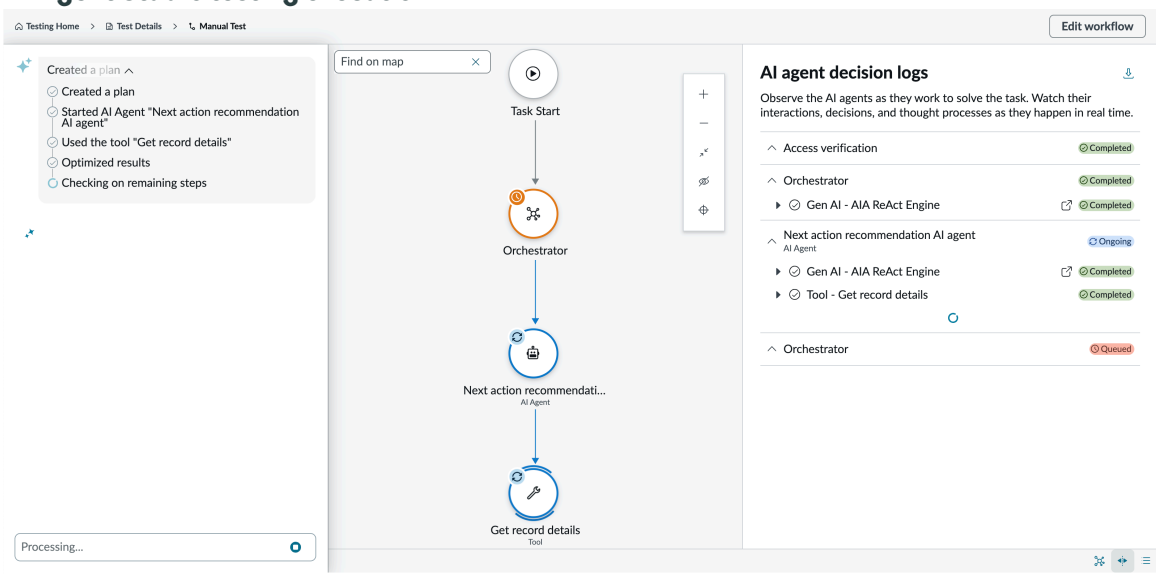
AI Agent Studio testing page



AI Agent Studio testing execution



AI Agent Studio settings

From the AI Agent Studio Settings page, you can enable AI GuardianGuardian for your AI agents. By using AI Guardian, you can configure:

- Offensiveness detection
- Prompt injection attempt decision
- Long-term memory for AI agents

The following image shows the AI Agent Studio settings.

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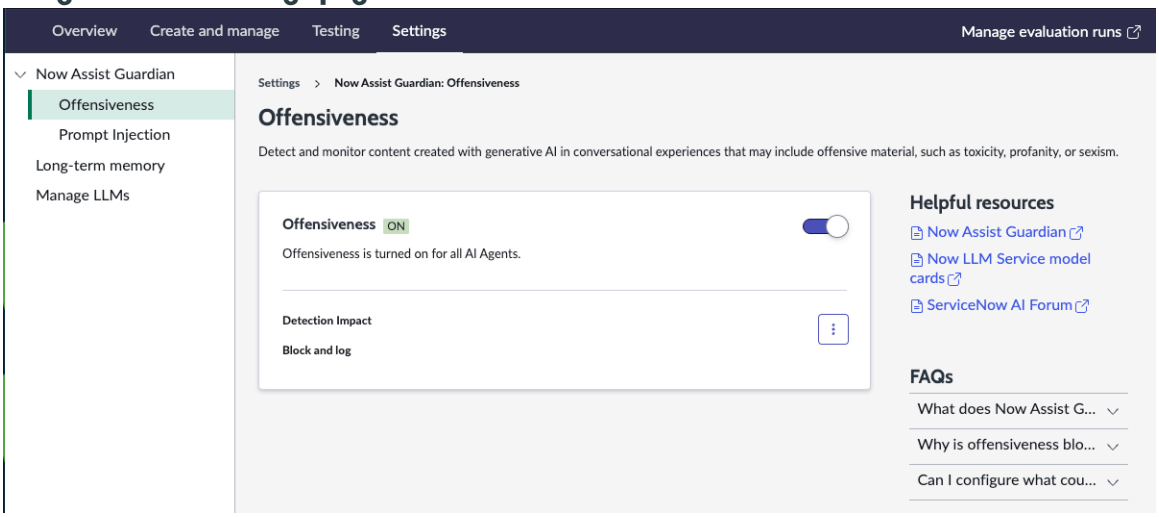
AI Agent Studio settings page

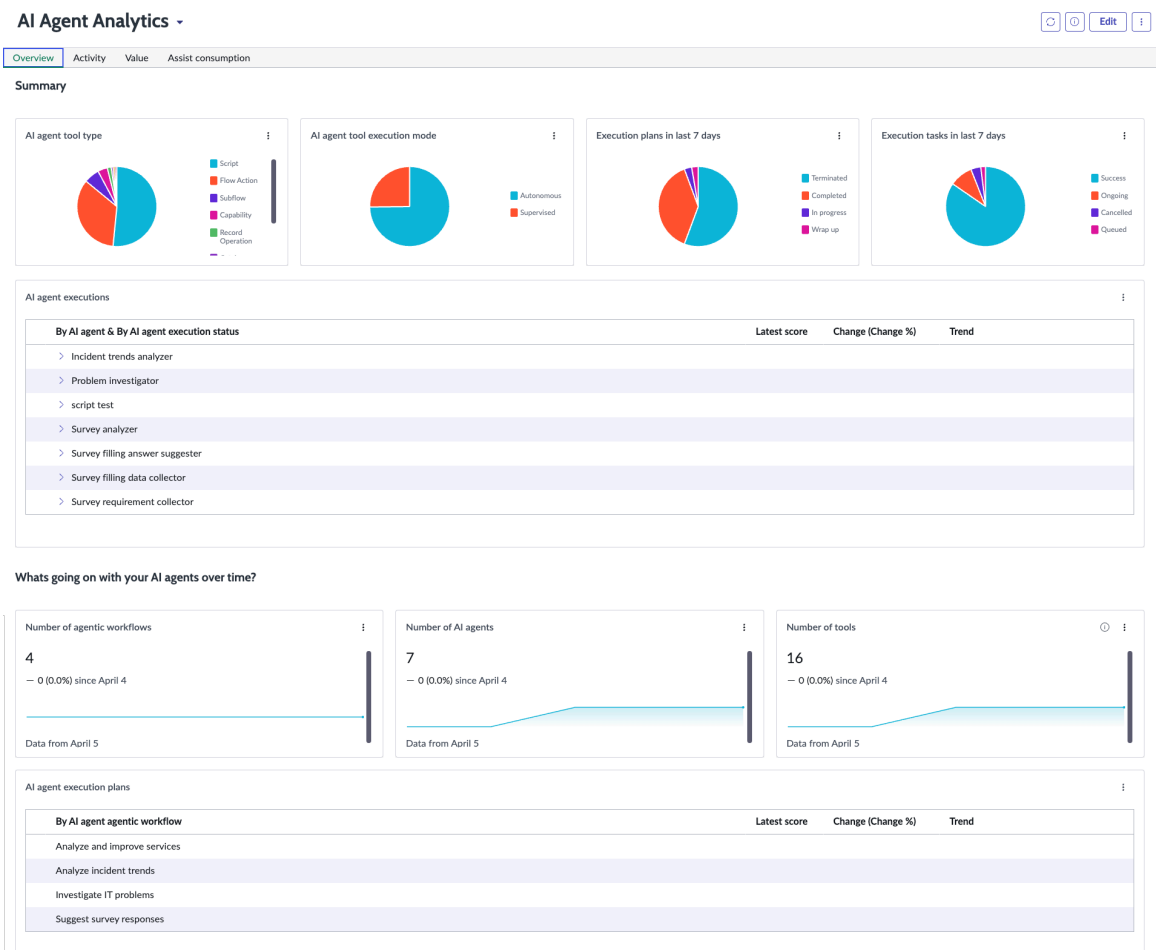


AI Agent Analytics dashboard

From the AI Agent Analytics dashboard, you can review the vital statistics about your AI agents and agentic workflows. You can see the data about the number of agents and agentic workflows used, time-to-resolution efficiency gain, and the number of executions.

The following example shows the overview page for the AI Agent Analytics dashboard.

AI Agent Analytics dashboard overview page



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Understand AI agents

The AI Agent Studio is designed to securely use your data, workflows, and integrations directly within the ServiceNow AI Platform. AI agents can dynamically adjust their actions based on the progress and changing conditions of incidents or cases to help verify that they stay focused on achieving their objectives.

AI agents Orchestrator

The AI Agent Studio guides users in using AI agents effectively, while AI Orchestrator verifies seamless collaboration among them. The AI agent Orchestrator is a central management system that coordinates AI agents to verify that they collaborate effectively to complete complex workflows. It can also retrieve missing context from users when needed. AI agents operate iteratively, seeking assistance from the Orchestrator if they encounter difficulties. The Orchestrator enhances inter-agent communication and centralizes coordination. The Orchestrator allows AI agents to share information effectively and transition tasks seamlessly, regardless of where the process originates. As a result, the Orchestrator is essential for managing intricate workflows, facilitating real-time adaptability, and efficient task delegation among agents.

The role of Orchestrator in AI Agent Studio:

1. Task Coordination & Execution: manages the interaction between multiple **AI agents**, ensuring that tasks are executed in the correct sequence.
2. Dynamic Decision-Making: Can invoke AI models dynamically based on the scenario.
3. Seamless Integration with Enterprise Systems: Works with ServiceNow workflows, CMDB, and third-party APIs to enable end-to-end automation.
4. Handling Multi-Step Workflows: Enables chained execution of AI-driven tasks among multiple AI Agents.
5. Policy & Governance Enforcement: Enforces governance rules to verify that AI agents adhere to conformance and security standards.

The Orchestrator works with ReAct prompt, where the previous reflection prompt has been merged with the planning prompt for a streamlined execution experience improving the efficiency and visibility of planner actions. With the ReAct prompt, a scheduling mode called Route has been introduced that enables asynchronous, parallel tool execution within agents to reduce latency and improve performance when an agent needs assistance from another agent during the execution process.

Dynamic Orchestrator for agentic workflows

The dynamic orchestrator helps map the right agents to the user's agentic workflow to provide better performance and accuracy. When there are more than the ideal 8 to 10 AI agents available for an agentic workflow, then the dynamic orchestrator helps identify the agents that need to be considered for executing that agentic workflow in the planning phase.

User impersonation in AI agents

The agentic workflow executes tools as the logged-in user in the ServiceNow Otto panel. Any operations that are performed within the tool in this flow are also executed as the logged-in user. After impersonation is enabled, testing an AI agent uses the instance-level impersonation.

Administrators can see logs with individual AI agent names as a record of who approved the agentic action in an agentic workflow. The logs help when determining a point of contact if there’s an issue with the approved agentic action by the AI agent.

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With impersonation, the fulfiller in the ServiceNow Otto panel and the requester in Virtual Agent can see the transactions recorded in the name of the AI agent that performed the agentic workflow execution.

Note: Virtual Agent can be turned on only for AI agents at the Define availability section in the AI agent guided setup. For more information, see Create an AI agent.

Best practices for AI agents configuration

AI agents can dynamically adjust the actions that are based on the progress and changing conditions of incidents or cases to help ensure that they stay focused on achieving their objectives.

AI agents can dynamically adjust the actions that are based on the progress and changing conditions of incidents or cases to help ensure that they stay focused on achieving their objectives.

- You can create, duplicate, and modify AI agents and agentic workflows. The default AI agents and agentic workflows are available in read only mode and to utilize them, you are required to duplicate these resources.
  - For more information about duplicating an AI agent, see Duplicate an AI agent.
  - For more information about duplicating an agentic workflow, see Duplicate an agentic workflow.
- You can also modify the duplicated AI agent and agentic workflow to meet your requirements.
  - For more information about modifying an AI agent, see Modify an AI agent.
  - For more information about modifying an agentic workflow, see Modify an agentic workflow.

Note: The agentic workflows available by default in the system are inactive and you must activate them to utilize. For more information about activating an agentic workflow, see agentic workflow template.

AI agents capabilities

Lists the features supported by AI agents, including configuration options and functional capabilities.

Invoke conversations with AI Agent Background Channel

The AI Agent Background Channel helps you to invoke AI Agent or agentic workflow execution from the Workspace. Use the AI Agent Background Channel associated with the AI Agent Background Provider to invoke conversations. The AI Agent Background Provider is based on the Custom Adapter Framework from Virtual Agent. For more information, see Configure a provider for your custom chat integration.

Create a channel identifier in the Provider Channel Identities table [sys_cs_provider_application] to add any additional conversational capabilities to your own provider application and get a new inbound ID that allows for customization. For more information, see Create a channel identifier for your custom chat integration.

To start a conversation, trigger the flow using the `sn_aia.AiAgentRunttimeUtil().startAiAgentConversation(request)` API in the Script Include (sys_script_include) of the AIAgentBackgroundProvider and select **Run Script**. When the Script execution status indicates Success, the conversation begins in the order of utterances defined in the Script.

Conversations that are invoked for executing an AI agent are logged in the Execution Plans [sn_aia_execution_plan] table. Open the conversation record to confirm the device type as **AI**

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Agent Background. Open the execution record to see the **Execution Tasks**, **Messages**, and the **Tools Executions** used to execute the AI agent.

You can also see the entire execution steps on the AI Agent Studio Testing page by copying the execution plan record's [sys_Id] and testing it. On the **Chat responses** tab, in the AI agent decision logs, you can see the AI agent details and the tools it used to resolve the issue.

Interactive and Non-interactive AI agents

The Interactive AI agents reach out to users for information when there is a fallback in the execution process, and the AI agent re-triggers the flow.

The Non-interactive AI agents do not reach out to the user at any fallback stage in the execution process. When the AI agent needs user information, it takes the dynamic prompt approach using the ReAct layer, where the prompt of the ReAct will change based on the execution mode of the AI agent or agentic workflow. Therefore, in the Non-interactive execution, the reach fallback options do not have to collect input from a user as a fallback option. However, the output of the AI agent or agentic workflow will still need to be presented to the user, and in any execution failure scenario, a message in the ServiceNow Otto panel or Virtual Agent is shown.

To implement the Non-interactive execution, the **Execution Mode** field is added in the Execution Plans [sn_aia_execution_plan] table, where the execution mode can be **Interactive** or **Non Interactive** based on the given runtime parameter.

You can run the AI agents and agentic workflows concurrently in the AI Agent Background Channel and in Non-interactive mode where the background execution allows AI agents to operate with any chat panel like ServiceNow Otto panel or Virtual Agent.

Multilingual support

You can leverage multilingual support for AI agents across languages for better translation quality to:

- Tune system prompts for native translations.
- Implement dynamic translation strategies when native support is unavailable.
- Provide extensive testing via automated and manual evaluations.

General guidelines for writing prompts for agentic AI

By following some general guidelines for creating AI agents and agentic workflows, you can create clear and effective instructions that help maximize their efficiency and effectiveness.

https://player.vimeo.com/video/1098393879?h=d37199a090&badge=0&autopause=0&player_id=0&app_id=58479

Creating AI agents and agentic workflows overview

AI agents and agentic workflows rely on large language models (LLMs), so the language that you use for their instructions is important. There are many steps that you can take to help improve the quality and consistency of your agentic AI solutions.

Follow these guidelines when writing AI instructions for an AI agent or agentic workflow.

Clarity

- Use instructions that are concise, clear, and precise. Simple language can help remove ambiguous situations that could stall or disrupt an agent's progress. Example: "You're an assistant tasked with helping the caller or requester by

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suggesting answers to survey questions." instead of "You help callers with questions."

- Use specific action verbs. Example: "Analyze" instead of "look at."
- Add explicit conditions when a certain step must be completed. Example: "If priority = High, then escalate immediately" instead of "escalate urgent issues."
- Clarify boundaries and limitations. Example: "NEVER modify incident status without supervisor approval."
- Limit technical jargon. Technical jargon can limit applicability because it may not be accessible or universal.

Context

- Embed requirements within context. Specify when certain requirements should be used within the task. Example: "When generating answers to present to the user, apply standard quality controls."
- Only include the context that affects decision making. Avoid extraneous information to help prevent the AI agent or agentic workflow from incorporating unwanted details.
- Define what good outcomes look like. Include examples. Missing or vague descriptions of results could cause AI agents or agentic workflows to exit before the end state is reached. Example: "Present the user with a report that includes a minimum of 3 relevant graphs pertaining to the list of records."

Constraints

- Denote hard requirements. Use strong language to insist on the importance of the requirements. While output may not always follow these requirements, being specific about standards can help reduce deviations.
- Describe preferences that can be adjusted based on context.
- Add conditional restraints. Example: "If more than one record is returned, present the results to the user in order of creation date. If more than five records are returned, present the results to the user in order of relevance."

Coherence

- Create steps that flow logically. Each step should build on the results of the previous step. Example: "Step 1 gathers a list of incident records. Step 2 performs record operations on those list of records."
- Use consistent terminology throughout.
- Design instructions that serve the overall objective. All of your tools and AI agents work together to solve problems.
- Break complex goals into individual pieces. Example: "Step 1: Analyze customer data systematically. Step 2: Check priority and validation permissions. Step 3: Generate and format comprehensive report."

Structure

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- Use consistent formatting. Similar instructions should use similar language patterns.
- Group related steps together.
- Create a smooth flow from instruction to instruction. Along with grouped instructions and logical step progression, this provides a systematic and structured process for the AI agent or agentic workflow to follow.

Guidelines for creating AI agents

The description, AI agent role, and list of steps give the LLM the context and instructions to perform a task. Together, they form the blueprint that's necessary for the LLM to complete its role in a complex workflow. Follow these guidelines to improve the accuracy, adaptability, and optimization of the AI agent:

AI agent description

- Specify the key areas or tasks that you want the agent to handle. Example: "Specializes in handling inquiries and resolving customer issues."
- Use clear, focused language and avoid vague terminology.
- Define the agent's inputs, outputs, and context.
- Differentiate the agent's unique role from other agents. Provide distinct and detailed descriptions of what that specific agent should do that is different than other agents.

AI agent role

- Clearly state the primary function of the AI agent in one or two sentences. Example: "The AI agent acts as a customer service assistant."
- State the specific business challenge that you want the AI agent to address. Example: "Reducing customer wait times by 50%."
- Provide a brief scenario of how the AI agent is to be used. Example: "Automating responses to common queries and escalating complex issues to human agents."

AI agent list of steps

- Create a logical progression from step to step.
- Use action-oriented language. Use verbs like the following:
  - Fetch
  - Retrieve
  - Filter
  - Analyze
  - Extract
  - Parse
  - Update
  - Send
  - Notify
  - Generate
  - Validate

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- Include outputs for each step to measure the task completion. Example: "Return the total incident count to other agents or processes that need it."
- Add contingencies to account for unexpected scenarios. Example: "If you encounter an error while looking up records, try again. If you still get an error, report that an error occurred."
- Define success and completion. Provide end states so that the AI Agent Orchestrator can determine whether an AI agent has finished its objective.
- If you have created a tool for your AI agent, refer to the tool by name. However, verify that the instructions change if the tool is ever renamed. If you don't, then the AI agent might not complete its task.

Tools

- Write detailed tool descriptions to help the AI agent understand what the tool is and how to use it.
- Create tools that work together. Build your tools around achieving the list of steps for the AI agent itself.
- Use the output transformation strategy field to define what the output of a tool should look like. Specifying how a tool should present its output can help the AI agent use that output when employing other tools or when sharing information between other agents.

Guidelines for creating agentic workflows

Follow these agentic workflow guidelines to provide the detailed information and the steps needed to accomplish a task:

Agentic workflow list of steps

- Write each step sequentially and number each step so that there's a logical and actionable flow.
- Account for as many possibilities as you can to avoid gaps. Provide enough detail that the agentic workflow can adapt if it encounters an edge case.
- Define the starting conditions, actions, decision points, and end states.
- Refer to end users as "the user."
- Use verbs like "show," "display," or "inform" to describe steps where the user needs to be shown something but they do not need to provide input.

Additional tips

Associate a maximum of 10 agents per agentic workflow. Adding more agents might not provide better or faster results. Instead, use small, well-defined scopes.

Note: You can assign up to 100 agents to an agentic workflow. However, not all 100 agents may be involved in resolving the agentic workflow. The AI Agent Orchestrator decides which agents should execute the plan. For example, an incident resolution gets impacted by the size of the agentic workflow and the number of agents that are assigned to it.

When creating agentic workflows with more than one assigned agent, make sure that you clearly define the agents with non-overlapping responsibilities. Include explicit limitations in the agents' roles. For example, one agent could handle user record details while another agent handles the incident record details.

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Common issues

Problem: Agent consistently uses the wrong tool

Potential solutions:

- Create clear, specific instructions with action keywords.
- Write detailed tool descriptions that specify when and why to use each tool.
- Include explicit input and output guidance in tool descriptions.
- Evaluate tool selection logic by testing against various scenarios.

Problem: Inconsistent output quality

Potential solutions:

- Embed standards as actionable requirements.
- Use phrases such as "implementing professional standards."
- Add quality verification steps.

Problem: Quality checks or other steps skipped

Potential solutions:

- Convert checklists to actionable steps.
- Use phrases such as "analyze completion against criteria."
- Add conditional progression logic.

Additional resources

For more prompting recommendations, see the Community AI Agents prompting guide.

Example AI agent

Use the example AI agent with clear name, description, AI agent role, and list of steps fields to use as a guide when creating your own AI agents.

Name

Categorize ITSM incident AI agent

Description

Categorize ITSM incident AI agent assigns the appropriate category, subcategory, and configuration item (CI) to an incident.

AI agent role

You're an expert in analyzing incidents and are tasked with assigning an appropriate category, subcategory, and configuration item (CI).

List of steps

Objective: Incidents represent disruptions, unavailability of a service, or issues faced by a user. The agent's task is to understand the issue and assign the appropriate:

- Category
- Subcategory
- Configuration Item (CI)

Step 1: Retrieve Incident Details.

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- Fetch the details of the given incident.
- DO NOT PROCEED if incident details are missing.
- If no details are found, verify the correctness of the incident number.
- Only proceed when incident details are successfully retrieved.

Step 2: Assign Category, Subcategory, and CI.

Step 2.1: Determine the Category.

- Fetch the available categories.
- Recommend a category only if the incident details contain clear, specific, and meaningful information that directly corresponds to one of the available categories.
- If the details are too vague, generic, lack context, or do not clearly indicate a relevant category, then set the category and subcategory to "Not determined" (field_value = null). Do not edit the subcategory later.
- Do not infer or guess a category based on common or placeholder terms (for example, "test", "check", "issue") unless they are accompanied by enough context to confidently justify a match.
- You must be 100% certain that the incident clearly belongs to a category before assigning it.

Step 2.2: Determine the Subcategory.

- Fetch the list of available subcategories for the chosen category.
- Choose the most appropriate subcategory based on the incident details.
- If no suitable subcategory can be determined or if the category is not determined, set subcategory to: "Not determined" (field_value = null).

Step 2.3: Determine the Configuration Item (CI).

- Fetch the list of CIs assigned to the caller of the incident.
- Pick the most relevant CI based on
  - Name
  - Manufacturer
  - Asset Name
- If no relevant CI is found or the list is empty, set CI to: "Not determined" (field_value = null).
- If multiple options exist, select the most relevant one.

Step 3: Present the Recommendation.

- PRESENT the recommended values to the user in the following bullet-point format:

  Recommended incident ({incident number}) categorization details:

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- Category: {recommended category}, (Reason: {reason for recommendation})
- Subcategory: {recommended subcategory}, (Reason: {reason for recommendation})
- Caller's CI: {recommended CI}, (Reason: {reason for recommendation})

- Ensure this information is explicitly displayed before proceeding to the next step.

Step 4: Update the Incident. Update the incident record with the selected Category, Subcategory, and CI values.

Key Considerations:

- NEVER ask the user for input.
- Never proceed without retrieving incident details.
- If NO appropriate value is found, assign "Not determined" (field_value = null).
- Do NOT ask the user to manually determine category, subcategory, or CI.
- Always present recommendations before updating the incident.
- Ensure that the recommendations are logical and relevant to the incident details.

Example agentic workflow

Use the example agentic workflow with clear name, description, and list of steps fields to use as a guide when creating your own agentic workflows.

Name

Investigate incident

Description

This workflow streamlines incident management by analyzing incidents, linking them to existing problems, and identifying relevant catalog items. It leverages three specialized AI agents: the ITSM Incident Resolution Investigation AI Agent retrieves incident details, identifies similar incidents, and fetches relevant knowledge articles; the Link Incident to Problem AI Agent searches for and links incidents to existing problems based on contextual similarity; and the Find Catalog Item AI Agent locates relevant catalog items and integrates their details into incident records or provides direct links. This structured orchestration ensures efficient incident resolution, reduces redundancy, and enhances decision-making by leveraging historical data, organizational knowledge, and catalog resources, ultimately improving enterprise incident management effectiveness.

List of steps

Step 1: Incident Analysis:

Analyze incident details and retrieve relevant historical data and knowledge articles.

Step 1.1: Retrieve Incident Context:

- Use the ITSM Incident Resolution Investigation AI Agent to fetch incident details (short description, description, caller, state).
- If retrieval fails, inform the user: "Unable to retrieve incident details. Please verify the incident number." and terminate workflow.

Step 1.2: Identify Similar Incidents and Knowledge Articles:

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- Use the ITSM Incident Resolution Investigation AI Agent to find similar incidents and relevant knowledge articles.
- Confirm with the user before adding resolutions to incident comments.

Step 1.3: Prepare Incident Documentation:

Update incident additional comments with approved resolutions and knowledge article references, preparing clear documentation for next phase.

Step 2: Problem Linking:

Link the incident to an existing relevant problem, if applicable.

Step 2.1: Receive Incident Documentation:

Use Link Incident to Problem AI Agent to validate incident details and confirm no existing problem linkage.

Step 2.2: Identify Relevant Problems:

- Execute search for relevant problems using incident short description.
- If no relevant problems found, inform the user: "No relevant problems found to link." and proceed to Catalog Item Identification.

Step 2.3: Link Incident to Problem:

- Present most similar problem details to the user for approval.
- Upon user approval, link incident to problem using "Set problem to incident" tool; confirm successful linkage to the user.

Step 3: Catalog Item Identification:

Identify and integrate relevant catalog items into the incident record.

Step 3.1: Receive Incident and Problem Context:

Use Find Catalog Item AI Agent to validate incident context and prepare for catalog item search.

Step 3.2: Execute Catalog Item Search:

- Perform targeted search for relevant catalog items based on incident description.
- If no catalog items found, inform the user: "No relevant catalog items identified." and proceed to final delivery.

Step 3.3: Integrate Catalog Item Details:

- Present catalog item choices to the user; upon selection, either add catalog item details to incident additional comments or provide direct catalog item link.
- Confirm successful integration or delivery to the user and complete workflow.

Group Action Framework

Group Action Framework (GAF) is an intelligence feature on the ServiceNow AI Platform that groups related records and applies actions to them using LLMs.

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GAF overview

GAF is composed of two processes. The grouping process identifies clusters of similar records (incident, cases, KB articles, and the actioning process maps) new records to clusters and selects the representative record. Topic-labeling occurs during the setup process and labels the different clusters, which form the *Description* field of records on the GAF record groups [sn_gaf_record_group] table. GAF processes together benefit your AI agents and generative AI features in multiple ways.

- Improves consistency and quality of agentic and generative AI features by using the best examples from groups of records.
- Reduces the cost of LLM calls by only executing on the representative records.
- Scales to accommodate large amounts of data because selected records can represent any size cluster.

Skills used in GAF

Multiple skills are involved in GAF setup and execution. They are modular, so not all executions will use all skills, but they can be used together in tandem. These skills are used exclusively for GAF and currently cannot be included on their own in custom agentic workflows.

Grouping skill

Clusters related records using machine learning techniques.

Topic-labeling skill

Adds human-readable names to the clusters using an LLM to make the clusters easier to identify.

Action strategy skill

Selects representative records from each cluster for the mapper and reducer skills to use.

Action mapper skill

Runs LLM inference calls for the selected representative records, producing a record summary for the selected records.

Action reducer skill

Uses the generated summaries created by the mapper skill to produce a single summary for the entire cluster.

GAF and ServiceNow® Otto for AI Search

GAF uses AI Search to improve its effectiveness and can use it as a fallback option in case GAF does not return any results. GAF can work without ServiceNow Otto for AI Search, but if it is enabled then GAF has optimized prediction. The optimized prediction feature increases clustering capacity up to 500,000 records and improves recall speed.

See Install ServiceNow Otto for AI Search and Set up AI Search for Group Action Framework for more information on configuring AI Search for GAF.

Grouping inputs

When you configure GAF, the Grouping inputs record in the Now Assist Skill Config Var Set defines what records are clustered and how clustering behaves. The default values work for most configurations, but the following parameters are available if you need to adjust them.

Table

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The source table whose records are clustered. For example, the Incident [incident] table for ServiceNow Otto for ITSM.

Fields

The field or fields used as the basis for clustering. GAF compares the content of these fields across records to identify similar ones.

Filter

Conditions that determine which records from the source table are included in the grouping. You should have at least 2,000 records after filters are applied for clustering to complete successfully.

Use taxonomy

When enabled, applies a taxonomy to improve the categorization of clusters.

HTML Preprocessing

When enabled, strips HTML markup from field content before clustering. Enable this if your source records contain HTML-formatted text.

Dimensionality reduction parameters (UMAP)

Controls how GAF compares records to each other before clustering. The *n_neighbors* parameter [2–100] sets how many similar records GAF considers when deciding which cluster a record belongs to. The *n_components* parameter [5–100] sets how many characteristics of each record GAF tracks during that comparison.

Clustering parameters (HDBScan)

Controls how clusters are formed from the compared records. The *min_samples* parameter [2–10] sets how many similar records must exist before GAF treats a pattern as a real cluster rather than noise. The *min_cluster_size* parameter [2–100] sets the minimum number of records required to form a cluster. The *cluster_selection_epsilon* parameter [0.01–0.99] controls how similar two clusters need to be before GAF merges them into one.

Note: The default values for UMAP and HDBScan parameters work for most configurations. Larger, denser clusters represent more common issue patterns and are surfaced more frequently. GAF's retrieval logic also handles smaller clusters, so less common patterns are still accessible.

Diagnosing and troubleshooting GAF

To find logs where GAF is used on your instance, go to the Generative AI Log [sys_generative_ai_log] table and filter based on the skill that used GAF. You can also filter the Log [syslog] table for the scope containing `sn-gaf`. Actions performed by skills, AI agents, and agentic workflows that use GAF all generate logs.

For more information about common errors and possible resolution steps, see Troubleshooting GAF.

Additional information

GAF does not support domain separation at this time.

Version control for AI agents and agentic workflows

Version control enables you to track changes made to instructions sent to the LLM for AI agents and agentic workflows.

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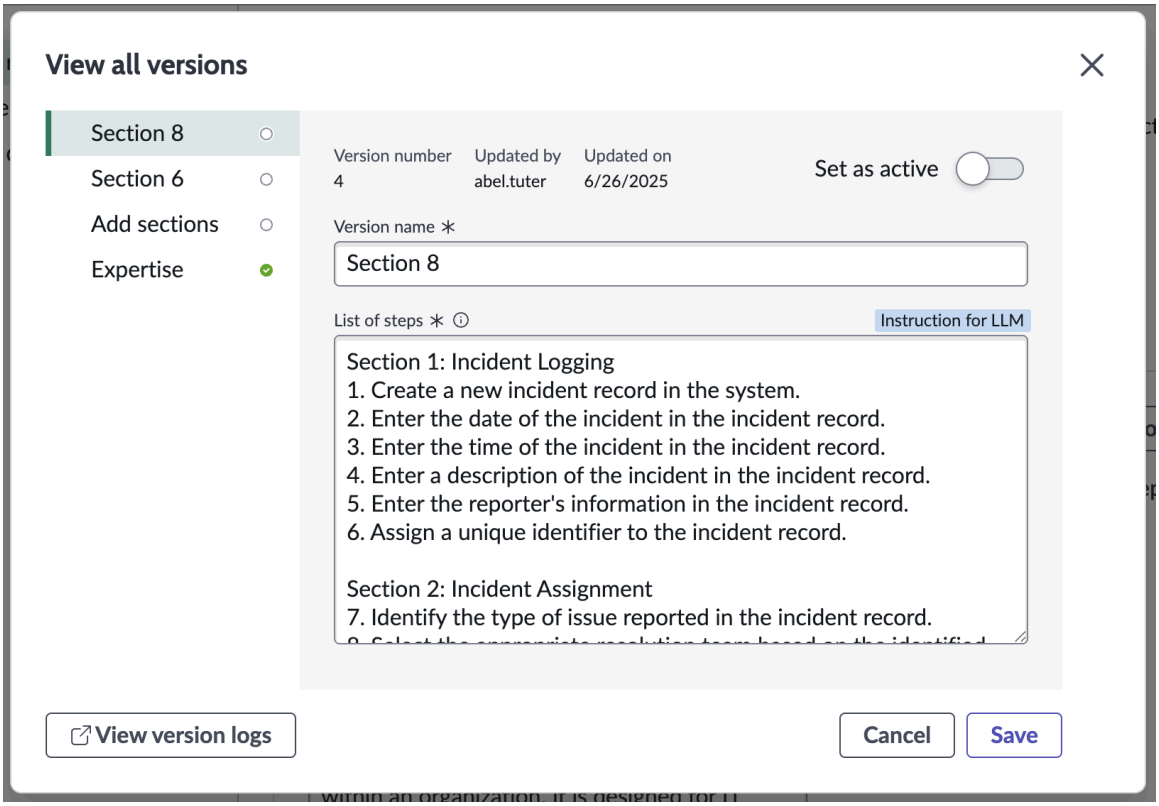
Version control overview

When creating an AI agent or agentic workflow, the *List of steps* field is important because it provides the context necessary for the large language model (LLM) to accomplish tasks. You can use version control to create multiple versions of the *List of steps* field in the guided setup. Tracking your changes with version control helps enable you to experiment and test new instructions. You can create versions, edit and refine versions, and revert to previous versions as needed.

Version control modal



Creating versions

You can create a version by selecting **View versions** > **New version** in the guided setup of an AI agent or agentic workflow. Doing so brings up the *Create a new version* modal where you can name the version and make changes. Naming your version enables you to identify what changes were made to make it easier to track.

You can choose to make the new version active immediately by selecting the **Set as active** toggle.

For more information about writing effective descriptions and instructions, see General guidelines for creating AI agents and agentic workflows.

When creating a new version, you also have the option to use ServiceNow Otto to refine your current *List of steps*. You must already have an active version for this option to be available. Selecting **View versions** > **Refine version** brings up the modal where ServiceNow Otto generates and displays a new *List of steps* for you to review. You can change any of the generated text, or you can use it as it was generated. Select **Create** to use the new, refined version.

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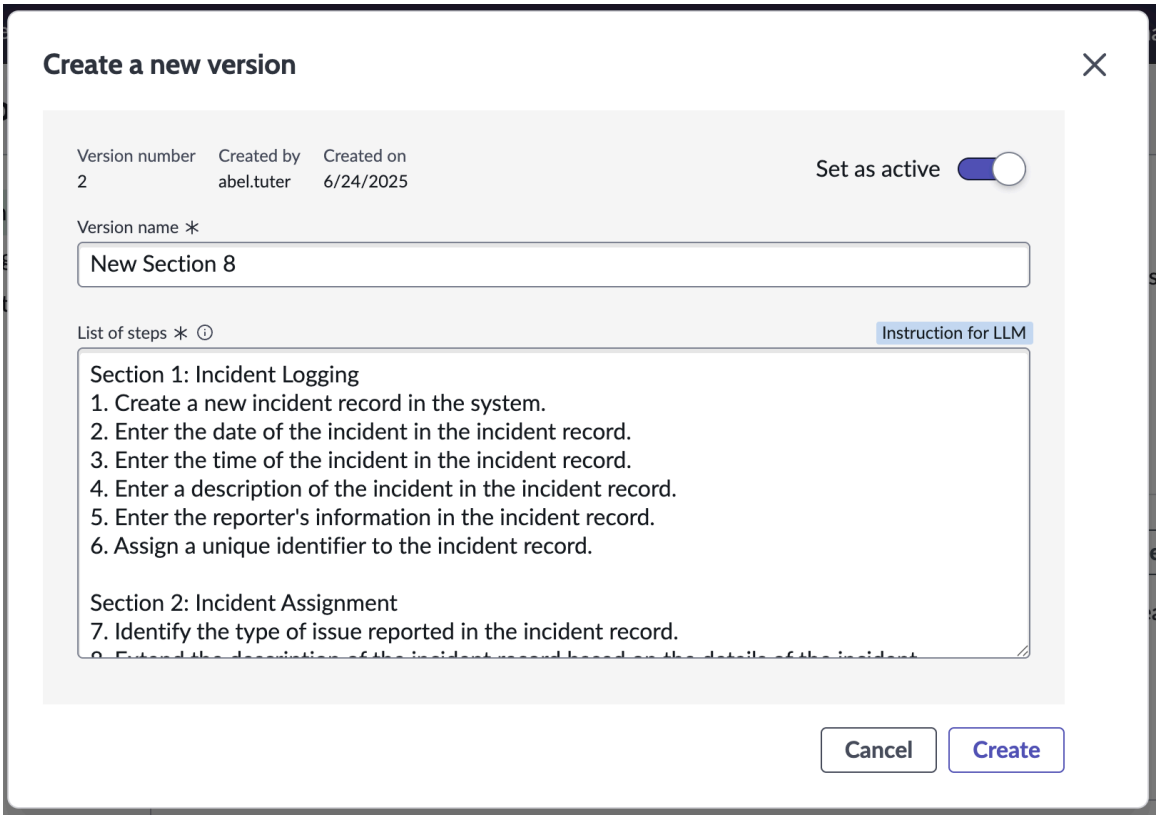
Create a version modal



Changing between versions

When you have multiple versions of the same *`List of steps`* field, you can switch which one is active at any time. Choosing to make a new version active enables you to test it and evaluate its effectiveness.

If you're updating an agentic workflow, you can execute an agentic evaluation run to measure performance.

You can decide which version is active by selecting **View versions** in the guided setup. Toggle the **Set as active** field and save your changes to make the new version active.

Testing different versions

You can test different versions of an agentic workflow or AI agent from the AI Agent Studio **Testing** page. The **Version** selector dropdown displays both active and inactive versions with the currently active version marked as *`(Active)`*. You can also start evaluation runs for specific versions by selecting **Set up evaluation run**.

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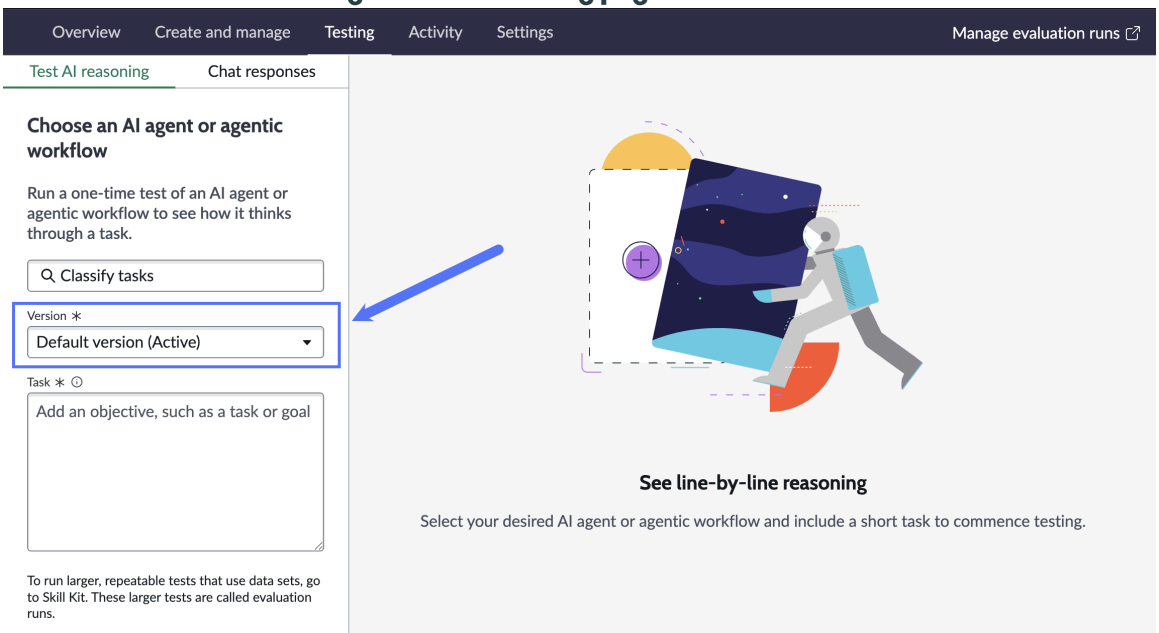
Version selector in the AI Agent Studio Testing page

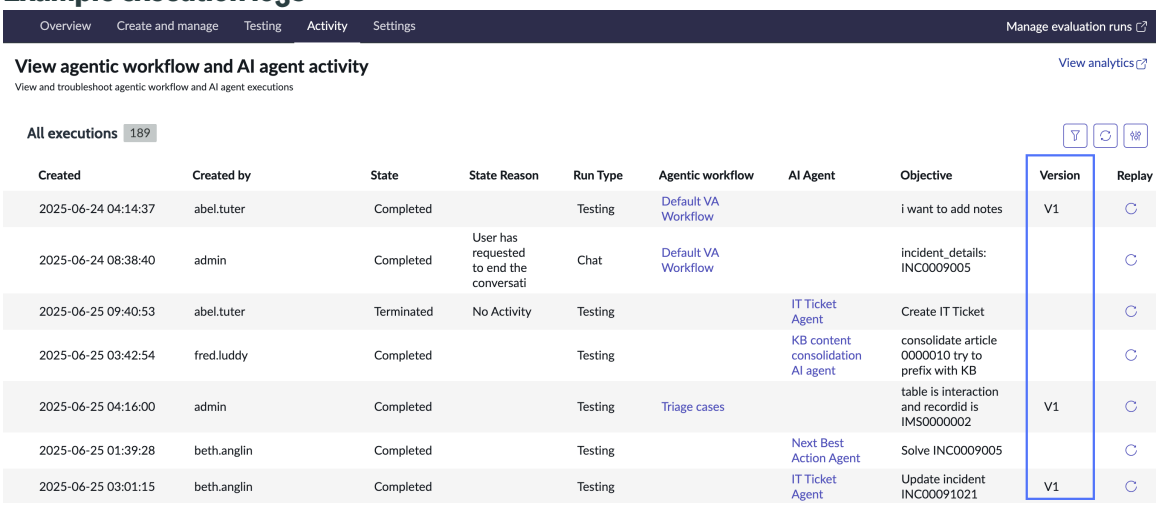


Version logs

The AI Agent Studio **Activity** page enables you to track AI agent and agentic workflow executions by version. When in the guided setup, you can select **View version logs** in the *`View all versions`* modal. Choosing to view the version logs opens the **Activity** tab in a new window with the list filtered for the version you selected.

When viewing the **Activity** tab at any time, you can choose to filter by version. The more specific your version names, the easier it is to identify those changes in the list.

Example execution logs



Created	Created by	State	State Reason	Run Type	Agentic workflow	AI Agent	Objective	Version	Replay
2025-06-24 04:14:37	abel.tuter	Completed		Testing	Default VA Workflow		i want to add notes	V1	
2025-06-24 08:38:40	admin	Completed	User has requested to end the conversati	Chat	Default VA Workflow		incident_details: INC0009005		
2025-06-25 09:40:53	abel.tuter	Terminated	No Activity	Testing		IT Ticket Agent	Create IT Ticket		
2025-06-25 03:42:54	fred.luddy	Completed		Testing		KB content consolidation AI agent	consolidate article 0000010 try to prefix with KB		
2025-06-25 04:16:00	admin	Completed		Testing	Triage cases		table is interaction and recordid is IMS0000002	V1	
2025-06-25 01:39:28	beth.anglin	Completed		Testing		Next Best Action Agent	Solve INC0009005		
2025-06-25 03:01:15	beth.anglin	Completed		Testing		IT Ticket Agent	Update incident INC00091021	V1	

Implement access control in AI agents

Implement security in AI Agent Studio through access control lists (ACLs), user identities, and role filtering with the access control-based security measures in the agentic system.

Security for AI agents

Access controls for agentic AI on the ServiceNow AI Platform comprises the major aspects: determining which users can access agentic AI resources and what access each of those resources has once invoked. These aspects are controlled through three main components:

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access control lists (ACLs), user identities and role filtering. The interaction between these components at the agentic workflow, AI agent, and tool levels within AI Agent Studio influences their overall security and functionality.

Access Control Lists (ACLs)

The access control lists (ACLs) in AI agents determine which role(s) a user must have to be allowed to invoke an agentic workflow or an AI agent. ACLs must be configured individually for each agentic workflow, AI agent, external AI agent, and certain AI agent tools such as generative AI Skills, Flows, and Flow Actions.

ACLs configured in the AI Agent Studio for are role-based and of the Allow If type:

- **Allow-If**: Grants access to data or resources when any of the specified conditions in the ACL are met. Allow If ACLs don't prevent other ACLs from granting access to the same resource even if it that specific ACL itself doesn't grant access.
- **Deny-Unless**: Grants access only when the invoking user identity meets all the specified conditions. No other ACLs can override or grant access to that resource once a Deny Unless ACL is in place. This is available when configuring ACLS in the ACL [sys_security_acl] table and not in the AI Agent Studio.

There are three possible options for ACLs created in AI Agent Studio:

- *`Any authenticated user`*: Grants access to any user who is authenticated on the instance, regardless of the role.
- *`Users with specified roles`*: The default ACL option that requires you to select the specific roles required to invoke an AI agent or an agentic workflow.

  Note: As the ACLs are Allow If ACLs, any user with at least one of the roles will be able to invoke the AI agent or agentic workflow.

- *`Public`*: Grants access to all users, including guests who aren't signed in.

  Note: Understand that this configuration should be used sparingly and only when needed.

Note:

- ACLs configured in AI Agent Studio only determine the roles required for users to invoke an agentic workflow or an AI agent. They don't determine the access that the agentic workflow or an AI agent has once it's invoked.
- For an agentic workflow or AI agent to successfully execute, the invoking user (or relevant AI user) must meet the criteria of all of the ACLs of any downstream components which have their own ACLs and are assigned to the agentic workflow or AI agent (even if the specific execution might not need to invoke all of those AI agents or tools). Therefore:
  - If there are conflicting security requirements between agentic workflows, AI agents, and AI agent tools, your agentic AI fails to execute.
  - The same occurs if the invoking user meets the criteria for some ACLs but not others. This includes components assigned to the agentic AI that might not be required for the specific execution.
- When configuring these security settings, consider all aspects of the agentic system- including the agentic workflow, AI agents, and tools.

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User identities

After configuring the access control lists (ACLs), you must configure the User identity (also called as *Run as*) which the AI agent or agentic workflow will run as during execution.

After configuring the access control lists (ACLs), you must also configure the user identity (also called as Run as) which the AI agent or agentic workflow will run as during execution.

The user identity determines which user the AI agent or an agentic workflow operates as during execution, and therefore the data it can access and the actions it can take, depending on the roles assigned to the user identity.

Note: Each agentic workflow and AI agent has its own user identity configuration.

There are two possible user configurations to select from:

- **Dynamic user**: The user identity of the person or resource (automated trigger/agentic workflow/parent agent) which invokes the execution of an AI agent or an agentic workflow. The roles assigned to the agentic workflow or AI agent will change dynamically depending on the identity of the invoking user.

  Note: Dynamic user is the default user identity, and you can use the dynamic user unless there's a specific need that justifies an AI user.

- **AI user**: A dedicated user identity that the AI agent or an agentic workflow runs as during execution, which has assigned roles that remain consistent regardless of who or how the execution is invoked. For example, an AI agent or an agentic workflow may need to be run with elevated privileges that the dynamic user might not have. If configured as a dynamic user, the execution would fail. However, if the AI agent or agentic workflow is configured to run as an AI user that has the elevated roles assigned to it, the execution will succeed even when invoked by a user with lower privileges.

  Note: If you don't have a suitable AI user but want to use the *AI user* identity, you must create a record on the User [sys_user] table. See Create a user and select *AI user* as the identity type.

Role filtering

Role filtering restricts the roles that AI agents can inherit from the invoking user to a subset of approved roles. This limits the capabilities of the agent, ensuring it can only use the roles that the builder of the AI agent has specifically permitted, even if the user possesses additional roles.

Role filtering only applies when the agent runs as a dynamic user — because the identity (and resulting roles) of the invoking user can't be known in advance. There could be situations in which high-privileged users invoke AI agents that should not run with high privileges. By applying role filtering, the builders of AI agents can make sure that their agents adhere to the Least Privilege Principle. Role filtering is not required when an AI agent runs as an AI user. Since the roles of the AI user are preconfigured and can (and should) be set to meet the needs of the specific AI agent – no additional filtering is required to conform to the Least Privilege Principle, which can be controlled entirely by the AI user configurations.

Deny by Default

The ServiceNow AI Platform enforces a deny-by-default ACL (Access Control Lists) configuration certain types of agentic components on newly activated instances. In earlier releases, these record types defaulted to allow access unless an ACL was configured for a specific record. In Australia release, newly activated instances start from a deny-by-default posture instead, so access has to be configured explicitly by creating an ACL for the specific record, rather than

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inherited through permissive defaults. This applies to any AI agents and agentic workflows that don't have an individual ACL configured, reducing unauthorized access risks.

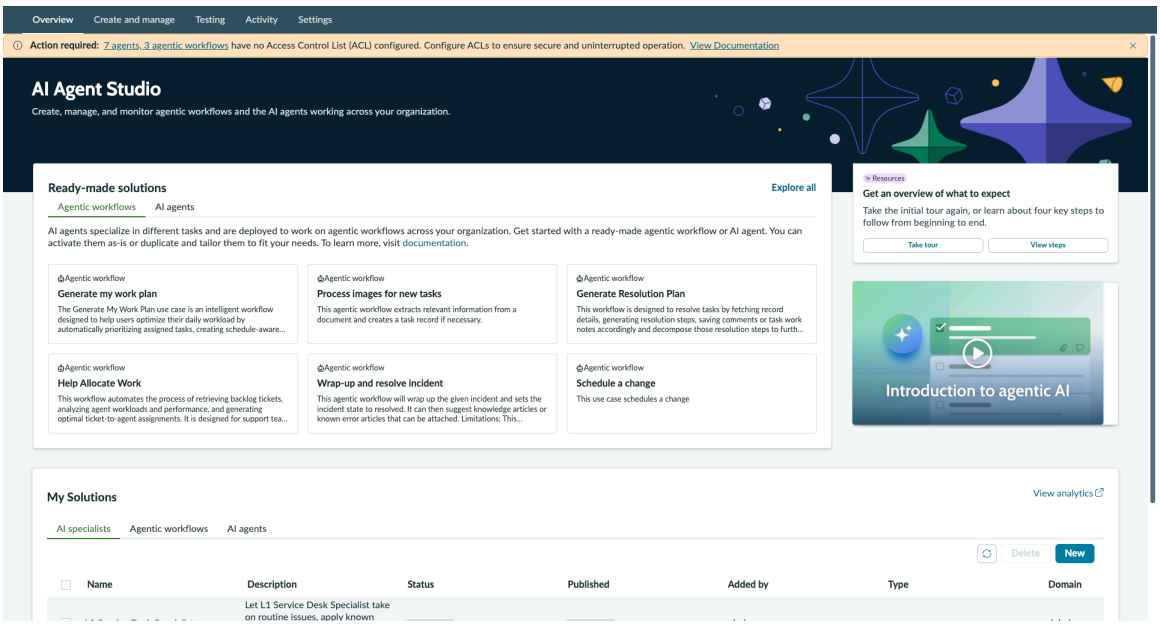
The deny-by-default enforcement works as follows: The **Security Attribute** field value for AI Agent and agentic workflow on the Access Controls table [sys_security_acl] is set to **Never**, enforcing the deny behavior and leaving the **Decision Type** field value as is, that is, **Allow If**. This configuration verifies that if an AI component already has a primary ACL in place, access continues to be governed by that ACL. The backup (wild card) ACLs deny access only when no primary ACL is present. The old wildcard ACLs allow users with agents that predate the availability of access controls in agentic products to continue to run their agents, but that general guidelines is to implement deny by default in all instances. The replacement means that the AI agents and agentic workflows must have explicit ACL entries to operate. Without explicit ACLs, access is denied by default.

Note: The enforcement applies only to the newly activated instances. Any instances that are upgraded to Australia release from previous releases aren't automatically affected by this configuration change and the adoption of the deny-by-default ACL configuration will require admins to proactively opt in.

Security check on AI Agent Studio

To inform users about security checks on the agentic system, the platform provides the following notifications in the AI Agent Studio interface:

- AI Agent Studio Home page: The AI Agent Studio Home page displays a warning when AI agents or agentic workflows don't have explicit ACLs configured on the instance.



- AI Agent guided setup: The AI agent guided setup page displays a warning banner when that agent doesn't have the required ACLs configured.

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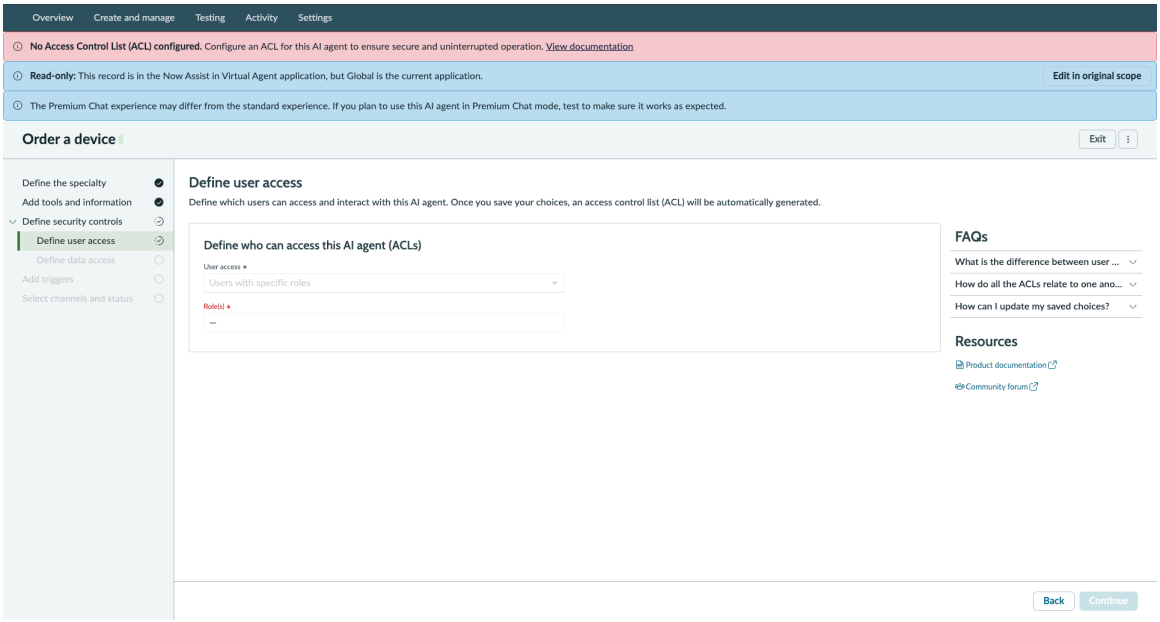
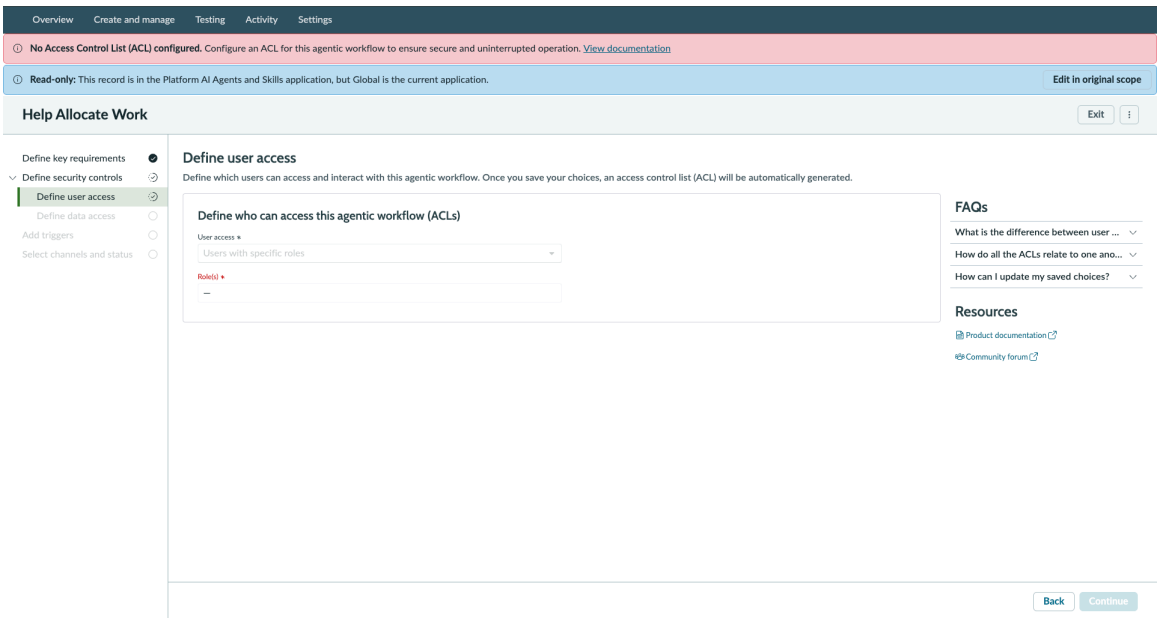


Note: To configure access control lists for an AI agent, see Define security controls for an AI agent.

- Agentic workflow guided setup: The agentic workflow agent guided setup page displays a warning banner when that agentic workflow doesn't have the required ACLs configured.



Note: To configure access control lists for an agentic workflow, see Define security controls for an agentic workflow.

Security mechanisms

Using ACLs, user identities, and role filtering together provides layered security for AI agents.

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- ACLs prevent unauthorized users from reaching and invoking the agent.
- User identities verify the agent operates under the correct privilege scope at runtime, preventing escalation beyond what the assigned dynamic user permits.
- Role filtering verifies that agents can't take actions that exceed defined boundaries even when invoking use has that access.

A common source of confusion is assuming that ACLs define agent actions. They don't! ACLs determine who can invoke the agent. The scope of permissible agent actions are determined by the user identity and role filtering. Use the following summary to distinguish the mechanisms:

Distinguishing ACLS, user identities, and role filtering

Feature	ACLs	User identities	Role filtering
Controls	Who can access the agent	Which identity the agent acts as	What the agent can do
Applied to	Users, groups, and roles that invoke the agent	The user identity with which the agent executes at runtime	The agent's runtime execution context
Security purpose	Restricts agent discoverability and invocation	Determines privilege scope during execution	Restricts agent actions and data access

Distinguishing AI user and Dynamic user

Feature	AI user	Dynamic user
Definition	A predefined identity the agent runs as	The identity of the agent at runtime which is inherited from the invoking user.
Role filtering applies	No	Yes
Roles used	Fixed to the AI user's assigned roles	Scoped down by role filtering
Identity source	Configured statically	Determined dynamically at runtime

Note: Configuring only one of these mechanisms leaves a gap in the agent's security posture. Therefore, it is necessary to configure the security mechanisms across the AI Agent Studio and other AI components such as generative AI Sills, Flows, and Flow Actions.

For more information, see Define security controls for an AI agent and Define security controls for an agentic workflow.

AI agent learning

Enhance AI agent learning through episodic memory, enabling agents to improve by learning from past successful interactions.

Episodic memory overview

The represents historical experiences and their associated learnings in the form of feedback. It's the ability to reflect on and learn from them by applying memory of similar episodes to new

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experiences. This capability enables agents to extract meaningful patterns and insights from experiences and use them effectively in the future.

Understanding episodic memory in AI agents

When an agent learning is enabled, the AI agent:

- Focuses on learning from execution outcomes, building episodic memory of what went wrong and how it was fixed.
- Acts as a feedback refinement loop, converting agent failures into structured learning for future tasks.
- Memory is heavily based on experience correction rather than just context extension.
- Memory entries carry relevance weights (like attention scores) → aligns with adaptive retention seen in human-like learning.

To configure agent learning at the AI agent level, see Define the specialty of an AI agent.

To configure agent learning at the AI Agent Studio level, see Set up long-term memory.

Configure AI agents

Configure AI agents to execute agentic workflows with AI agents and mapped tools.

AI agents follow your instructions and act toward a specific goal and outcome by using the tools that you configure for those agents. By using the context of your record and your searchable content, AI agents can plan and analyze the task with a business logic that is combined with the instructions that are sent to large language models (LLMs) that suggest the next best action to be taken.

Note: Make sure that your record data and knowledge base have the latest accurate information for the best results.

Preparing for AI agents configuration

Prerequisites

By making a plan, you can improve your AI agent performance and result quality. When you have a solid foundation of what you want to build, you can minimize creating redundant agents and maximizing the efficiency of your existing ones. Before you send instructions to your AI agents, make sure that you follow these prerequisites:

- Have a good idea of the different kinds of tasks that your agentic workflow should be able to handle.
- Understand the general flow for your agentic workflow and agents.
- Use agentic tools with well-written descriptions.

Configurable elements

Instruct the agentic workflows and AI agents through the following elements within the framework:

- **Base plan**: Instructions to the AI Agent Orchestrator for the initial planning procedure that is configured at the agentic workflow level.
- **Role**: Clear identity of the AI agent that includes these elements:

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- **Agent reasoning**: When a role is added to each reasoning prompt, it provides a sense of identity to the content that is generated by the LLM.
- **Agent proficiency**: An LLM-generated description of what an agent is capable of, including the content from the role, instructions, and the descriptions from the tools that are assigned to the AI agent.

  Note: The agent proficiency is auto-generated.

- **Instructions**: Clear directives for the AI agent. Write instructions as a step-by-step algorithm that describes the operational flow for the AI agent.

Understanding the tools for agentic workflows configuration

Define the procedure to build functional tools for your agentic workflow with the following three elements:

Functionality

What an AI agent contributes to the agentic workflow. Configure the tools with a single purpose. Multipurpose tools can cause a problem for the agents for the following reasons:

- Multipurpose tools are harder for the AI agent to reason through and determine when to use the tool. If a tool can be used for more than one purpose, the AI Agent Orchestrator has to determine which purpose is most applicable, which can decrease your AI agent's performance by increasing the runtime.
- The tool description must be comprehensive enough to account for all the scenarios for the usage of the tool that is being defined.

Note: Don't use tools that can operate in different modes. Instead, configure your tools as the solution to a singular problem for a scenario.

Tool description

Natural language descriptions that describe the utility provided by the tool. Make sure that you define the scope and limits of the tools clearly to help verify that the tools are picked for the appropriate scenarios in the following ways:

- Provide a description of what the tool is supposed to do.
- Describe the scenarios where the tool can be called. Include the specific agentic workflows and tasks where the tool and its functionality can be used.
- Explore the scenarios where the tool is explicitly not useful but an AI agent can confuse the tool as being useful.
- Explain the terms that are being used in the preceding cases. For example, if you have a tool for assigning a role to a user, you must explain what the role is in the agentic system of the given instance.

Error messages

An AI agent operates through trial and error. For example, an error message about an execution that accidentally ran incorrect tools can help the AI agent reach more valid conclusions in the future. Error messages offer an AI agent a chance to reflect and explore other options.

Understanding the scenarios where the tool can go wrong can help the AI agent with keeping the execution on track.

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Invoke Conversations with AI Agent Background Channel

The AI Agent Background Channel helps you to invoke AI Agent or agentic workflow execution from the Workspace. Use the AI Agent Background Channel associated with the AI Agent Background Provider to invoke conversations. The AI Agent Background Provider is based on the Custom Adapter Framework from Virtual Agent. For more information, see Configure a provider for your custom chat integration.

Create a channel identifier in the Provider Channel Identities table [sys_cs_provider_application] to add any additional conversational capabilities to your own provider application and get a new inbound ID that allows for customization. For more information, see Create a channel identifier for your custom chat integration.

To start a conversation, trigger the flow using the `sn_aia.AiAgentRunttimeUtil().startAiAgentConversation(request)` API in the Script Include (sys_script_include) of the AIAgentBackgroundProvider and select **Run Script**. When the Script execution status indicates Success, the conversation begins in the order of utterances defined in the Script.

Conversations that are invoked for executing an AI agent are logged in the Execution Plans [sn_aia_execution_plan] table. Open the conversation record to confirm the device type as **AI Agent Background**. Open the execution record to see the **Execution Tasks**, **Messages**, and the **Tools Executions** used to execute the AI agent.

You can also see the entire execution steps on the AI Agent Studio Testing page by copying the execution plan record's [sys_Id] and testing it. On the **Chat responses** tab, in the AI agent decision logs, you can see the AI agent details and the tools it used to resolve the issue.

Interactive and Non-interactive AI agents

The Interactive AI agents reach out to users for information when there is a fallback in the execution process, and the AI agent re-triggers the flow.

The Non-interactive AI agents don't reach out to the user at any fallback stage in the execution process. When the AI agent needs user information, it takes the dynamic prompt approach using the ReAct layer, where the prompt of the ReAct will change based on the execution mode of the AI agent or agentic workflow. Therefore, in the Non-interactive execution, the reach fallback options don't have to collect input from a user as a fallback option. However, the output of the AI agent or agentic workflow will still need to be presented to the user, and in any execution failure scenario, a message in the ServiceNow Otto panel or Virtual Agent is shown.

To implement the Non-interactive execution, the **Execution Mode** field is added in the Execution Plans [sn_aia_execution_plan] table, where the execution mode can be **Interactive** or **Non Interactive** based on the given runtime parameter.

You can run the AI agents and agentic workflows concurrently in the AI Agent Background Channel and in Non-interactive mode where the background execution allows AI agents to operate with any chat panel like ServiceNow Otto panel or Virtual Agent.

Multilingual support

You can leverage multilingual support for AI agents across languages for better translation quality to:

- Tune system prompts for native translations.
- Implement dynamic translation strategies when native support is unavailable.
- Provide extensive testing via automated and manual evaluations.

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AI Agent Studio Skills migration

You can auto-migrate all the AI Agent Studio skills from on-glide execution path to the off-glide execution path by setting the **Off-Glide Enabled** to **true**, to enable the skill migration to Mosaic. To do this:

- Navigate to the OneExtend Capabilities [sys_one_extend_capability.list] table.
- Find the ServiceNow Otto AI Agents application.
- Set the **Off-Glide Enabled** to **true**
- Select **Save.**

Install ServiceNow Otto AI Agents

Install ServiceNow Otto AI Agents on your ServiceNow instance to enable the agentic AI experience.

Before you begin

To get started with AI agents, you must have:

- **License requirements**: A ServiceNow Otto Pro Plus or Enterprise Plus license.

  Note: A ServiceNow Otto License is required. ServiceNow Otto AI Agents is available to all instances that have who have ServiceNow Otto.

- **Instance requirements**: An instance on Australia Patch 1 or later.
- **Application requirements**: The following store applications and all the dependency applications must be installed and updated:
  - ServiceNow Otto for IT or HRSD (or other workflows).

    Note: ServiceNow Otto AI Agents aren't standalone applications that you can install directly. To enable AI agents on your instance, you must install and activate other ServiceNow Otto applications that include AI agents, such as ServiceNow Otto for IT Service Management (ITSM) or ServiceNow Otto for Customer Service Management (CSM).

  - ServiceNow Otto AI Agents store application
- AI Search enabled on your instance.
- The ServiceNow Otto panel must be turned on.

  Note: You can access AI agents in the ServiceNow Otto panel. To enable the ServiceNow Otto panel, see Turn on the ServiceNow Otto panel.

Role required: sn_aia.admin

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for and select a ServiceNow Otto application, such as ServiceNow Otto for IT Service Management (ITSM) or Now Assist for Platform.
3. Select **Install**.

Result

AI agents associated with the ServiceNow Otto application are installed on your instance.

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What to do next

Assign the admin role

Add the role `sn_aia.admin` to the user who will administer the AI Agent Studio, and then navigate to **All** > **AI Agent Studio** > **Overview**.

Access the AI Agent Studio

Navigate to **All** > **AI Agent Studio** > **Overview** in the AI Agent Studio application navigator where you can create and manage AI agents and agentic workflows.

Set up AI agents

The default (base system) AI agents provide preconfigured agentic workflows that address common business challenges across ServiceNow applications. Before activating the default AI agents, you must verify that your instance meets the prerequisites and complete the required configuration steps.

Before you begin

Role required: sn_aia_admin

About this task

Prerequisites

Platform version:

- Minimum: Yokohama Patch 1+ or Xanadu Patch 7+
- Recommended: Yokohama Patch 8 or Zurich Patch 4
- Latest: Zurich Patch 12 or Australia Patch 5

Required plugins and store Apps

- ServiceNow Otto AI agents store app (version 8.2 as of Australia Patch 5.)
- At least one ServiceNow Otto workflow plugin:
  - ServiceNow Otto for ITSM
  - ServiceNow Otto for HRSD
  - ServiceNow Otto for CSM
  - ServiceNow Otto for Security Incident Response (SIR)
- Generative AI Controller plugin (minimum version 11.0.0)

Note: Select **Load demo data** during installation to access preconfigured examples.

Licensing Requirements

ServiceNow Otto Pro Plus or Enterprise entitlement

Required User Roles

- sn_aia.admin - Provides access to AI Agent Studio
- sn_nowassist_admin.nsa_admin - Enables ServiceNow Otto administration

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Procedure

1. Enable AI Search.
   a. Navigate to **AI Search** > **AI Search Status**.
   b. Verify that AI Search is enabled.
2. Enable ServiceNow Otto panel.
   a. Navigate to **Now Assist admin** > **Experiences**.
   b. Turn on the **Panel** option.
3. Access the AI Agent Studio.
   a. Navigate to **All** > **AI Agent Studio** > **Overview**.
   b. Review the available default (base system) agentic workflows.
4. Activate the default agentic workflows.
   a. Select the agentic workflow that you want to use from the available default workflows.
   b. Activate the workflow. The default workflows are set to read only and must be activated before use.

   The default (OOTB) agentic workflows include:

   - Generate resolution plans
   - Analyze incident trends
   - Classify tasks
   - Investigate IT problems
   - Process emails for tasks
5. Configure chat assistants.
   a. Navigate to **Conversational Interfaces** > **Assistants**.
   b. Determine which chat assistants can access your AI agents.
   c. Complete the configuration wizards for ServiceNow Otto panel or ServiceNow Otto ServiceNow Otto for Virtual Agent.
6. Configure LLM Connections (optional).

   If using external LLM providers instead of the default OpenAI GPT-4.1:

   a. Navigate to **AI Admin Hub** > **Settings** > **Manage Integration**.
   b. Configure API credentials for your chosen LLM provider.

   Note: The default Orchestration layer uses OpenAI GPT-4.1 5.4 on ServiceNow-managed Azure servers.

7. Test the default AI agents.
   a. Navigate to **AI Agent Studio** > **Testing** > **Test AI reasoning**.
   b. Verify that the orchestrator canvas displays agent execution properly.
   c. Review AI agent decision logs to confirm interactions and thought processes are recorded.

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Enable AI Guardian for AI agents

Identify and block offensive messages that are sent by human agents automatically by enabling AI Guardian in AI agents. With this capability, you can help reduce your agentic workflow or test from being exposed to harmful content.

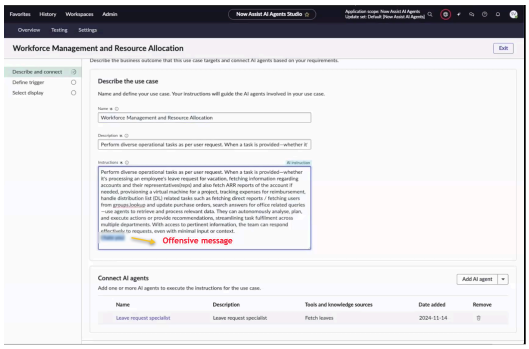
Before you begin

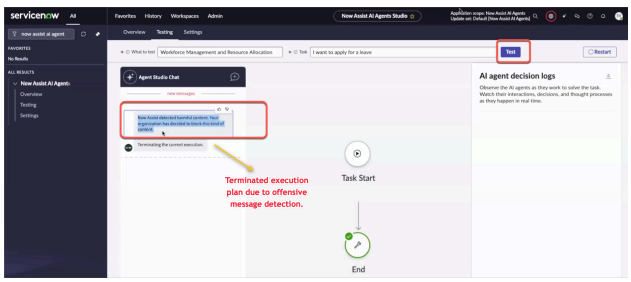
Role required: admin

About this task

The AI Guardian, which is a ServiceNow AI Platform capability in the ServiceNow Otto panel, is a set of guardrails that are designed to intercept and mitigate offensive, sensitive, or security-related issues that may arise during interactions with the ServiceNow Otto application.

For example, let's say that AI Guardian detects an offensive message in the execution plan of an agentic workflow. When you try to trigger the plan or test it, AI Guardian can step in to terminate the plan or test because it detected harmful content at the first step of the execution plan.



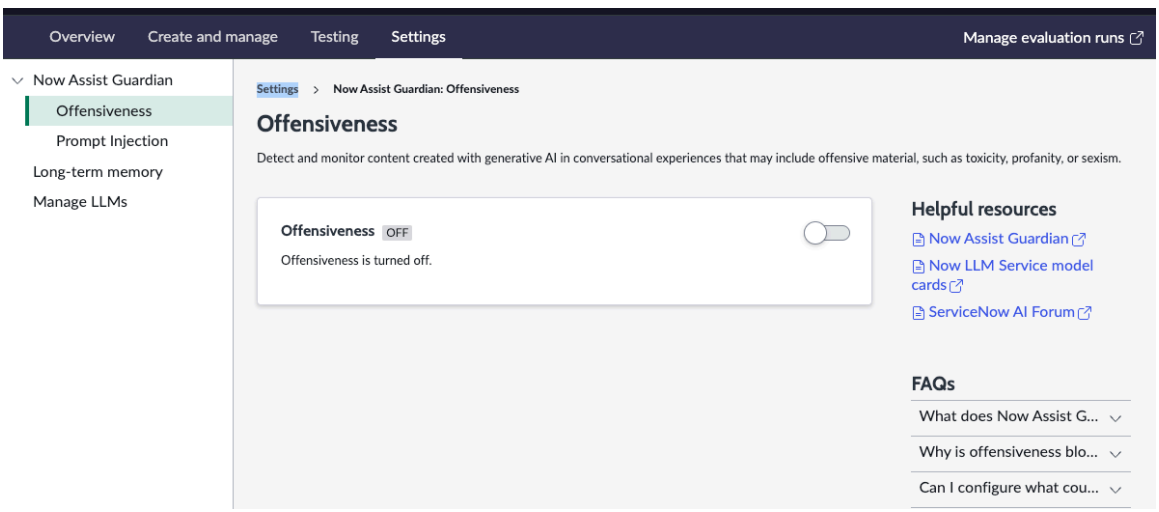


For more information about the different guardrails, see AI Guardian.

Procedure

1. Configure Offensiveness for AI agents.

   a. In AI Agent Studio, navigate to the **Settings** tab.
   You're directed to the Offensiveness page.



   b. Turn on the Offensiveness setting for AI agents by using the toggle button.

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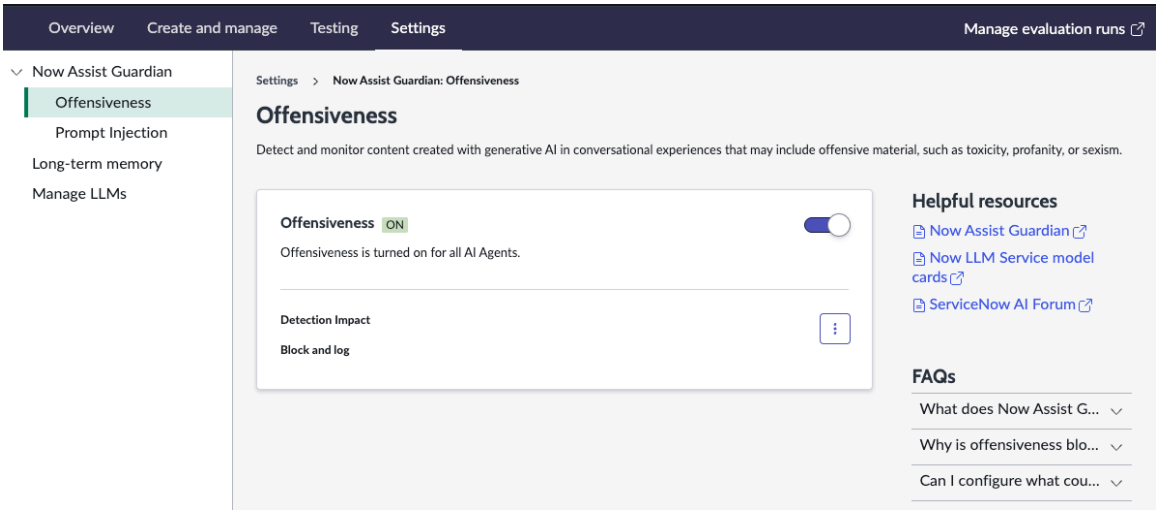
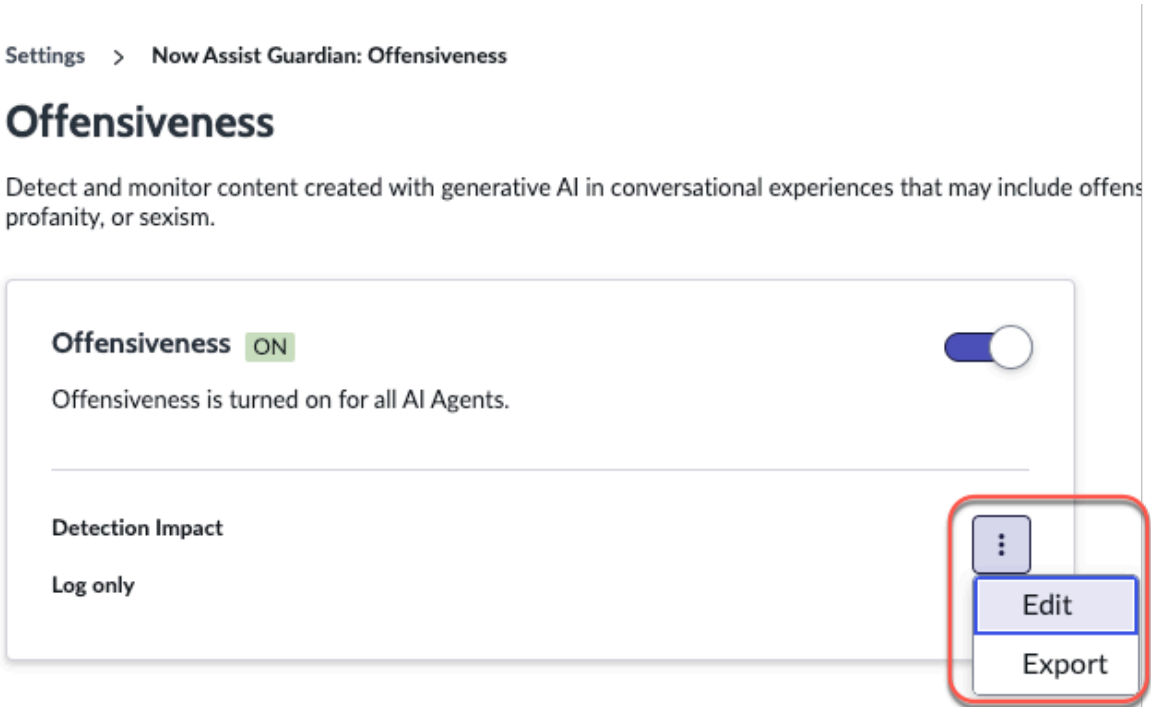


c. Configure the detection impact by selecting the options icon (⋮) to enable the detection impact to use the following options:



- **Edit**: Choose the detection impact between logging or both blocking and logging.

  Enable the detection impact:

  i. Select the **Edit** option.

  ii. On the Detection impact page, select either the **Log** or **Block and log** button based on your requirements.

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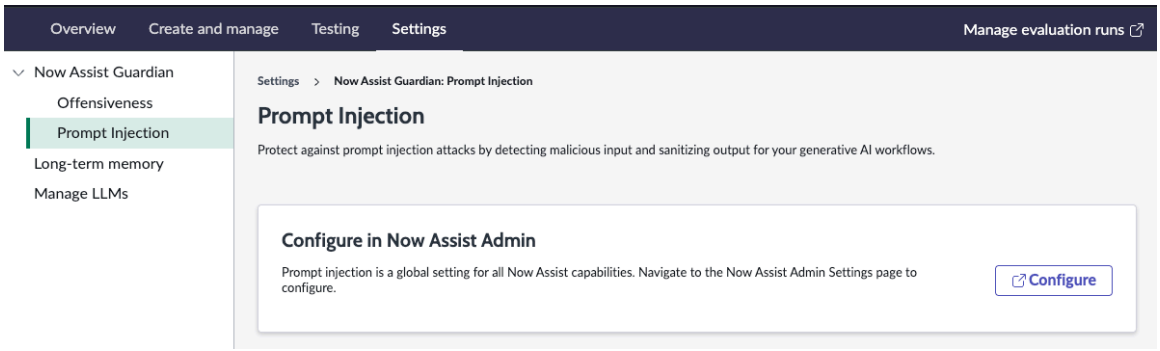
Note: You can switch the detection impact from **Log** to **Block and log** or from **Block and Log** to **Log** at any time.

iii. Select **Save**.

- **Export**: Exports the offensiveness-based logs as a . CSV file. Logs can be analyzed for the types of content that are being identified so you can take other preventive measures, such as changing conversational questions.

2. Configure Prompt Injection for AI agents.

a. In the AI Agent Studio, navigate to **Settings** > **Prompt Injection** and select **Configure**. You're directed to the AI Admin Hub page to configure the Prompt Injection.



Note: For more information about configuring the Prompt Injection, see .

When you configure the Prompt Injection for an agentic workflow by using the required instructions, the system is designed to detect harmful content and block the conversation.

Select the LLM for AI agents and agentic workflows

Choose the large language model (LLM) service provider for AI agents in AI Agent Studio.

Before you begin

Role required: sn_aia.admin

About this task

LLMs are part of the foundation of agentic AI. Different LLMs can provide slightly different performance and responses. You can select which LLM to use at a global level for agentic AI from the AI Agent Studio to help adjust the response quality to best fit your agentic workflows.

Note: If you already have agents built and you change the global LLM, then you must test the agents after making the change. You can test the models in the skill kit without changing the LLM provider for all generative AI skills. Outside of the Skill kit, skills use whichever provider is set as default for the AI Agent Skills group.

Depending on your region, you may have to consent to using a different service provider.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Settings**.

2. Navigate to the **Model provider** tab.

3. Select **Configure** to be redirected to AI Admin Hub.

4. In the *`Choose a default model provider`* field, select from the following choices.

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- Now LLM Service
- AWS Claude
- Azure OpenAI
- Google Gemini

The new generative AI Config property records *sys_generative_ai_config* and *sys_generative_ai_prompt_config* have been introduced for the Azure OpenAI: gpt 5.4 model provider. Both the properties share a **definition** field that references the same *sys_one_extend_capability_definition* record, which identifies the LLM provider.

Note: The new prompt config records are set to **true** by default.

5. To use a different model provider:
   a. Navigate to the *sys_generative_ai_prompt* table.
   b. Filter and group by the relevant skill definition.
   c. Locate the record for the appropriate skill and provider.
   d. Set the preferred record as default.
6. Review the impacted AI agents.

   Certain AI agents may require specific model providers. Select the AI agents tab in the **Impact overview** section to see which AI agents are affected by any changes to the model provider.
7. Select **Save**.

Result
Your chosen LLM is used globally for all AI agents and agentic workflows.

Set up long-term memory

Make AI agents remember your preference or facts from previous interactions and use memories for more focused conversations.

Before you begin
Role required: sn_aia.admin

Procedure
1. Navigate to **All** > **AI Agent Studio** > **Settings**.
2. Select **Long-term memory**.

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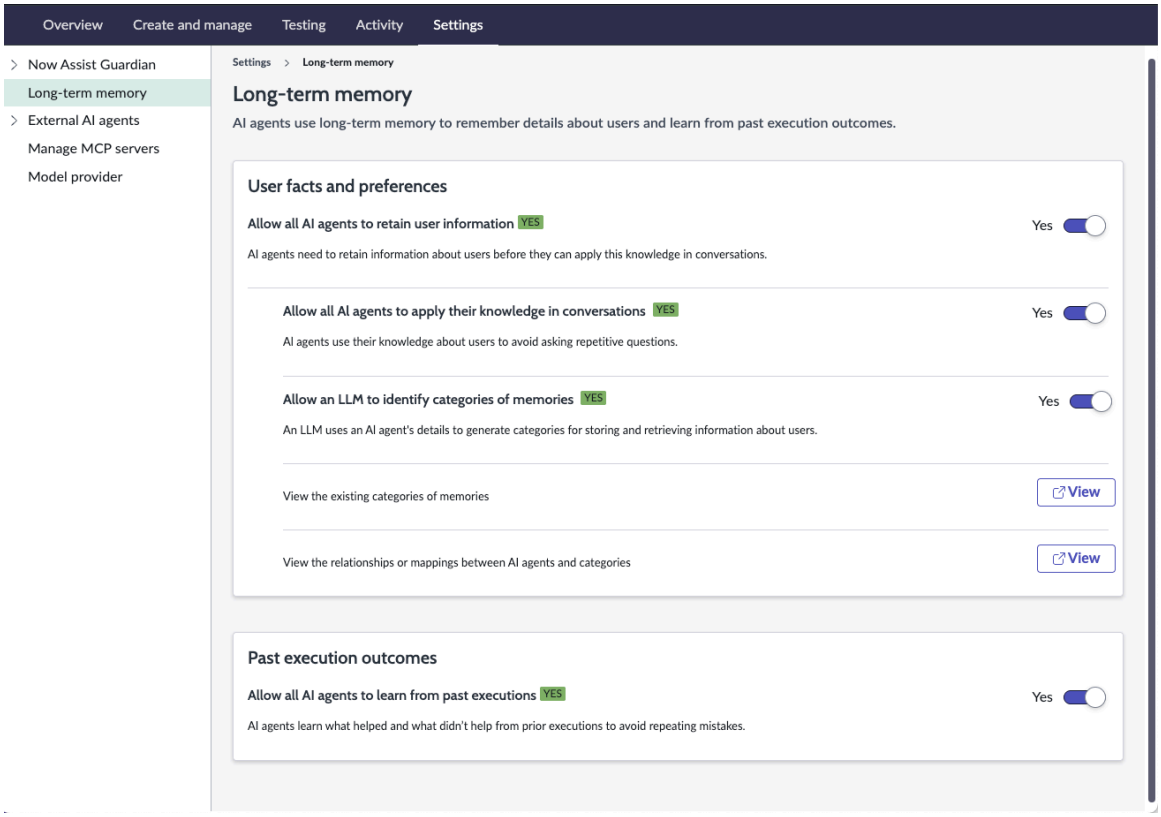
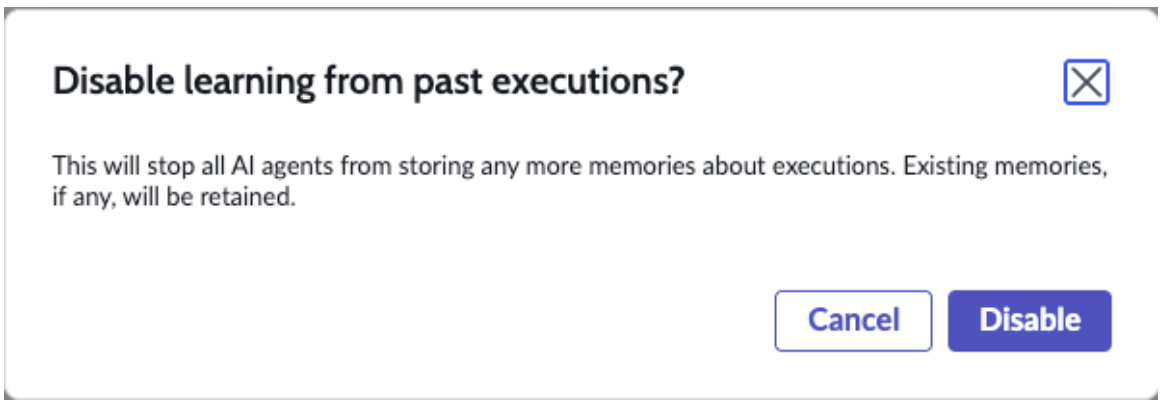


3. Configure the User facts and preferences.
   a. Turn on the Allow all AI agents to retain user information using the toggle button.
   b. Turn on the Allow all AI agents to apply their knowledge in conversations using the toggle button.
   c. Turn on the Allow an LLM to identify categories of memories using the toggle button.
   d. To view the existing categories of memories, select **View**.
   e. To view the relationships or mappings between AI agents and categories, select **View**.
4. Configure Past executions outcomes by turning on the Allow all AI agents to learn from past executions using the toggle button.
   When you want to turn off agent learning from past executions, you will see a confirmation pop up. Selecting **Disable** will disable agent learning.



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Configure Group Action Framework

Set up Group Action Framework (GAF) to improve the response quality, recall speed, and consistency of AI agents.

Before you begin

There must be a ml_platform read ACL for GAF to be configured. If there is no read ACL present, you must create it and grant the appropriate role access, such as admin, ml_admin, or sn_aia.admin. This is required for GAF to access Machine Learning tables and services. If your ACL is not configured correctly, you may see the error "Failed to initialize pipeline: Failed to load message_content dataset. No columns to parse from file."

Verify that your configured LLM provider (such as OpenAI or Anthropic) has valid credentials and available token quota.

Verify that the prerequisite scheduled job for your workflow exists and is properly configured. For example, if you're configuring GAF for HR Service Delivery, navigate to **All** > **System Definition** > **Scheduled Jobs** and search for "HR service GAF grouping job". Verify that the **Active** field is set to true and that the **Class** field is populated. If either field is empty, the job will not execute.

To access GAF's optimized prediction feature, you can enable AI Search. For more information, see Setup AI Search for Group Action Framework.

Role required: sn_aia.admin

About this task

You can activate GAF to have AI agents use indexed clusters that perform LLM executions on representative records rather than all records. GAF is used by some AI agents and agentic workflows to work optimally. For more information about GAF and how it works, see Group Action Framework.

You can have different GAF configurations for different agentic workflows and applications. You must configure each agentic workflow or application separately.

Important: Setting up GAF can take some time, between 10 minutes up to an hour, depending on the number of records in the grouping. The script runs in the background.

Procedure

1. Navigate to **All** > **System Definition** > **Scripts - Background**.
2. Paste the following code into the text area.

   Do not run the script until the groupSkillID and the actionSkillID variables have values. The values are acquired in the following steps.

   ```
   var groupSkillId = "";
   var actionSkillId = "";
   var topicSkillId = "43bce9e477e012103f075cea5b5a998f";
   new sn_gaf.GAFUtils().activate(groupSkillId, topicSkillId,
    actionSkillId, "run_once");
   ```

   The topicSkillId is the same for all GAF setups.
3. In a new browser tab, navigate to the Now Assist Skill Config [sn_nowassist_skill_config] table by entering `sn_nowassist_skill_config.list` in the filter navigator.
4. In the **Name** field, enter `*grouping` and search to see the grouping records that are associated with your agentic workflows and applications.

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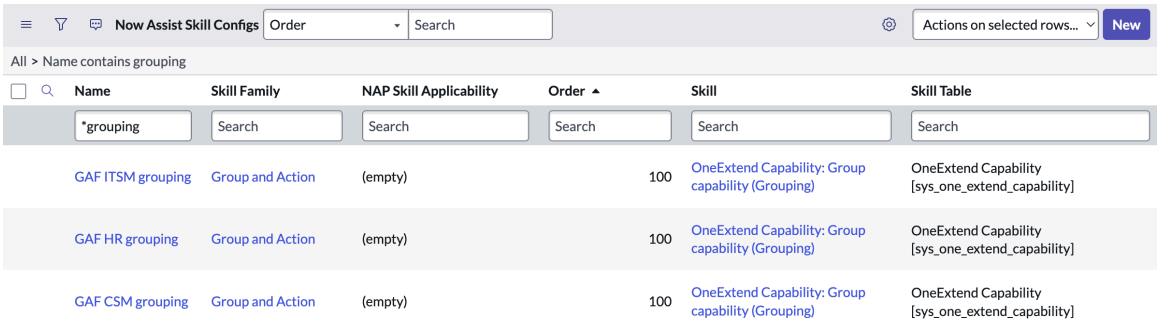
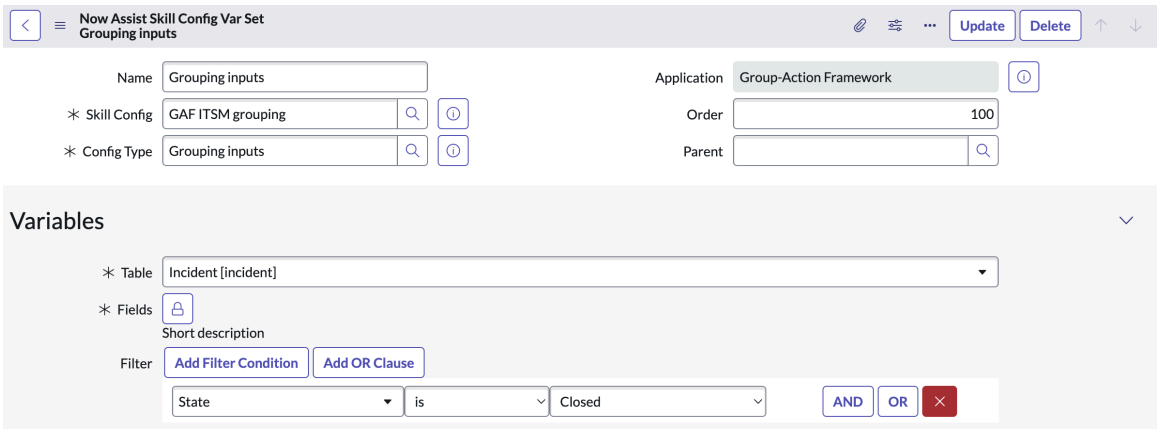


5. Open the grouping record for the agentic workflow or application that you want to configure.
6. In the Now Assist Config Var Set related list, open the Grouping inputs record.
7. Confirm that the filters for the grouping include all the records you want to index.

   If you want to add filters to change what records are included in the GAF setup, do so here. The more records that you include means that you have a longer setup time, but they can help increase the quality of your results. You should have at least 2000 records for successful clustering.

   Note: Your current scope should be Group-Action Framework to make changes.



8. Return to the Now Assist Skill Config Grouping record and copy the sys_id.
   You use this sys_id and two other sys_ids in the background script function call.
9. In the browser tab with the background script, paste the sys_id in the script between the quotation marks for the groupSkillId variable.

   Your `groupSkillId` variable should be in the same format as the `topicSkillId` variable.
10. In the tab with the Now Assist Skill Config record, return to the Now Assist Skill Config table and search for `*action strategy` to find the action strategy skill config for the application. Make sure that the record is for the same application. If you pasted the sys_id of the GAF ITSM grouping, you must open the GAF ITSM action strategy.
11. Open the action strategy record for the application that you're configuring.

    Note: The Group table field should be left empty. The Group table refers to the table where the grouped records are, not the source table, so the field is populated automatically by the GAF setup job. If this field is populated before you run the script, the GAF job will fail.

12. Copy the sys_id of the action strategy record.

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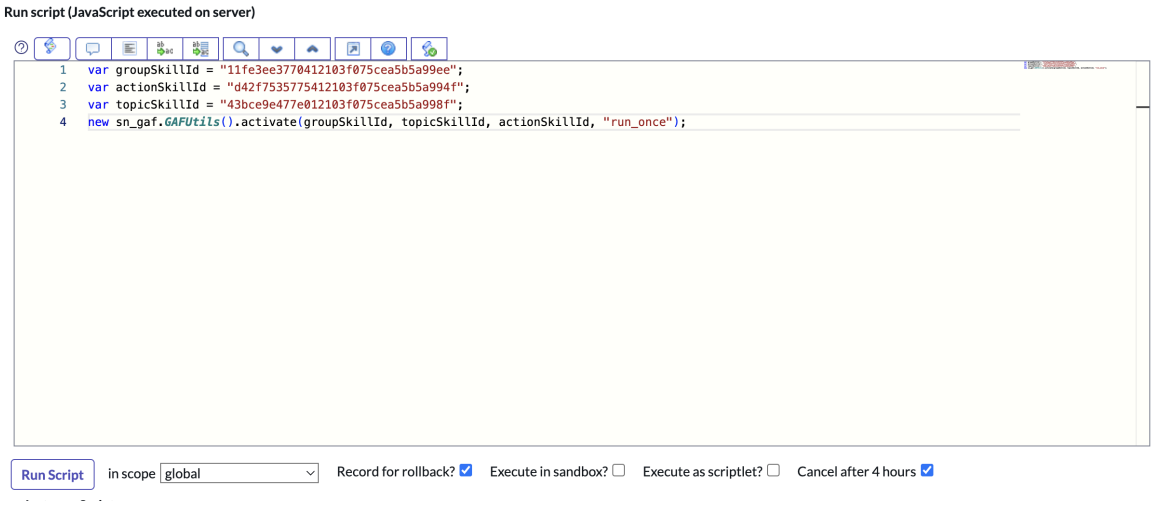
13. In the browser tab with the background script, paste the sys_id in the script between the quotation marks for the actionSkillId variable.

    Your `actionSkillId` variable should be in the same format as the `groupSkillId` and `topickillId` variables.



14. Run the background script by selecting **Run script**.

    Running this background script creates a scheduled job called GAF - Run Offline Flow. You can view the scheduled job on the Scheduled Script Executions [sysauto_script] table.

Result

GAF is configured on your instance for an application and can be used by AI agents to find related records.

What to do next

To verify that grouping and action outputs have been generated, go to the ML Solution [ml_solution] table to check if the clustering solution is running or completed. If it is complete, check the following tables to see records for groups, clustered records, and down-sampled records per group are present.

- GAF record group [sn_gaf_record_group]
- GAF record group detail [sn_gaf_record_group_detail]
- GAF action strategy result [sn_gaf_action_strategy_result]

You can repeat this procedure for additional agentic workflows and applications.

You may see the error "Failed to initialize pipeline: Failed to load message_content dataset. No columns to parse from file." when trying to configure GAF. This could be because your instance lacks data on the table or filters you configured excluded records from the table. You can reach out to Now Support for additional assistance if you cannot resolve this error.

Set up AI Search for GAF

Configure AI Search to enable Group Action Framework (GAF) to improve quality and consistency of agentic AI and generative AI on the ServiceNow AI Platform.

Before you begin

Role required: admin

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About this task

GAF is a feature on the ServiceNow AI Platform that clusters and indexes related records and executes actions on them in agentic AI and generative AI. See Group Action Framework for more information about GAF's role in intelligent experiences and how it works.

AI Search is the foundation for GAF's optimized prediction feature. AI Search is the backup search for certain workflows, and if it is not enabled and ready, GAF will not return any results.

You must index every table for each workflow or application you'd like to configure GAF for. For example, if you're configuring GAF for ServiceNow Otto for IT Service Management, you must index the Incident and related tables.

Procedure

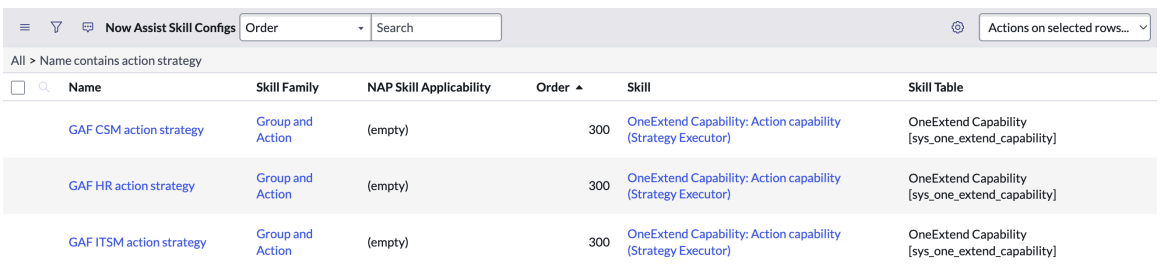
1. Navigate to **All** > **AI Search** > **AI Search Status**.
   If you see "AI Search is ready," proceed. If not, request AI Search installation, which can take 2–24 hours.
2. Install ServiceNow Otto for AI Search by installing an application with generative or agentic AI features.
   For more information, see Install ServiceNow Otto for AI Search.
3. Verify that your LLM provider is configured and accessible.

   GAF's action strategy skill requires a working LLM provider (such as OpenAI or Anthropic) to generate topics and summaries. Before proceeding with AI Search indexing, verify the following:

   - *`LLM provider credentials:`* Navigate to the LLM provider configuration and verify that API keys and credentials are current and valid.
   - *`Token quota:`* Verify that your LLM provider account has sufficient token quota remaining. If quota is exhausted, the action strategy job will fail with "Action strategy job trigger failed. The topic is not generated for any group."
   - *`Model availability:`* Verify that the selected model (e.g., GPT-4, Claude) is available and accessible.

   If any of these checks fail, contact your LLM provider to resolve the issue before proceeding.
4. Navigate to the Now Assist Skill Config [sn_nowassist_skill_config] table by entering `sn_nowassist_skill_config.list` in the filter navigator.
5. Search the Now Assist Skill Config table for action strategy skills by searching *Name* is `*action strategy`, and select the action strategy skill for the application you want to configure.

   For example, if you're configuring GAF for ITSM, select the GAF ITSM action strategy record.



6. In the related list, select the Now Assist Skill Config Var Set record.
7. Set *`Semantic Index Name`* to the appropriate field for your table.

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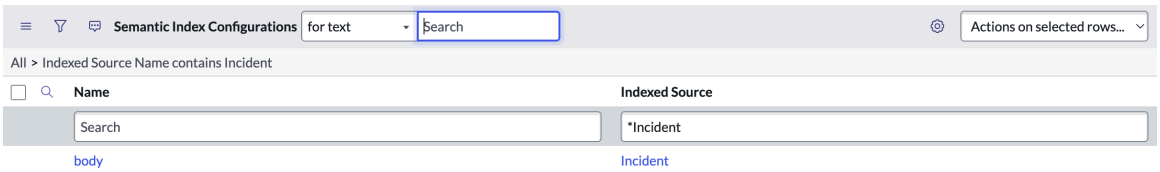
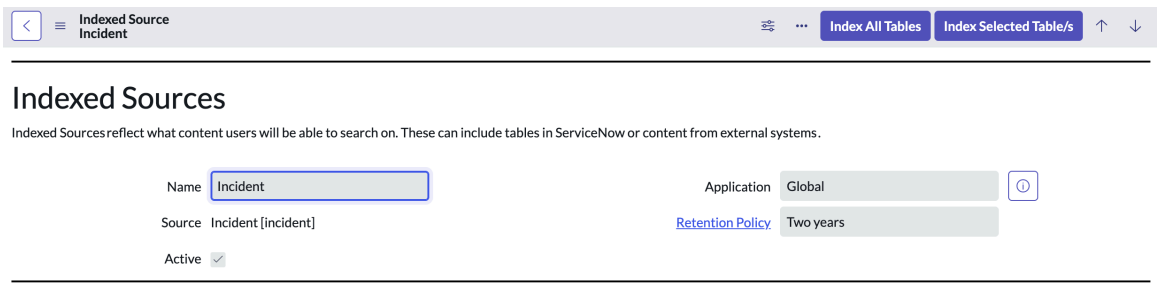
To find the field for your table, go to the Semantic Index Configuration [ais_semantic_index_configuration] table by entering `ais_semantic_index_configuration.list` in the filter navigator, filter the *`Indexed Source`* for the table you want to index, and use the value in the *Name* field. For example, the value is *`body`* for the Incident table.

8. Navigate to the Semantic Index Configuration [ais_semantic_index_configuration] table by entering `ais_semantic_index_configuration.list` in the filter navigator, filter the *`Indexed Source`* for the table you want to index and the *`Semantic Index Name`* you configured in the previous step, and set *`Active`* to `true` to activate the embedding model.



9. Navigate to **All** > **AI Search** > **AI Search Index** > **Indexed Source**, filter the list so that the *Name* is the name of the table you're configuring, and select the record.
10. Select **Index All Tables**.



Result

The tables for ServiceNow Otto for AI Search for your Now Assist application is indexed based on the appropriate field.

What to do next

To confirm that indexing has occurred successfully, check the Indexed Source History related list and ensure that both the *`Keyword Ingestion State`* and *`Semantic Ingestion State`* are both set to *`Indexed`*.

Once your tables have been indexed, you can continue to Configure Group Action Framework to set up GAF for each application.

Multiple conversations in AI agents

Multiple active conversations enable live agents to maintain separate conversations for different records. You can preserve the context of multiple conversations and enable multiple AI agents to interact at the same time through the ServiceNow Otto panel.

Multiple conversations between live agents and AI agents overview

Once configured, live agents can interact with multiple AI agent conversations through the ServiceNow Otto panel.

Note: By default, the ServiceNow Otto panel currently supports only a single conversation and it is required for you to enable the multiple conversation support if you intend to use it

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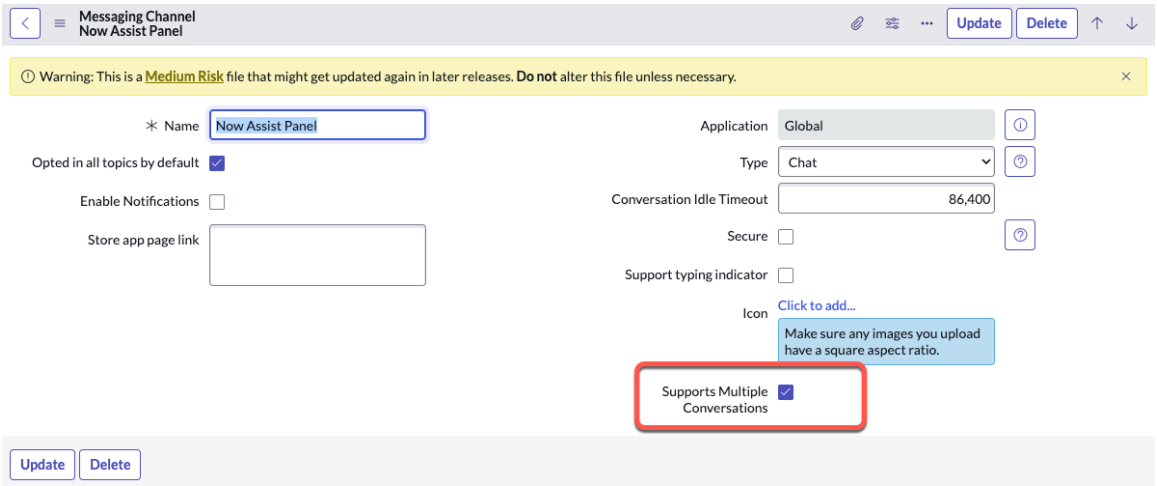
Enabling multiple conversations

Enable multiple conversations on a ServiceNow instance in the Messaging Channels [sys_cs_channel.list] table by setting the value of the **Supports Multiple Conversations** field on the ServiceNow Otto panel record to **true**. If you don't see this field, make sure you are in the Global scope and are using the Default view. By saving the record and refreshing the instance, you can see the multiple active conversations features in the ServiceNow Otto panel.



Title for the conversation

With the multiple conversations feature enabled in the ServiceNow Otto panel, the first utterance from the live agent is set as the title for that conversation. For example, if the first utterance is `Explain change risk`, then Explain change risk is set as the title for that conversation in the ServiceNow Otto panel.

Starting a conversation

Start a new conversation by selecting the plus icon ( ) and choosing a topic. See the conversation list by selecting the All chats icon ( ), to see the Active chats and Closed chats.

Unread chats on the conversation list

See the batch count of the unread chats on the conversation list icon ( ). For example, if number 6 appears on the All chats icon ( ), that means there's six unread conversations on the ServiceNow Otto panel.

Citations in AI agents

You can see citations on the ServiceNow Otto panel when you execute AI agents and agentic workflows in AI agents that provide summaries to get similar incidents and relevant knowledge articles.

Generating citations:

- Citations are generated by the LLM (Large Language Model), which use the information available to it.
- URLs can't be generated by LLM if relevant information isn't provided.
- LLMs need provide proper URLs for better results.

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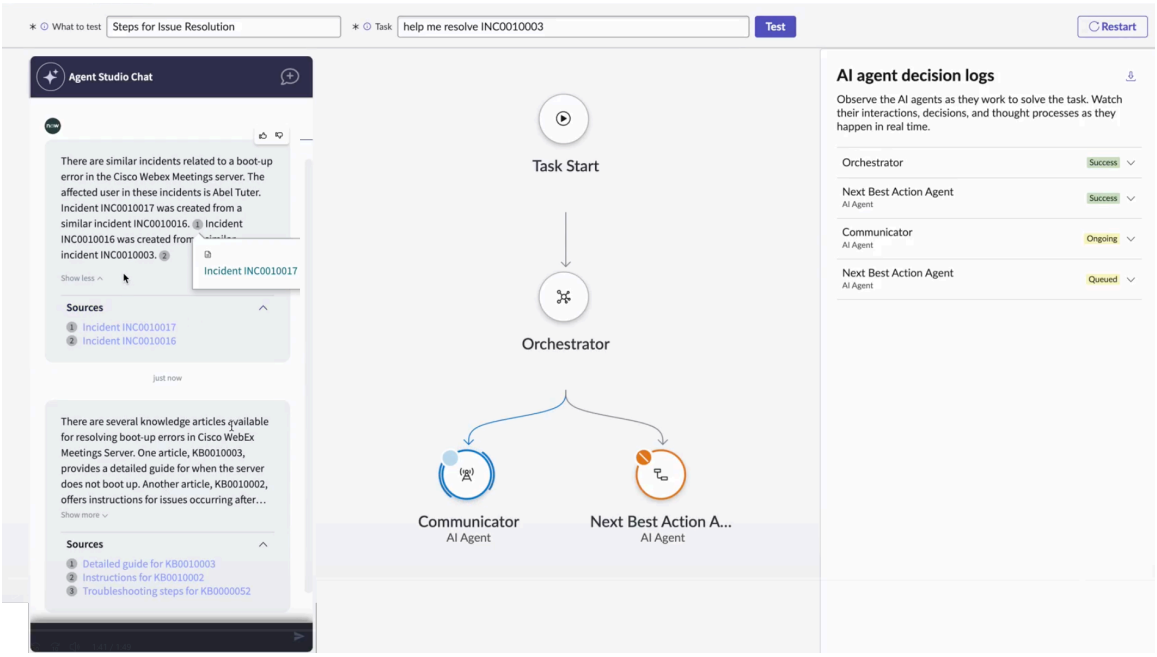
- Citation URLs return directly from the tool's outputs.
- The LLM is instructed not to generate or assume citations if they aren't present.

Note: Invalid or malformed URLs won't be displayed to the user.

Citations with similar incidents and relevant knowledge articles appear in the Sources section of the AI Agent Studio Chat and on the ServiceNow Otto panel and in with click-able links that direct you to the incident or knowledge article.



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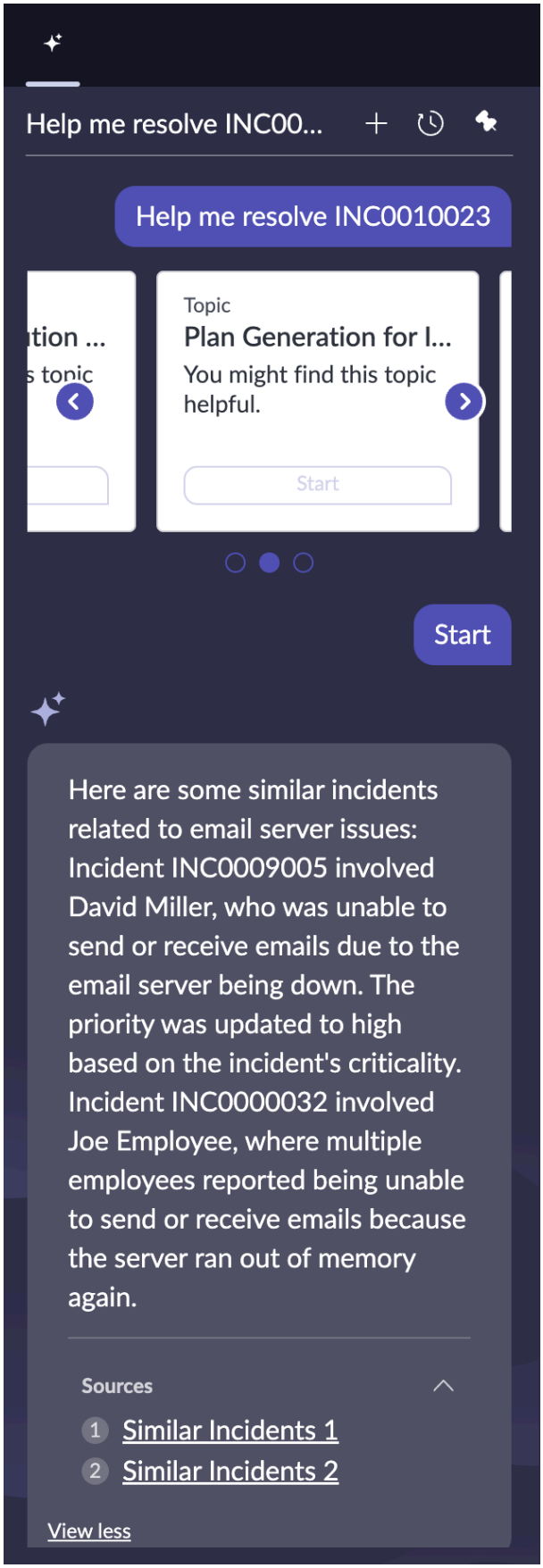

You can hide citations for specific agentic workflows or AI agents where it's necessary or confidential. For more information, see Disable citations in AI Agent Studio.

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Disable citations in AI Agent Studio

Disable citations for specific agentic workflows or AI agents in AI Agent Studio where citations aren't required or involve confidential information.

Before you begin

Role required: sn_aia_admin

About this task

By default, the citations are enabled for all agentic workflows and AI agents. The Agent Properties [sn_aia_property] table enables disabling citations at the agentic workflow or AI agent level. Create a record only when you want to disable citations for specific agentic workflows or AI agents when the **Output transformation strategy** field in the Agent tool record is set either to **Summary for Search Results** or **Verbose**.

- All citations are generated by the LLM (Large Language Model), which uses the information available to it.
-

Procedure

1. Navigate to **All** > **System Definitions** > **Tables** and open the Agent Properties [sn_aia_property] table.
2. Select **New**.
3. On the form, fill in the fields.

Agent Property form

Field	Description
Name	Name for the agent property record used to hide citations for the agentic workflow or AI agent.
Value	Provide **false** as the value to hide the citations.
Target table	The table where the target agentic workflow or AI agent resides.
Target record	The record of the target agentic workflow or AI agent.
Application	The application scope for the agent property record: ServiceNow Otto AI agents.

4. Select **Submit**.

Result

Execute an AI agent or an agentic workflow for which you have disabled citations. You'll see the output without citations. See the following example for reference.

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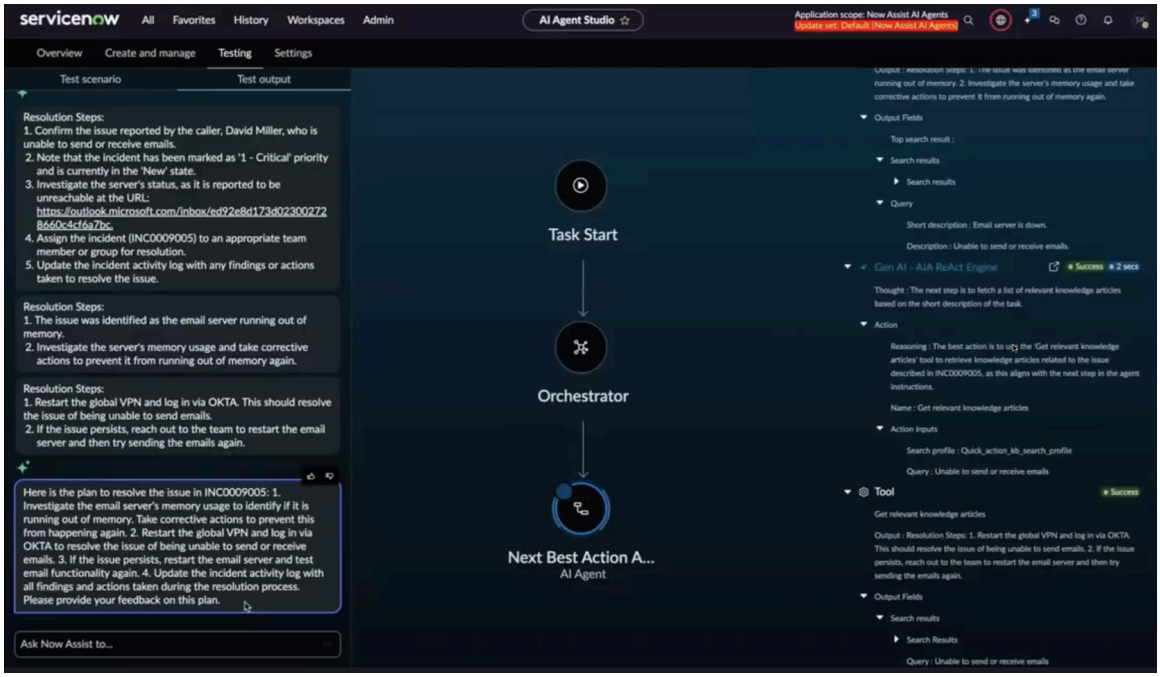

Follow-up conversations

AI agents continue with follow-up conversations after the AI agent execution is complete.

Before you begin

Role required: sn_aia_admin

About this task

When the [sn_aia.enable_follow_up] system property is set to **true** and if there is no record for the agentic workflow created in the Agent properties [sn_aia_property] table, then the AI agents continue with the `How else can I help you?` follow-up message after the agentic workflow execution.

The AI agent conversation doesn't get closed after the execution is complete by default. If you would like to override the follow-up behavior for your AI agents for a specific agentic workflow, you must create a record in the Agent Properties [sn_aia_property] table.

Procedure

1. Navigate to **All** > **System Definitions** > **Tables** and open the Agent Properties [sn_aia_property] table.
2. Select **New**.
3. On the form, fill in the fields.

Agent Property form

Field	Description
Name	Name for the agent property record for the agentic workflow.For example, `follow_up_behaviour`
Value	Provide the following values as per the requirement:

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Field	Description
	○ **no_followup_close_conversation**: Closes the conversation after the use case is complete. ○ **no_followup_open_conversation**: Keeps the conversation open after the use case is complete.
Target table	The table where the target agentic workflow resides: Agentic workflows [sn_aia_use case] table.
Target record	The record of the target agentic workflow or AI agent.
Application	The application scope for the agent property record: ServiceNow Otto AI agents.

4. Select **Submit**.

Add recipients to usage spike, execution failure, and latency error email notifications

Add or change recipients to email notifications triggered by unexpected or undesired behavior in AI agent and agentic workflow executions.

Before you begin

Set your application scope to ServiceNow Otto AI Agents.

Role required: admin

About this task

There are different email notifications that can be configured: one for Assist usage spikes, one for failed AI agent executions, and two for latency errors. The properties for configuring the thresholds for sending these notifications can be found in the Now Assist AI Agents Reference.

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. In the *Name* field, search for `AI Agent`, and select the notification you want to edit.

   There are different Notifications records for the different sources of alert. If you want to change the recipients for all types of alerts, you must edit each of the Notification records individually.
3. Open the **Who will receive** tab.
4. Select the unlock icon for the type of recipient you want to add or change.

   To quickly add yourself to the list of recipients, select the Add me icon next to the *Users* field.
5. Select the users and groups you want to receive email alerts.

   If you select **Send to event creator**, the owner of the AI agent or agentic workflow that triggered the alert receives a notification.

   You can select **Exclude delegates** if you don't want delegated users to receive the notification. By default, delegates will receive notifications.
6. Update or save the record.

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Result
The specified users or groups can now receive notifications for a specific triggered condition of AI agent or agentic workflow executions.

What to do next
Repeat for any other AI agent alert notifications you want to configure.

Role masking in AI agents

Role masking for AI agents and agentic workflows helps users enhance security by enabling them to limit their roles during tool execution and verify that AI agents run with least-access privileges.

Role masking overview

Role masking lets AI admins in the AI Agent Studio to limit permissions of agentic workflows or AI agents set to run as dynamic users by defining an allow-list of roles they can inherit from invoking users, enforcing least-privilege access.

Use role masking to:

- Empower users to follow least-access principles when an agentic workflow or AI agent executes on behalf of a dynamic user.
- Limit roles that agentic workflows, AI agents, and skills inherit from users and can be applied when a user invokes them.

  For more information about configuring skills, see AI Skill Kit.
- Reduce the risk of AI solutions accessing the resources that they shouldn't, therefore helping prevent agentic overreach into sensitive data or capabilities beyond what the user is allowed.
- Expand the security configurations to increase functionality of agentic products while reducing security risks by enforcing governance for elevated or scoped roles.

Prerequisites

To configure role masking on your ServiceNow instance, you must have:

- ServiceNow Otto for Platform version 10.0.2-SS.
- The sn_aia.admin privileges.

Role masking behavior

Role masking behavior in agentic workflows, AI agents, and tools controls which of the invoking user's roles are available to AI agents and tools during workflow execution. The roles are applied sequentially across layers in the agentic workflow, AI agent, and Tool sequence to verify that tools execute with minimum required privileges.

Role masking rules

1. Role masking limits the roles with which an agentic workflow, AI agent or Skill can execute to the intersection between the roles assigned to the invoking user and the roles included in the role masking approved roles list.
2. AI user vs Role mask:

   The AI admin can choose for the component to run as either an AI user or a dynamic user. If set to run as a dynamic user, the AI admin can configure role masking for the component. Role masking cannot be configured for agentic workflows or AI agents set to run as AI users.

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- If an AI user is selected, all roles assigned to the AI user are available to the agentic workflow or AI agent. This can be used to provide elevated access to the agentic workflow AI agent.

  Note: Tools always run as dynamic users.

- If Role masking is applied to an agentic workflow, AI agent, or tool running as a dynamic user, the component runs with roles with roles limited to the intersection of the current invoking user's roles and the roles included in the role masking approved roles list.

3. Multiple role masks can be configured and applied in the agentic workflow - AI agent - tool sequence, but each mask still follows the intersection rule.
4. Role masking only restricts roles that components can execute with, but never grants components roles which exceed those of the invoking user. Thus, if the invoking user has a role that is not included in the approved roles list, the component will not be allowed to execute with that role. And, if the approved roles list includes a role that is not assigned to the invoking user, the component will not be able to execute with that role again.
5. When a workflow running as an AI user invokes an AI agent running as a dynamic user with role masking configured, then the roles available to the AI agent will be the intersection of the role masking configuration of the AI agent and the roles assigned to the AI user of the agentic workflow. The same holds true for an AI agent running as an AI user that then invokes a skill with role masking configured.

Configuration

- To configure role masking for an AI agent, see Define security controls for an AI agent.
- To configure role masking for an AI agent, see Define security controls for an agentic workflow.

Create an AI agent

Create an AI agent in AI Agent Studio to solve problems for your users and coordinate with other AI agents while executing the agentic workflows.

Before you begin

Role required: sn_aia.admin

About this task

In the ServiceNow agentic ecosystem, an AI agent is a set of large language model (LLM) instructions and tools that can perform specific tasks.

An AI agent can collaborate with other agents to achieve better results by using fewer LLM calls. AI agents can also reach out to the user if they need any help or information.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **AI agents**.
2. From the **Add** drop-down menu, select one of the following agent creation options:**Chat** or **External**.

   a. **Chat**: Select the Chat option to create AI agents in the AI Agent Studio to connect with internal AI agents within the ServiceNow AI Platform to execute agentic workflows.

   The following instructions are for Chat AI agents. See the following links for guides to create other types of AI agents.

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b. **Voice**: Select the Voice option to create an AI voice agent.

   See Deploy AI agents for voice for more information on setting up and creating AI voice agents.

c. **External**: Select the External option to create external AI agents in the AI Agent Studio to connect the ServiceNow AI Platform with the third-party agentic AI providers.

   For more information about creating external AI agents in the AI Agent Studio, see Create an external AI agent.

3. Define the AI agent's specialty.
4. Define the AI agent security controls.
5. **Optional:** Add a trigger to automatically invoke your AI agent if a specified event occurs.

   (Optional) If you want your AI agent to be used only in chats, you don't need to add a trigger.

6. Determine the chat assistants to access your AI agent, set the processing messages, and activate your AI agent..
7. Select **Save and test** to complete the configuration steps or review a previous step by selecting **Back**.

   Selecting Save and test leads you to the AI agent testing page, where you can test the AI agent that you created. For more information, see Manually test the execution of an AI agent.

   To test the AI agent, you must have the sn_aia.admin role and any roles the ACLs configured for the AI agent and its tools require, if applicable.

Result

You can see the AI agent that you created in the **Manage agentic workflows and AI agents** page.

If you selected **Users with specific roles** for your ACL, you can change roles at any point. Return to the guided setup and double-click the pills to make changes. All other security changes must be done on the ACL [sys_security_acl] table by a user with elevated permissions.

Find AI agents

Find available AI agents in AI Agent Studio to explore your options when creating agentic workflows.

Before you begin

Role required: sn_aia_viewer.

About this task

AI agents are autonomous systems that interact with their environment to gather data, make decisions, and complete tasks that would otherwise need to be done by a human.

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Procedure

1. View the available AI agents in AI Agent Studio.

Current location	Navigation option
AI Agent Studio Overview page	Select the **Explore all** button in the Ready-made agentic workflow and AI agents section, and then select the **AI agents** tab.
AI Agent Studio Overview page	View the Recent agentic workflows and AI agents activity section on the **AI agents** tab to see the most recently added or changed agents. **Note:** You see a list of the AI agents on ly when there's recent activity of the AI agents on your instance.
Anywhere else	Navigate to **All** > **AI Agent Studio** > **Create and manage**, and then select the **AI agents** tab.

2. View all AI agents, including those AI agents that were installed with Now Assist applications by navigating to the **AI agents** tab.

Result
Navigating through any of the preceding options directs you to the AI agents that are available on your AI Agent Studio instance.

Define the specialty of an AI agent

In the guided setup for an AI agent, write a clear description defining your agent and its role. You can also configure supported LLMs, enable third-party access, and manage long-term memory.

Before you begin
Role required: sn_aia.admin

About this task
The first step of the guided setup enables you to define the fundamentals of the AI agent. The description, AI agent role, and list of steps fields are used by the LLM to understand how to use the AI agent, by itself or as part of an agentic workflow. Descriptions, AI agent roles, and list of steps should be clear and well-defined. For guidelines for writing these fields, see Writing effectively for agentic AI. For an example AI agent, see Example AI agent.

Note: If you have the Off Glide Conversation Server plugin (com.glide.cs.offglide) installed on your ServiceNow instance, then the Premium Chat experience may differ from the standard experience. If you plan to use an AI agent in the Premium Chat mode, make sure to test so it works as expected.

Procedure

1. Enter a name for the AI agent.
2. Craft an AI agent description.

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The description should clarify the purpose of the AI agent, including its inputs, outputs, and context.

3. Craft the AI agent role.

   The difference between the description and the agent role is that the agent role provides more detail about the function that the AI agent serves within a greater context. The greater context may be as part of an agentic workflow, or it could be the specific function it serves in another type of work process.

4. Craft a list of steps.
   You can also use an old version of a list of steps. Select **View versions** for a full list of previous versions of the field. See Version control for more information.
5. Determine unsupported model providers.

   You may find that some models use your AI agent better than others. If you want to avoid users from having a less optimal experience with a certain model, you can mark a model as unsupported. If an administrator changes the instance-level settings to an unsupported model, your AI agent won't be available to users.

6. Determine if the AI agent can be accessed by third parties.

   Make your AI agent discoverable by turning on the **Allow third-party to access this AI agent** toggle button that enables you to use your ServiceNow AI agent on other platforms. You can still use it on your ServiceNow instances as well.

   See ServiceNow agents as secondary agents for more information about configuring agents to use on other AI platforms.

7. Configure long-term memory options.

   Long-term memory for AI agents enables agents to access data outside of the specific conversation or trigger that executes it. For example, you can select the *`Device and Software`* category to give the AI agent access to user information about the kinds of hardware devices and software that are available to the invoking user. The AI agent can remember this information in later conversations.

   - For more information about creating LTM categories, see .
   - For more information about selecting the categories to map them to you AI agent, see .

8. Configure AI agent learning.

   You can enable the AI agent to learn from past interactions with the user. For example, if the user encounters a similar issue, enabling this feature could help the AI agent understand what didn't work previously, so it can recommend other options.

   Note: When the agent learning capability is inactive at the AI Agent Studio level, the option to enable at the AI agent level is also inactive. To enable agent learning at the AI Agent Studio level, see Set up long-term memory.

Result
You have defined the basics of your AI agent.

What to do next
Select **Save and continue** to move to the next step, Add tools and information.

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Add tools and information to an AI agent

Add a tool to an AI agent to enable different functionalities and help your AI agents achieve their objectives.

Tool overview

Tools provide your AI agents with the capabilities necessary to complete their tasks. When adding tools, consider how the AI agent uses them to achieve its objectives and how those tools interact with each other. Providing your AI agents with the appropriate tools help promote the robustness and quality of their performance.

Some additional guidelines for adding and creating tools are the following:

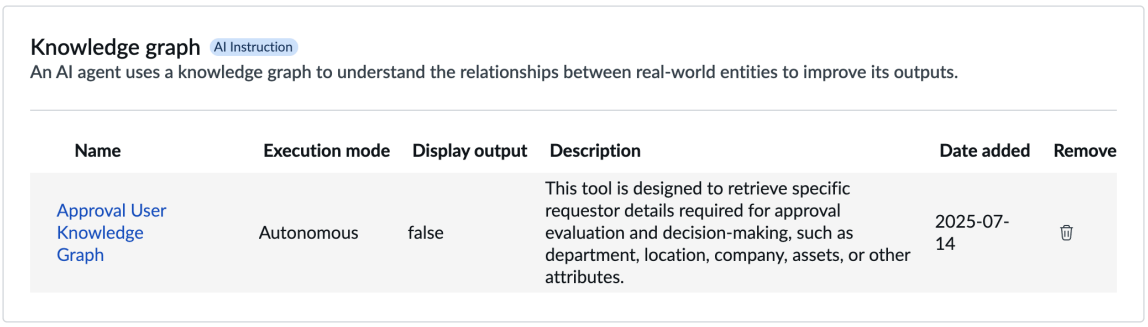
- Design tools to work together. Your AI agent should solve a specific, discrete task, and the tools should give the AI agent the capabilities necessary to achieve its goal.
- Write detailed tool descriptions. Tool descriptions are used by the AI agent to determine a tool's function. Thorough descriptions about what the tools are and how they work give the AI agent the best chance to succeed.
- Consider the outputs of tools when creating them. Use the tool description or output transformation strategy fields to describe how to process the tool outputs. For example, if you have a tool that gathers records from many tables, provide the tool with plans for how to handle the large number of records.

Note: If you select Google as your web search tool provider, the web search tool leverages Grounding with Google Search, offered under a Global Standard deployment. Because grounding isn't data resident, Google's global infrastructure routes traffic to a global datacenter for each web search request. This processing may be different than your data processing location chosen for your ServiceNow instance. Consider your organization's data policies before enabling AI agents that use Google web search tools.

Once you have added the tools to your AI agent, you can select **Save and continue** to move to the next step in the guided setup.

Knowledge graphs

In this step, you can also add Knowledge graphs. Knowledge graphs give the AI agent information to understand the relationships between real-world entities to improve its outputs. For example, you could add a Knowledge Graph to an approval AI agent that maps users to their location, company, and department to help the AI agent understand the specific approval process to apply.



Supervised execution mode for AI agents

You can minimize the potential negative impact of an AI agent not executing as expected by configuring AI agents' tools to run in supervised mode. Running in supervised mode means that

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the tools use human oversight when executing actions. You can use the Supervised mode to enhance security for agents with the capability to perform sensitive or critical actions.

You can set the supervised execution mode when creating a tool in the AI agent guided setup. For example, choose Supervised as the Execution mode when adding a catalog item tool. For reference, see Add a catalog item to an AI agent.

Add a catalog item to an AI agent

Add a Service Catalog to an AI agent in AI Agent Studio so that your users can access conversational catalog items.

Before you begin

Role required: sn_aia.admin

Procedure

1. Navigate to **All** > *AI Agent Studio* > **Create and manage** > **AI agents**.
2. Open the AI agent that you want to add a catalog item to and navigate to the Add tools and information section.
3. In the Add tool drop-down list, select **Catalog item**.
4. On the form, fill in the fields.

Add a catalog item form

Fields	Description
Name	Name that you want to specify for your catalog item.
Description	Description of the catalog item and what it's going to do to assist your AI agent. **Note:** This description is sent to the large language model (LLM).
Select catalog item	Catalog item that you want to add. If there is a tool used by an AI agent for the same catalog item, the rest of the form will populate the fields based on the other tool. You can make any changes specific to the current AI agent to suit your needs, and it will not affect the tool of the existing AI agent.
Execution mode	Mode of execution for your selected catalog item: ○ **Supervised**: Inputs from your human agent are required during the execution of this catalog item while the AI agent runs. ○ **Autonomous**: Doesn't require any input from your live agent during the execution of this catalog item while the AI agent runs.

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Fields	Description
Display output	Permission to display the output of the execution in the ServiceNow Otto panel or in Virtual Agent: ○ **Yes** ○ **No** If you want the AI agent to work in Off Glide architecture with Premium Chat experience, you must turn-on the **Display output** toggle. When the toggle is turned-on, you can add widgets that can be used in assistants built with Premium Chat experiences. The widget configuration includes: ○ **Widget**: Defines the display output to render the content in a better user experience. You can select the widget from the drop-down. ○ **Require widget transformation**: An additional LLM call is required to transform the raw tool. If you choose to skip this transformation step, the tool output will be directly mapped to the widget. ▪ **Yes** ▪ **No** ○ **Display refined widget message**: Refines the widget message when configured. ▪ **Yes** ▪ **No** **Note:** The display output as a toggle is exclusively available for the Premium Chat experience when the Off Glide Conversation Server plugin (com.glide.cs.offglide) is installed. If the plugin is not installed, you will continue to access the standard display output options.
zz	
Select an output transformation format	Style for the LLM to present the results as it passes information between tools and to other agents. Out transformation formats: ○ None ○ Concise ○ Paragraph ○ Summary ○ Custom

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Fields	Description
Write processing messages for users	Message to display to users during tool execution. ○ In-progress message: Write an in-progress message to be displayed to end-users while the tool is running. ○ Completion message: Write a completion message to be displayed to end-users once the tool finishes running.

5. Select **Add**.
   A catalog item is added in the Catalog items list on the Add tools and information page.

Add a conversational topic to an AI agent

Add a Virtual Agent topic to an AI agent in AI Agent Studio so that you can use conversations to get additional information from the user. For example, a conversational topic could be used to let a user select a date range for surveys.

Before you begin

Role required: sn_aia.admin

Procedure

1. Navigate to **All** > *AI Agent Studio* > **Create and manage** > **AI agents**.
2. Open the AI agent that you want to add a conversational topic to and navigate to the Add tools and information section.
3. In the Add tool drop-down list, select **Conversational topic**.
4. On the form, fill in the fields.

Add a conversational topic form

Fields	Description
Name	Name that you want to specify for your conversational topic.
Description	Description of the conversational topic and what it's going to do to assist your AI agent. **Note:** This description is sent to the large language model (LLM).
Select topic	The Virtual Agent topic that you want to add. After it's selected, the description of the topic displays underneath the drop-down list. If there is a tool used by an AI agent for the same conversational topic, the rest of the form will populate the fields based on the other tool. You can make any changes specific to the current AI agent to suit your

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Fields	Description
	needs, and it will not affect the tool of the existing AI agent. **Note:** Only large language model (LLM) topics can be selected.
Execution mode	Mode of execution for your selected conversational topic: ○ **Supervised**: Inputs from your human agent are required during the execution of this conversational topic while the AI agent runs. ○ **Autonomous**: Doesn't require any input from your live agent during the execution of this conversational topic while the AI agent runs.
Display output	Permission to display the output of the execution in the ServiceNow Otto panel or in Virtual Agent: ○ **Yes** ○ **No** If you want the AI agent to work in Off Glide architecture with Premium Chat experience, you must turn-on the **Display output** toggle. When the toggle is turned-on, you can add widgets that can be used in assistants built with Premium Chat experiences. The widget configuration includes: ○ **Widget**: Defines the display output to render the content in a better user experience. You can select the widget from the drop-down. ○ **Require widget transformation**: An additional LLM call is required to transform the raw tool. If you choose to skip this transformation step, the tool output will be directly mapped to the widget. ▪ **Yes** ▪ **No** ○ **Display refined widget message**: Refines the widget message when configured. ▪ **Yes** ▪ **No**

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Fields	Description
	Note: The display output as a toggle is exclusively available for the Premium Chat experience when the Off Glide Conversation Server plugin (com.glide.cs.offglide) is installed. If the plugin is not installed, you will continue to access the standard display output options.
Advanced settings	
Select an output transformation format	Style for the LLM to present the results as it passes information between tools and to other agents. Out transformation formats: ○ None ○ Concise ○ Paragraph ○ Summary ○ Custom
Write processing messages for users	Message to display to users during tool execution. ○ In-progress message: Write an in-progress message to be displayed to end-users while the tool is running. ○ Completion message: Write a completion message to be displayed to end-users once the tool finishes running.

5. Select **Add**.
   A conversational topic is added in the Conversational topics list on the Add tools and information page.

Add a defined desktop action tool to an AI agent for desktop and web-based task

Add a desktop action as a tool to an AI agent in AI Agent Studio so that AI agents can execute defined path desktop actions for repetitive tasks in desktop and web environment.

Before you begin

Familiarize yourself with defined path desktop actions. For more information, see Defined desktop actions for desktop and web-based tasks and Defined desktop actions in AI Desktop Actions.

Role required: sn_aia.admin

About this task

Desktop actions are tools that AI agents use to interact with web and desktop applications. When you configure an AI agent and select desktop action as a tool, you define whether the AI agent follows a defined path (fixed steps designed in AI Desktop Actions) or an adaptive path (high-level goal described in the tool configuration). Unlike adaptive path desktop actions that dynamically plan execution, defined path desktop actions enable AI agents to execute preconfigured workflows through a fixed sequence of steps.

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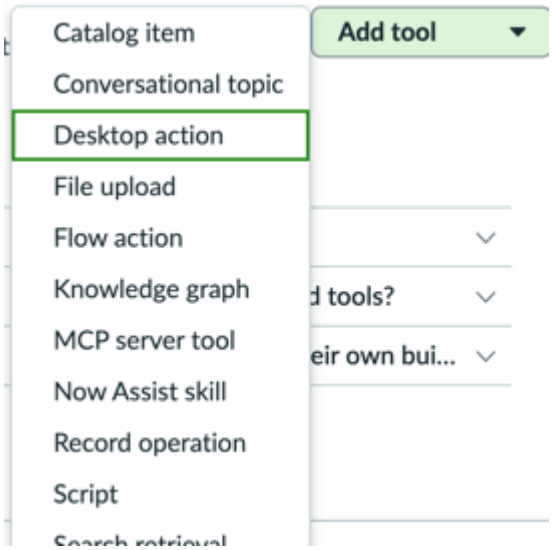
Defined desktop actions are further categorized into on-screen tasks and background tasks.

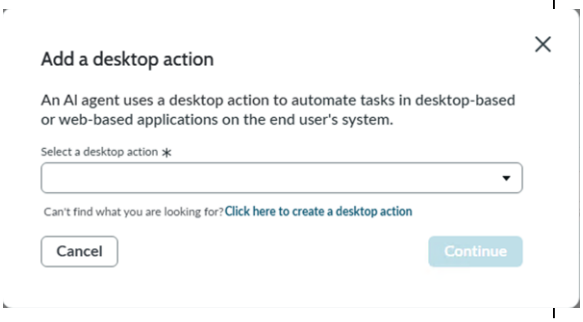
- **On-screen tasks**: These actions help you simulate humans interacting with UI elements on your thick client applications, legacy systems, or SaaS applications without APIs. These actions include clicking buttons, typing into text boxes, selecting from drop-down menus, and more. They encapsulate repeatable UI interactions, such as screens, anchors, and steps. You can create, manage, and test your desktop actions in AI Desktop Actions.
- **Background tasks**: These actions include prebuilt connectors that enable your AI agents to interact with various applications and system components in the background. These connectors streamline automation by offering actions for common tasks, reducing the need for complex scripting. Each connector focuses on a specific application or system area, providing a collection of related methods. You can't create background tasks actions.

Procedure

1. Navigate to **All** > *AI Agent Studio* > **Create and manage** > **AI agents**.
2. Open the AI agent that you want to add a desktop action to.
   For creating an AI agent, see Create an AI agent.
3. Navigate to the Add tools and information step.
4. In the **Add tool** drop-down list, select **Desktop action**.



5. Select or create a desktop action.

Existing desktop action	New desktop action
a. Select an existing desktop action of type on-screen task or background task from the **Select a desktop action** drop-down list. The background task desktop actions are supported for the following applications: ▪ Microsoft Excel ▪ Microsoft Outlook ▪ Microsoft Word ▪ PDF ▪ PowerShell Connector	**a.** On the Add a desktop action modal, select the **Click here to create a desktop action** link. 

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Existing desktop action	New desktop action
▪ SQL ▪ SSH ▪ SystemAction **b.** Select **Continue**.	**b.** Select the option **Record a fixed sequence of steps for desktop and web-based tasks**. **c.** Select **Open AI Desktop Actions app**. Record or manually capture the desktop action in AI Desktop Actions Windows application, activate it, and then come back here to add it as a tool. For more information, see Defined desktop actions in AI Desktop Actions. The creation process of defined desktop actions ends here.

6. On the form, fill in the fields.

Add a desktop action form

Fields	Description
Desktop action description	Read-only. Description of the desktop action or application that you selected.
Applications	Read-only. Applications that this desktop action interacts with. **Note:** This field appears only when **On-screen task** desktop action is selected.
Created by	Read-only. User who created the desktop action. **Note:** This field appears only when **On-screen task** desktop action is selected.
Last updated	Read-only. Date when this desktop action was last updated. **Note:** This field appears only when **On-screen task** desktop action is selected.
Inputs	Read-only. Input parameters associated with this desktop action. **Note:** This field appears when a desktop action or application is selected from the list.
Outputs	Read-only. Output parameters associated with this desktop action.

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Fields	Description
	Note: This field appears when a desktop action or application is selected from the list.
Name	Name that you want to specify for your selected desktop action.
Tool description	Description of the desktop action tool and what it's going to do to assist your AI agent. **Note:** This description is sent to the large language model (LLM).
Map parameters **Important:** If you update a desktop action after mapping its inputs in AI Agent Studio, the agent continues to use the previous mapping until you reopen the tool configuration and save it again. If you rename an input in the desktop action, the agent treats it as a new input and the existing mapping for that input is removed. You must remap the renamed input before the desktop action can be saved.	
Step name	Read-only. The name of the step that is configured to use a parameter. **Note:** This field appears only when an **On-screen task** desktop action with inputs configured for parameters is selected.
Description	Read-only. The description entered for the step that is configured to use a parameter. **Note:** This field appears only when an **On-screen task** desktop action with inputs configured for parameters is selected.
Parameter record	Select the Desktop action parameter record that the AI agent must use to retrieve the value for this step at execution time. Mapping a parameter record is required for all steps before the desktop action can be saved.

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Fields	Description
	Note: This field appears only when an **On-screen task** desktop action with inputs configured for parameters is selected. The same parameter record can be mapped to multiple steps. Each step can only be mapped to one parameter record.
Execution mode	Mode of execution for your selected desktop action: ○ **Supervised**: Inputs from your live agent are required during the execution of this desktop action while the AI agent runs. ○ **Autonomous**: Doesn't require any input from your live agent during the execution of this desktop action while the AI agent runs.
Display output	Permission to display the output of the execution in the ServiceNow Otto panel or in Virtual Agent: ○ **Yes** ○ **No** If you want the AI agent to work in Off Glide architecture with Premium Chat experience, you must turn-on the **Display output** toggle. When the toggle is turned-on, you can add widgets that can be used in assistants built with Premium Chat experiences. The widget configuration includes: ○ **Widget**: Defines the display output to render the content in a better user experience. You can select the widget from the drop-down. ○ **Require widget transformation**: An additional LLM call is required to transform the raw tool. If you choose to skip this transformation step, the tool output will be directly mapped to the widget. ▪ **Yes** ▪ **No** ○ **Display refined widget message**: Refines the widget message when configured. ▪ **Yes** ▪ **No**

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Fields	Description
	Note: The display output as a toggle is exclusively available for the Premium Chat experience when the Off Glide Conversation Server plugin (com.glide.cs.offglide) is installed. If the plugin is not installed, you will continue to access the standard display output options.
Advanced settings	
Select an output transformation format	Style for the LLM to present the results as it passes information between tools and to other agents. Out transformation formats: ○ None ○ Concise ○ Paragraph ○ Summary ○ Custom
Write processing messages for users	Message to display to users during tool execution. ○ In-progress message: Write an in-progress message to be displayed to end-users while the tool is running. ○ Completion message: Write a completion message to be displayed to end-users once the tool finishes running.

7. Select **Add desktop action**.
   The desktop action is added in the Desktop actions list on the Add tools and information page.

What to do next

For more information about executing desktop actions, see Examples of executing desktop actions using AI agents.

Add a file upload to an AI agent

Upload files for analysis by an AI agent in AI Agent Studio to grant your AI agent access to specialized knowledge.

Before you begin

Role required: sn_aia.admin

Procedure

1. Navigate to **All** > *AI Agent Studio* > **Create and manage** > **AI agents**.
2. Open the AI agent that you want to add a file upload to and navigate to the Add tools and information section.
3. In the Add tool drop-down list, select **File upload**.
4. On the form, fill in the fields.

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Add file upload form

Fields	Description
Name	Name that you want to specify for your file upload.
Description	Description of the file upload and what it's going to do to assist your AI agent. **Note:** This description is sent to the large language model (LLM).
Execution mode	Mode of execution for your selected file upload: ○ **Supervised**: Inputs from your human agent are required during the execution of this uploaded file while the AI agent runs. ○ **Autonomous**: Doesn't require any input from your live agent during the execution of this uploaded file while the AI agent runs.
Display output	Permission to display the output of the execution in the ServiceNow Otto panel or in Virtual Agent: ○ **Yes** ○ **No** If you want the AI agent to work in Off Glide architecture with Premium Chat experience, you must turn-on the **Display output** toggle. When the toggle is turned-on, you can add widgets that can be used in assistants built with Premium Chat experiences. The widget configuration includes: ○ **Widget**: Defines the display output to render the content in a better user experience. You can select the widget from the drop-down. ○ **Require widget transformation**: An additional LLM call is required to transform the raw tool. If you choose to skip this transformation step, the tool output will be directly mapped to the widget. ▪ **Yes** ▪ **No** ○ **Display refined widget message**: Refines the widget message when configured. ▪ **Yes** ▪ **No**

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Fields	Description
	Note: The display output as a toggle is exclusively available for the Premium Chat experience when the Off Glide Conversation Server plugin (com.glide.cs.offglide) is installed. If the plugin is not installed, you will continue to access the standard display output options.
Attachments	For analysis by an AI agent, attach up to 5 files with a maximum size of 5 MB each in these file formats: PDF, DOCX, or TXT formats. **Note:** A user who interacts with the AI agent with the file upload tool can see the information contained within the files.
Advanced settings	
Select an output transformation format	Style for the LLM to present the results as it passes information between tools and to other agents. Out transformation formats: ○ None ○ Concise ○ Paragraph ○ Summary ○ Custom
Write processing messages for users	Message to display to users during tool execution. ○ In-progress message: Write an in-progress message to be displayed to end-users while the tool is running. ○ Completion message: Write a completion message to be displayed to end-users once the tool finishes running.

5. Select **Add**.
   A file upload is added to the AI agent.

Add a flow action to an AI agent

Add a flow action to an AI agent in AI Agent Studio. Define the flow action to use it as a reusable operation in automating the ServiceNow AI Platform features without having to write code.

Before you begin

When an AI agent uses a flow action tool, the user the AI agent is running as must pass the ACL of the flow action. Ensure that the security configurations for the flow action are met by the AI agent and agentic workflow. For more information, see Security for AI agents.

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Role required: sn_aia.admin

Procedure

1. Navigate to **All** > *AI Agent Studio* > **Create and manage** > **AI agents**.
2. Open the AI agent that you want to add a flow action to and navigate to the Add tools and information section.
3. In the Add tool drop-down list, select **Flow action**.
4. On the form, fill in the fields.

Add a flow action form

Fields	Description
Name	Name that you want to specify for your selected flow action.
Description	Description of the flow action and what it's going to do to assist your AI agent. **Note:** This description is sent to the large language model (LLM).
Select flow action	Existing automated process to be selected from the list. If there is a tool used by an AI agent for the same flow action, the rest of the form will populate the fields based on the other tool. You can make any changes specific to the current AI agent to suit your needs, and it will not affect the tool of the existing AI agent.
Inputs	Flow action inputs. The values are filled in by the LLM at runtime unless you specify a value override. **Note:** If the agent uses multiple tools, you can choose to use another tool's output as an input value override. Select the data picker icon ( ) to review the available options.
Execution mode	Mode of execution for your selected flow action: ○ **Supervised**: Inputs from your human agent are required during the execution of this flow action while the AI agent runs. ○ **Autonomous**: Doesn't require any input from your live agent during the execution of this flow action while the AI agent runs.

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Fields	Description
Display output	Permission to display the output of the execution in the ServiceNow Otto panel or in Virtual Agent: ○ **Yes** ○ **No** If you want the AI agent to work in Off Glide architecture with Premium Chat experience, you must turn-on the **Display output** toggle. When the toggle is turned-on, you can add widgets that can be used in assistants built with Premium Chat experiences. The widget configuration includes: ○ **Widget**: Defines the display output to render the content in a better user experience. You can select the widget from the drop-down. ○ **Require widget transformation**: An additional LLM call is required to transform the raw tool. If you choose to skip this transformation step, the tool output will be directly mapped to the widget. ▪ **Yes** ▪ **No** ○ **Display refined widget message**: Refines the widget message when configured. ▪ **Yes** ▪ **No** **Note:** The display output as a toggle is exclusively available for the Premium Chat experience when the Off Glide Conversation Server plugin (com.glide.cs.offglide) is installed. If the plugin is not installed, you will continue to access the standard display output options.
Advanced settings	
Select an output transformation format	Style for the LLM to present the results as it passes information between tools and to other agents. Out transformation formats: ○ None ○ Concise ○ Paragraph ○ Summary ○ Custom

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Fields	Description
Write processing messages for users	Message to display to users during tool execution. ○ In-progress message: Write an in-progress message to be displayed to end-users while the tool is running. ○ Completion message: Write a completion message to be displayed to end-users once the tool finishes running.

5. Select **Add**.
   A flow action is added in the Flow actions list on the Add tools and information page.

Add a Knowledge Graph to an AI agent

Add a Knowledge Graph to an AI agent in AI Agent Studio that uses the structured and unstructured data from different ServiceNow records to enhance the performance of AI agents.

Before you begin

Role required: sn_aia.admin

Procedure

1. Navigate to **All** > *AI Agent Studio* > **Create and manage** > **AI agents**.
2. Select **New** or open the AI agent that you want to add a Knowledge Graph to and navigate to the Add tools and information section.
3. In the Add tool drop-down list, select **Knowledge graph**.
   You may have to scroll down.
4. On the form, fill in the fields.

Add a Knowledge Graph form

Fields	Description
Name	Name that you want to specify for your selected Knowledge Graph.
Description	Description of the Knowledge Graph and what it's going to do to assist your AI agent. **Note:** This description is sent to the large language model (LLM).
Select Knowledge Graph	Existing Knowledge Graph to be added to the AI agent. If there is a tool used by an AI agent for the same Knowledge Graph, the rest of the form will populate the fields based on the other tool. You can make any changes specific to the current AI agent to suit your needs, and it will not affect the tool of the existing AI agent.

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Fields	Description
	You can utilize Enterprise Graph and Enterprise Graph (Small) as Knowledge Graph resources while creating the Knowledge Graph tool.
Query instruction	The search query. Translate your request into a search query, including a verb. The query instruction is passed on to the LLM to generate a structured query for the Graph from the inputs selected in the tool form.
Conversation history	When enabled, the last 5 conversation turns are passed to the Knowledge Graph tool, allowing users to ask follow-up questions on the previously returned results. Turn off the toggle if each query should be treated as a standalone lookup. **Note:** The knowledge graph tools added previously to your AI agents will have the Conversation history turned off by default.
Execution mode	Mode of execution for your selected Knowledge Graph: ○ **Supervised**: Inputs from your human agent are required during the execution of this Knowledge Graph while the AI agent runs. ○ **Autonomous**: Doesn't require any input from your live agent during the execution of this Knowledge Graph while the AI agent runs.
Display output	Permission to display the output of the execution in the ServiceNow Otto panel or in Virtual Agent: ○ **Yes** ○ **No** If you want the AI agent to work in Off Glide architecture with Premium Chat experience, you must turn-on the **Display output** toggle. When the toggle is turned-on, you can add widgets that can be used in assistants built with Premium Chat experiences. The widget configuration includes: ○ **Widget**: Defines the display output to render the content in a better user experience. You can select the widget from the drop-down. ○ **Require widget transformation**: An additional LLM call is required to transform

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Fields	Description
	the raw tool. If you choose to skip this transformation step, the tool output will be directly mapped to the widget. ▪ **Yes** ▪ **No** ○ **Display refined widget message**: Refines the widget message when configured. ▪ **Yes** ▪ **No** **Note:** The display output as a toggle is exclusively available for the Premium Chat experience when the Off Glide Conversation Server plugin (com.glide.cs.offglide) is installed. If the plugin is not installed, you will continue to access the standard display output options.
Advanced settings	
Select an output transformation format	Style for the LLM to present the results as it passes information between tools and to other agents. Out transformation formats: ○ None ○ Concise ○ Paragraph ○ Summary ○ Custom
Write processing messages for users	Message to display to users during tool execution. ○ In-progress message: Write an in-progress message to be displayed to end-users while the tool is running. ○ Completion message: Write a completion message to be displayed to end-users once the tool finishes running.

5. Select **Add**.
   The Knowledge Graph tool is added to the AI agent.

Add a generative AI skill to an AI agent

Add a generative AI skill to an AI agent in AI Agent Studio. You can customize the skills to meet the needs of your users in different workflows.

Before you begin

If you want to add a custom skill to an AI agent, the skill must be published and activated on the . For more information on deploying custom skills, see Finalize and publish a custom skill and Activate a custom skill.

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When an AI agent uses a skill as a tool, the user the AI agent is running as must pass the ACL of the skill. Ensure that the security configurations for the skill are met by the AI agent and agentic workflow. For more information on setting skill-level ACLs, see Configure access control lists for a skill.

Role required: sn_aia.admin

Procedure

1. Navigate to **All** > *AI Agent Studio* > **Create and manage** > **AI agents**.
2. Open the AI agent that you want to add a skill to and navigate to the Add tools and information section.
3. In the Add tool drop-down list, select **Generative AI skill**.
4. On the form, fill in the fields.

Add a generative AI skill form

Fields	Description
Name	Name that you want to specify for your skill.
Description	Description of the skill and what it's going to do to assist your AI agent. **Note:** This description is sent to the large language model (LLM).
Select skill	Existing skill to be selected from the list. If there is a tool used by an AI agent for the same skill, the rest of the form will populate the fields based on the other tool. You can make any changes specific to the current AI agent to suit your needs, and it will not affect the tool of the existing AI agent.
Inputs	Skill inputs. The values are filled in by the LLM at runtime unless you specify a value override. **Note:** If the agent uses multiple tools, you can choose to use another tool's output as an input value override. Select the data picker icon ( ) to review the available options.
Execution mode	Mode of execution for your skill: ○ **Supervised**: Inputs from your human agent are required during the execution of this tool while the AI agent runs. ○ **Autonomous**: Doesn't require any input from your live agent during the execution of this tool while the AI agent runs.

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Fields	Description
Display output	Permission to display the output of the tool execution in the ServiceNow Otto panel or in Virtual Agent: ○ **Yes** ○ **No** If you want the AI agent to work in Off Glide architecture with Premium Chat experience, you must turn-on the **Display output** toggle. When the toggle is turned-on, you can add widgets that can be used in assistants built with Premium Chat experiences. The widget configuration includes: ○ **Widget**: Defines the display output to render the content in a better user experience. You can select the widget from the drop-down. ○ **Require widget transformation**: An additional LLM call is required to transform the raw tool. If you choose to skip this transformation step, the tool output will be directly mapped to the widget. ▪ **Yes** ▪ **No** ○ **Display refined widget message**: Refines the widget message when configured. ▪ **Yes** ▪ **No** **Note:** The display output as a toggle is exclusively available for the Premium Chat experience when the Off Glide Conversation Server plugin (com.glide.cs.offglide) is installed. If the plugin is not installed, you will continue to access the standard display output options.
Advanced settings	
Select an output transformation format	Style for the LLM to present the results as it passes information between tools and to other agents. Out transformation formats: ○ None ○ Concise ○ Paragraph ○ Summary ○ Custom

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Fields	Description
Write processing messages for users	Message to display to users during tool execution. ○ In-progress message: Write an in-progress message to be displayed to end-users while the tool is running. ○ Completion message: Write a completion message to be displayed to end-users once the tool finishes running.

5. Select **Add**.
   A generative AI skill tool is added in the Skills section on the Add tools and information page.

Add a record operation to an AI agent

Add a record operation to an AI agent in AI Agent Studio to create, update, look up, or delete records.

Before you begin

Role required: sn_aia.admin

Procedure

1. Navigate to **All** > *AI Agent Studio* > **Create and manage** > **AI agents**.
2. Open the AI agent that you want to add a record operation to and navigate to the Add tools and information section.
3. In the Add tool drop-down list, select **Record operation**.
4. On the form, fill in the fields.

Add a record operation form

Fields	Description
Select a type of record operation to add	If you select **An existing one**, you can select a record operation tool used by the current AI agent or any other AI agent. You can make changes to the settings of that tool to fit the needs of your specific AI agent.
Name	Name that you want to specify for your record operation.
Description	Description of the record operation and what it's going to do to assist your AI agent. **Note:** This description is sent to the large language model (LLM).
Inputs	○ **Input name**: Name of the input for the LLM to use. ○ **Description**: Description of the input to give the LLM context.

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Fields	Description
	○ **Value override**: Value for the input. If you leave it blank, generative AI fills in the value for you. **Note:** If the agent uses multiple tools, you can choose to use another tool's output as an input value override. Select the data picker icon ( ) to review the available options.
Table	Table that you want to perform the record operation on.
Select operation	Inputs should be referred to as {{inputname}}. Camelcase is not supported. ○ **Create record**: Requires values for fields in the new record. ○ **Delete records**: Requires the conditions to determine which records to delete. ○ **Look up records**: Requires the conditions to determine which records to look up, number of results specified, which fields to return, the result order, and the result sort type. ○ **Update records**: Requires the values for fields in the updated record and conditions to determine which records to update.
Execution mode	Mode of execution for your selected record operation: ○ **Supervised**: Inputs from your human agent are required during the execution of this tool while the AI agent runs. ○ **Autonomous**: Doesn't require any input from your live agent during the execution of this tool while the AI agent runs.
Display output	Permission to display the output of the execution in the ServiceNow Otto panel or in Virtual Agent: ○ **Yes** ○ **No** If you want the AI agent to work in Off Glide architecture with Premium Chat experience, you must turn-on the **Display output** toggle. When the toggle is turned-on, you can add widgets that can be used in assistants built with Premium Chat experiences. The widget configuration includes:

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Fields	Description
	○ **Widget**: Defines the display output to render the content in a better user experience. You can select the widget from the drop-down. ○ **Require widget transformation**: An additional LLM call is required to transform the raw tool. If you choose to skip this transformation step, the tool output will be directly mapped to the widget. ▪ **Yes** ▪ **No** ○ **Display refined widget message**: Refines the widget message when configured. ▪ **Yes** ▪ **No** **Note:** The display output as a toggle is exclusively available for the Premium Chat experience when the Off Glide Conversation Server plugin (com.glide.cs.offglide) is installed. If the plugin is not installed, you will continue to access the standard display output options.
Advanced settings	
Select an output transformation format	Style for the LLM to present the results as it passes information between tools and to other agents. Out transformation formats: ○ None ○ Concise ○ Paragraph ○ Summary ○ Custom
Write processing messages for users	Message to display to users during tool execution. ○ In-progress message: Write an in-progress message to be displayed to end-users while the tool is running. ○ Completion message: Write a completion message to be displayed to end-users once the tool finishes running.

5. Select **Add**.
   A record operation is added in the Record operations list on the Add tools and information page.

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Add a script to an AI agent

Create a script to add it to an AI agent in AI Agent Studio. With scripts, you can use the scriptable APIs and back-end integration to support the AI agent.

Before you begin

Role required: sn_aia.admin

Procedure

1. Navigate to **All** > *AI Agent Studio* > **Create and manage** > **AI agents**.
2. Open the AI agent that you want to add a script to and navigate to the Add tools and information section.
3. In the **Add tool** drop-down list, select **Script**.
4. On the form, fill in the fields.

Add a script form

Fields	Description
Select a type of record operation to add	If you select **An existing one**, you can select a record operation tool used by the current AI agent or any other AI agent. You can make changes to the settings of that tool to fit the needs of your specific AI agent.
Name	Name that you want to specify for your script.
Description	Description of the script and what it's going to do to assist your AI agent. **Note:** This description is sent to the large language model (LLM).
Script inputs	Input name and description to use in the script. The LLM uses the name and description to determine what value should be used at runtime. Example: Input name is *task_record_sys_id* and description is *sys_id of the Task Record, this is mandatory*.
Script	JavaScript code that includes an object class or a function for your script. **Note:** For improved security, use GlideRecordSecure instead of GlideRecord and addUserEncodedQuery() instead of addEncodedQuery().
Execution mode	Mode of execution for your script:

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Fields	Description
	○ **Supervised**: Inputs from your human agent are required during the execution of this tool while the AI agent runs. ○ **Autonomous**: Doesn't require any input from your live agent during the execution of this tool while the AI agent runs.
Display output	Permission to display the output of the tool execution in the ServiceNow Otto panel or in Virtual Agent: ○ **Yes** ○ **No** If you want the AI agent to work in Off Glide architecture with Premium Chat experience, you must turn-on the **Display output** toggle. When the toggle is turned-on, you can add widgets that can be used in assistants built with Premium Chat experiences. The widget configuration includes: ○ **Widget**: Defines the display output to render the content in a better user experience. You can select the widget from the drop-down. ○ **Require widget transformation**: An additional LLM call is required to transform the raw tool. If you choose to skip this transformation step, the tool output will be directly mapped to the widget. ▪ **Yes** ▪ **No** ○ **Display refined widget message**: Refines the widget message when configured. ▪ **Yes** ▪ **No** **Note:** The display output as a toggle is exclusively available for the Premium Chat experience when the Off Glide Conversation Server plugin (com.glide.cs.offglide) is installed. If the plugin is not installed, you will continue to access the standard display output options.
Advanced settings	
Select an output transformation format	Style for the LLM to present the results as it passes information between tools and to other agents. Out transformation formats: ○ None ○ Concise

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Fields	Description
	○ Paragraph ○ Summary ○ Custom
Write processing messages for users	Message to display to users during tool execution. ○ In-progress message: Write an in-progress message to be displayed to end-users while the tool is running. ○ Completion message: Write a completion message to be displayed to end-users once the tool finishes running.

5. Select **Add**.
   A script tool is added in the Scripts section on the Add tools and information page.

Add a search retrieval to an AI agent

Add a search retrieval to an AI agent in AI Agent Studio. Leveraging the Retrieval-Augmented Generation (RAG) enables an AI agent to retrieve and incorporate relevant information from an external source.

Before you begin

Role required: sn_aia.admin

Procedure

1. Navigate to **All** > *AI Agent Studio* > **Create and manage** > **AI agents**.
2. Open the AI agent that you want to add a search retrieval to and navigate to the Add tools and information section.
3. In the Add tool drop-down list, select **Search retrieval**.
4. On the form, fill in the fields.

Add search retrieval form

Fields	Description
Select a type of record operation to add	If you select **An existing one**, you can select a record operation tool used by the current AI agent or any other AI agent. You can make changes to the settings of that tool to fit the needs of your specific AI agent.
Name	Name that you want to specify for your search retrieval tool.
Description	Description of the search retrieval tool and what it's going to do to assist your AI agent. **Note:** This description is sent to the large language model (LLM).

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Fields	Description
Search profile	Name of the search profile that you want to add to your RAG-based tool from the list. To learn more about a search profile, see Search profiles in AI Search.
Search sources	One or multiple sources that you want to add to your search profile. To learn more about the search sources, see Search profiles in AI Search.
Fields returned	One or multiple fields that you want your search profile to return from the search sources.
Results limit	Number of records to be retrieved from the defined search source. The default value is 10.
Search criteria	Type of search that needs to be used: ○ **Semantic**: This search is carried out with the logical meaning of the search query. ○ **Keyword**: This search is carried out with the defined keywords. ○ **Hybrid**: This search is a combination of both keyword and semantic searches.
Semantic indexes	Fields on the source table that are indexed for a semantic search. **Note:** Semantic indexed fields are required if the search criteria are semantic or hybrid.
Document matching threshold	Cosine similarity score between 0 and 1 (exclusive). Default value is 0. The higher the number, the more variation in search results.
Execution mode	Mode of execution for your search retrieval tool: ○ **Supervised**: Inputs from your human agent are required during the execution of this tool while the AI agent runs. ○ **Autonomous**: Doesn't require any input from your live agent during the execution of this tool while the AI agent runs.
Display output	Permission to display the output of the tool execution in the ServiceNow Otto panel or in Virtual Agent: ○ **Yes** ○ **No**

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Fields	Description
	If you want the AI agent to work in Off Glide architecture with Premium Chat experience, you must turn-on the **Display output** toggle. When the toggle is turned-on, you can add widgets that can be used in assistants built with Premium Chat experiences. The widget configuration includes: ○ **Widget**: Defines the display output to render the content in a better user experience. You can select the widget from the drop-down. ○ **Require widget transformation**: An additional LLM call is required to transform the raw tool. If you choose to skip this transformation step, the tool output will be directly mapped to the widget. ▪ **Yes** ▪ **No** ○ **Display refined widget message**: Refines the widget message when configured. ▪ **Yes** ▪ **No** **Note:** The display output as a toggle is exclusively available for the Premium Chat experience when the Off Glide Conversation Server plugin (com.glide.cs.offglide) is installed. If the plugin is not installed, you will continue to access the standard display output options.
Advanced settings	
Select an output transformation format	Style for the LLM to present the results as it passes information between tools and to other agents. Out transformation formats: ○ None ○ Concise ○ Paragraph ○ Summary ○ Custom
Write processing messages for users	Message to display to users during tool execution.

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Fields	Description
	○ In-progress message: Write an in-progress message to be displayed to end-users while the tool is running. ○ Completion message: Write a completion message to be displayed to end-users once the tool finishes running.

5. Select **Add**.
   A search retrieval tool is added in the Search retrievals section on the Add tools and information page.

Add a subflow to an AI agent

Add a subflow tool to an AI agent in AI Agent Studio. Subflows are reusable sequences of processing steps that can be called from within a flow.

Before you begin

When an AI agent uses a subflow tool, the user the AI agent is running as must pass the ACL of the subflow. Ensure that the security configurations for the subflow are met by the AI agent and agentic workflow. For more information, see Security for AI agents.

Role required: sn_aia.admin

Procedure

1. Navigate to **All** > *AI Agent Studio* > **Create and manage** > **AI agents**.
2. Open the AI agent that you want to add a subflow to and navigate to the Add tools and information section.
3. In the Add tool drop-down list, select **Subflow**.
4. On the form, fill in the fields.

Add a subflow form

Fields	Description
Name	Name that you want to specify for your selected subflow.
Description	Description of the subflow and what it's going to do to assist your AI agent. **Note:** This description is sent to the large language model (LLM).
Select subflow	Existing process automation capability you want to add. If there is a tool used by an AI agent for the same subflow, the rest of the form will populate the fields based on the other tool. You can make any changes specific to the current AI agent to suit your needs, and it will not affect the tool of the existing AI agent.

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Fields	Description
Inputs	Subflow inputs. The values are filled in by the LLM at runtime unless you specify a value override. **Note:** If the agent uses multiple tools, you can choose to use another tool's output as an input value override. Select the data picker icon ( ) to review the available options.
Execution mode	Mode of execution for your selected subflow: ○ **Supervised**: Inputs from your human agent are required during the execution of this tool while the AI agent runs. ○ **Autonomous**: Doesn't require any input from your live agent during the execution of this tool while the AI agent runs.
Display output	Permission to display the output of the execution in the ServiceNow Otto panel or in Virtual Agent: ○ **Yes** ○ **No** If you want the AI agent to work in Off Glide architecture with Premium Chat experience, you must turn-on the **Display output** toggle. When the toggle is turned-on, you can add widgets that can be used in assistants built with Premium Chat experiences. The widget configuration includes: ○ **Widget**: Defines the display output to render the content in a better user experience. You can select the widget from the drop-down. ○ **Require widget transformation**: An additional LLM call is required to transform the raw tool. If you choose to skip this transformation step, the tool output will be directly mapped to the widget. ▪ **Yes** ▪ **No** ○ **Display refined widget message**: Refines the widget message when configured. ▪ **Yes** ▪ **No**

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Fields	Description
	Note: The display output as a toggle is exclusively available for the Premium Chat experience when the Off Glide Conversation Server plugin (com.glide.cs.offglide) is installed. If the plugin is not installed, you will continue to access the standard display output options.
Advanced settings	
Select an output transformation format	Style for the LLM to present the results as it passes information between tools and to other agents. Out transformation formats: ○ None ○ Concise ○ Paragraph ○ Summary ○ Custom
Write processing messages for users	Message to display to users during tool execution. ○ In-progress message: Write an in-progress message to be displayed to end-users while the tool is running. ○ Completion message: Write a completion message to be displayed to end-users once the tool finishes running.

5. Select **Add**.
   A subflow tool is added in the Subflows section on the Add tools and information page.

Add a web search to an AI agent

Add a web search to an AI agent in AI Agent Studio using a third-party search API such as Microsoft Bing or Google.

Before you begin

Note: If you select Google as your web search tool provider, the web search tool leverages Grounding with Google Search, offered under a Global Standard deployment. Because grounding is not data resident, Google's global infrastructure routes traffic to a global data center for each web search request. This processing may be different than your data processing location chosen for your ServiceNow instance. Please consider your organization's data policies before adding a web search tool with Google as the provider.

Role required: sn_aia.admin

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Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **AI agents**.
2. Open the AI agent that you want to add a web search to and navigate to the Add tools and information section.
3. In the Add tool drop-down list, select **Web search**.
4. On the form, fill in the fields.

Add a web search

Fields	Description
Name	Name that you want to specify for your web search.
Resource	Resource for the web search.
Provider	Third-party search API provider. **Note:** You can configure the default provider for the Web Search API capability on the OneExtend Definition Config table [sys_one_extend_definition_config].
Inputs	Information for the search API to include in the web search. You can select value overrides or leave them blank for generative AI to fill in the details for you. ○ **Country**: Country where results come from. ○ **Max tokens**: Maximum number of tokens to include in the response. ○ **Number of results**: Total number of results acquired. ○ **Search query**: Value to search for ○ **Sites or domains**: Websites where you want to search. **Note:** If the agent uses multiple tools, you can choose to use another tool's output as an input value override. Select the data picker icon ( ) to review the available options.
Execution mode	Mode of execution for your selected web search:

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Fields	Description
	○ **Supervised**: Inputs from your human agent are required during the execution of this tool while the AI agent runs. ○ **Autonomous**: Doesn't require any input from your live agent during the execution of this tool while the AI agent runs.
Display output	Permission to display the output of the execution in the ServiceNow Otto panel or in Virtual Agent: ○ **Yes** ○ **No** If you want the AI agent to work in Off Glide architecture with Premium Chat experience, you must turn-on the **Display output** toggle. When the toggle is turned-on, you can add widgets that can be used in assistants built with Premium Chat experiences. The widget configuration includes: ○ **Widget**: Defines the display output to render the content in a better user experience. You can select the widget from the drop-down. ○ **Require widget transformation**: An additional LLM call is required to transform the raw tool. If you choose to skip this transformation step, the tool output will be directly mapped to the widget. ▪ **Yes** ▪ **No** ○ **Display refined widget message**: Refines the widget message when configured. ▪ **Yes** ▪ **No** **Note:** The display output as a toggle is exclusively available for the Premium Chat experience when the Off Glide Conversation Server plugin (com.glide.cs.offglide) is installed. If the plugin is not installed, you will continue to access the standard display output options.
Advanced settings	
Select an output transformation format	Style for the LLM to present the results as it passes information between tools and to other agents. Out transformation formats:

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Fields	Description
	○ None ○ Concise ○ Paragraph ○ Summary ○ Custom
Write processing messages for users	Message to display to users during tool execution. ○ In-progress message: Write an in-progress message to be displayed to end-users while the tool is running. ○ Completion message: Write a completion message to be displayed to end-users once the tool finishes running.

5. Select **Add**.
   A web search is added in the Web search list on the Add tools and information page.

Define security controls for an AI agent

In the guided setup for an AI agent, define security controls for who can access the AI agent and what data the AI agent has access to.

Before you begin

Role required: sn_aia.admin

About this task

The **Define security controls** step is divided into two parts: **Define user access** and **Define data access**. The former creates an ACL that determines who can discover or invoke the AI agent. The latter defines the data that the AI agent has access to once it's invoked.

See Security for AI agents for more information about creating ACLs and user identities for security for AI agent.

Procedure

1. Select which users can access the AI agent.

   The drop-down menu options are:

   ○ Users with specified roles
   ○ Authenticated users
   ○ Public

   If you select *`Users with specified roles`*, you can select exactly which roles can access the AI agent.

   AI agents installed with applications each require specific roles. To learn which roles they need, consult the documentation for the AI agent or the agentic workflow that uses the AI agent.

2. Select **Save and continue** to move to the next step.

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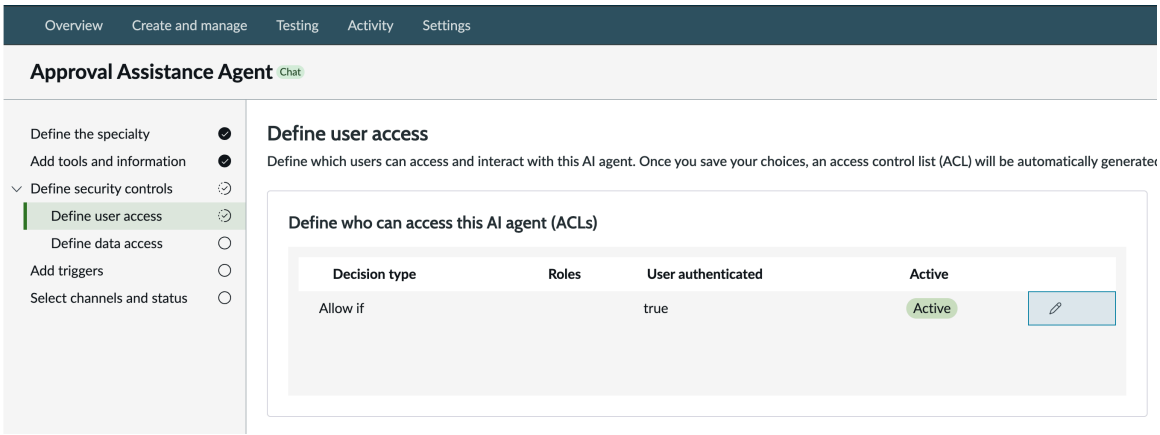
Saving and moving onto the next step triggers the creation of an ACL for your AI agent. If you want to make changes later, you can return to the guided setup and change the options here. If you have the correct elevated role, you can also make edits directly on the ACL table.



3. Define the user identity of the AI agent to determine what data it has access to.

   The two options are *`Dynamic user`* and *`AI user`*. The dynamic user is the user invoking the AI agent or the dynamic user of the agentic workflow calling on the AI agent. An AI user is a dedicated user that has its own specified roles that allow access, which could be more than the dynamic user.

   If you do not have an AI user but want to use the *`AI user`* identity, you need to create a record on the User table. See Create a user. Select *`AI user`* as the identity type.

   If you select *`Dynamic user`*, you can select the *`Approved roles`* that the AI agent runs with. By default, an AI agent runs as a dynamic user and has the roles of the invoking user. Select the approved roles to limit the data access that an AI agent could have. Role masking must be applied for all AI agents and agentic workflows to run as dynamic users.

   To override the role masking requirement for a specific agentic workflow or AI agent, admins with the correct elevated access can create an approved list of roles for a given agentic workflow or AI agent. Then, they can access that role masking record in the Agent Access Role Configurations table [sys_agent_access_role_configuration], and select the “allow all roles” check box. Taking these steps deactivates the requirement for a role masking approved roles list in AI Agent Studio, so the AI admin can return to AI Agent Studio and continue to configure the agentic workflow or AI agent without role masking applied.

   Note: Role masking should be applied as security best practice and adherence to the principle of least privilege. Overriding the role masking requirement isn’t recommended.

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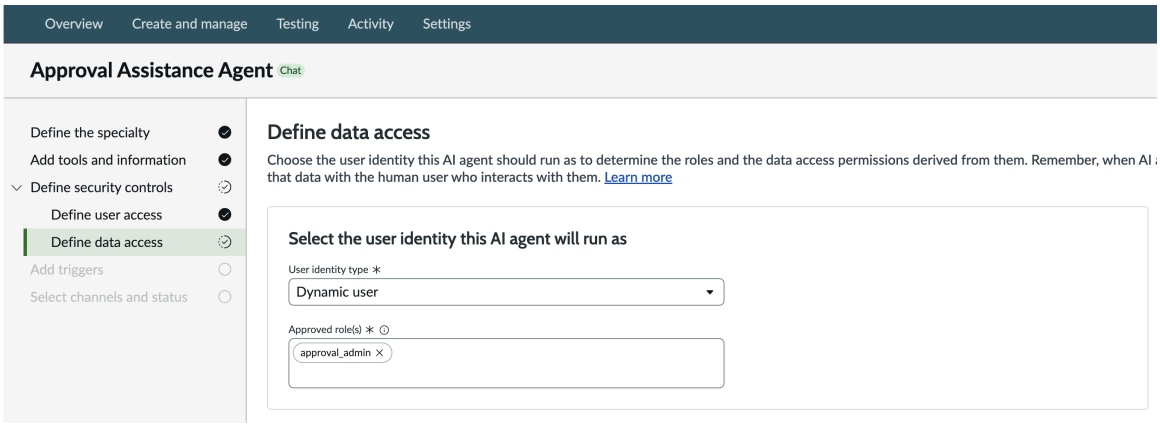
If you select *AI user*, the list of roles that the AI user has is displayed.



Result

You have created an ACL that determines who can discover and access your AI agent, and you have assigned a user identity (and role masking, if relevant) to the AI agent to determine what data it can access.

What to do next

Select **Save and continue** to move to the next step, Adding a trigger. Adding a trigger is optional. You can also skip to the final step, Select channels and access.

Add a trigger to an AI agent

In the guided setup for an AI agent, add triggers to run the AI agent automatically when certain conditions are met.

Before you begin

Role required: sn_aia.admin

About this task

Adding a trigger is optional. If you want your AI agent to be used only in chats, you don't need to add a trigger. Only add a trigger if you want to invoke the AI agent automatically when some event occurs.

Note: Triggers contain instance-specific information. If you're moving AI agents or agentic workflows between instances using Update Sets, you must set the triggers to inactive before adding them to the update sets and then activate them on the new instance.

If you don't want to add a trigger, skip to the final step, Select channels and access.

Procedure

1. Select **Add trigger**.
2. On the form, fill in the fields.

Create a new trigger

Fields	Description
Select trigger	List of triggers that are available in the instance.
Name	Name of the trigger.

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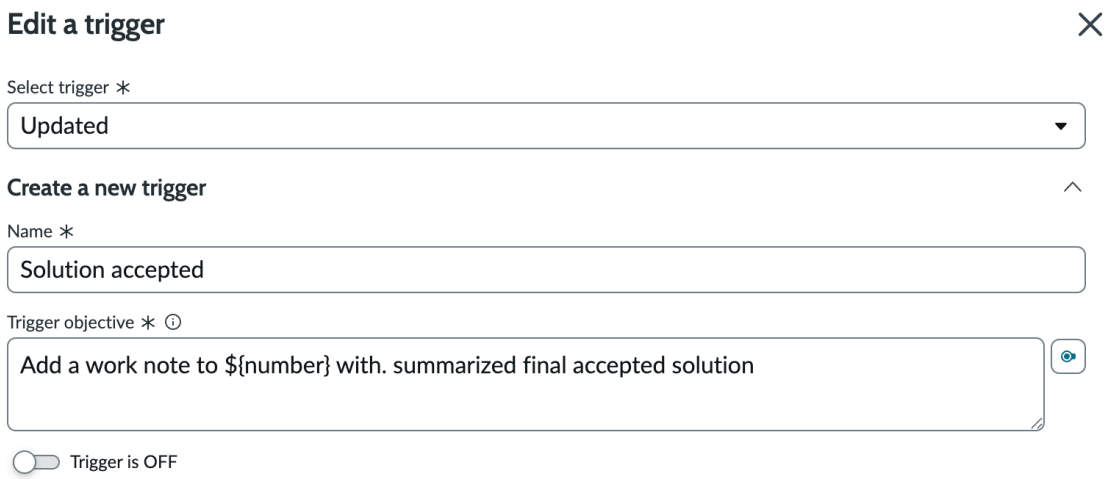
Fields	Description
Trigger objective	Additional user statements or sample utterances that help guide when to trigger this AI agent.



Define when this trigger occurs

Fields	Description
Table	Name of the applicable table for your AI agent.
Conditions	Conditions that you can add to control the trigger configuration. You must have at least one condition. Select **+ Add condition set** to add conditions to your AI agent trigger.
Active trigger toggle	Only enable the trigger once you're confident in the execution of your AI agent. Try testing the AI agent execution and user access. To review overall trends over many executions, try an automated evaluation.

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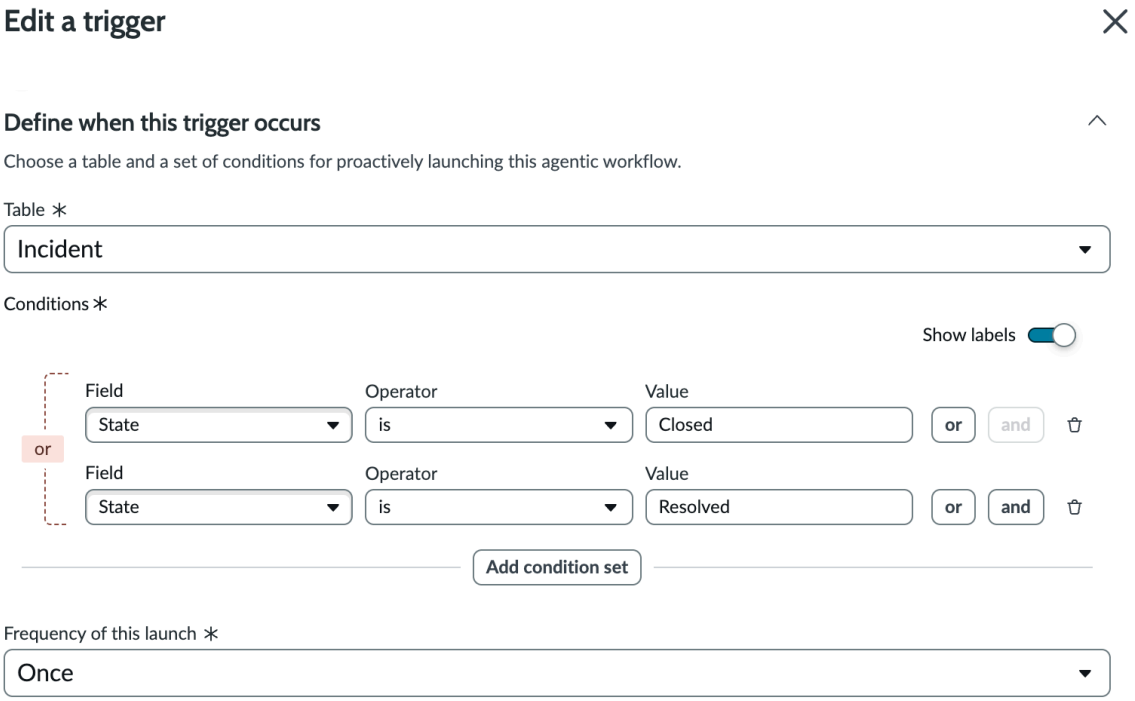

Select where to show this launch

Fields	Description
Channel	Medium for the AI agent output: ServiceNow Otto panel or Virtual Agent. **Note:** To view the output from a triggered AI agent in the ServiceNow Otto panel, you need the now_assist_panel_user role.
Show an alert to users	Alerts appear in the selected channel.

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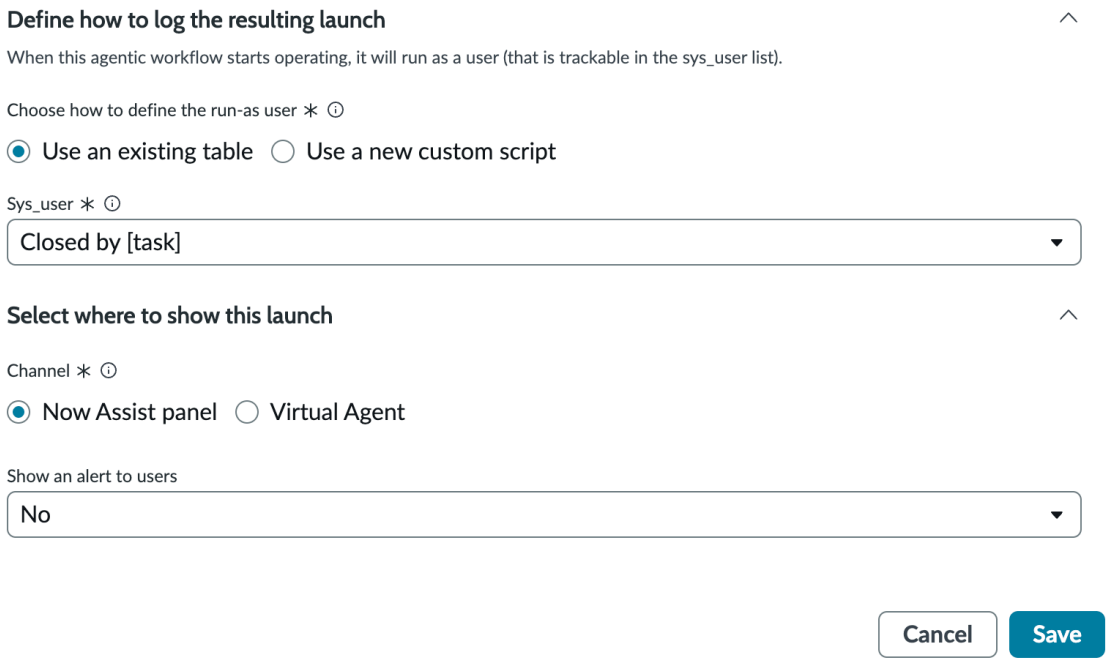

If you choose a scheduled trigger, additional options are available, such as the day of the week and time when you want the trigger to run.

Note: When running a scheduled trigger, not every record is included in the execution. By default, the value is 10. If you want to change this number, you must set the *sn_aia.max_scheduled_trigger_query* system property to a different value.

If you choose an email trigger, the target emails must exist on the Reply [sys_email] table. New emails aren't available as triggers.

3. Select **Add**.
4. Repeat the preceding steps for additional triggers.

Result
You have added triggers to your AI agent to run it automatically under the specified conditions.

What to do next
Select **Save and continue** to move to the final step, Select channels and access.

Select channels and status for an AI agent

In the guided setup for an AI agent, activate the AI agent to use in an assistant in ServiceNow Otto for Virtual Agent, and set the processing messages.

Before you begin
Role required: sn_aia.admin

About this task
The final step of the AI agent guided setup includes options for where you can invoke the agentic workflow as well as set the processing message. You must select which assistants for ServiceNow Otto in Virtual Agent you want to be able to invoke the AI agent. Your processing messages appear when the AI agent is running and when the AI agent's task is completed.

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Procedure

1. Select whether you want users to use ServiceNow Otto in Virtual Agent to invoke the AI agent.

   If enabled, you must select which chat assistants have access to the AI agent. You can edit assistants using Assistant Designer.

2. **Optional:** Set the processing and completion messages for your AI agent.

   (Optional) You can set a processing message, completion message, or both. If you don't want to use a specific type of message, unselect the toggle next to the message field.

   You can also use ServiceNow Otto to generate the messages for you by selecting **Generate messages**. You can change the messages after they're generated.

3. Activate the AI agent.

   Select the **This AI agent is active** toggle to activate the AI agent only when you want users to be able to use it. If you want to test your AI agent first, wait until after you have tested it before activating it. You can return to the guided setup later.

   If you don't see this option, you may need to scroll.

   Note: If you have installed the Off Glide Conversation Server plugin (com.glide.cs.offglide) on your ServiceNow AI Agent Studio instance, then agent learning and voice agents won't work if the assistant is in Premium Chat mode.

4. Select **Save and test**.

Result

You have completed the guided setup for creating an AI agent. Your new AI agent can be edited at any time using AI Agent Studio.

What to do next

Move to the **Testing** page to test an AI agent execution using example utterances or to test user access.

Duplicate an AI agent

Duplicate an existing AI agent in AI Agent Studio so that you can save time by not having to manually configure or create AI agents.

Before you begin

Role required: sn_aia.admin

About this task

Duplicate the AI agents to do the following tasks:

- Duplicate the record.
- Disallow any AI agents with existing names.

Custom columns, such as the Tools and Knowledge sources, Status, and a column with the Duplicate icon ( ) are available for the AI agents list.

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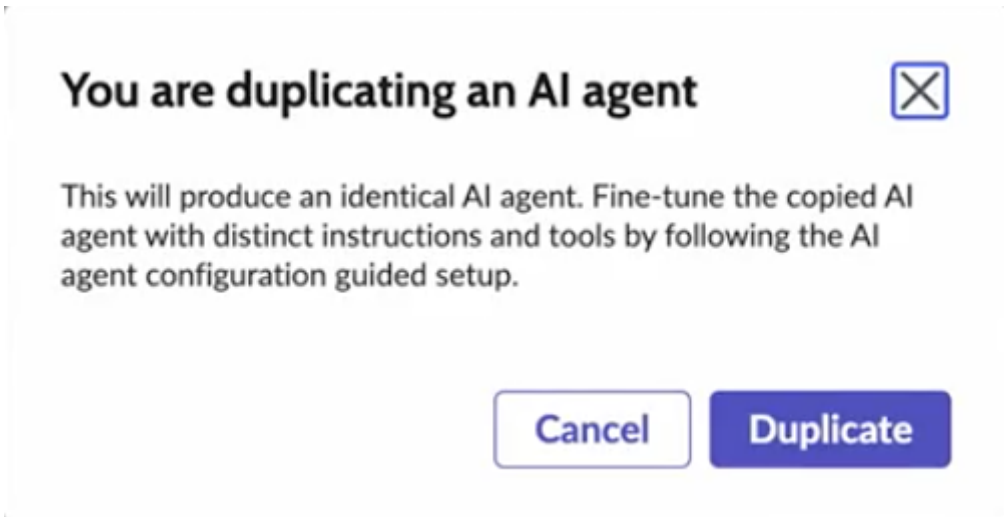
Note: The duplicated AI Agents use the same tools as the original agent and modifying the agent tools in the duplicated AI agent affects the agent tools in the original AI agent. To use the tools in a duplicated AI agent, you can either use the duplicated agent tools without making changes to them or add a new tool."

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **AI agents** and open the AI agents list in AI Agent Studio.
2. Duplicate the AI agent from either the Manage agentic workflows and AI agents page or the AI agent form.

Current location	Navigation option
Manage agentic workflows and AI agents page	On the AI agents list, select the duplicate icon ( ) for the AI agent that you would like to duplicate.
AI agent form	Open the AI agent that you want to duplicate, select the menu icon ( ) next to **Exit** on the Describe and instruct form, and select **Duplicate**.

You see a confirmation message in a pop-up window.



3. Create a copy of the AI agent with the same information from the original AI agent's record by selecting **Duplicate**.

   Note: The name of the duplicated AI agent is appended with the suffix `(Copy)` so that you can clearly identify the duplicated AI agent from the original AI agent. For example, `Knowledge Article Agent (Copy)`. You can rename the duplicated AI agent and also edit the other information that is duplicated from the original AI agent.

4. After editing the details in the Describe and instruct section, select **Save and continue**.
5. In the Add tools and information section, edit the details that are from the original AI agent or add new tools for your requirements and select **Save and continue**.
6. In the Toggle display section, turn on the Status for the duplicated AI agent and select **Save and continue**.

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Result
You're redirected to the AI Agent Studio home page. In the Manage and configure AI Agents to solve agentic workflow section on the **AI Agents** tab, you see the duplicated AI agent.

Modify an AI agent

Modify an AI agent in AI Agent Studio to suit your changing business needs.

Before you begin
Role required: sn_aia.admin

Procedure
1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **AI agents**
2. Select the AI agent that you want to modify.
3. Modify the fields of the different sections of the Guided Setup, making changes to the fields for your requirements.

   The guided setup is the same as the one for creating an AI agent:

   - Define the AI agent's specialty.
   - Define the AI agent security controls.
   - (Optional) Add a trigger to automatically invoke your AI agent if a specified event occurs..
   - Determine whether you want to use the ServiceNow Otto in Virtual Agent chat assistants and/or as UI action, set the processing messages, and activate your AI agent..

   Note: Some fields aren't editable if the agent is associated with an application. If you want to make more modifications, duplicate the agentic workflow and make changes to the duplicate.

   - For the *`List of steps`* field in the **Define specialty** step, you can create multiple versions of the same AI agent without losing previous versions. Creating versions enables you to test different instructions to evaluate performance. See Version control for AI agents and agentic workflows for more information.
   - For more guidance on creating effective instructions, see the general guidelines for creating AI agents and agentic workflows.
   - For the access control lists (ACLs), you can edit the security fields and define who can access the AI agent and edit the entity to run the AI agent as a dynamic user or an AI user. For more information, see Implement access control in AI agents.

   You can navigate through the steps of the Guided Setup with the **Continue** and **Back** buttons.
4. Navigate to the last step and select **Test** to save your changes and begin testing your modified agent.

Result
Your agent is modified and ready to test.

What to do next
You can test an execution of your AI agent manually or test the user access. Once you've determined that the AI agent has the basic functionality you expect, you can evaluate the AI agent using automated tests.

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Manually test the execution of an AI agent

Analyze the execution of an AI agent so you can see that it functions the way that you defined it.

Before you begin

Role required: sn_aia_admin and either admin or at least one role required by the ACL of the AI agent being testing and each of the ACLs of its downstream components

About this task

After you create an AI agent, test it to see that it functions the way that you defined it. You can choose to run a manual test with a single instruction to test its basic functioning, or you can evaluate the AI agent's performance across multiple executions.

If you want to test multiple executions using execution logs, you can run an automated test. If you select **Start automated evaluation**, the agentic evaluation guided setup opens in a new browser tab. See Evaluate an AI agent for more details about running a new automated evaluation.

When manually testing performance, you can see how the AI agent interacts with the AI Agent Orchestrator and the Communicator AI agent. The Orchestration is an agent that directs different AI agents, and the Communicator AI agent facilitates the communication between the user and other AI agents.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. Select **Start manual test**.

   If you want to start an automated test, see Evaluate an AI agent for more details on that process.
3. In the *Choose a test type* drop-down menu, select *AI agent or workflow*.

   If you want to test user access security controls, see Test AI agent user access.
4. Under *Choose a testing mode*, select the testing mode either as **Premium Chat** or **Standard**.

   Note: The Premium Chat testing mode is exclusively accessible when the Off Glide Conversation Server plugin (com.glide.cs.offglide) is installed. If the plugin is not installed, you will continue to access the standard testing playground.
5. Select an agentic workflow or AI agent that you want to test by searching the name of a workflow or choosing from the drop-down menu.
6. In the Version drop-down list, select the version of the AI agent you want to test.

   See Version control for AI agents and agentic workflows for more information about creating and changing versions.
7. In the **Task** field, provide a concise summary of the task to be achieved.

   Note: In the task summary, include a reference number or specific record for better results during your testing.
8. Select **Continue to Test Chat Response**.

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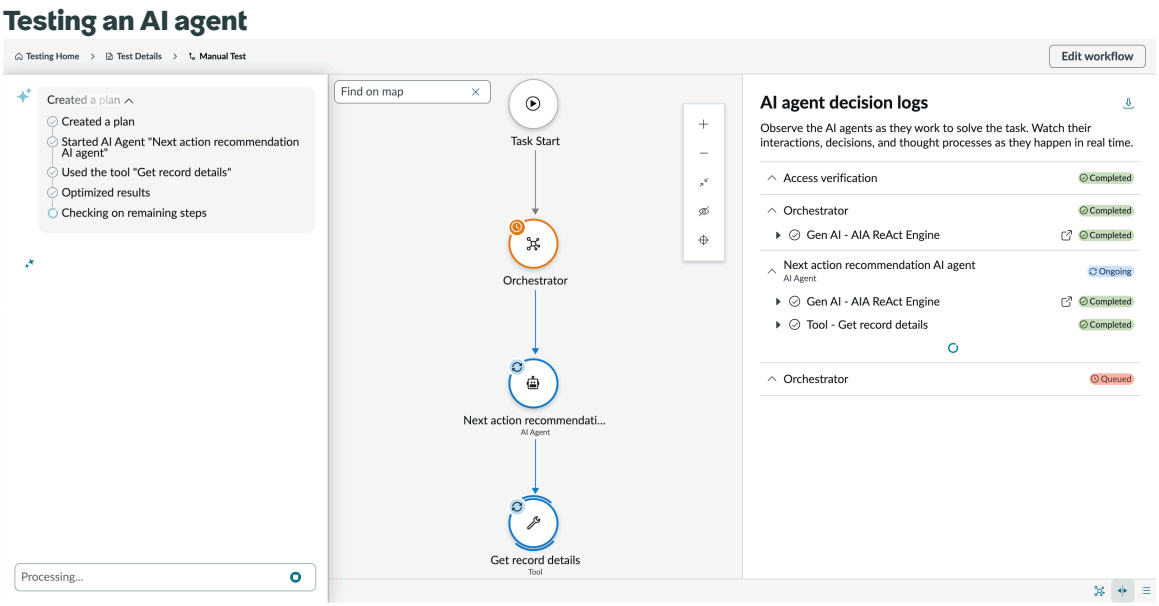
Result

When testing an AI agent, you can see the AI agent Orchestrator and Communicator working together to organize and manage the AI agents like a team. The AI agent Orchestrator assigns the individual, specialized agents to complete the subtasks. The AI agent Communicator lets the AI agent Orchestrator know the status of each agent.

Note: If you don't have the roles necessary to pass the ACLs of the AI agent and all of its tools, you'll be notified that you don't have the necessary access and the test won't execute.

Your AI agent starts to execute the test autonomously to resolve the task.



- A simulated chat experience begins on the ServiceNow Otto panel between your invoking user and AI agent.
- At the top of the canvas, you can see information about the AI agent you're testing, including its name, version, and description.
- A diagram shows the tasks and communication of the AI agents that are working together to solve the case.
- A decision log records the thought process of each AI agent that is involved in solving the agentic workflow.

Note: You can view the entire decision log by selecting **Download logs**.

You can restart the entire testing process at any time by selecting **Restart**.

Test user access to an AI agent

Run a manual test to verify that only the users you want to access the AI agent can do so.

Before you begin

Role required: sn_aia.admin and either admin or at least one role required by the ACL of the AI agent being testing and each of the ACLs of its downstream components

About this task

You can establish the security settings for an AI agent in the guided setup to establish which users can access it. See Define security controls for instructions on how to change the user

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access settings. When you select **Save and continue** on that step of the guided setup, an ACL is created that establishes limitations on which users can access the AI agent.

Once you have created these ACLs, you can verify that they work as intended by using the *Test access* test type of a manual test of an AI agent.

To see instructions for performing manual tests to evaluate performance, see Test performance manually. For more information about automated tests, see Evaluate an AI agent.

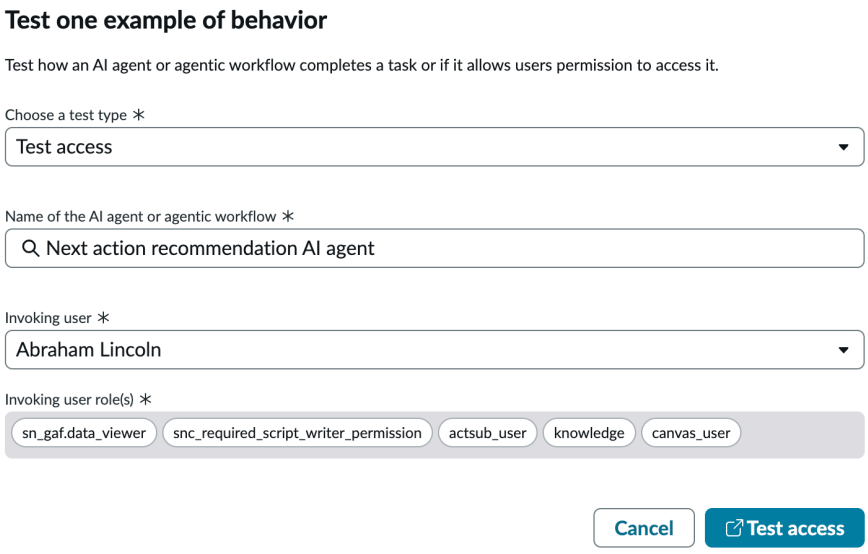
Procedure

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. Select **Start manual test**.
3. In the *Choose a test type* drop-down menu, select *Test access*.

   If you want to test the basics of how an AI agent works, select *AI agent or workflow*. The full instructions for that test type can be found in Test performance manually.
4. Search for or select the name of the AI agent you want to test.
5. Select an invoking user.

   The invoking user can be the user that triggers the AI agent or it can be the invoking user of an upstream component, such as an agentic workflow. For more information about how the invoking user works, see Security for AI agents.

   When you select an invoking user, the user roles are populated in the *Invoking user roles* field. The field is read-only. If you want to change a user's roles, you must change the user's User record. See Assign a role to a user.
6. Select **Test access**.



Result

The results of the access test are opened in the Access Analyzer in a new browser tab.

Access Analyzer identifies all the ACL calls made in the execution of the AI agent, including its tools, if any are present. You can see the results of each ACL to verify that each one has the correct user access defined.

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What to do next
If the results are different than what you expect or want, you can redefine the security controls of the AI agent.

You can also test an AI agent's performance with either a manual test or automated evaluations. See Test performance manually or Evaluate an AI agent.

Delete an AI agent

Delete an AI agent from AI Agent Studio if you no longer need it.

Before you begin
Role required: sn_aia_admin

About this task
You must assign appropriate permissions by using the access control lists (ACLs) to delete AI agents on AI Agent Studio.

Note: You can't delete the AI agents that come installed with applications.

Procedure
1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **AI agents**.
2. Select the check box of the AI agent that you want to delete and select **Delete**.

   You can also delete multiple AI agents by selecting multiple AI agent records at a time.

   Note: Some AI agents installed with ServiceNow applications can't be deleted.

3. In the confirmation pop-up window, select **Delete**.

Result
The selected AI agents are deleted from the AI agents list in AI Agent Studio.

Create an external AI agent

Create external AI agents in AI Agent Studio to connect the ServiceNow AI Platform with third-party agentic AI providers as primary agents.

Integrating external AI agents

Integrate and configure external agents with the ServiceNow agentic AI system using Agent2Agent (A2A) protocol integration to use in agentic workflows created in the AI Agent Studio.

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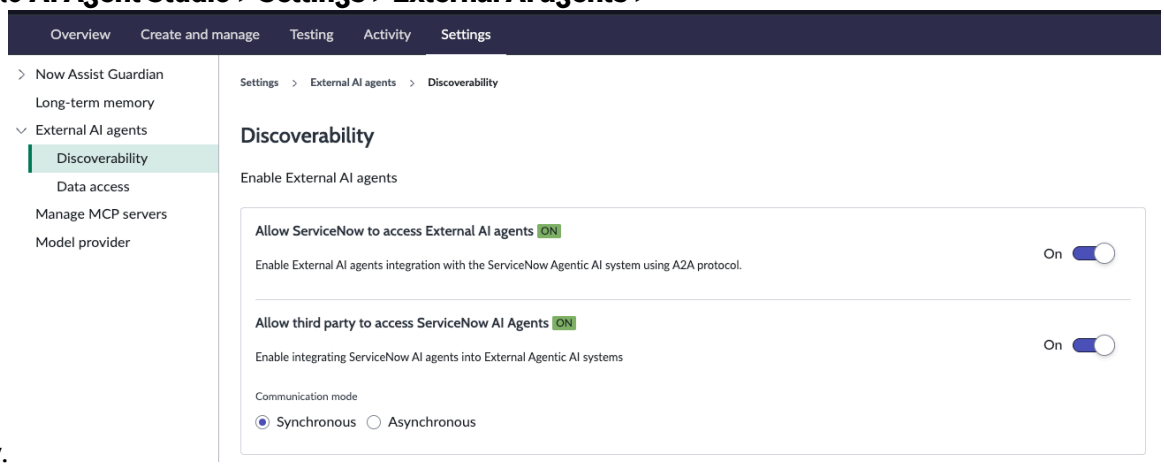
External agent discovery on the ServiceNow AI Platform

You can enable external AI agents on the AI Agent Studio via the Settings page. Navigate to **AI Agent Studio** > **Settings** > **External AI agents** > **Discoverability**.



- **Allow ServiceNow to access External AI agents**: Turn on the toggle to enable external AI agents integration with the ServiceNow agentic AI system using the A2A protocol.
- **Allow third party to access ServiceNow AI agents**: Turn on the toggle to enables integrating ServiceNow AI agents into external agentic AI systems.

When creating a new external AI agent in AI Agent Studio, you can connect your agent to the ServiceNow agentic AI system using the Agent2Agent (A2A) protocol integration. To do this, you must have a Connection & Credential alias record that connects to your agentic AI provider.

After connecting to the external AI agent, you can add details about its role and instructions to provide context for the AI Agent Orchestrator. Additional context helps differentiate your AI agent from other AI agents so that the AI Agent Orchestrator can decide about which agent to use.

Contextual data access for external agents on the ServiceNow AI Platform

Enable contextual data access for external agents to improve AI agent response during execution.

- **Short-term memory**: Turn on the toggle to enable external AI agents remember your preferences or facts from the current interaction only.
- **Long-term memory**: Turn on the toggle to enable external AI agents remember your preferences or facts from previous interaction.
- **Knowledge graph for external AI agent interactions**: Turn on the toggle to enable external AI agents to use structured and unstructured data from different records across the ServiceNow AI Platform.

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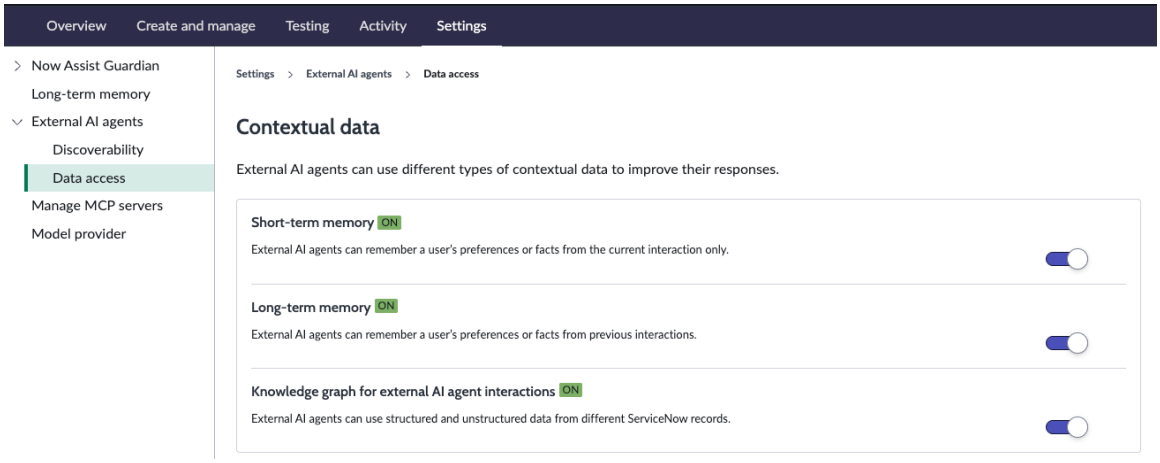

Agent2Agent protocol overview

Agent2Agent (A2A) is an open standard that enables AI agents across different platforms to communicate with each other. The standard relies on every AI agent having an Agent Card associated with it that provides basic information for providers like the ServiceNow AI Platform, Azure, and Google to use them.

Version 0.3 of A2A is supported.

An AI agent's Agent Card uses standardized JSON to help different providers understand its capabilities. The Agent Card is accessed by a specific type of endpoint from a provider's server. Execution plans are communicated through an execution endpoint so that both the provider's server and the ServiceNow AI Platform can track what the external AI agent is doing.

See Create an external AI agent with the Agent2Agent protocol for instructions for using this protocol to create an AI agent.

Configuring A2A authentication

A2A connections require authorization from the source platform to execute on the ServiceNow AI Platform. Authentication is established by creating two Connection & Credential Alias and Connection records, one with an Agent Card endpoint and another with an execution endpoint.

Custom Headers for External Agent Configuration

When configuring external agents, you can pass custom HTTP headers to be included in the API calls to external endpoints. In the External Agent Configuration [sn_aia_external_agent_configuration] table, use the custom headers column to specify headers in JSON format. These headers are applied to all HTTP requests made by that agent during offline execution, regardless of the connection type (OAuth, API Key, or other). The configured headers are sent alongside the agent's authentication credentials and are useful for passing additional metadata or requirements that your external API expects.

Note: Custom headers apply only to the Premium Chat experience.

Configuration Properties

The following properties configure different aspects of how your agents can interact with the ServiceNow AI Platform.

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External AI agent properties

Name	Description
sn_aia.external_agents.enabled	Set to `true` to enable external agent features
sn_aia.external_agents.parallel_conversations.enabled	Enables or disables multiple simultaneous conversations per user

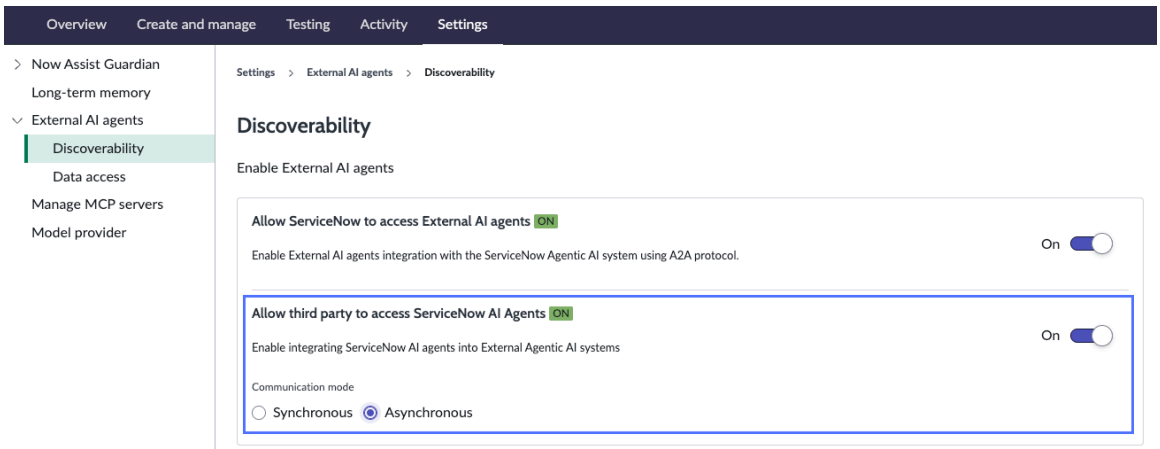
ServiceNow AI agents as secondary agents

Integrate ServiceNow AI agents into other agentic AI systems, such as Google Cloud or Azure OpenAI.

Enabling discovery of ServiceNow mobile agents

In AI Agent Studio, on the **Settings** page, under **External AI Agents** > **Discoverability**, you can enable the discovery of ServiceNow AI agents to use on other AI platforms. To do so, toggle **Allow third party to access ServiceNow AI Agents**.

You can also choose between **Synchronous** and **Asynchronous** communication between your external AI agent and the agentic AI provider.



ServiceNow AI agents as secondary agents overview

You can connect your ServiceNow agent to other agentic AI model providers using the Agent2Agent protocol.

After creating your AI agent in AI Agent Studio, you can point to the Agent Card URL that is displayed for secondary agents for easy access so the admins can view, copy, and consume the URL.

The endpoint to point to for the actual execution of the AI agent is in the format `{{instance}}.service-now.com/api/sn_aia/a2a/v2/agent/id/{{agent-id}}`.

You can use the same OAuth or API key for authenticating the agent discovery and the agent execution.

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To verify that your AI agent is running from the ServiceNow side, during a conversation with the AI agent, you can go to the *Execution Plan [sn_aia_execution_plan]* table. From the Execution Plan table, you can identify the execution plan based on the *Objective* field that contains the prompt from the conversation on the other platform.

For more information about sample payloads for Google A2A with ServiceNow AI agent as Secondary agent, see Sample payloads for Google A2A.

For more information about setting up instructions for your ServiceNow AI agents as secondary agents (acting as A2A server), refer to Authentication for Google A2A - ServiceNow as Secondary Agent.

Asynchronous connection

Asynchronous connection involves communication where the sender and receiver don't have to be active simultaneously unlike the synchronous communication mode.

To establish asynchronous connection, you must obtain a callback URL for push notifications to function.

Once you have obtained a callback URL, you must create a record on the External Agent Callback Registries [sn_aia_external_agent_callback_registry] table. Go to the table, select **New**, and enter the callback URL. Save the record.

Once you save the record, a Connection & Credential Alias [sys_alias] record is created for you. To add authentication, you can open the Connection record associated with the sys_alias record and add a credential to the *Credential* field.

When the record is created, you can go back to the External Agent Callback Registry record you created and select **Verify URL** to test the connection works as expected.

Create an external AI agent with the Agent2Agent protocol

Create external AI agents in AI Agent Studio to connect the ServiceNow AI Platform with third-party agentic AI providers.

Before you begin

If you don’t see the option to create an external agent, confirm that your administrator has selected **Allow ServiceNow to access External AI Agents**. This option is available on the **Settings** page in AI Agent Studio, under **External AI Agents** > **Discoverability**.

Your instance must be at least on Zurich patch 4.

Role required: sn_aia.admin

About this task

You can integrate third-party AI providers into the ServiceNow AI Platform by creating an external AI agent in AI Agent Studio.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **AI agents**.
2. Select **New** > **External**.
3. In the **Discover and activate** step, select the AI agent provider for your external agent and discover your agent.
   Select **Save and continue** to navigate to the next step.

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a. Select an existing provider or add a provider.

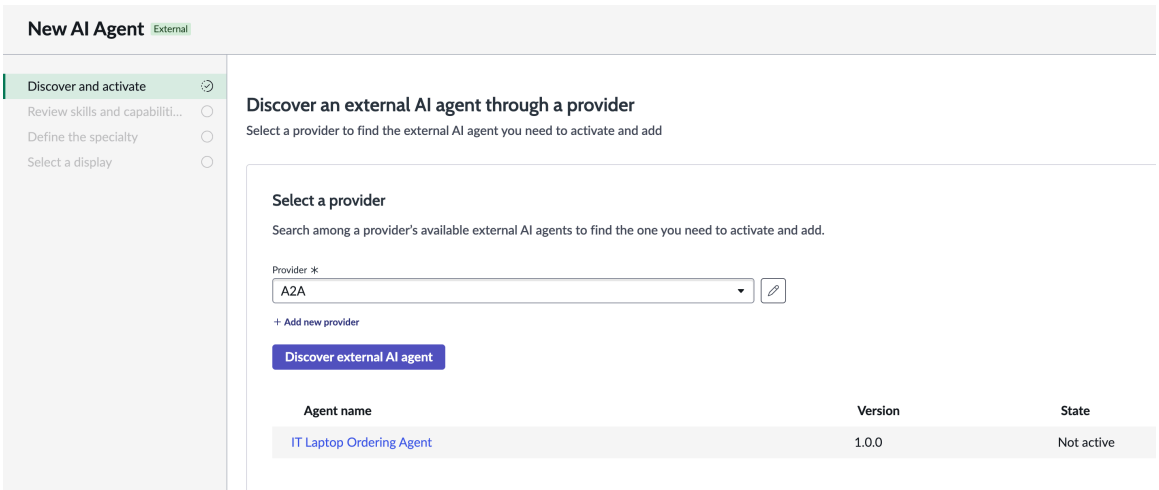
If you select **Add new provider**, you must fill out the fields and then select **Save**.

Add provider form fields

Name	Description
Name	Name of the agentic AI provider.
Agent card URL	The URL that points to the external AI agent's Agent Card. The URL should include `well_known/agent_json`.
Under **Advanced settings**, Connection & Credential alias	Credentials to access your external AI agent's Agent Card. You can select an existing alias or create one.
Under **Advanced settings**, Select subflow	Subflow that establishes Agent2Agent protocol. The default subflow should handle the majority of cases, but you can also create your own.

b. Select **Discover external AI agent** to validate the connection to your external agent.

If discovery is successful, the name of your agent and the version number are added to the page previous the Discover external AI agent button.



c. Select the name of the agent to verify that the *`Name`*, *`Version`*, *`Description`*, and *`Skills`* fields are populated correctly, then select **Selected**.

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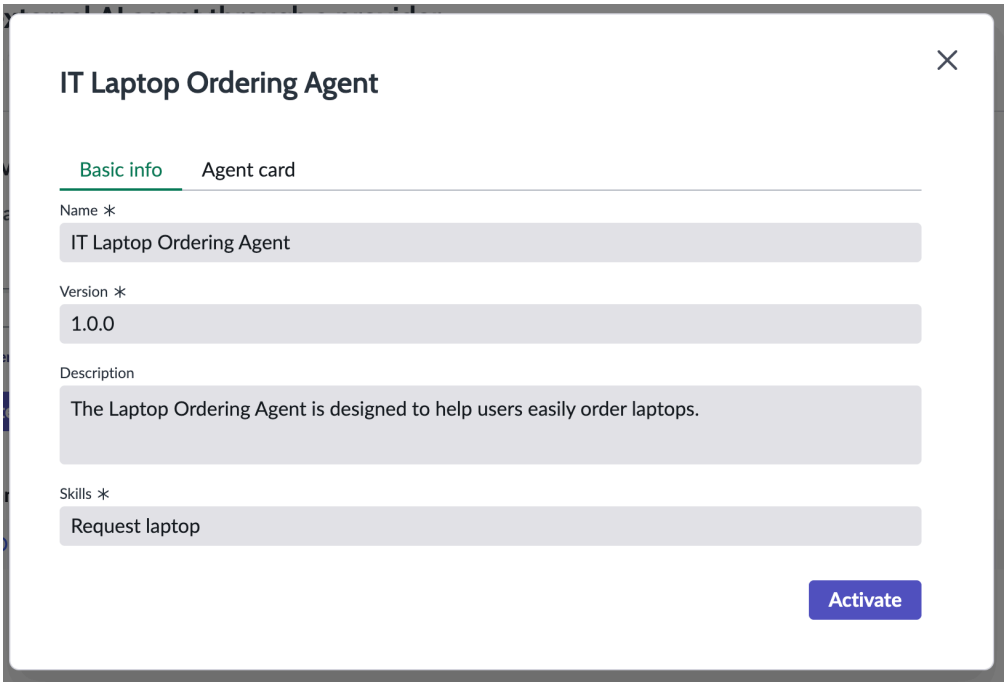
The **Agent card** tab shows the entire JSON for the agent.



4. In the **Review skills and capabilities** step, verify that the skill names are correct.
5. In the **Define the specialty** step, add details for how the external agent fits in the ServiceNow agentic system.

   a. Review your AI agent description.

      You can leave your AI agent description as it is, or you can add a longer description to help differentiate the agent from other AI agents. This helps enable the AI Agent Orchestrator to use your external AI agent more effectively. For suggestions for writing AI agent descriptions, see General guidelines for creating AI agents and agentic workflows.

   b. Set your communication mode to either **Synchronous** or **Asynchronous**.

      Some agents don't support asynchronous communication.

      Under **Advanced settings**, you can use the default subflow, an existing subflow, or create a subflow. The default subflow should work for the majority of cases.

   c. Select your AI agent's execution Connection & Credential alias for authentication.

      Choose which credentials access your external AI agent's execution endpoint. You can select an existing alias or create one. If you create one, a modal displays with options for configuring an OAuth or API Key authentication.

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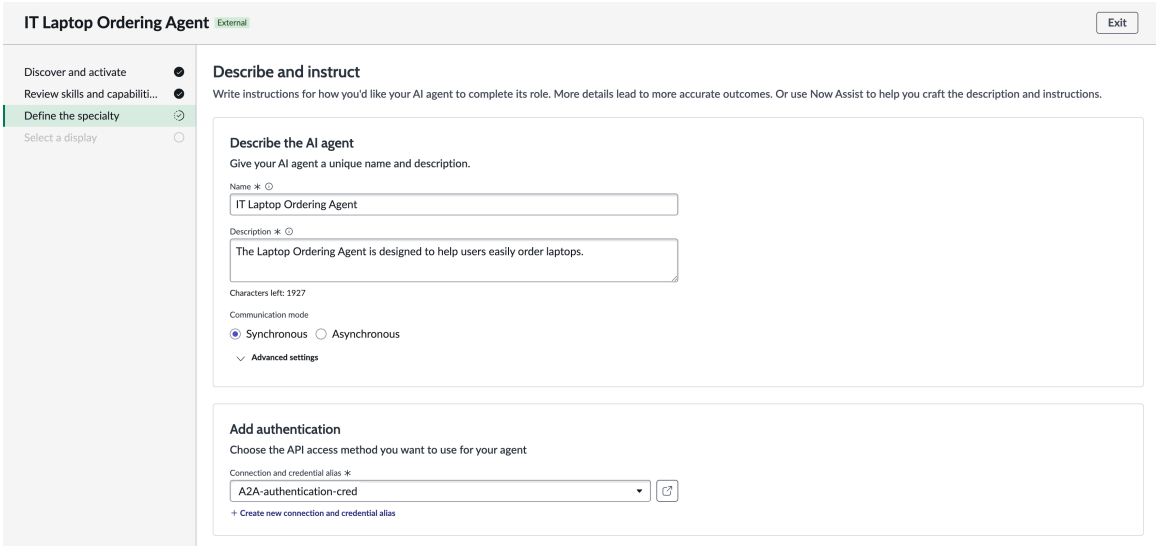

Note: For more information about the API Key credential, see .

d. Configure access control lists (ACLs) for the AI agent.

Note: The ACLs determine who has access to discover and execute the AI agent. To learn more about the ACLs you can create in AI Agent Studio and how to add more advanced security configurations, see Implement access control in AI agents.

This is a required step. If you have previously configured an AI agent without creating an ACL, you must generate an ACL before you can make other modifications.

Define who can access the AI agent

Field	Description
User access	The type of users whose access for the AI agent is defined by the following options: ▪ **Any authenticated user**: Any user who is logged in can access the AI agent. ▪ **Users with specific roles**: Users that have at least one of the roles assigned to them can access the AI agent. This option is the default. **Note:** If a user doesn't have access to an AI agent or if the user doesn't have access to at least one of the AI agents in the respective agentic workflow execution, then the whole execution aborts before the first AI agent is initiated. ▪ **Public**: Any user can access the AI agent even without logging in. Use this option only when you want guests to be able to access the AI agent.

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Field	Description
Role	Assign one or more specific roles from the drop-down menu. **Note:** Selecting the role is possible only when you chose the **Users with specific roles** user access.

6. In the **Select a display** step, choose where you want the AI agent to appear and what message users see when the AI agent is running.

   a. Select your AI agent's availability.
   Set the *`Status`* to active if you want the AI agent to be available to users with the correct role.

   b. Select a display channel.

   You can choose to use a Virtual Agent and specify which assistant you want to access the AI agent. If you want to test the AI agent first, you don't need to select a display channel yet.

   c. Choose processing messages to display to the user when the AI agent is executing.

   For example, *`Initiating AI agent`* or *`Processing record details`*, or *`An AI agent is looking into the request`*.

   d. Activate the AI agent.

   Select the toggle to activate the AI agent if you want the AI agent to be discoverable. If you want to test your AI agent first, wait until after you have tested it before activating it.

   If you don't see this option, you may need to scroll.

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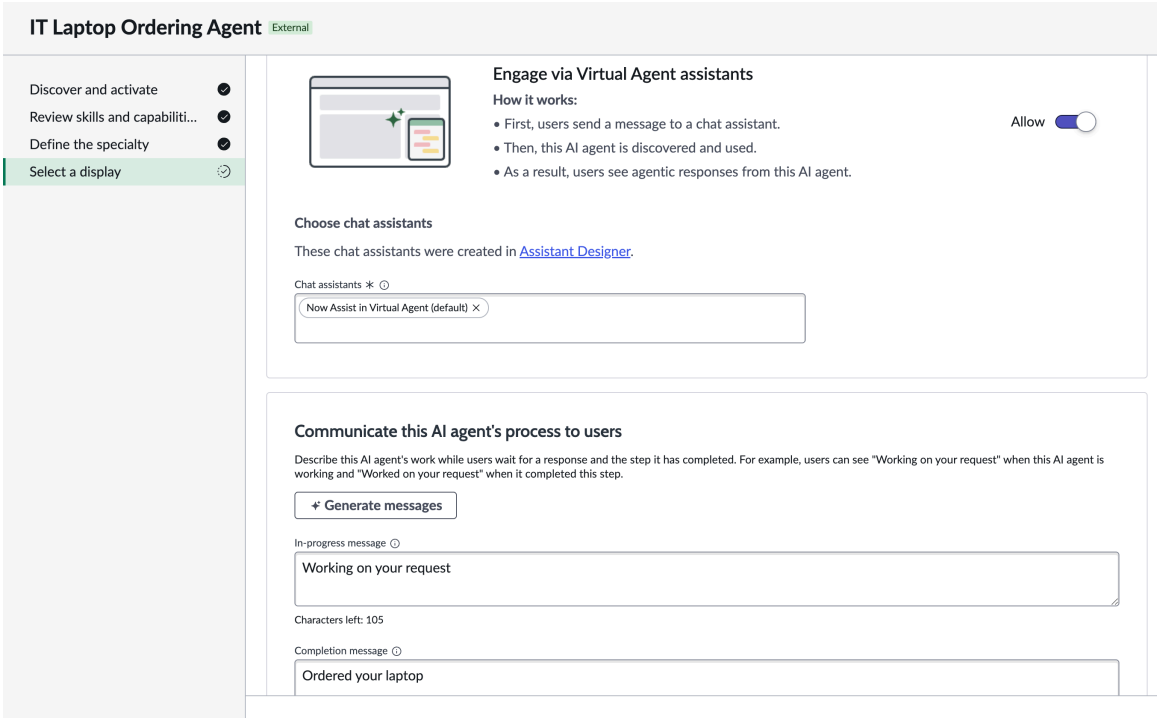

7. Select **Save and test** to save the AI agent details and go to the Testing page of AI Agent Studio.

Result
Your external AI agent is connected to ServiceNow.

What to do next
You can test an execution of your AI agent or its data access. You can also add it to a new or existing agentic workflow. See Create an agentic workflow for the steps to create or configure an agentic workflow.

Create an agentic workflow

Create an agentic workflow in AI Agent Studio so that AI agents can coordinate to solve complex problems.

Before you begin
Role required: sn_aia.admin

About this task
Agentic workflows solve business problems by automating processes with agentic AI. In AI Agent Studio, you must define an agentic workflow and connect it with an AI agent to execute complex goals. These goals can involve variable data or other factors that traditional automation can struggle with.

Procedure
1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **Agentic workflows** and select **New**.
2. Define your key requirements.
3. Define the agentic workflow security controls.
4. **Optional:** Add a trigger to automatically invoke your agentic workflow if a specified event occurs..

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(Optional) If you want your agentic workflow to be used only in chats, you don't need to add a trigger.

5. Determine the channels to invoke your agentic workflow..

Result
An agentic workflow is created and can be seen in the agentic workflow list in the Create and manage page.

What to do next
- Move to the **Testing** playground to test your new agentic workflow using example utterances.
- Review the Platform agentic workflows.

Define key requirements for an agentic workflow

In the guided setup for an agentic workflow, write a clear description of what the agentic workflow is, add AI agents, and select unsupported AI model providers.

Before you begin
Role required: sn_aia.admin

About this task
The first step of the guided setup includes defining the fundamentals of the agentic workflow. The description and list of steps fields are used by the large language model (LLM) to achieve its objectives. Descriptions and list of steps should be clear and well-defined. For guidelines for writing these fields, see Writing effectively for agentic AI. For an example agentic workflow, see an example agentic workflow.

You also assign the AI agents that the agentic workflow has access to in this step. The AI agents should be clearly defined and referred to in your list of steps so that the LLM knows how to use them. You can use existing AI agents installed with AI applications or create your own. See Create an AI agent for the steps to create your own custom AI agents.

Procedure
1. Enter a name for the workflow.
2. Craft a workflow description.
3. Craft a list of steps.

   You can also use an old version of a list of steps. Select **View versions** for a full list of previous versions of the field. See Version control for more information.

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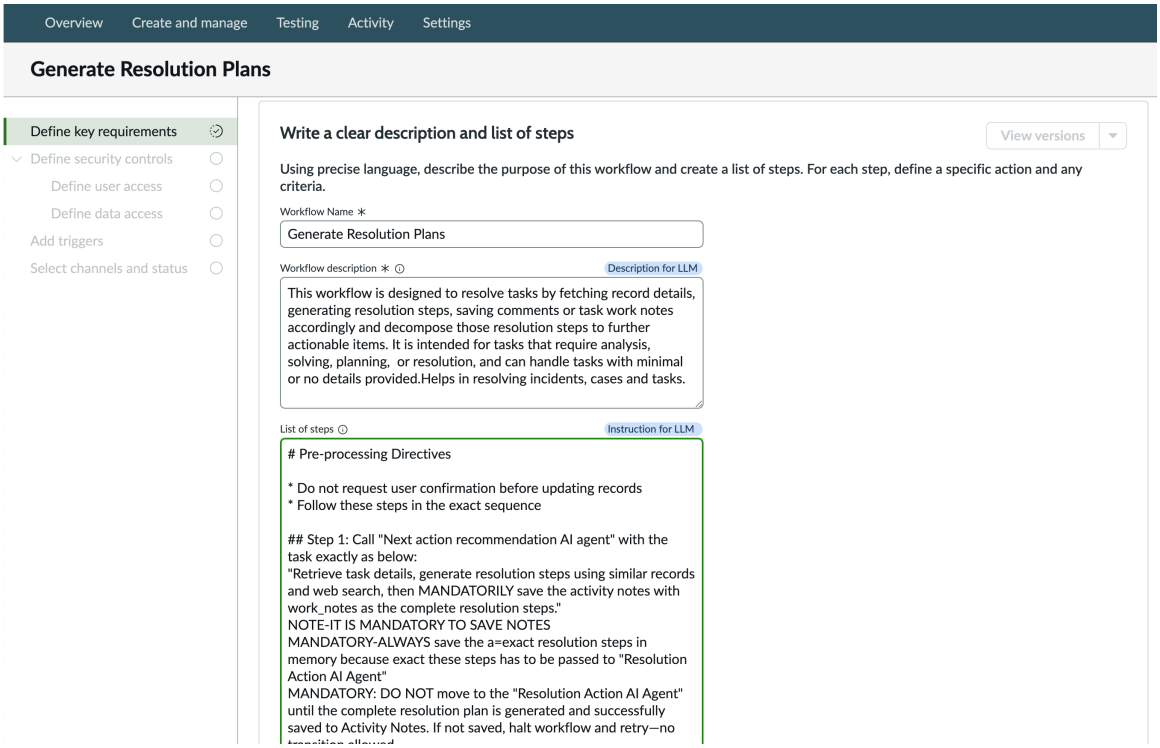
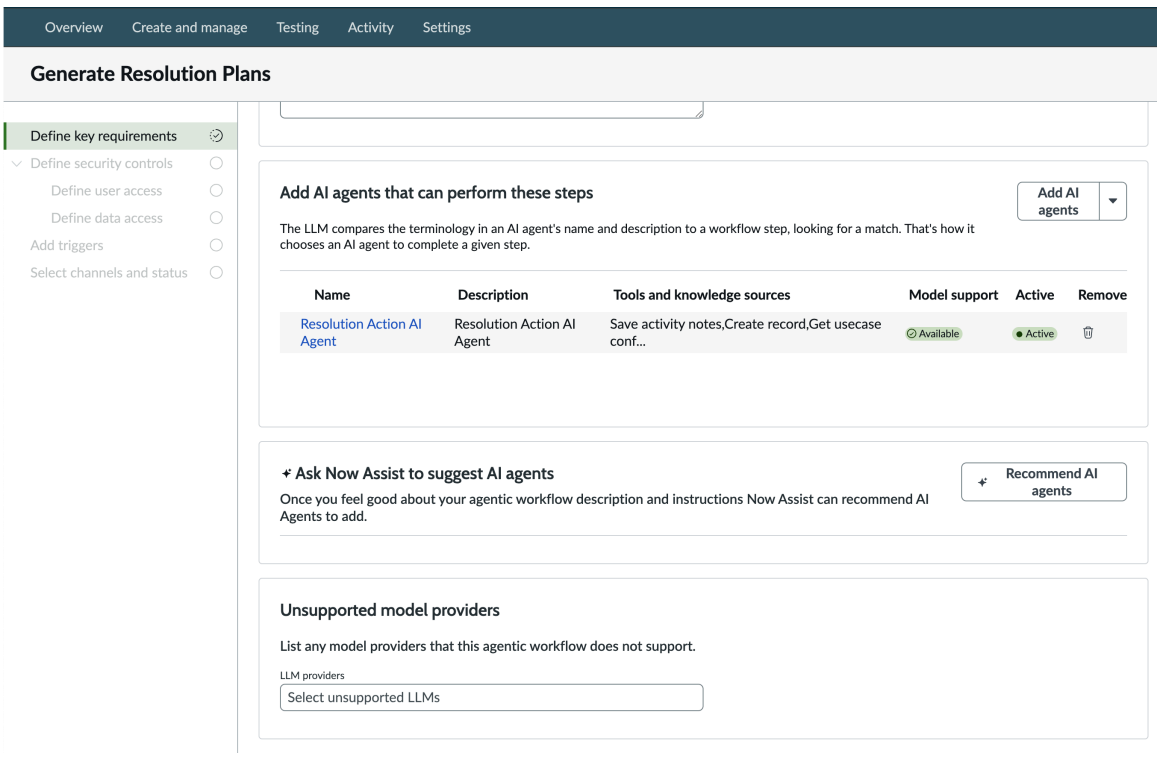


4. Add AI agents to perform the tasks described in the list of steps.

   You can use ServiceNow Otto to generate a list of AI agents for you.

5. Determine unsupported model providers.

   You may find that some models use your AI agent better than others. If you want to avoid users from having a less optimal experience with a certain model, you can mark a model as unsupported. If an administrator changes the instance-level settings to an unsupported model, your AI agent isn't available to users.



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Result
You have written instructions for the LLM to determine how to use the agentic workflow, assigned AI agents, and determined LLM provider support.

What to do next
Select **Save and continue** to move to the next step, Define security controls.

Define security controls for an agentic workflow

In the guided setup for an agentic workflow, define security controls for who can access the agentic workflow and what data the agentic workflow has access to.

Before you begin
Role required: sn_aia.admin

About this task
The **Define security controls** step is divided into two parts: **Define user access** and **Define data access**. The former creates an access control list (ACL) that determines which users can discover or invoke the agentic workflow. The latter defines the data that the agentic workflow has access to once it's invoked.

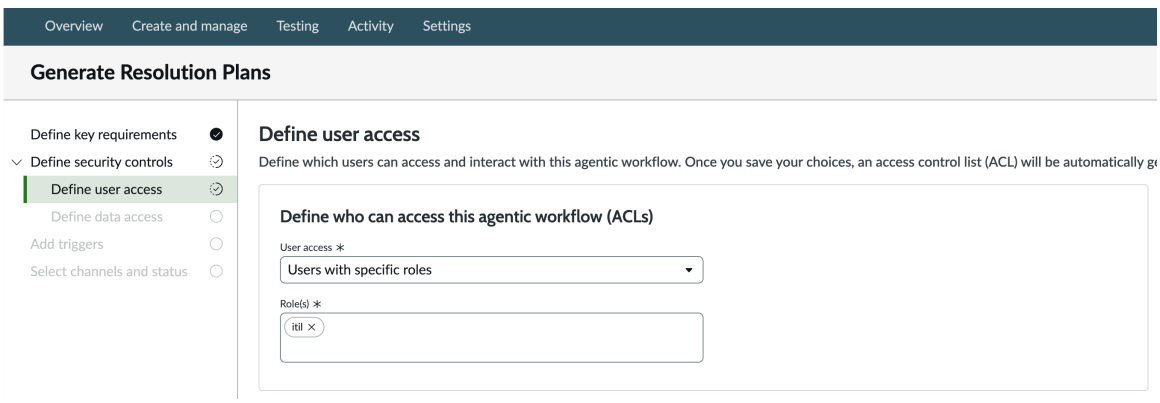
See Security for AI agents for more information about creating ACLs and user identities for security for agentic workflows.

Procedure
1. Select which users can access the agentic workflow.

   The drop-down menu options are:

   - Users with specified roles
   - Authenticated users
   - Public

   If you select *`Users with specified roles`*, you can select exactly which roles can access the agentic workflow. Agentic workflows installed with ServiceNow applications and their AI agents might require you to include specific roles. To learn which roles they need, consult the documentation for the AI agent or the agentic workflow that uses the AI agent.



2. Select **Save and continue** to move to the next step.

   Saving and moving onto the next step triggers the creation of an ACL for your agentic workflow. If you want to make changes later, you can return to the guided setup and change the options here. If you have the correct elevated role, you can also make edits directly on the ACL table.

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3. Define the user identity of the agentic workflow to determine what data it has access to.

   The two options are *Dynamic user* and *AI user*. The dynamic user is the user invoking the agentic workflow. An AI user is a dedicated user that has its own specified roles that allow access, which could be more than the dynamic user.

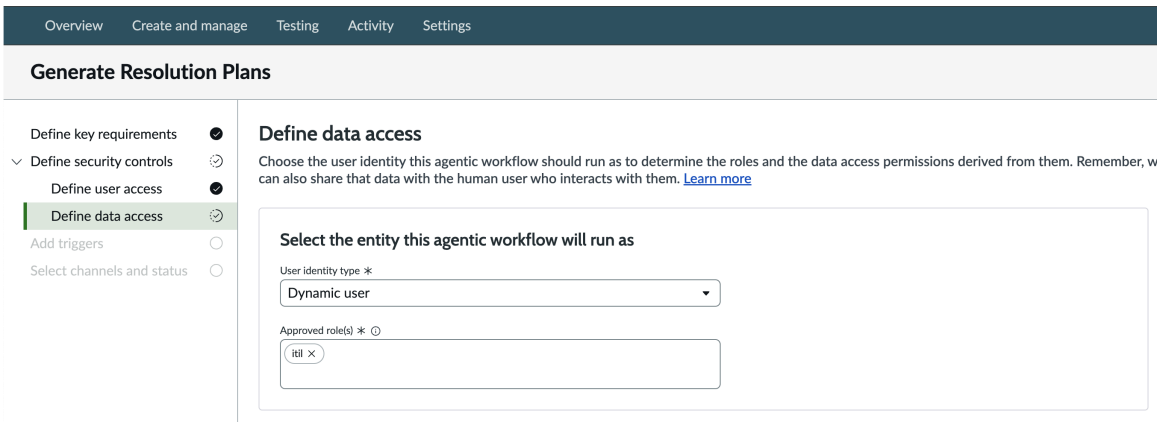
   If you do not have an AI user but want to use the *AI user* identity, you need to create a new record on the User table. See Create a user. Select *AI user* as the identity type.

   If you select *Dynamic user*, you can select the *Approved roles* that the AI agent runs with. By default, an AI agent runs as a dynamic user and has the roles of the invoking user. Select the approved roles to limit the data access that an AI agent could have. Role masking must be applied for all AI agents and agentic workflows set to run as dynamic users.

   To override the role masking requirement for a specific agentic workflow or AI agent, admins with the correct elevated access can create an approved list of roles for a given agentic workflow or AI agent. Then, they can access that role masking record in the Agent Access Role Configurations table [sys_agent_access_role_configuration], and select the "allow all roles" check box. Taking these steps deactivates the requirement for a role masking approved roles list in AI Agent Studio, so the AI admin can return to AI Agent Studio and continue to configure the agentic workflow or AI agent without role masking applied.

   Note: Role masking should be applied as security best practice and adherence to the principle of least privilege. Overriding the role masking requirement isn't recommended.

   If you select *AI user*, the list of roles that the AI user has is displayed.



Result

You have created an ACL that determines who can discover and access your agentic workflow, and you have assigned a user identity (and role masking, if relevant) to the agentic workflow to determine what data it can access.

What to do next

Select **Save and continue** to move to the next step, Adding a trigger. Adding a trigger is optional. You can also skip to the final step, Select channels and access.

Add a trigger to an agentic workflow

In the guided setup for an agentic workflow, add triggers to run the agentic workflow automatically when certain conditions are met.

Before you begin

Role required: sn_aia.admin

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About this task

Adding a trigger is optional. If you want your agentic workflow to be used only in chats such as in ServiceNow Otto for Virtual Agent or ServiceNow Otto panel, you don't need to add a trigger. Only add a trigger if you want to invoke the agentic workflow automatically when some event occurs.

Note: Triggers contain instance-specific information. If you're moving AI agents or agentic workflows between instances using Update Sets, you must set the triggers to inactive before adding them to the update sets and then activate them on the new instance.

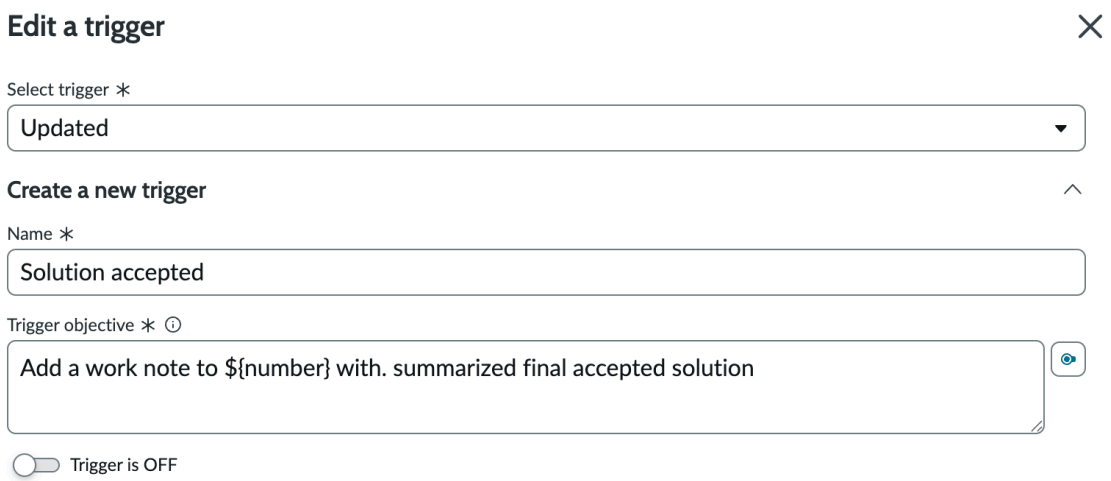
If you don't want to add a trigger, skip to the final step, Select channels and access.

Procedure

1. Select **Add trigger**.
2. On the form, fill in the fields.

Create a trigger

Fields	Description
Select trigger	List of triggers that are available in the instance.
Name	Name of the trigger.
Trigger objective	Additional user statements or sample utterances that help guide when to trigger this agentic workflow.



Define when this trigger occurs

Fields	Description
Table	Name of the applicable table for your agentic workflow.
Conditions	Conditions that you can add to control the trigger configuration. You must have at least one condition. Select **+ Add condition set** to add conditions to your agentic workflow trigger.

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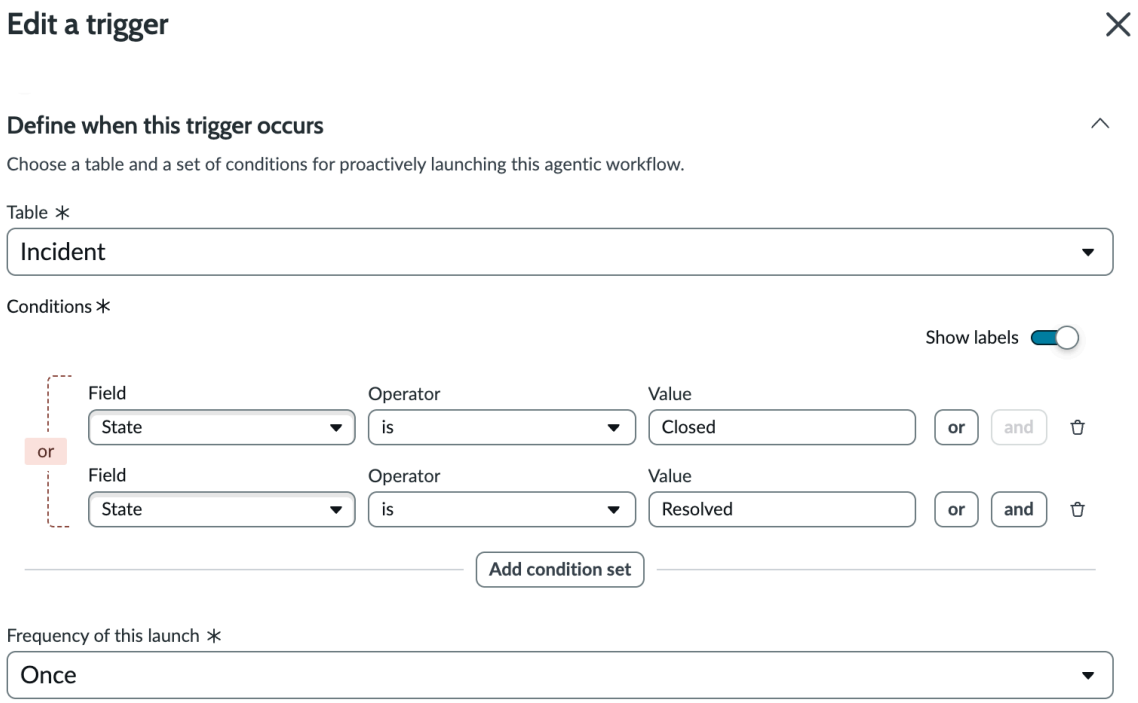
Fields	Description
Active trigger toggle	Only enable the trigger once you're confident in the execution of your agentic workflow. Try testing the agentic workflow execution and user access first. To review overall trends over many executions, try an automated evaluation.



Select where to show this launch

Fields	Description
Channel	Medium for the agentic workflow output: ServiceNow Otto panel or Virtual Agent. **Note:** To view the output from a triggered agentic workflow in the ServiceNow Otto panel, you need the now_assist_panel_user role.
Show an alert to users	Alerts appear in the selected channel.

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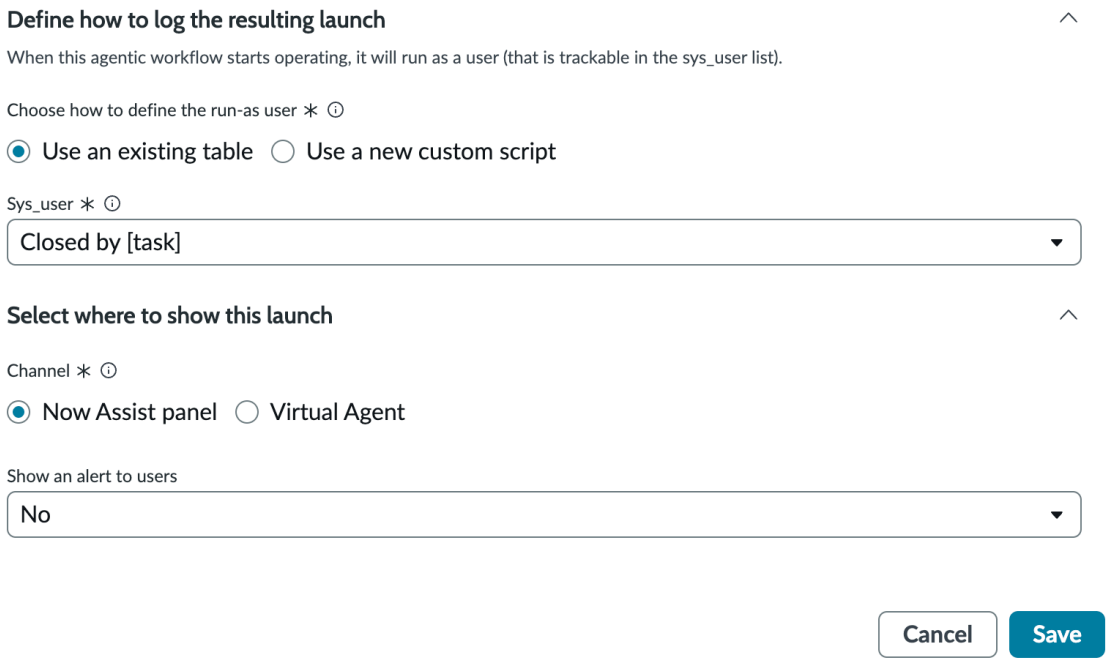

If you choose a scheduled trigger, additional options are available, such as the day of the week and time when you want the trigger to run.

Note: When running a scheduled trigger, not every record is included in the execution. By default, the value is 10. If you want to change this number, you must set the *sn_aia.max_scheduled_trigger_query* system property to a different value.

If you choose an email trigger, the target emails must exist on the Reply [sys_reply] table. New emails aren't available as triggers.

3. Select **Add**.
4. Repeat the preceding steps for additional triggers.

Result
You have added triggers to your agentic workflow to run it automatically under the specified conditions.

What to do next
Select **Save and continue** to move to the final step, Select channels and access.

Select channels and access for an agentic workflow

In the guided setup for an agentic workflow, activate the agentic workflow to use in the ServiceNow Otto panel or UI actions in the Core UI and workspaces.

Before you begin
Role required: sn_aia.admin

About this task
The final step of the agentic workflow guided setup includes options for where a user can invoke the agentic workflow. The ServiceNow Otto panel is available to users with the correct role. You can specify the exact conditions when a UI action is available to users on a table.

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Procedure

1. Select whether you want users to use the ServiceNow Otto panel to invoke the agentic workflow.
2. **Optional:** Add a UI action to your agentic workflow.

   a. Select **Add UI action**.

   b. Enter the UI action label.

   (Optional) The UI action label is the text that the user sees in the button on the table.

   c. Select a table where the UI action can be used.

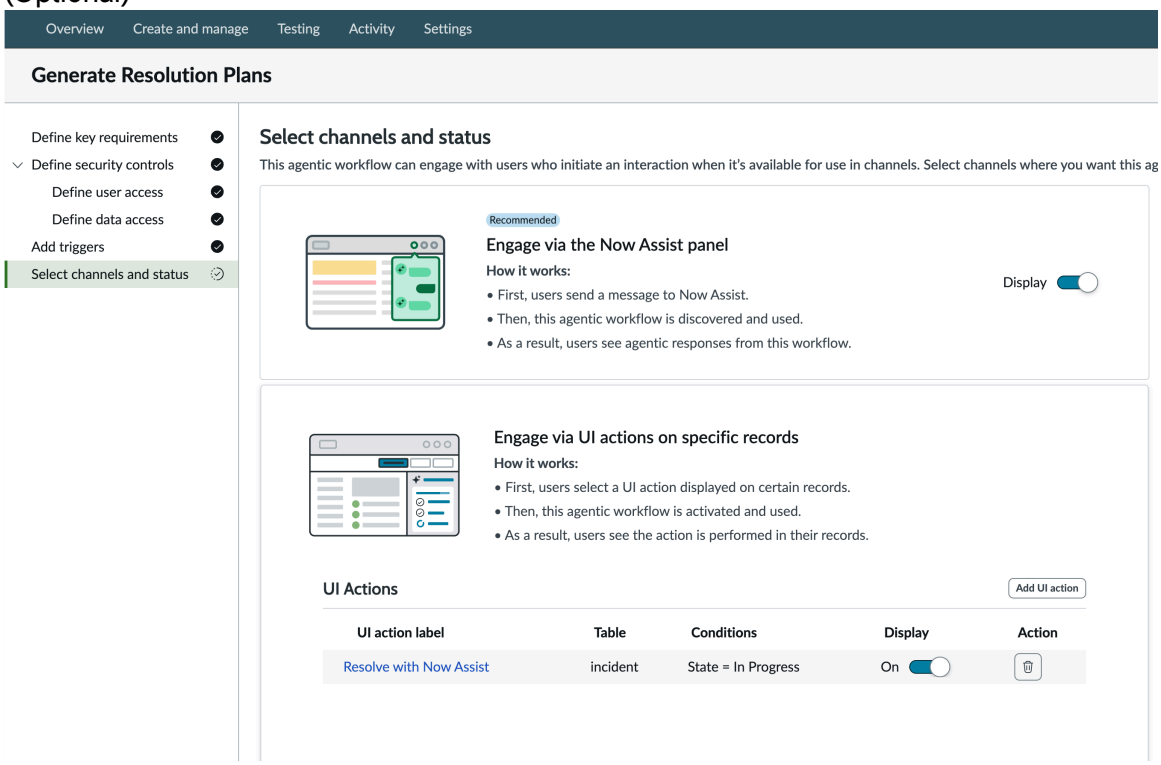
   (Optional) Users who are accessing a record on the selected table can view the UI action in the Core UI and workspaces. See In-product agentic AI for more information about the AI Workflows panel.

   d. Specify conditions for the UI action to appear and select **Add**.

   (Optional) For example, you could only show a UI action for a Generate resolution plan agentic workflow if the record state is Active.

   Note: The display for a new UI action is turned on by default.

(Optional)



3. Select **Save and test**.

Result

You have completed the guided setup for creating an agentic workflow. Your new agentic workflow can be edited at any time using AI Agent Studio.

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If you added a UI action for your agentic workflow in this guided setup, but the UI action is not appearing on forms, ensure that the property *com.glide.agentic_processes_view.enabled* is set to `true`.

What to do next

Move to the **Testing** playground to test an agentic workflow execution using example utterances or to test user access.

Duplicate an agentic workflow

Duplicate an existing agentic workflow in AI Agent Studio to save time by not having to manually configure or create agentic workflows.

Before you begin

Role required: sn_aia.admin

About this task

Duplicate the agentic workflows to do the following tasks:

- Duplicate the record.
- Disallow any agentic workflows with existing names.

Custom columns, such as the Tools and Knowledge sources, Status, and a column with the Duplicate icon ( ) are available for agentic workflows list.

Note: Selecting the Duplicate icon duplicates the selected agentic workflow.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **Agentic workflows** and open the AI agents list in AI Agent Studio.
2. Duplicate the agentic workflow from either the Manage agentic workflows and AI agents page or the AI agent form.

Current location	Navigation option
Manage agentic workflows and AI agents page	On the agentic workflows list, select the duplicate icon ( ) for the agentic workflow that you would like to duplicate.
AI agent form	Open the agentic workflow that you want to duplicate, select the menu icon ( ) next to **Exit** on the Describe and instruct form, and select **Duplicate**.

You see a confirmation message in a pop-up window.

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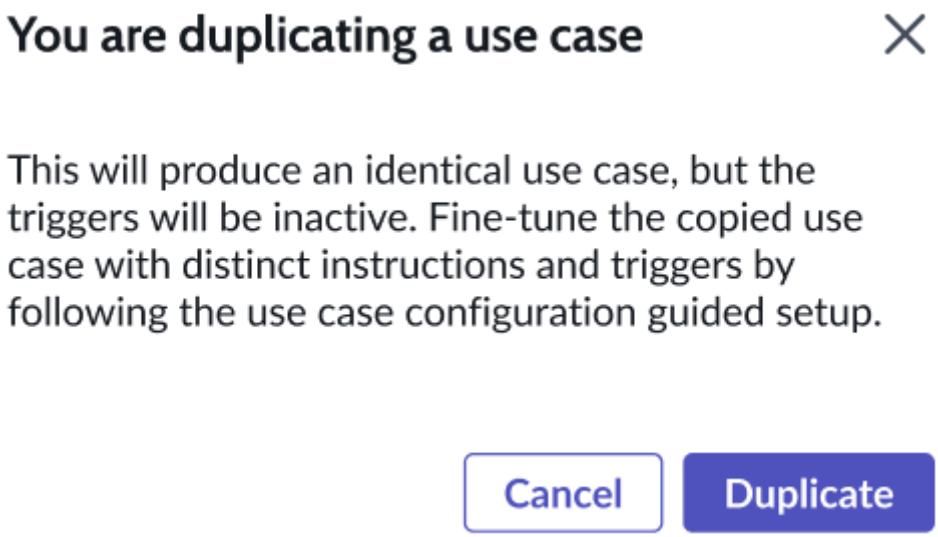

3. Create a copy of the agentic workflow with the same information from the original agentic workflow's record by selecting **Duplicate**.

   Note:

   - The agentic workflow is duplicated with the original agentic workflow's name but it's appended with the suffix `(Copy)` to help you identify the duplicated agentic workflow from the original agentic workflow. For example, `Steps for Issue Resolution (Copy)`. You can rename it and also edit the other information that is duplicated.
   - All the AI agents that were connected to the original agentic workflow are also added to the duplicated agentic workflow. You can edit these AI agents and add more agents for your own requirements.

4. After editing the details in the Describe and instruct section, select **Save and continue**.
5. In the Define Trigger section, activate any triggers that are duplicated from the original agentic workflow if you need them and select **Save and continue**.

   Note: The triggers that you see in the duplicated agentic workflows are from the original agentic workflow. They aren't active by default but you can activate them if necessary.

6. In the Toggle display section, turn on the Display toggle for the duplicated agentic workflow to be visible in the ServiceNow Otto panel and select **Save and test**.

Result
You're redirected to the AI Agent Studio home page. In the Manage and configure AI agents to solve agentic workflow section on the **Agentic workflows** tab, you see the duplicated agentic workflow.

Activate an agentic workflow template

Activate an agentic workflow that come installed with ServiceNow applications in AI Agent Studio.

Before you begin
Role required: sn_aia.admin

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About this task

Agentic workflows that are installed with AI applications aren't automatically activated. You must activate them before they can be used in the ServiceNow Otto panel or as a UI action. Some may come with predefined triggers that must be set to active, too.

These predefined agentic workflows can also be used as templates for your own customized ones. You can duplicate an agentic workflow and use it as a blueprint for one that better suits your business needs, such as changing which records are available or providing different instructions.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **Agentic workflows**.
2. Select the agentic workflow that you want to configure.
3. Select **Define trigger** to go to that step in Guided Setup.
4. In the Existing triggers section, select the name of an inactive trigger to open the form.
5. Toggle the Active slider so that it's turned on.
6. Select **Save**.
7. If there's more than one trigger, repeat steps 4–6 for each trigger that you want to activate.
8. Select **Save and continue**.
9. Toggle the display for the ServiceNow Otto panel and/or UI action so that it's turned on.
   You have enabled the agentic workflow in the ServiceNow Otto panel. If the option isn't available, you must enable the panel first. For more information, see Activate the ServiceNow Otto panel standard chat, Activate ServiceNow Otto panel enhanced chat, or Display your assistant on Platform or ServiceNow Studio for premium chat.
10. Select **Save and test**.

Result

The agentic workflow runs when the trigger is detected in the ServiceNow Otto panel.

What to do next

After completing the steps, you're redirected to test your agentic workflow to be sure it works as intended. You can test an execution of your agentic workflow manually or test the user access. Once you've determined that the agentic workflow has the basic functionality you expect, you can evaluate it using automated tests.

Modify an agentic workflow

Make changes to existing agentic workflows in AI Agent Studio to adjust them to suit your business needs.

Before you begin

Role required: sns_aia.admin

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **Agentic workflows** and open the agentic workflows list on your AI Agent Studio.
2. Select the agentic workflow that you want to modify.
3. Modify the fields in the different sections of the guided setup, making changes to the fields for your own requirements.

   The guided setup is the same as the one for creating an agentic workflow:

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- Define the AI agent's specialty.
- Define the AI agent security controls.
- (Optional) Add a trigger to automatically invoke your AI agent if a specified event occurs..
- Determine the channels to invoke your agentic workflow..

> **Note:** Some fields aren't editable if the agent is associated with a ServiceNow application. If you want to make more modifications, duplicate the agentic workflow and make changes to the duplicate.

- For the *List of steps* field, you can create multiple versions of the same agentic workflow without losing previous versions. Creating versions enables you to test different instructions to evaluate performance. See Version control for AI agents and agentic workflows for more information.
- For the access control lists (ACLs), you can edit the security fields and define who can access the agentic workflow and edit the entity to run the agentic workflow as a dynamic user or an AI user. For more information, see Implement access control in AI agents.
- For more guidance on creating effective instructions, see the general guidelines for creating AI agents and agentic workflows.

You can navigate through the steps of the Guided Setup with the **Continue** and **Back** buttons.

4. Navigate to the last step and select **Save and test** to save your changes and begin testing your modified agentic workflow.

Result
Your agentic workflow is modified and ready to test.

What to do next
You can test an execution of your agentic workflow manually or test the user access. Once you've determined that the agentic workflow has the basic functionality you expect, you can evaluate it using automated tests.

Manually test the execution of an agentic workflow

Test your agentic workflow in AI Agent Studio to analyze how it functions while it executes the instructions that you defined.

Before you begin
Role required: sn_aia_admin and either admin or at least one role required by the ACL of the agentic workflow being testing and each of the ACLs of its downstream components

About this task
After you create an agentic workflow, test it to see that it functions the way that you defined it. You can choose to run a manual test with a single instruction to test its basic functioning, or you can evaluate the AI agent's performance across multiple executions.

If you want to test multiple executions using execution logs, you can run an automated test. If you select **Start automated evaluation**, the agentic evaluation guided setup opens in a new browser tab. See Evaluate an agentic workflow for more details about running a new automated evaluation.

When manually testing performance, you can see how the agentic workflow and its AI agents interact with the AI Agent Orchestrator and the Communicator AI agent. The Orchestration is an agent that directs different AI agents, and the Communicator AI agent facilitates the communication between the user and other AI agents.

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Procedure

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. Select **Start manual test**.

   If you want to start an automated test, see Evaluate an agentic workflow for more details on that process.

3. In the *Choose a test type* drop-down menu, select *AI agent or workflow*.

   If you want to test user access security controls, see Test AI agent user access.

4. Select an agentic workflow that you want to test by entering the name of a workflow or choosing from the drop-down menu.
5. Under *Choose a testing mode*, select the testing mode either as **Premium Chat** or **Standard**.

   Note: The Premium Chat testing mode is exclusively accessible when the Off Glide Conversation Server plugin (com.glide.cs.offglide) is installed. If the plugin is not installed, you will continue to access the standard testing playground.

6. In the Version drop-down list, select the version of the AI agent you want to test.

   See Version control for AI agents and agentic workflows for more information about creating and changing versions.

7. In the Task drop-down list, provide a concise summary of the task to be achieved.

   Note: In the task summary, include a reference number for a specific record for better results during your testing.

8. Select **Continue to Test Chat Response**.

Result

When testing an agentic workflow, you can see the AI Agent Orchestrator and AI Agent Communicator working together to organize and manage the AI agents like a team. The AI agent Orchestrator assigns the individual, specialized agents to complete the subtasks. The AI Agent Communicator lets the AI Agent Orchestrator know the status of each agent.

Note: If you don't have the roles necessary to pass the ACLs of the agentic workflow and all of its AI agents and tools, you're notified that you don't have the necessary access and the test won't execute.

Your AI agents start to execute the test autonomously to resolve the agentic workflow by taking the input from the live agent as required.

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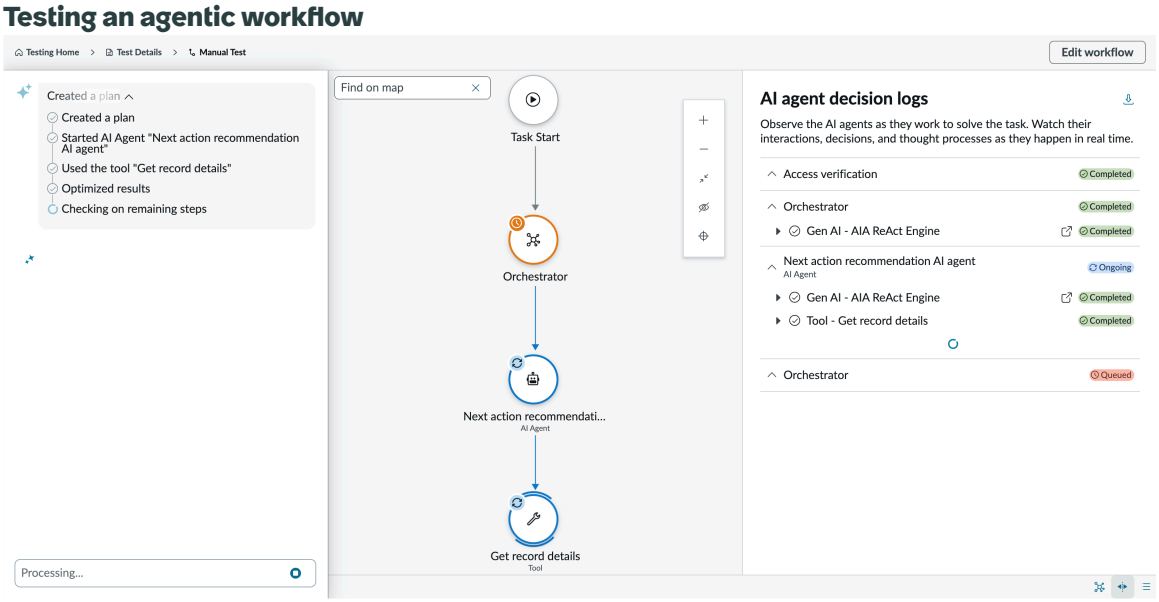

- A simulated chat experience begins on the ServiceNow Otto panel between your invoking user and AI agent.
- At the top of the canvas, you can see information about the agentic workflow you're testing, including its name, version, and description.
- A diagram shows the tasks and communication of the AI agents that are working together to solve the case.
- A decision log records the thought process of each AI agent that is involved in solving the agentic workflow.

> **Note:** You can view the entire decision log by selecting **Download logs**.

You can restart the entire testing process at any time by selecting **Restart**.

Test user access to an agentic workflow

Run a manual test to verify that only the users you want to access the agentic workflow can do so.

Before you begin

Role required: sn_aia_admin and either admin or at least one role required by the ACL of the agentic workflow being testing and each of the ACLs of its downstream components

About this task

You can establish the security settings for an agentic workflow in the guided setup to establish which users can access it. See Define security controls for instructions on how to change the user access settings. When you select **Save and continue** on that step of the guided setup, an ACL is created that establishes limitations on which users can access the agentic workflow.

Once you have created these ACLs, you can verify that they work as intended by using the *`Test access`* test type of a manual test of an agentic workflow.

To see instructions for performing manual tests to evaluate performance, see Test performance manually. For more information about automated tests, see Evaluate an agentic workflow.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. Select **Start manual test**.

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3. In the *Choose a test type* drop-down menu, select *Test access*.

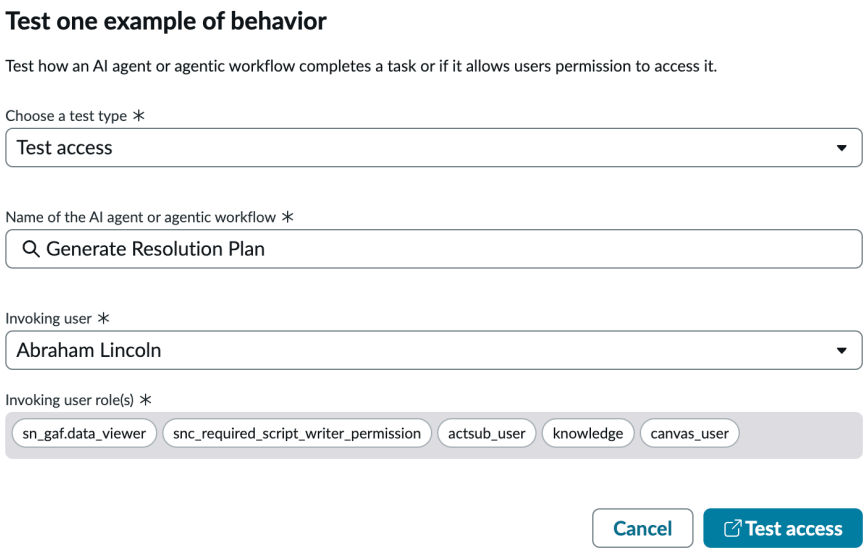
   If you want to test the basics of how an agentic workflow works, select *AI agent or workflow*. The full instructions for that test type can be found in Test performance manually.

4. Search for or select the name of the agentic workflow you want to test.
5. Select an invoking user.

   The invoking user can be the user that triggers the agentic workflow or it can be the invoking user of an upstream component, such as an agentic workflow. For more information about how the invoking user works, see Security for AI agents.

   When you select an invoking user, the user roles are populated in the *Invoking user roles* field. The field is read-only. If you want to change a user's roles, you must change the user's User record. See Assign a role to a user.

6. Select **Test access**.



Result
The results of the access test are opened in the Access Analyzer in a new browser tab.

Access Analyzer identifies all the ACL calls made in the execution of the agentic workflow, including its AI agents and tools, if any are present. You can see the results of each ACL to verify that each one has the correct user access defined.

What to do next
If the results are different than what you expect or want, you can redefine the security controls of the agentic workflow.

You can also test an agentic workflow's performance with either a manual test or automated evaluations. See Test performance manually or Evaluate an agentic workflow.

Delete an agentic workflow

Delete an agentic workflow from AI Agent Studio.

Before you begin
Role required: sn_aia_admin

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About this task

You must assign appropriate permissions by using the access control lists (ACLs) to delete agentic workflows in AI Agent Studio.

Note: You can't delete the default agentic workflows.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **Agentic workflows**.
2. Select the check box of the agentic workflow that you want to delete and select **Delete**.

   You can also delete multiple agentic workflows by selecting multiple agentic workflow records at a time.

   Note: Some agentic workflows installed with ServiceNow applications can't be deleted.

3. In the confirmation pop-up window, select **Delete**.

Result

The selected agentic workflows are deleted from the Agentic workflows list AI Agent Studio.

Deploy AI voice agents

AI voice agents are generative AI-powered agents that bring natural, conversational experiences to phone-based support. As part of the broader AI agent ecosystem, they connect with telephony providers to replace rigid menu trees with seamless and human-like interactions that can help make support faster and more intuitive.

AI voice agents overview

AI voice agents use generative AI to deliver natural, dynamic conversations that help users complete tasks, resolve issues, and access information.

AI voice agents are part of the ServiceNow AI Platform capabilities and can be deployed from the base system or customized to meet specific business needs. AI voice agents are managed through the AI Agent Studio, which provides tools for creating, deploying, and monitoring AI voice agents.

AI voice agents are associated with voice assistants, which act as a virtual help desk. A voice assistant can host multiple AI voice agents. Each AI voice agent is equipped with specific AI instructions, tools, and knowledge to resolve user issues. You can configure welcome messages, select voice profiles from the voice library, and define fallback options like live agent routing or record producer-based ticket creation.

When you create or edit a voice assistant, you configure communication channels to define how the voice assistant connects to users. Communication channels are organised into two tabs:

- **Telephony provider** — connects the voice service to phone networks. Select a communication channel type, then select a CCaaS provider.
- **Web Real-Time Communication (WebRTC)** — connects the voice service to mobile applications.

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Note: AI voice agents support the following:

- **LLMs (large language model):** Azure OpenAI, Google Gemini, and AWS Claude. Now LLM Service is also supported but limited to English language only.
- **Telephony providers:** Twilio (WebSocket), Genesys (WebSocket and SIP), Amazon Connect (PSTN), 3CLogic (WebSocket), Five9 (SIP), NICE CXone (SIP), and Custom (SIP). Mobile and web applications are supported through the Web Real-Time Communication (WebRTC) channel.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Deploying AI voice agents

To get started with AI voice agents, perform the following steps.

1. Install AI voice agents
2. Configure user identification and authentication
3. Create an AI voice assistant
4. Create an AI voice agent
5. Test AI voice agents

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

For more information, see the Now Assist documentation.

Privacy notice

By using this feature, you confirm that your use (including use by your service providers) complies with relevant anti-wiretapping, recording consent, and other privacy laws, as applicable.

Related topics

- HR AI voice agents
- Agentic AI in the Voice application

Install AI voice agents

Install the required plugins to enable AI voice agents on your ServiceNow instance.

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Before you begin
Role required: sn_aia_admin

About this task
ServiceNow Otto for Voice Agents is the application that enables AI voice agents on your instance. It is included with ServiceNow Otto for Platform (sn_genai_platform), which is automatically installed with any of your ServiceNow Otto products, for example, ServiceNow Otto for IT Service Management (ITSM) and ServiceNow Otto for HR Service Delivery (HRSD).

Procedure
1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the following plugins.
   - ServiceNow Otto for Platform (sn_genai_platform) for enabling default platform AI voice agents
   - IT Service Management AI voice agent collection (sn_itsm_voice_aia) for enabling default ITSM AI voice agents. See Agentic AI in the Voice application for more information.
   - HR Voice AI Agents (sn_hr_voice_aia) for enabling default HRSD AI voice agents. See HR AI voice agents for more information.
3. Select **Install** to install each of the required plugins.

Result
AI voice agents associated with the applications are installed on your instance.

Create an AI voice assistant

Create an AI voice assistant to enable natural, conversational voice interactions between users and AI voice agents.

Before you begin
Role required: virtual_agent_admin or admin

Set up your preferred user identification and authentication methods to allow access to AI voice agents. See Authentication factors for more information.

About this task
An AI voice assistant enables natural, conversational voice interactions between users and AI voice agents. It uses speech-to-text (STT), large language model (LLM), and text-to-speech (TTS) to understand and respond to callers in real time. You can configure a voice assistant with personalized voice and welcome message, fallback options, and assign AI voice agents with specific AI instructions. The fallback options include live agent transfer and ticket creation, based on the origin of the call.

Procedure
1. Navigate to **All** > **Conversational Interfaces** > **Assistant Designer** > **Assistants** and select **Create assistant**.
2. Select **Voice-only** option in the Create an assistant window and select **Continue**.

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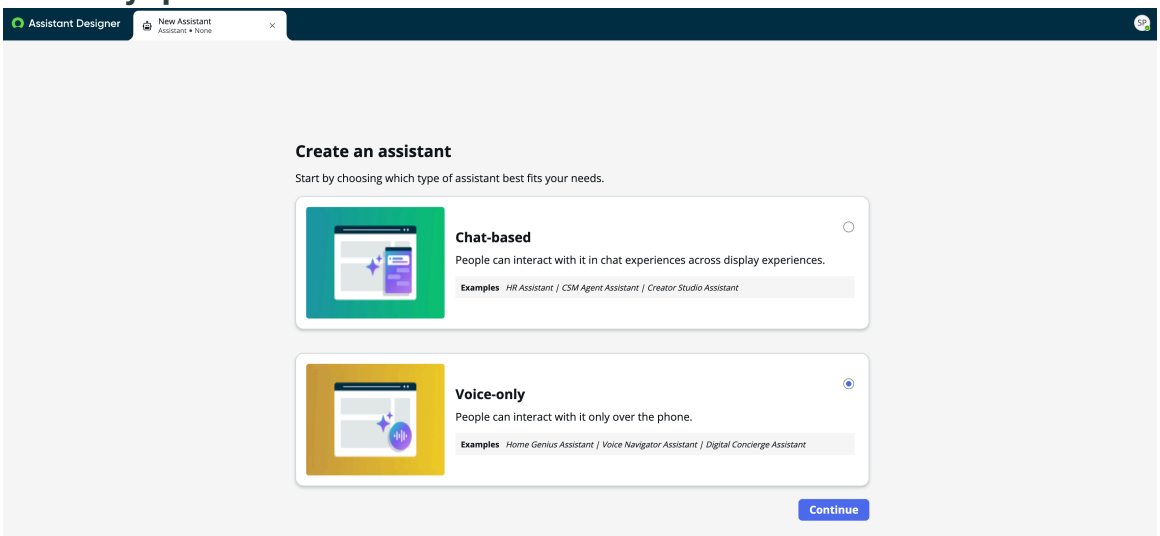
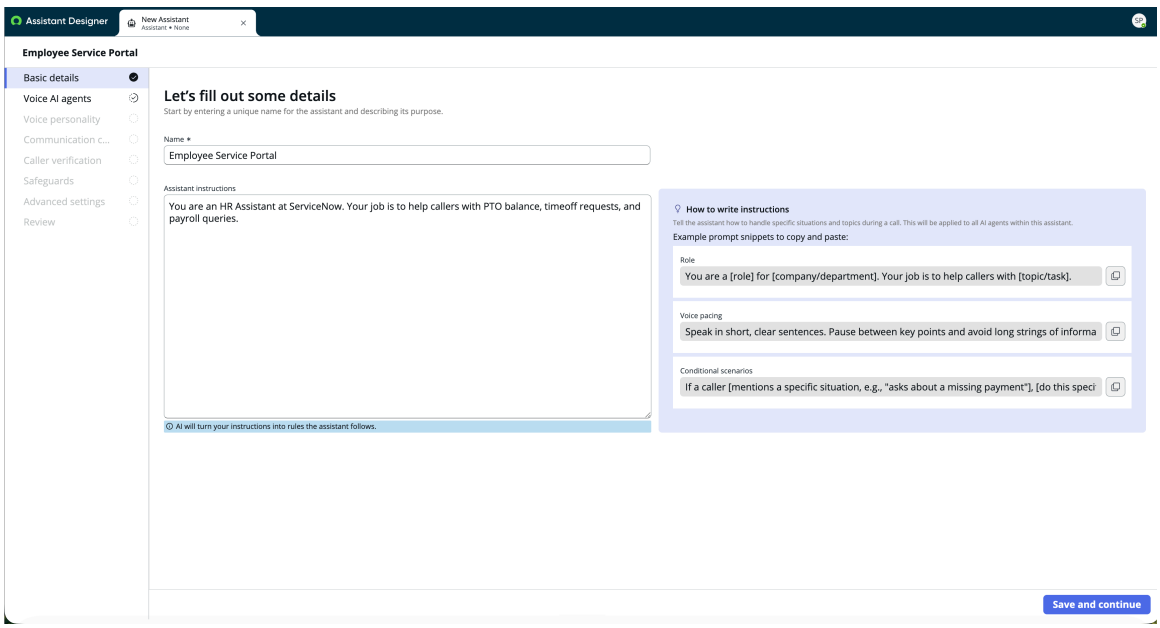
Voice-only option in Create assistant



3. Add basic details of the assistant.

Basic details form



a. On the form, fill in the fields.

Basic details form

Field	Description
Name	Name of the voice assistant. Provide a name according to the business outcome that the voice assistant targets. For example: HR Service Desk
Assistant instructions	Instructions that tell the assistant how to handle specific situations and topics during

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Field	Description
	a call. These instructions apply to all AI voice agents within the assistant. AI turns your instructions into rules that the assistant follows. For example: "You are an HR assistant for ServiceNow. Your job is to help callers with PTO balance, timeoff requests, payroll queries."

Follow these guidelines for writing effective assistant instructions:

- Define the role:
  - State the assistant's role and department, and the topics it should help callers with.
  - Example: You are a [role] for [company/department]. Your job is to help callers with [topic/task].
- Set the voice pacing:
  - Describe how the assistant should pace its spoken responses.
  - Example: Speak in short, clear sentences. Pause between key points and avoid long strings of information.
- Define conditional scenarios:
  - Describe how the assistant should respond to specific situations.
  - Example: If a caller mentions a specific situation, for example, asks about a missing payment, describe what the assistant should do.

b. Select **Save and continue**.
You're directed to the Voice AI agents page.

4. Add one or more AI voice agents to the voice assistant by selecting **Add from library** and select **Save and continue**.

> **Note:** Adding AI agents is optional. If no AI agents are added, you can add them later by editing this assistant. The assistant will be inactive. Select **Add from library** to add an existing agent, or select **Create** to create a new one. See Create an AI voice agent for more information.

5. Select language and voice persona.

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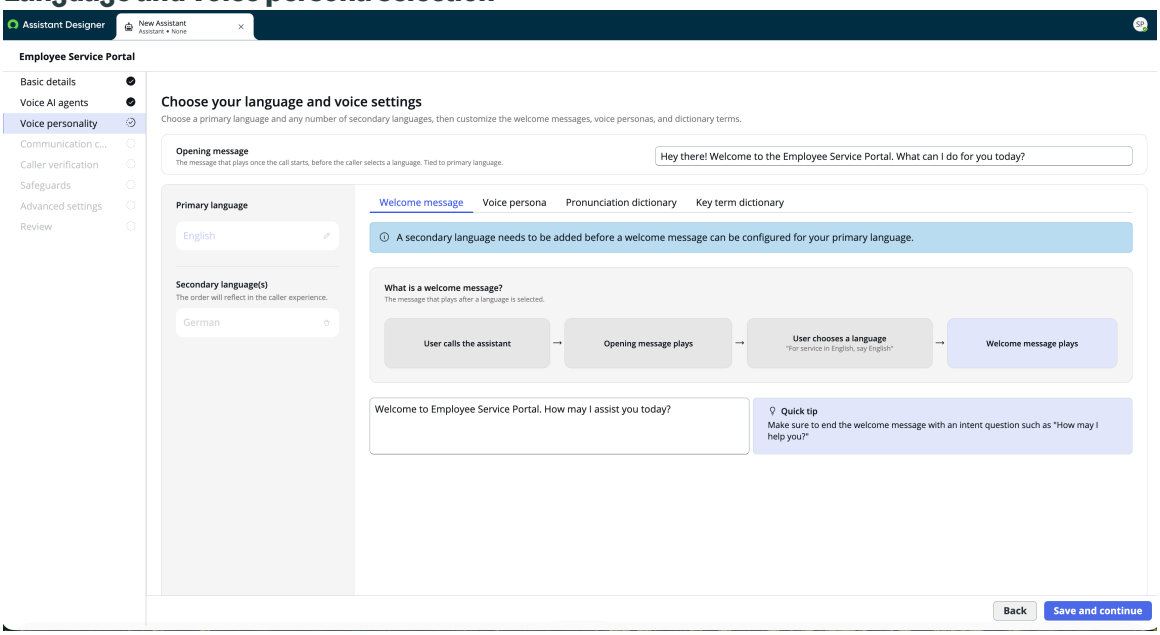
Language and voice persona selection



a. Select the primary language your assistant will use for interacting with callers.
You can configure a primary language and any number of secondary languages. You can select from the following languages:

- English
- German
- Spanish
- Japanese
- Korean
- Dutch
- Brazilian Portuguese
- Italian
- Mandarin Simplified
- French
- Canadian French
- British English
- Mexican Spanish
- Thai
- Hindi
- Danish
- Russian
- Turkish
- Polish
- Swedish
- Norwegian
- Australian English

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- Irish English
- Finnish
- Czech
- Slovakian
- Ukrainian
- Malay
- Canadian English

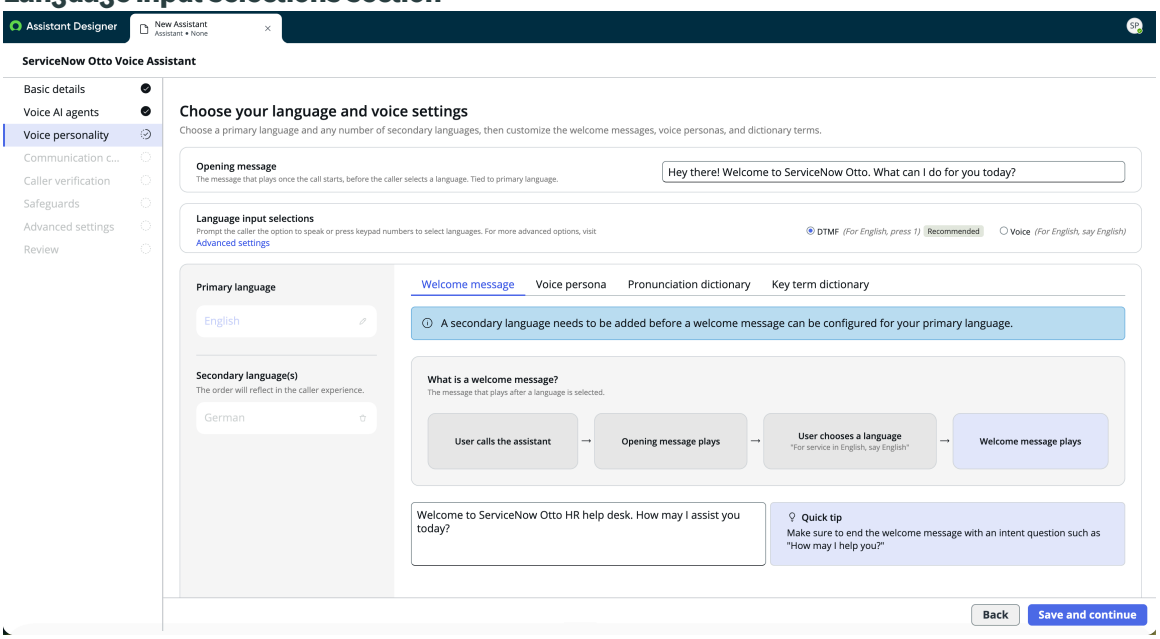
See Multilingual support for voice assistants for more information.

b. Enter an **Opening message** for callers to hear when the call starts.
The opening message always plays first, before any language selection. If you configure only one language, end the opening message with an intent question, for example, "Thank you for calling. How may I help you today?" because it's the only greeting callers hear. If you configure secondary languages, keep the opening message general instead, for example, "Thank you for calling. This call may be recorded for quality purposes."

c. On the **Welcome message** tab, add the message that plays immediately after the caller selects a language.
This tab only applies if you configure at least one secondary language. With a single language, no language selection occurs, and no welcome message plays. After secondary languages are configured, add a separate welcome message for each language. End each welcome message with an intent question, for example, "How may I help you today?"

d. Optional: In the **Language input selections** section, select how callers can choose a language during the call.

Language input selections section



Select **DTMF** (dual-tone multi-frequency) to allow callers to press a keypad number to select a language. Select **Voice** to allow callers to speak a language name. DTMF is the recommended option. You can only enable one option.

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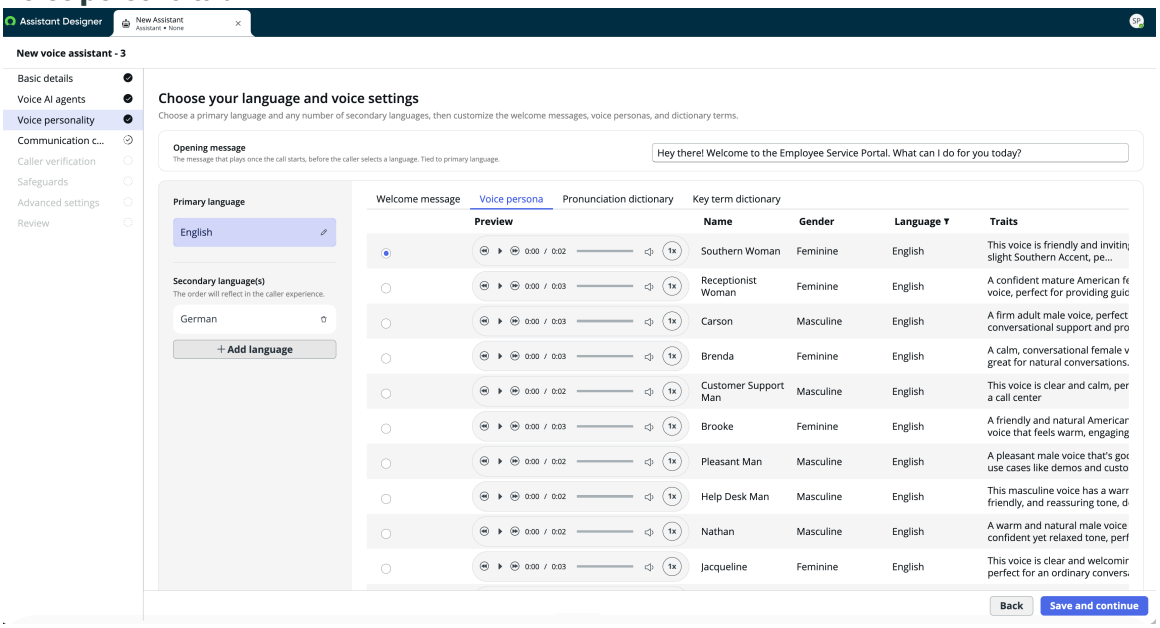
This section is available only when secondary languages are added. For additional settings such as defining retry and goodbye messages, select the **Advanced settings** hyperlink in this section.

e. On the **Voice persona** tab, select a voice persona that best suits the conversational experience that you want to deliver through the voice assistant.

Voice persona tab



Preview the voice samples to determine the appropriate voice and tone. All AI voice agents connected to the voice assistants share the same voice.

f. Optional: Select **+ Add language** to add secondary languages.
For each secondary language, select the corresponding voice persona on the **Voice persona** tab and add a welcome message on the **Welcome message** tab. When secondary languages are configured, callers are presented with a language selection prompt at the start of the call. The order of secondary languages determines the sequence in which options are presented to the caller during language selection.

g. Optional: On the **Pronunciation dictionary** tab, add custom pronunciations for domain-specific or company-specific terms.

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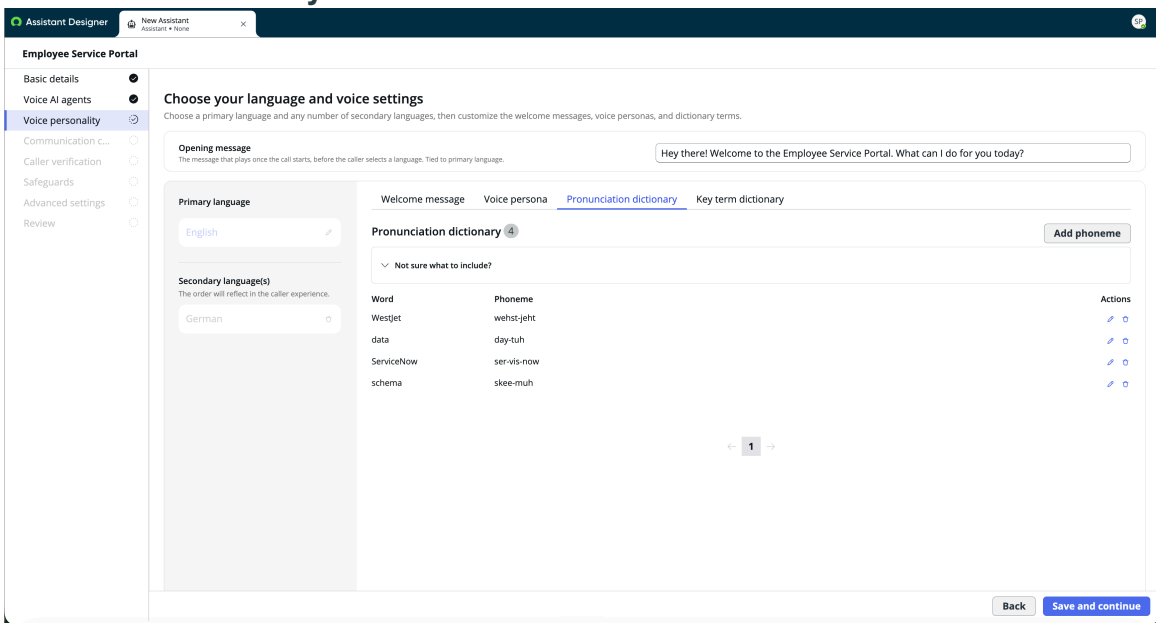
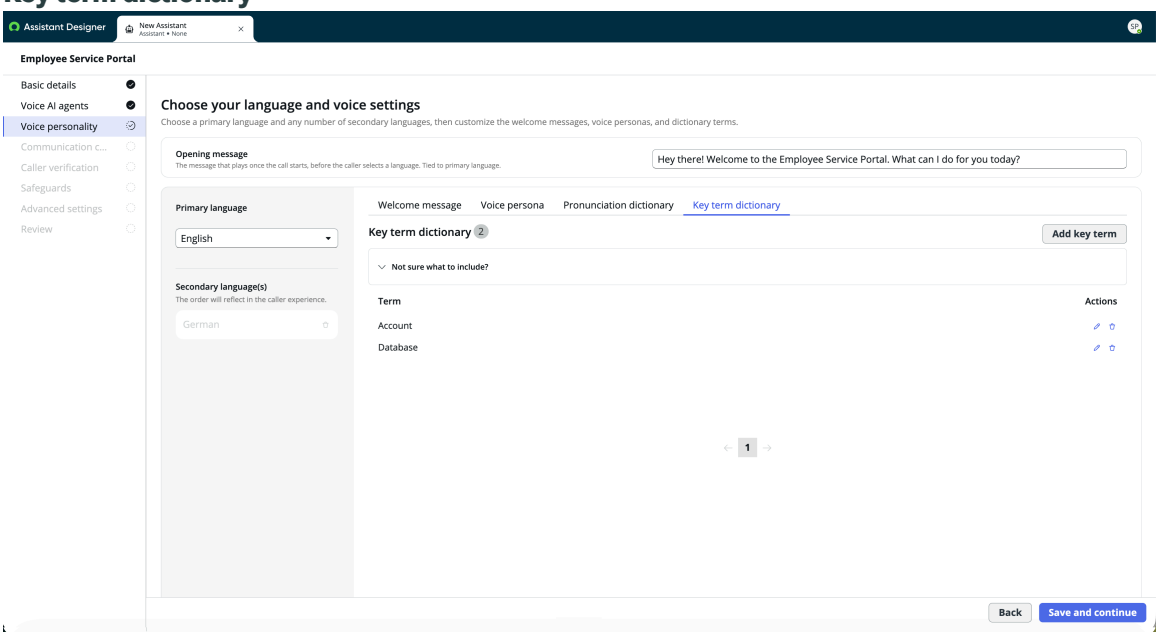
Pronunciation dictionary



Select **Add phoneme** and provide the word or phrase and its pronunciation in either phonetic spelling or phoneme format. Pronunciation entries are specific to the selected language and are applied during voice interactions.

h. Optional: On the **Key term dictionary** tab, select **Add key term** and add a term that the STT engine might misinterpret, to help it transcribe more accurately.

Key term dictionary



Key terms improve STT accuracy for domain-specific vocabulary, such as product names or acronyms that the STT engine might otherwise mishear as a similar-sounding common word or phrase.

Results can vary based on audio quality, caller accent, and context.

Key term entries are specific to the selected language. You can add up to 30 key terms for each language.

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Note: The key term dictionary is separate from the **Pronunciation dictionary**. Key terms improve STT recognition accuracy; pronunciation entries control TTS playback.

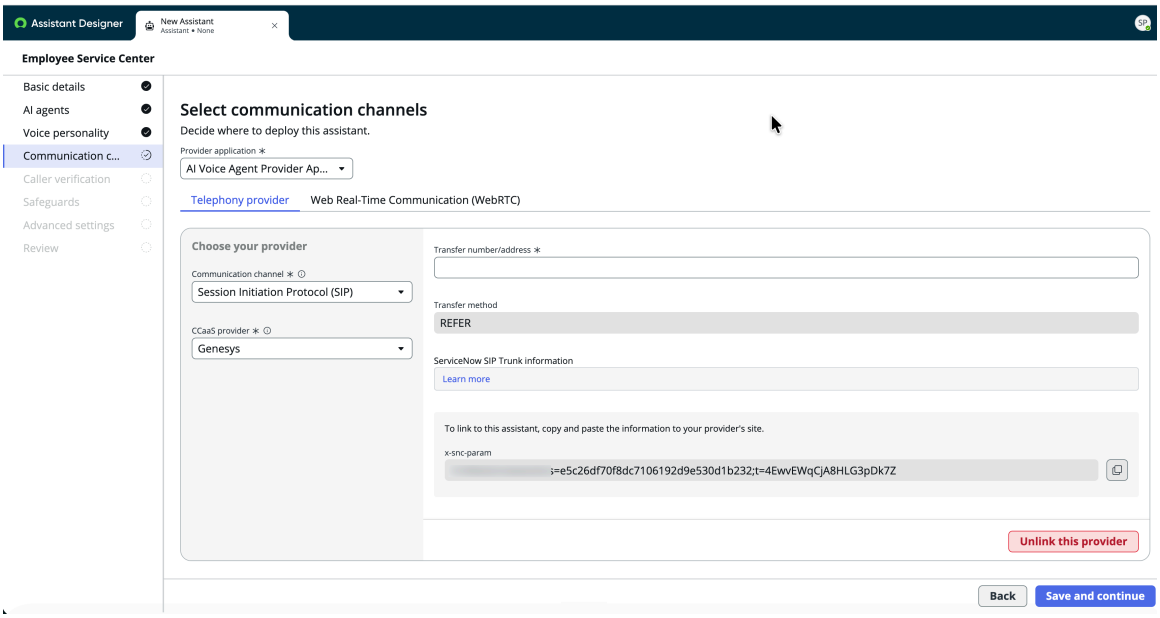
i. Select **Save and continue**.
You're directed to the Communication channels page.

6. Set up communication channels for the user to interact with the assistant.

Select a **Provider application** to deploy this voice assistant to. This field is required for all communication channel types.

Configure at least one communication channel to activate the voice assistant.

Communication channels step



a. Select the **Telephony provider** tab to connect the voice assistant to a phone network. Select a communication channel type from the **Communication channel** dropdown, then select a CCaaS provider and configure the required fields. For more information, see Integrating voice assistant with CCaaS provider.

b. Select the **Web Real-Time Communication (WebRTC)** tab to connect the voice assistant to mobile, web, and external applications.

Select **Mobile applications** to configure ServiceNow applications such as chat launcher functions, voice launcher functions, and prominent action button overrides. You can also configure external applications. For more information, see Integrate voice assistant with mobile app voice launcher.

Select **Web applications** to configure the voice call widget on your ServiceNow Portal or Engagement Messenger. For more information, see Enable WebRTC for voice calls.

Note: Guest callers connecting through a WebRTC web application, such as an unauthenticated portal visitor, are automatically authenticated using a cookie-based session. No additional widget configuration is required. Guest callers are still subject to the identification and authentication factors you configure in the next step, Identify and authenticate the caller. For more information about the voice call widget, see Enable WebRTC for voice calls.

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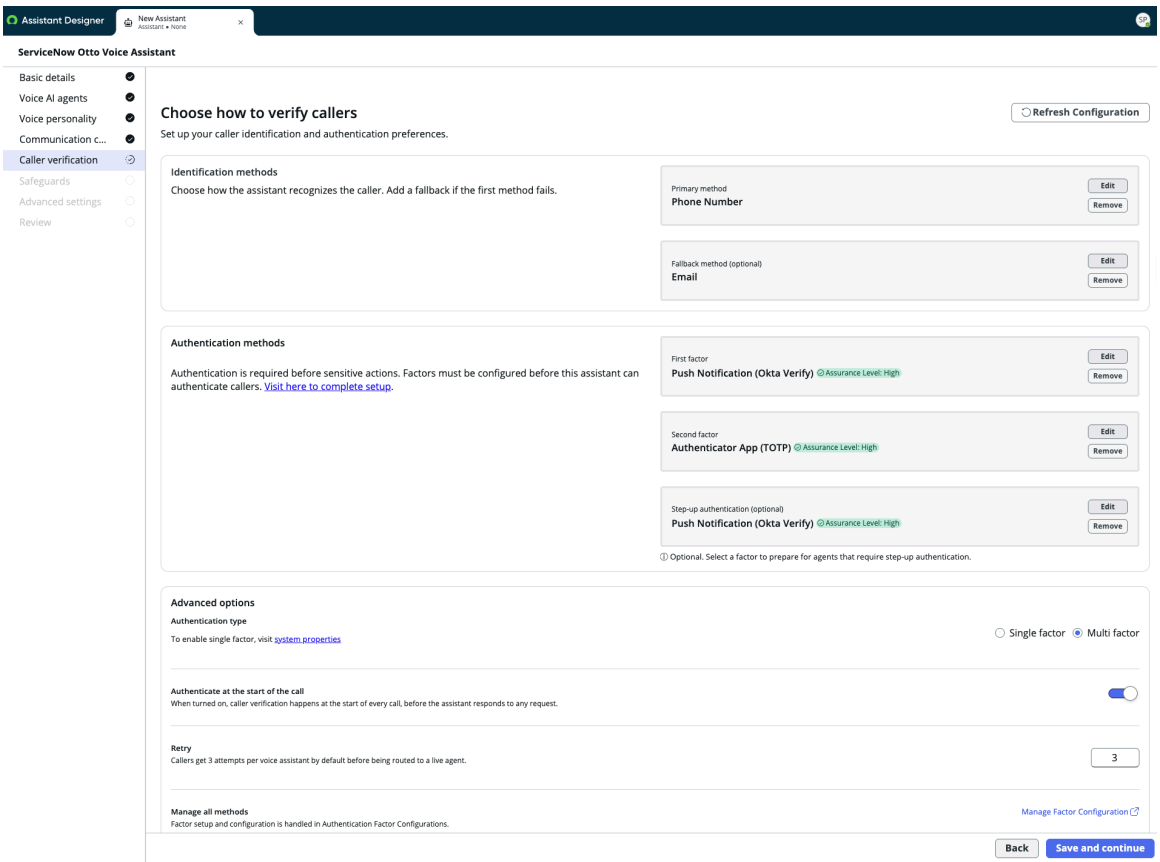
c. Select **Save and continue**.
You're directed to the Caller verification page.

7. Identify and authenticate the caller.

Authentication settings configured in this step apply to the telephony provider communication channel. They also apply to guest callers connecting through a WebRTC web application, such as an unauthenticated portal visitor. If you selected only the mobile communication channel, or if a caller connects through a WebRTC web application while already logged in, skip this step. In these cases, the system uses the caller's existing authentication token instead.

Caller identification and authentication method selection



Ensure the identification and authentication factors are configured at the platform level before you select them here. For more information, see Authentication factors.

To reload available factors from the platform-level configuration without leaving this page, select **Refresh configuration** at the top of the screen. If you have unsaved changes, a confirmation dialog appears before the refresh proceeds. Use this option when authentication factors or system properties have been updated outside Assistant Designer, as those changes are not reflected automatically.

a. Select the method used to identify the caller when the call begins.

Caller identification determines who the caller is before any authentication occurs. The information provided by the caller is matched with system records to identify the caller. If you select the default phone number question, the system automatically matches the caller's registered phone number to the incoming caller ID from the telephony provider.

To change or remove an identification method, select **Remove** on the method card.

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b. Optional: Select the fallback method to identify the caller.
If the caller can't be uniquely identified through the primary method, the system automatically retries using the fallback method.

c. Select the **First factor** and **Second factor** authentication methods to enable caller access to AI voice agents.

Caller authentication verifies the caller's identity before allowing access to AI voice agents that require authentication. Select a **First factor** and, when MFA is enabled, a **Second factor**. The option selected as the **First factor** is not available in the **Second factor** dropdown. To change or remove an authentication factor, select **Remove** on the factor card. The first and second factor can each be independently cleared.

Authentication factors

Factor	Description	Input method
Knowledge-based authentication (KBA)	Verifies the caller using preconfigured security questions, or questions that you configure at the platform level using internal records or external sources. See Knowledge-based authentication (Security Questions) for more information.	Voice or DTMF
Okta Verify push notification	Sends a push notification to the caller's registered Okta Verify app for approval. See Push notification - Okta Verify for more information.	Approve on device
SMS verification code	Sends a one-time numeric code via SMS to the caller's registered phone number. See SMS One-time passcode (OTP) authentication for more information.	Voice or DTMF
Authenticator app time-based One Time Password (TOTP)	The caller provides a time-based one-time password generated by an authenticator app. See Time-based one-time password (TOTP) authentication for more information.	Voice or DTMF
Soft PIN	The caller provides a numeric PIN enrolled through ServiceNow. See Soft PIN authentication for more information.	Voice or DTMF
Email one-time password (OTP)	Sends a one-time code to the caller's configured email address. See Email One-time passwords (OTP) authentication for more information.	Voice or DTMF

d. Select the step-up authentication factor.

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This step is required if one or more AI voice agents in this assistant require step-up authentication. If none do, the step is optional and you can select the factor in advance. For more information about step-up authentication, see Step-up authentication.

Select one factor. The same factor applies to every AI voice agent in this assistant that requires step-up authentication. Supported factors are Okta Verify push notification, SMS verification code, and Authenticator app time-based One Time Password (TOTP). The factor selected as the **First factor** or **Second factor** can also be selected for step-up authentication. The caller receives a new challenge.

An AI agent is set to require step-up authentication in AI Agent Studio, not on this screen. When one or more AI voice agents in this assistant require step-up authentication, the step-up authentication card shows which agents require it. For more information, see Create an AI voice agent.

To change or remove the factor, select **Remove** on the card.

Note: If an AI agent is set to require step-up authentication after this assistant is saved without a step-up factor, callers reaching that agent are directed to the fallback method configured on the Safeguards screen until a factor is selected.

e. **Optional:** Enable the **Authenticate at the start of the call** option to prompt callers for authentication or identification details before the voice assistant responds to any request. When enabled, every caller is prompted to complete authentication or identification at the start of the call, regardless of which AI voice agent handles the interaction. If the caller's first request reaches an AI voice agent that requires step-up authentication, the caller completes first factor and second factor authentication and then completes the step-up challenge before the agent handles the request.

f. In the **Advanced options** section, configure the authentication type and retry attempts.

- **Authentication type**: Select **Multi-factor authentication (MFA)** to require callers to complete both a first and second factor before the system grants access. MFA is enabled by default. Select **Single factor** to require one verification method only. To enable single factor, set the `glide.voice.authenticate.mfa_mandatory` system property to `false`. This setting applies to the first and second factor only. Step-up authentication runs regardless of the authentication type selected.
- **Retry**: Set the number of first factor and second factor authentication attempts callers get before the system routes them to a live agent. The default is 3 attempts. This setting doesn't apply to step-up authentication, which is one attempt.

g. Select **Save and continue**.

If the configuration is incomplete or inconsistent, inline messages appear next to the relevant field.

You're directed to the Safeguards page.

8. Set up safeguards to create a secure and seamless experience for users interacting with the assistant.

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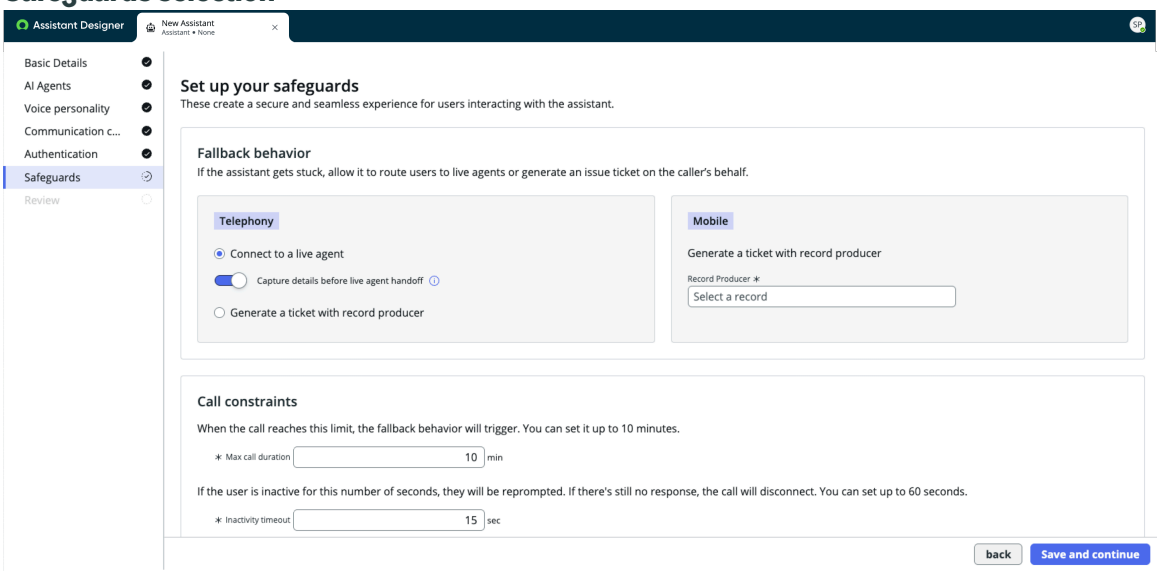
Safeguards selection



a. Set fallback options to route the call to a live agent or create a ticket.
When a voice agent cannot complete a user's request, the system determines the appropriate fallback behavior based on the call origin, for example, telephony provider or mobile channel.

- Telephony provider requires either connect to live agent or a record producer as fallback option.
- Mobile channel requires a record producer as fallback option.
- **Connect to live agent** option. When selected, this option redirects the caller to a live agent. You must set up live agent transfer for your telephony provider separately.

  Note: You can enable the **Capture details before live agent handoff** option, in which the voice agent prompts the caller to provide details in order to triage the call to the appropriate live agent.

- **Generate a ticket with record producer** option. When selected, this option creates a ticket for further tracking.

  Note: If you choose to use generating a ticket with record producer as the fallback option, you must keep the fields in the record producer simple and short to optimize the user experience for both the communication channels. For example, a short description, description, and an optional field for the callback number should suffice. You can also enable the **Require authentication** option, which restricts ticket creation to authenticated employees.

b. Set the time limits for call duration and reprompting users after inactivity.

- Set Max call duration to trigger fallback behavior when the call reaches this limit. You can set up to 10 minutes.
- Set the duration of inactivity after which the user is reprompted for a response. If there's still no response, the call is disconnected. You can set up to 300 seconds. The default is 30 seconds.

c. Select **Save and continue**.
You're directed to the Advanced settings page.

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9. Configure advanced settings for the voice assistant.

   Advanced settings let you configure supplementary features for the voice assistant.

   a. In the **Noise cancellation** section, select the level of background noise cancellation intensity.
   Noise cancellation reduces background noise from the caller's side so the voice agent can better hear them. Select from the following levels:

   - **Low**: Picks up even the quietest background noises. Use in quiet environments where background sounds such as TV or music may be present.
   - **Medium** (default): Picks up somewhat quiet background noises. Use in environments with moderate background noise, such as public places or areas with normal talking.
   - **High**: Picks up only the loudest background noises. Use in very noisy environments such as construction sites or areas with loud background speech.

   b. On the **Language and voice** tab, configure the messages played during language selection.

   Language and voice settings

Field	Description
Retry message	Message played before each replay of the language selection prompt, up to three times.
Goodbye message	Message played after the maximum number of retry attempts is reached without a valid selection.

   c. Select **Save and continue**.
   You're directed to the Review page.

10. Review your voice assistant configuration.

    You can change the configuration later.

11. Select **Save and activate** to complete the configuration steps or review a previous step by selecting **Back**.
    Activating the assistant also activates any inactive AI agents associated with it.The following conditions must be met in order to activate the assistant. If any of these conditions are not met, select **Save and close** to return later.

    - At least one communication channel is selected (telephony provider or mobile channel)
    - At least one AI agent is associated with the assistant
    - If a telephony provider is enabled, authentication is set up and fallback is configured to either connect to a live agent or create a record producer.
    - If a mobile channel is enabled, fallback is configured to create a record producer.

What to do next

Test the execution of your AI voice agent by manually calling in the telephony number to see if the AI voice agent functions the way you defined it. Review the transcript and logs for troubleshooting and improving the conversational experience of users. See AI voice agent transcript and logs tables for information on the tables containing transcript and logs.

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Configure custom assistant

Configure a custom telephony provider to use instead of the out-of-the-box voice assistant.

Before you begin

Role required: admin

Procedure

1. Configure the token by doing one of the following, depending on the token type:
   - Static token:
     a. Navigate to **All**, and then enter `token_verification.list` in the navigation filter.
     b. Select **New**.
     c. On the form, fill in the fields.

Token Verifications form

Field	Description
Name	Name of the authentication token, such as `AI voice token`.
Description	Description of the authentication token, such as `Voice Agent Auth Token`.
Token	Authentication token that is used to authenticate the provider application. Enter the authentication token that you generated using any general programming or scripting language, or select the **Generate Secure Token** related link.

     d. Select **Submit**.
   - Hash token:
     a. Navigate to **All**, and then enter `hash_message_verification.list` in the navigation filter.
     b. Select **New**.
     c. On the form, fill in the fields.

Hash Message Verification form

Fields	Description
Name	Name of the authentication token, such as `AI voice token`.
Description	Description of the authentication token, such as `Voice Agent Auth Token`.
Secret	Authentication token (random string).

     d. Select **Submit**.
2. Set up Provider Authentication for token-based authentication.
   a. Navigate to **All**, and then enter `message_auth.list` in the navigation filter.
   b. Select **New**.

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c. On the form, fill in the fields.

Message Auth form

Field	Description
Name	Name of the message authentication, such as `AI voice token`.
Provider	Name of the provider, for example, AI Voice provider.
Group name	Not required.
Service Portal	Not required.
Inbound message verification	Select the Static token or Hash message token that you created.
Outbound message creation	Select the Static token or Hash message token that you created.
Outbound service token	This field is not supported.

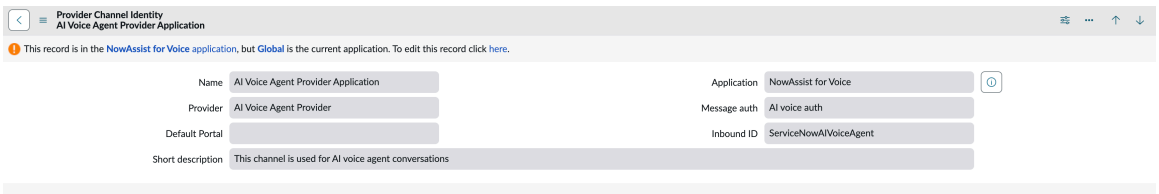
d. Select **Submit**.

3. Set the channel identity.

a. Navigate to **All**, and then enter `sys_cs_provider_application.list` in the navigation filter.

b. Select the **AI Voice Agent Provider Application** record to open it.
If you want to use an existing application or create a new provider application, be sure to update the existing configuration according to the values mentioned in Configuration for custom AI voice agent provider before proceeding further.

c. In the Provider Channel Identity form, locate the **Message auth** field and select the message auth that you set up previously.



d. Select **Update**.

Create an AI voice agent

Create an AI voice agent in the AI Agent Studio to resolve cases, incidents, or tasks through the phone channel.

Before you begin

Role required: sn_voice_aia.admin

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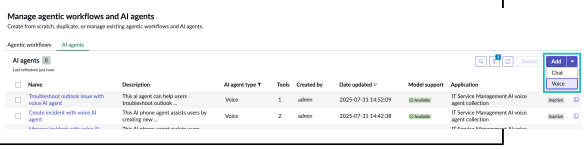
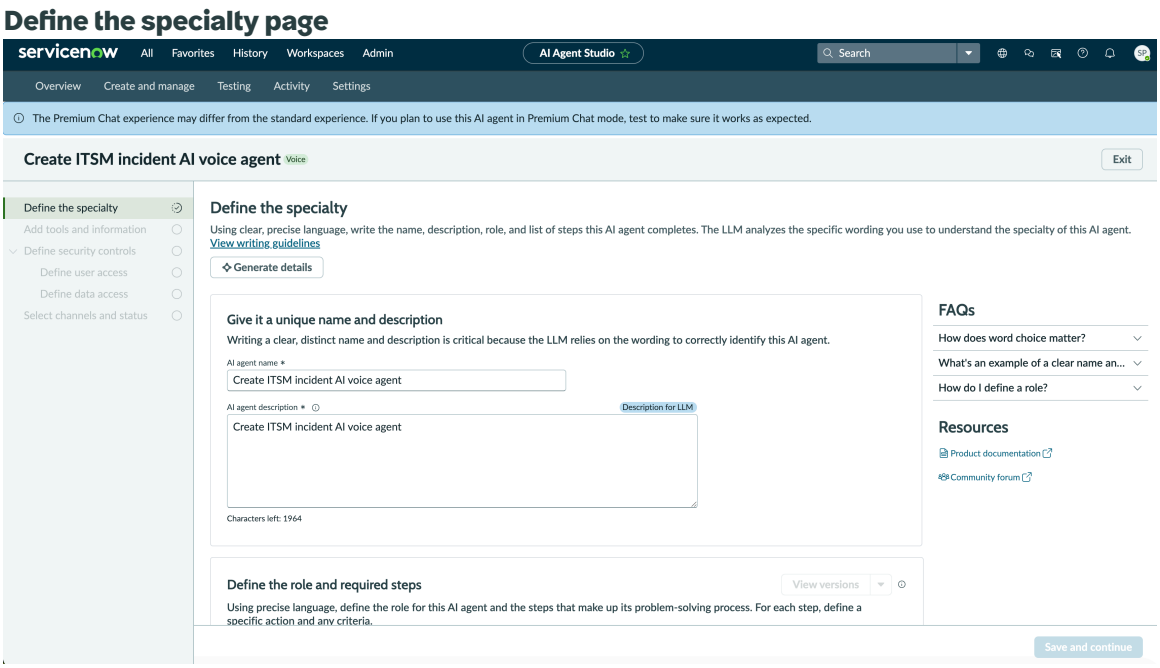
Procedure

1. Navigate to the New AI Agent page in the Assistant Designer or AI Agent Studio.

To	Do this
Navigate in Assistant Designer	**a.** Go to the **Asset Library** and select **Create asset**. The Create asset window appears. **b.** Select **AI Agent**. You are redirected to the New AI Agent workflow in the AI Agent Studio.
Navigate in AI Agent Studio	**a.** Go to **All** > **AI Agent Studio** > **Create and manage** and select the **AI agents** tab. **b.** In the Add drop-down list, select **Voice** to create an AI voice agent. 

2. On the Define the specialty page, describe your AI agent and provide instructions on how you want your AI agent to perform its tasks.



Select **Generate details** to generate a description and instructions with AI. If you provide the description of what you want the agent to do, you can select **Generate** to write the name, description, AI agent role, and instructions fields for you. You can change those fields after the text has been generated or try again with new instructions.

Note: The more details that you provide, the more accurately your AI agent can perform.

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a. On the form, fill in the fields.

Give a unique name and description form

Field	Description
AI agent name	Name of the AI agent. Provide a name according to the outcome that you want your AI agent to achieve. For example: Incident manager.
AI agent description	Brief summary of what your AI agent can do autonomously. Outline all the activities that you want your AI agent to perform. Example for the Incident manager: The Incident manager AI agent assists users with existing incidents by gathering information over the phone, matching it to records in the system, and sharing relevant incident details. It can also make limited updates to the incident using preconfigured tools.

b. On the form, fill in the fields.

Note: The AI agent uses this information as guidance to tailor its responses and actions.

Define the role and required steps form

Field	Description
AI Agent role	Capabilities and responsibilities for your AI agent. Roles enable your AI agent to perform its required actions. Example for the Incident manager: You're an AI agent that communicates incident details and makes changes to incidents for callers. You can retrieve incident fields and comments, and escalate urgency. Only gather information and run tools if the caller matches the user listed on the incident.
List of steps	Necessary steps to be followed by the AI agent while carrying out its role. **Note:** The instructions are sent to the large language model (LLM).

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Field	Description
	Example for the Incident manager: Incidents are records for tracking issues and their resolution updates through a set of journal entries. Your objective is to act as an incident manager. If the user provides an incident number, verify the caller identity before sharing permitted details. If no number is given, match incidents using the short description and confirm with the user. Allow updates only if the user matches the caller. Offer live agent transfer if the user is unsatisfied. To resolve an incident: **i.** Verify the caller number. **ii.** Search for incident records associated with the user. **iii.** Consider the context and relationship between different data points. **iv.** If the user provides an incident number, verify their identity against the caller field before sharing permitted details. Proceed with updates or modifications only after the caller's identity is verified. **v.** If no incident number is given, search using the short description, list matching incidents with brief summaries, and confirm which one the users wants to explore further. **vi.** Only share allowed fields (for example, incident number, caller, dates, urgency, state, short description, comments). Summarize comments if there are more than five, and notify the user if a field is empty or restricted. **vii.** If the user is unsatisfied, offer to transfer to a live agent. End the conversation politely if they’re satisfied or after a transfer.

Follow these guidelines for writing effective Instructions:

- Define the AI agent's role:
  - Clearly state the primary function of the AI agent in one or two sentences.
  - Example: The AI agent acts as a customer service assistant.
- Outline specialties:

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- Specify the key areas or tasks that the AI agent handles.
- Example: Specializes in handling inquiries and resolving customer issues.

- Identify the business problem:
  - Articulate the specific business challenge for the AI agent to address.
  - Example: Reducing customer wait times by 50%.

- Describe the workflow:
  - Provide a brief scenario of how the AI agent is to be used.
  - Example: Automating responses to common queries and escalating complex issues to human agents.

- Be concise and clear:
  - Use simple and direct language.
  - Avoid jargon and technical terms.
  - Example: The AI agent helps customers find answers quickly.

- Provide actionable steps:
  - Include specific instructions on how to set up and use the AI agent.
  - Example: Step 1: Define the types of inquiries the AI agent handles. Step 2: Integrate the AI agent with the customer service platform.

- Include examples:
  - Provide real-world examples to illustrate how the AI agent should function.
  - Example: For example, the AI agent can automatically respond to questions about the order status.

- Focus on outcomes:
  - Emphasize the benefits and outcomes of using the AI agent.
  - Example: Using the AI agent leads to faster resolution times and higher customer satisfaction scores.

By following these general guidelines, you can create clear and effective prompt instructions that enable you to use AI agents to their fullest potential. For more information and examples, see General guidelines for creating AI agents.

c. Optional: Determine if the AI agent can be accessed by third parties.
Making your AI agent discoverable allows you to use your ServiceNow AI agent on other platforms. You can still use it on your ServiceNow instances as well.

d. Select **Save and continue** to move to the next step.

3. In the **Add tools and information** tab, configure additional tools and data sources that provide capabilities necessary to your AI agent to accomplish its objectives.

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Select **Recommend Tools** for AI to suggest the tools that are required for the AI agent to carry out the tasks that it's built for. AI suggests tools based on the AI agent description and instructions given in the previous section.

You can add the tools suggested by AI or manually select the tools from the Add tool drop-down list. You must add at least one tool to continue setting up your AI agent, but you can also add more tools to your AI agent. The data input and output type for tools must be string for optimal voice experience.

The following tools are available for AI voice agents:

- File upload: Different file types such as PDF, DOCX, or TXT formats that you can add to your AI agent.
- Flow action: Custom automated processes in your system that you can add to your AI agent. Example for the Incident manager agent: Fetch details of the incident.
- Knowledge Graph: Various Knowledge Graph items that you can add to you AI agent.
- MCP server tool: An MCP server tool that you can to your AI agent.
- Record operation: Different record operations that you can add to your AI agent.
- Script: Editable scripts and APIs that you can add to your AI agent.
- Search retrieval: Information retrieval processes in your system that you can add to your AI agent.

  Note: Create a dedicated search profile that includes only the KB articles for AI voice agents to reduce the search scope and minimize latency.

- Sub flow: Automated flows in your system that you can add to your AI agent.

4. In the Define security controls tab, define who can access the AI agent and what data the AI agent has access to.

   a. Define the users who can access this AI agent (ACLs).
   Choose from:

   - **Any authenticated user**: A user who is logged in can access the AI agent.
   - **Users with specific roles**: Users that are assigned specific roles can access the AI agent. Selecting this option enables you to select the roles in the Role drop-down list.
   - **Public**: Anyone can access the AI agent, even without logging in.

   b. **Optional:** If you selected **Public**, select **Require caller identification** to have the AI voice agent identify the caller before the conversation begins.

   (Optional) When selected, the agent uses the caller identification methods configured in the Caller Identification section of the voice assistant to match the caller to a name. Identification does not authenticate the caller or grant additional access. The session continues with public user permissions.

   Note: This option is available only for voice agents configured with **Public** access.

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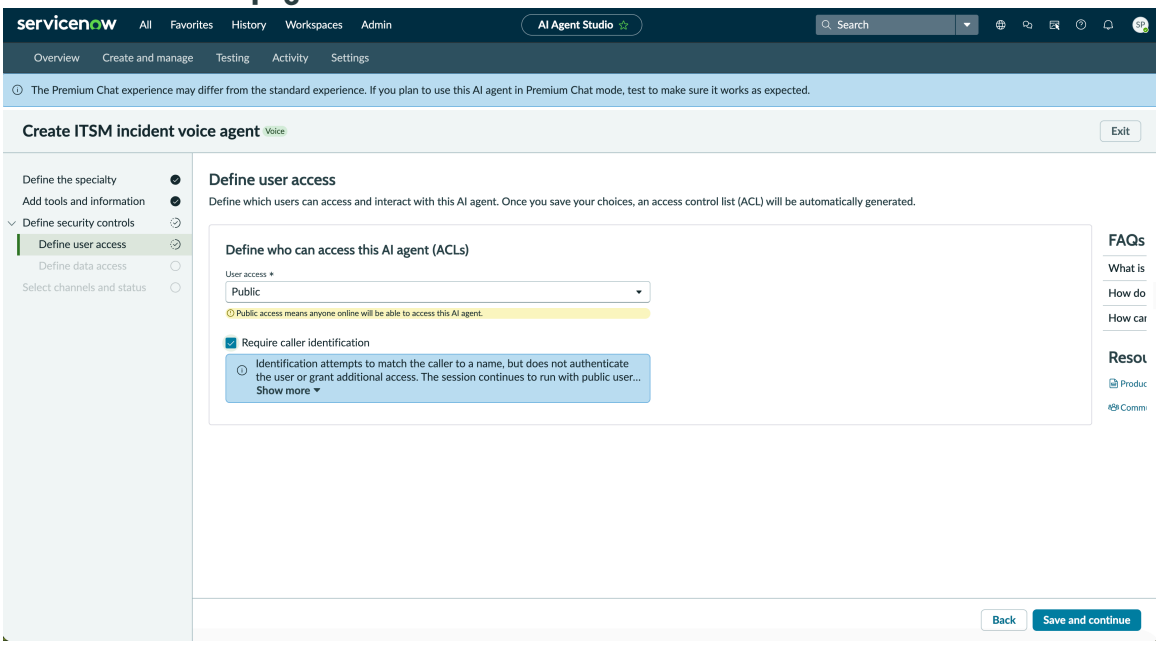
Define user access page



c. Optional: Select **Require step-up authentication of users** to require callers to complete a high-assurance authentication factor before the AI agent runs.

> **Note:**
>
> This option is available only for AI voice agents. For more information about step-up authentication, see Step-up authentication.
>
> A step-up authentication factor must also be selected in **Caller Verification** for each voice assistant that uses this AI agent, from the following supported factors: Okta Verify push notification, SMS verification code, and authenticator app time-based one-time password (TOTP). See Identify and authenticate the caller. Without a selected factor, callers are routed to the fallback method configured on the Safeguards screen.

d. Define the user identity of the AI agents to determine what data it has access to.

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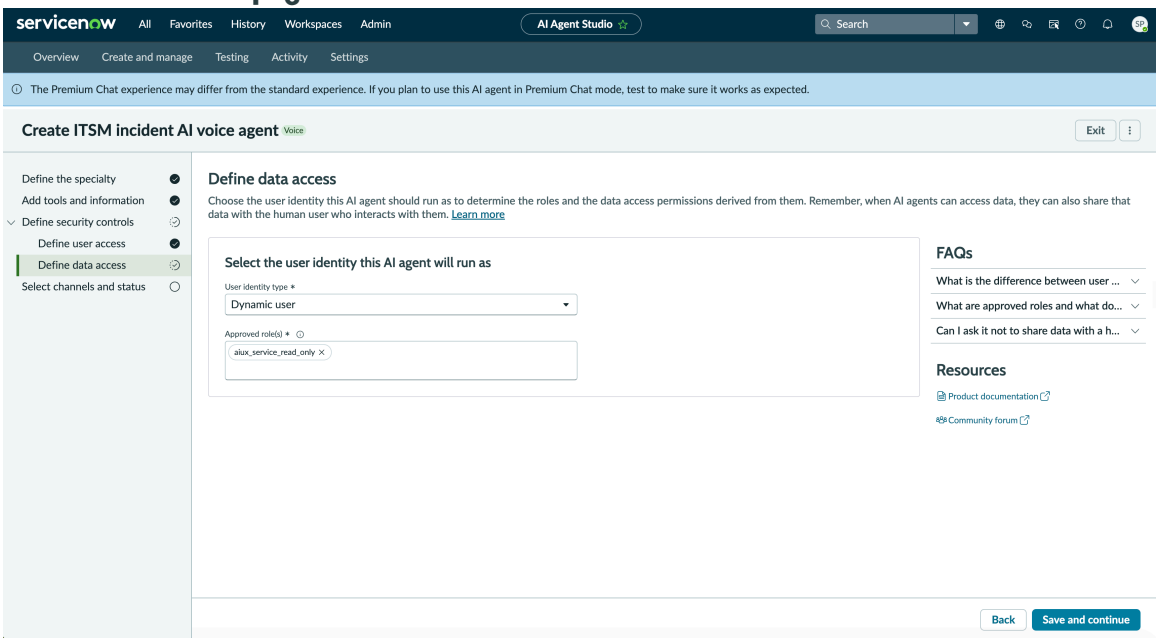
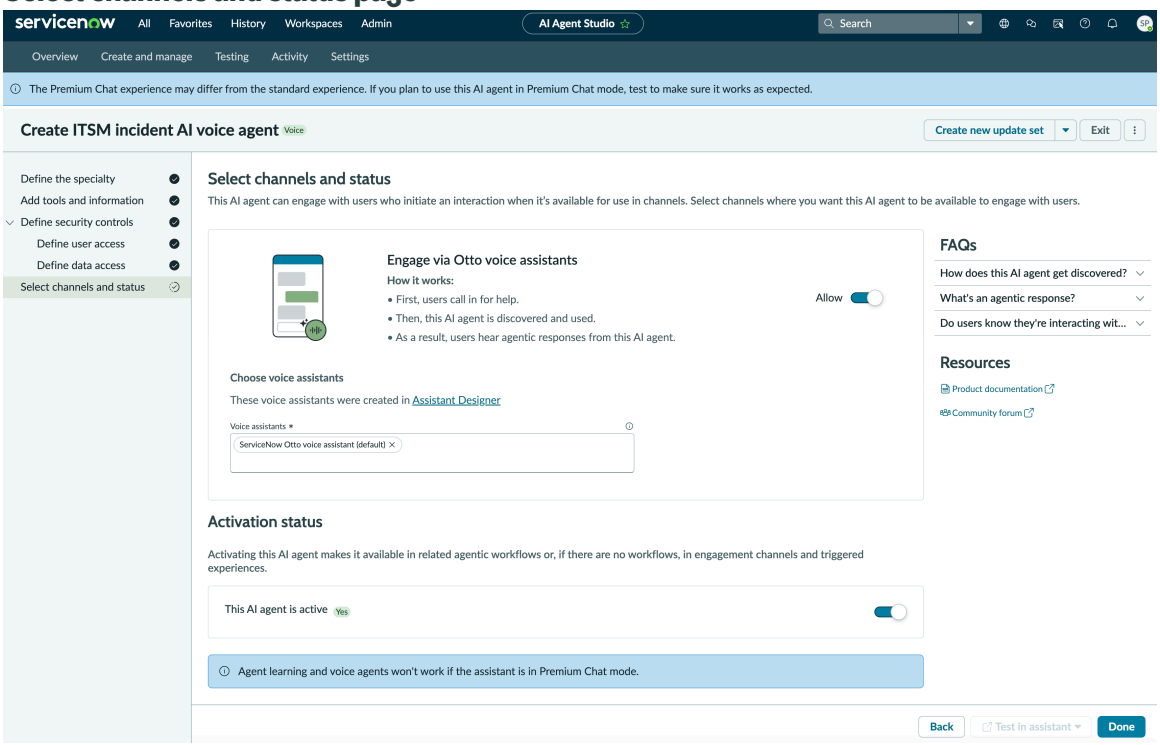
The default selection is **Dynamic user**. The user passes their roles to the AI agent, and the AI agent runs as the user that invokes it. The user's ACLs determine the data accessible to the AI agent.

Define data access page



5. Select channels and activation status for your AI voice agent.

Select channels and status page



a. Select **Allow** to enable users to use phone calls to invoke the AI agent.

b. In the **Choose voice assistants** field, select the default assistant or a custom assistant. Voice assistants are created in Assistant Designer. See Create a voice assistant for more information.

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c. Activate the AI agent by toggling the **Status**.

d. **Optional:** Select **Test in assistant** to test your AI voice agent in the voice testing experience.
   - If one voice assistant is linked, the voice testing panel opens directly.
   - If multiple voice assistants are linked, select the voice assistant you want to use for testing.
   - If no voice assistants are linked, **Test in assistant** is disabled. Link a voice assistant first.

6. Select **Done** to save the configuration.

Integrating voice assistant with CCaaS provider

Enable users to get voice-based support from ServiceNow AI voice agents by integrating ServiceNow voice assistant with supported third-party Contact Center as a Service providers (CCaaS).

When you create or edit a voice assistant, you configure communication channels to define how the assistant connects to users. Select a **Provider application** to deploy the assistant to — this field is required for all communication channel types and appears above the channel tabs.

Communication channels are organized into two tabs:

- **Telephony provider** — connects the voice assistant to a phone network.
- **Web Real-Time Communication (WebRTC)** — connects the voice assistant to mobile applications.

Note: To configure a telephony provider, select a communication channel type from the **Communication channel** drop-down, then select a CCaaS provider. The available CCaaS providers depend on the selected channel type. To remove a linked provider, select **Unlink this provider**.

Telephony providers

The following sections describe the configuration fields for each supported CCaaS provider under the **Telephony provider** tab.

Twilio voice service (WebSocket)

Twilio voice service configuration fields

Field	Description
Authentication Token	Authentication token to authenticate to your Twilio voice service account.
URL	Read-only. Autogenerated URL to connect Twilio voice service to the voice assistant.

Genesys voice service (Audio Connector)

Genesys uses the Audio Connector integration and the WebSocket channel type. After the configuration is saved, copy the generated credentials and paste them into your Genesys Cloud account to complete the integration.

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Genesys Audio Connector configuration fields

Field	Description
Base connection URI	Read-only. Autogenerated WebSocket URL to connect the Genesys Cloud Audio Connector to the voice assistant. Copy this value to your Genesys Cloud account.
Connector ID	Read-only. Autogenerated identifier for the Genesys Cloud Audio Connector. Copy this value to your Genesys Cloud account.
Client secret	Read-only. Base64-encoded client secret for secure access. Copy this value to your Genesys Cloud account.
API key	Read-only. API key to authenticate your Genesys Cloud service to the voice assistant. Copy this value to your Genesys Cloud account.

Genesys voice service (SIP)

Genesys voice service configuration fields

Field	Description
Transfer number/address	SIP URI to transfer the call to the Genesys voice service. Use the format `user@domain`, where the user part is up to 16 characters and the domain part is up to 256 characters. URI parameters are not supported.
Transfer method	Read-only. Set to **REFER** for Genesys voice service.
ServiceNow SIP Trunk information	Read-only. The ServiceNow SIP fully qualified domain name for your region, used to route calls from Genesys voice service to the voice assistant. For configuration details, see KB3023612.
x-snc-param	Read-only. Generated token to send to your Genesys CCaaS account to authenticate requests to the voice assistant.

Amazon Connect (PSTN)

Amazon Connect configuration fields

Field	Description
Transfer method	Read-only. Set to **BYE** for Amazon Connect.
Call context API	Read-only. The URL that Amazon Connect uses to send call context data to the voice assistant.
Client ID	Read-only. Generated client ID for OAuth2 authentication of call context requests from Amazon Connect to the voice assistant.
Client Secret	Read-only. Generated client secret for OAuth2 authentication of call context requests from Amazon Connect to the voice assistant.

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3CLogic (WebSocket)

3CLogic uses the WebSocket channel type. After the configuration is saved, copy the generated credentials and paste them into your 3CLogic account to complete the integration.

3CLogic configuration fields

Field	Description
URL	Read-only. Autogenerated WebSocket URL to connect the 3CLogic voice service to the voice assistant. Copy this value to your 3CLogic account.
Client secret	Read-only. Generated client secret to authenticate requests from 3CLogic to the voice assistant. Copy this value to your 3CLogic account.
Client id	Read-only. Generated client ID to authenticate requests from 3CLogic to the voice assistant. Copy this value to your 3CLogic account.

Five9 (SIP)

Five9 configuration fields

Field	Description
Transfer method	Read-only. Set to **BYE** for Five9.
ServiceNow SIP Trunk information	Read-only. The ServiceNow SIP fully qualified domain name (FQDN) for your region, used to route calls from Five9 to the voice assistant. For configuration details, see KB3023612.
x-snc-param	Read-only. Generated token to send to your Five9 account to authenticate requests to the voice assistant.

NICE CXone (SIP)

NICE CXone uses the SIP channel type. Enter the NICE API credentials from your CXone account, then use the generated ServiceNow SIP Trunk information to configure the SIP trunk in CXone.

NICE API credentials

Field	Description
API endpoint	The CXone API base URL. Must be a valid NICE domain, such as `https://cxone.niceincontact.com` or `https://cxone-gov.niceincontact.com`.
Token endpoint	The CXone OAuth token URL used to generate authentication tokens. Must be a valid NICE domain.
Username	The access key ID from your CXone account. Work with your Nice account team to obtain this credential.
Password	The access key secret from your CXone account. This value is only displayed once when generated. Copy it before navigating away.

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NICE API credentials (continued)

Field	Description
Client ID	The OAuth client ID from your CXone account.
Client Secret	The OAuth client secret from your CXone account.

ServiceNow SIP Trunk information

Field	Description
Transfer number/address	SIP URI or phone number to transfer the call to your CXone service. Use the format `user@domain`.
Transfer method	Read-only. Set to **REFER** for CXone.
ServiceNow SIP FQDN	Read-only. The ServiceNow SIP fully qualified domain name (FQDN) for your region, used to route calls from CXone to the voice assistant. For configuration details, see KB3023612.
x-snc-param	Read-only. Generated token to send to your CXone account to authenticate requests to the voice assistant.

Integrate ServiceNow voice assistant with Twilio voice service

Enable users to get support from AI voice agents by integrating a ServiceNow AI voice assistant with the Twilio voice service.

Before you begin

ServiceNow AI voice assistant uses the authentication token of your Twilio account to connect to the Twilio voice service. To obtain the authentication token, do the following.

1. Sign up or log in to your Twilio admin console.
2. Navigate to **Account Dashboard** > **Account Info**.
3. Copy your Account SID and Auth Token.

Role required: sn_aia.admin

About this task

Connect your Twilio voice service to a ServiceNow voice assistant using the WebSocket communication channel. After the integration is configured, Twilio routes calls to the ServiceNow voice assistant. When the interaction is complete, the integration supports transferring the caller to a live agent.

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Assistant Designer** > **Assistants**.
2. Find the voice assistant to connect to Twilio and select **Edit**.
3. Select **Communication channels** from the guided setup navigation.
4. In the **Provider application** field, select the provider application to deploy the voice assistant to.
5. Select the **Telephony provider** tab.
6. From the **Communication channel** drop-down list, select **WebSocket**.
7. From the **CCaaS provider** drop-down list, select **Twilio** and fill in the fields.

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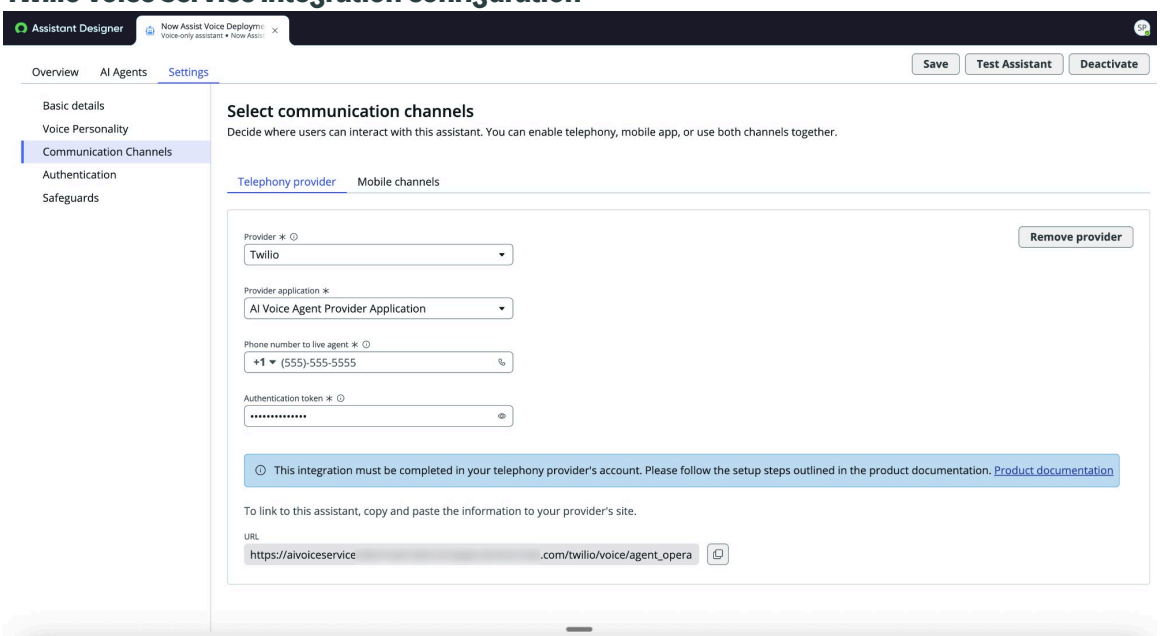
Twilio voice service configuration fields

Field	Description
Authentication token	Authentication token to connect the ServiceNow® voice assistant to your Twilio voice service. Enter the Auth Token that you collected earlier.
URL	Autogenerated URL to connect Twilio voice service to the ServiceNow® voice assistant. Copy the URL for use in the Twilio console. If you do not see the URL, make sure an endpoint is associated with the `sys_service` record for AIVoiceAgents. This endpoint is used to generate the URL required for your integration. If no endpoint is present in the record, click Refresh Connections to populate it.

Twilio voice service integration configuration

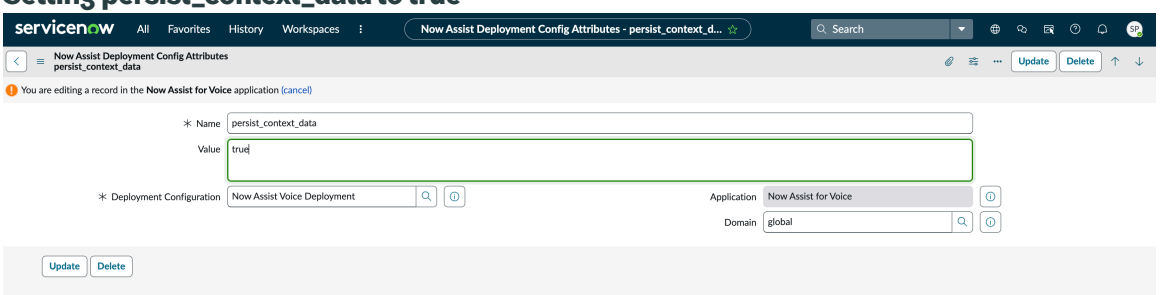


8. Enable context data persistence for the voice service.

   a. Navigate to `sys_now_assist_deployment_config_attributes.list` and check whether a `persist_context_data` attribute exists for your voice service.

   b. If the attribute exists, open it and set **Value** to `true`.

Setting persist_context_data to true



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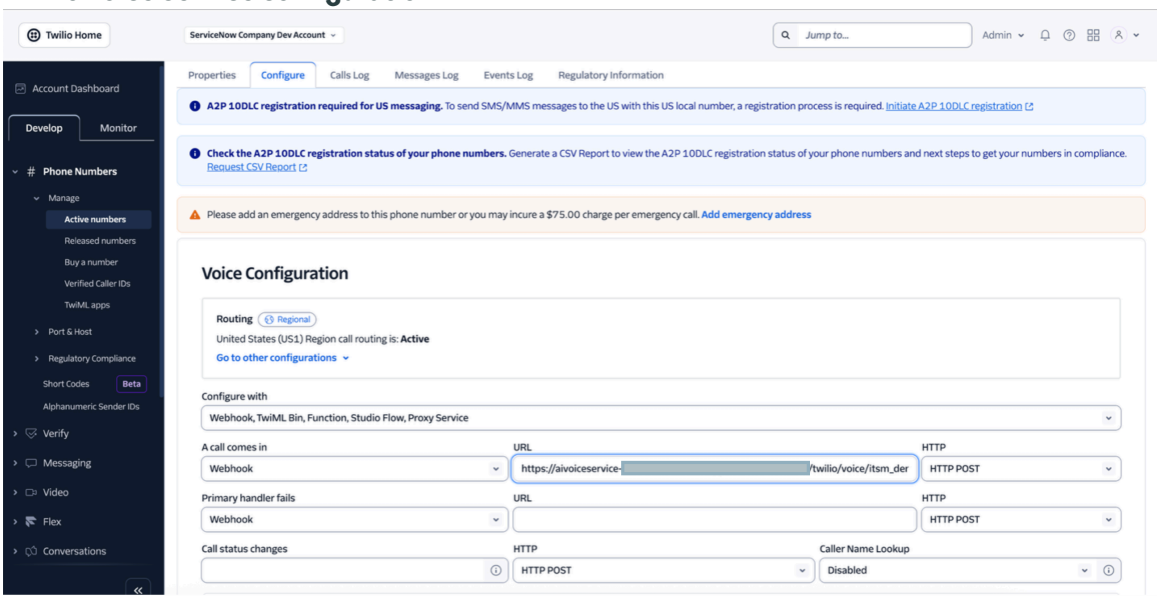
c. If the attribute does not exist, navigate to `sys_now_assist_deployment_config.list`, open your voice assistant's deployment configuration record, and copy its sys_id.
To copy the sys_id, select and hold (or right-click) the record header bar and select **Copy sys_id**.

d. Navigate to `sys_now_assist_deployment_config_attributes.list`, select **New**, set **Deployment Configuration** to the sys_id you copied, **Name** to `persist_context_data`, and **Value** to `true`, then select **Submit**.

When `persist_context_data` is enabled, the voice assistant saves the session context as an `interaction_context` record named `bot_context_data` after each call. For details about the stored fields, see Bot context data.

9. In the Twilio console, go to your purchased number's configuration and set the URL copied earlier as the Webhook URL.

Twilio voice service configuration



Integrate ServiceNow voice assistant with Genesys Cloud service (Audio Connector)

Enable users to get support from AI voice agents by integrating a ServiceNow AI voice assistant with Genesys Cloud service using the Audio Connector integration.

Before you begin

- Be aware of Genesys Audio Connector limits and throttling policies. See Organization rate limits and Platform API rate limits for more information.
- Be sure to host the ServiceNow instance in a region the same as or closer to the region where the Genesys Cloud service is hosted to minimize latency.
- To route live agent transfer via Advanced Work Assignment (AWA), download and install the Unified Experience from Genesys - Core and Unified Experience from Genesys Store apps.

Role required: sn_aia.admin

About this task

Connect your Genesys Cloud contact center to a ServiceNow voice assistant using the Audio Connector integration and the WebSocket communication channel. After the integration is

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configured, Genesys Cloud routes calls to the ServiceNow voice assistant through the Audio Connector. When call handling is complete, the integration supports transferring the caller to a live agent queue.

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Assistant Designer** > **Assistants**.
2. Find the voice assistant to connect to Genesys Cloud service and select **Edit**.
3. Select **Communication channels** from the guided setup navigation.
4. In the **Provider application** field, select the provider application to deploy the voice assistant to.
5. Select the **Telephony provider** tab.
6. From the **Communication channel** drop-down list, select **WebSocket**.
7. From the **CCaaS provider** drop-down list, select **Genesys**.

   The following fields are generated. Copy these values to configure the Audio Connector integration in your Genesys Cloud account.

Genesys Audio Connector configuration fields

Field	Description
Base connection URI	Autogenerated WebSocket URL to connect your Genesys Cloud Audio Connector to the ServiceNow voice assistant. Copy the URL for use in the Audio Connector configuration. If you do not see the URL, make sure an endpoint is associated with the `sys_service` record for AIVoiceAgents. This endpoint is used to generate the URL required for your integration. If no endpoint is present in the record, click Refresh Connections to populate it.
Connector ID	Autogenerated identifier for the Genesys Cloud Audio Connector. Copy the value for use in the Audio Connector configuration.
Client secret	Base64-encoded client secret used to provide secure access to the required resources. Copy the value for use in the Audio Connector configuration. For more information on Client secret and API key, see Client Authentication.
API key	API key to authenticate your Genesys Cloud service to the ServiceNow voice assistant. Copy the value for use in the Audio Connector configuration.

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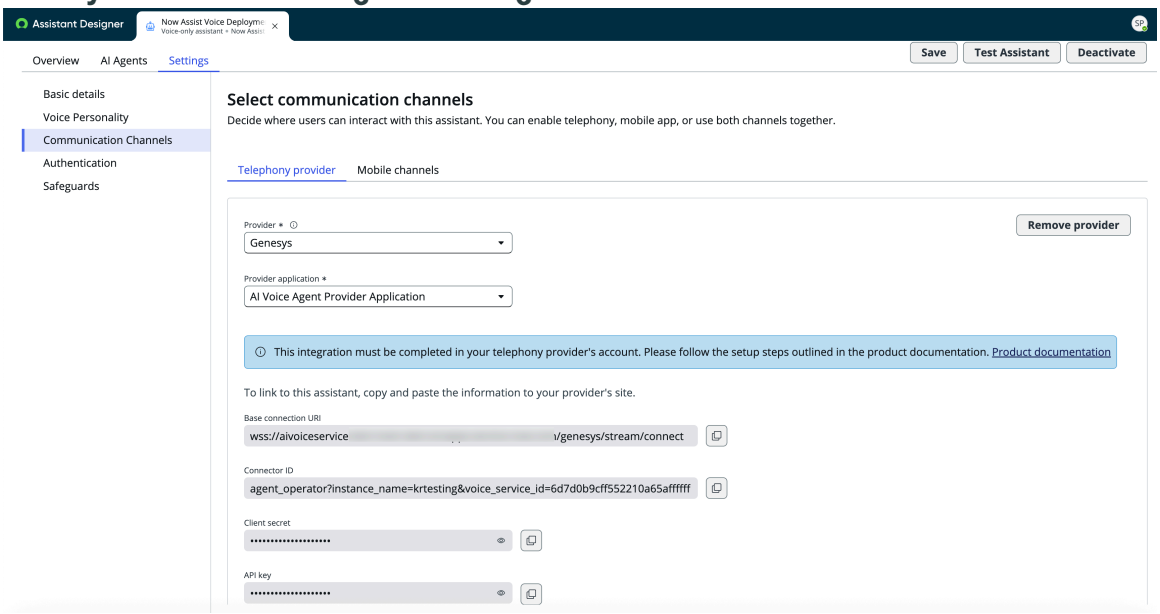
Genesys Cloud service integration configuration

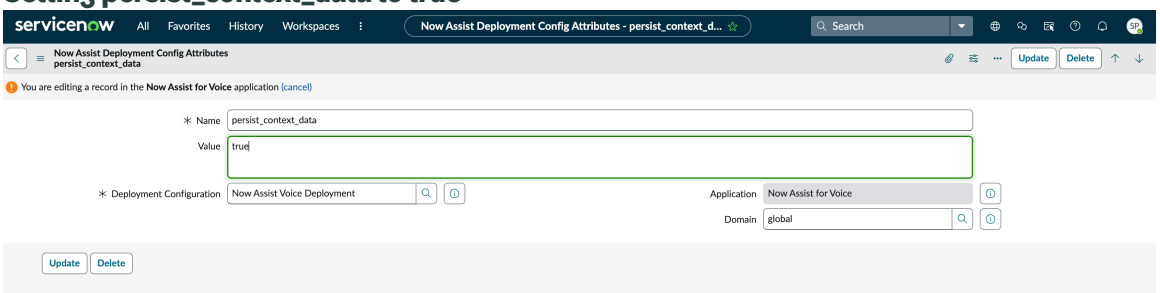


8. Enable context data persistence for the voice service.

   a. Navigate to `sys_now_assist_deployment_config_attributes.list` and check whether a `persist_context_data` attribute exists for your voice service.

   b. If the attribute exists, open it and set **Value** to `true`.

Setting persist_context_data to true



   c. If the attribute does not exist, navigate to `sys_now_assist_deployment_config.list`, open your voice assistant's deployment configuration record, and copy its sys_id.
   To copy the sys_id, select and hold (or right-click) the record header bar and select **Copy sys_id**.

   d. Navigate to `sys_now_assist_deployment_config_attributes.list`, select **New**, set **Deployment Configuration** to the sys_id you copied, **Name** to `persist_context_data`, and **Value** to `true`, then select **Submit**.

   When `persist_context_data` is enabled, the voice assistant saves the session context as an `interaction_context` record named `bot_context_data` after each call. For details about the stored fields, see Bot context data.

9. Create Audio Connector integration.

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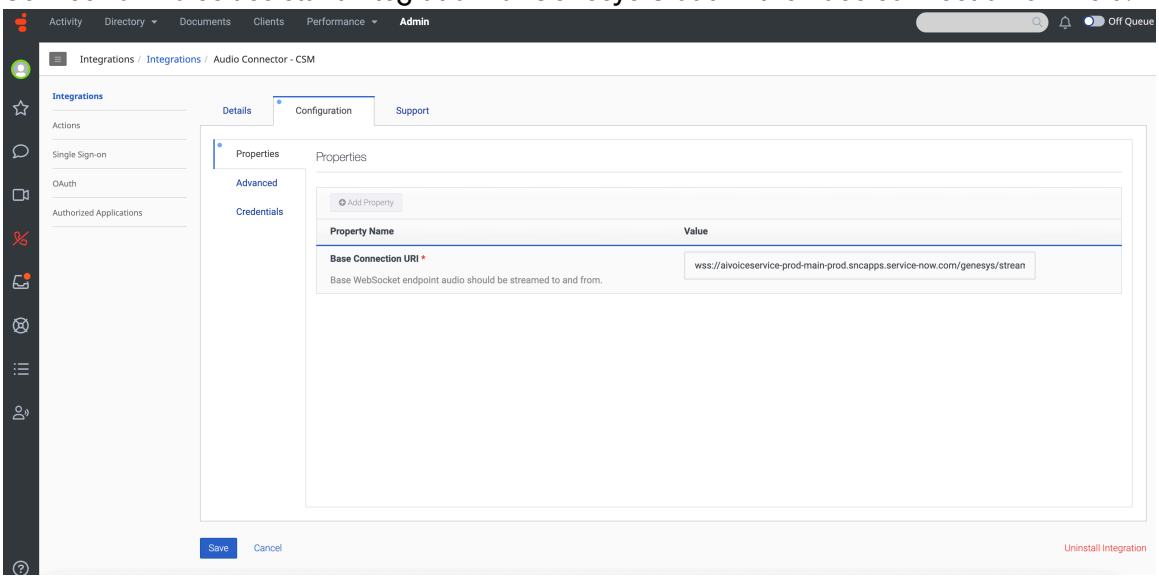
a. Navigate to **Menu** > **IT and Integrations** > **Integrations** and select **Add new integration**.

b. Select **Audio Connector** as the integration type and select **Install**.

c. In the Details tab, name the integration, for example, Audio Connector - Voice.

d. In the **Configuration** tab, select **Properties**, and add the Base connection URI from your ServiceNow voice assistant integration for Genesys Cloud in the Base connection URI field.



e. Select **Credentials**, and add the API key and Client secret obtained from ServiceNow voice assistant integration for Genesys Cloud.

f. Select **Save**.

10. Architect the inbound call flow.

a. Use the search bar to navigate to Architect and create the inbound call flow according to your requirements.

Note:

In the **Connector ID** field, enter the Connector ID obtained from creating ServiceNow voice assistant integration for Genesys Cloud.

If you intend to use live agent transfer as the fallback option, add the transfer logic in the call flow and validate the flow.

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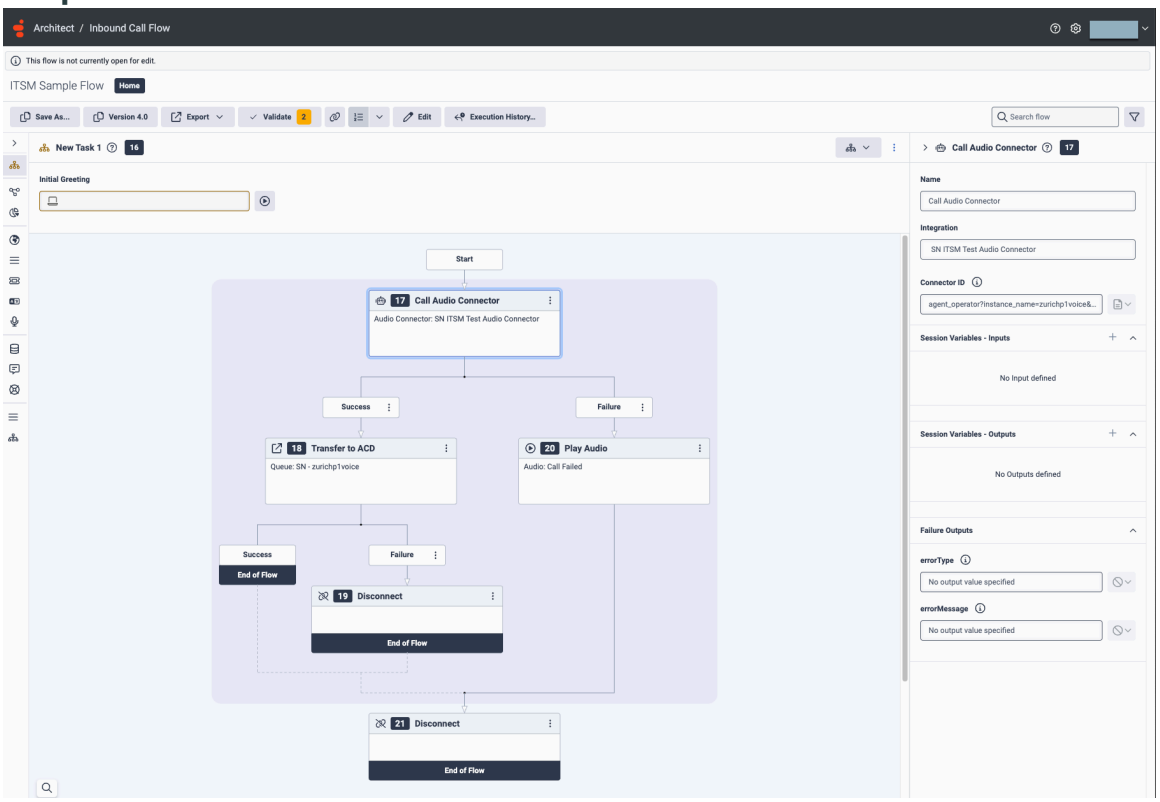
Sample inbound call flow



b. Select **Save** to save and **Publish** to publish the call flow.

11. Configure call routing.

a. Use the search bar to navigate to Call Routing and create a call route.
For more information on creating a call flow routing, see Add a call route.

b. Assign the inbound call flow that you created earlier to the call route.

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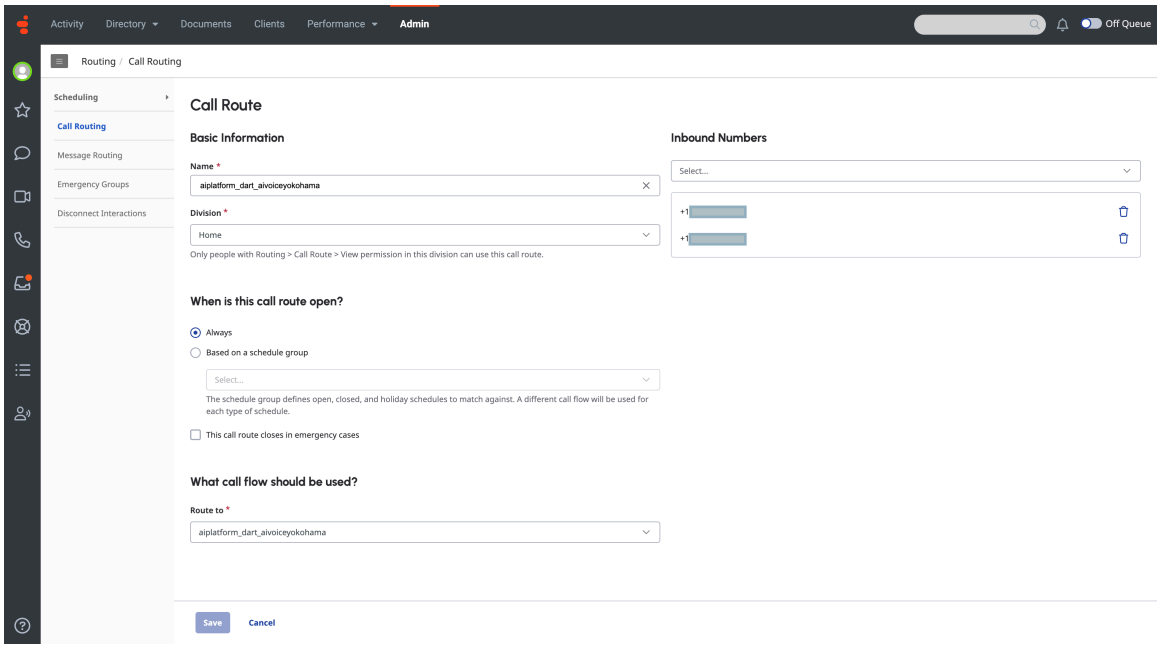
c. Select **Save**.



12. Assign a phone number to the call route.
    a. Use the search bar to navigate to Telephony and select DID numbers.
    b. Select a DID number and assign the number to the call route created earlier.

Integrate ServiceNow voice assistant with Genesys Cloud service (SIP)

Enable users to get support from AI voice agents by integrating a ServiceNow voice assistant with Genesys Cloud service using the Session Initiation Protocol (SIP) communication channel.

Before you begin

- Create a voice assistant. See Create an AI voice assistant for more information.

Role required: sn_aia.admin

About this task

Connect your Genesys Cloud contact center to a ServiceNow voice assistant using the Session Initiation Protocol (SIP) communication channel. After the integration is configured, Genesys Cloud routes calls to the ServiceNow SIP endpoint, where the AI voice agent handles the interaction. When call handling is complete, the integration supports transferring the caller to a live agent queue using the SIP REFER transfer method.

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Assistant Designer** > **Assistants**.
2. Find the voice assistant to connect to Genesys Cloud service and select **Edit**.
3. Select **Communication channels** from the guided setup navigation.
4. In the **Provider application** field, select the provider application to deploy the voice assistant to.
5. Select the **Telephony provider** tab.
6. From the **Select communication channels** drop-down list, select **Session Initiation Protocol (SIP)**.

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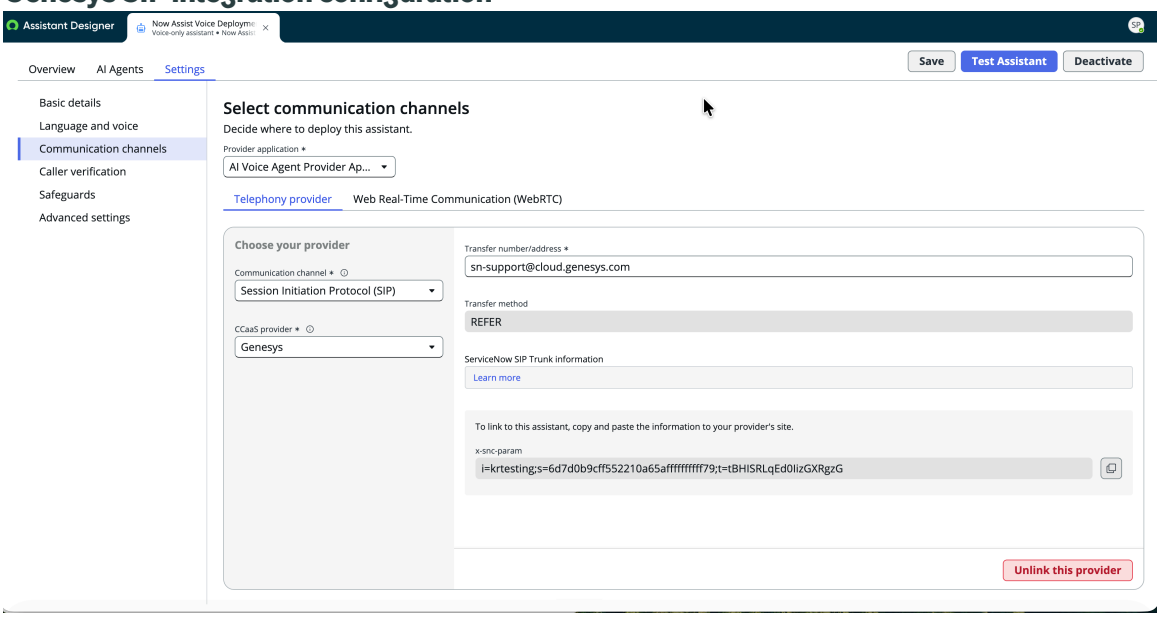
7. From the **CCaaS provider** drop-down list, select **Genesys**.

   Enter the **Transfer number/address** and note the following generated values. You need these to configure the SIP trunk in your Genesys Cloud account.

Genesys SIP configuration fields

Field	Description
Transfer number/ address	SIP URI to transfer the call to your Genesys Cloud service. Use the format `user@domain`, where the user part is up to 16 characters and the domain part is up to 256 characters. URI parameters are not supported.
Transfer method	Value set to **REFER** for Genesys Cloud service.
ServiceNow SIP Trunk information	The ServiceNow SIP fully qualified domain name (FQDN) for your region, used to route calls from Genesys Cloud service to the voice assistant. For SIP trunk configuration details including IP addresses and FQDNs per region, see SIP trunk configuration [KB3023612].
x-snc-param	Generated token to send to your Genesys Cloud account to authenticate requests to the voice assistant.

Genesys SIP integration configuration



8. Enable context data persistence for the voice service.

   a. Navigate to `sys_now_assist_deployment_config_attributes.list` and check whether a `persist_context_data` attribute exists for your voice service.

   b. If the attribute exists, open it and set **Value** to `true`.

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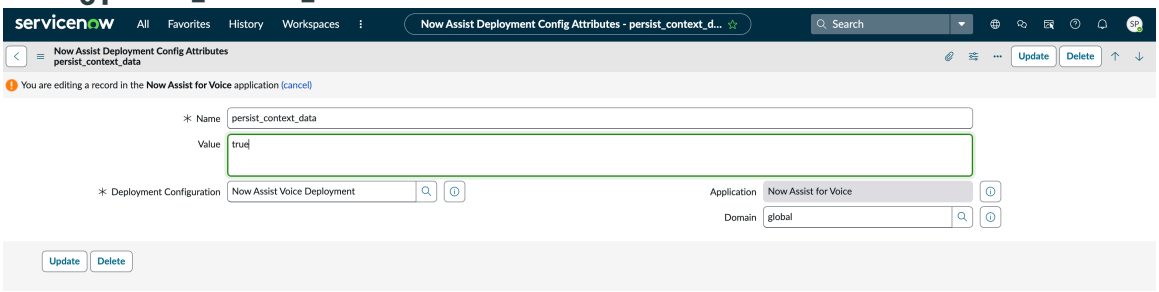
Setting persist_context_data to true



c. If the attribute does not exist, navigate to `sys_now_assist_deployment_config.list`, open your voice assistant's deployment configuration record, and copy its sys_id.
To copy the sys_id, select and hold (or right-click) the record header bar and select **Copy sys_id**.

d. Navigate to `sys_now_assist_deployment_config_attributes.list`, select **New**, set **Deployment Configuration** to the sys_id you copied, **Name** to `persist_context_data`, and **Value** to `true`, then select **Submit**.

When `persist_context_data` is enabled, the voice assistant saves the session context as an `interaction_context` record named `bot_context_data` after each call. For details about the stored fields, see Bot context data.

9. In your Genesys Cloud account, configure the SIP trunk using the ServiceNow SIP FQDN and authentication token.
Use the **ServiceNow SIP Trunk information** and the **x-snc-param** token generated in the previous step. For SIP trunk configuration details, see SIP trunk configuration [KB3023612].

Result
Genesys Cloud service is connected to your ServiceNow voice assistant. Incoming calls routed through Genesys Cloud service are handled by the AI voice agent, which responds with a greeting and processes the caller's requests.

What to do next
For live agent transfer configuration and advanced SIP trunk settings, refer to your Genesys Cloud documentation or contact Genesys support.

Integrate ServiceNow voice assistant with 3CLogic

Enable users to get support from AI voice agents by integrating a ServiceNow AI voice assistant with the 3CLogic voice service.

Before you begin
- Create a voice assistant. See Create an AI voice assistant for more information.

Role required: sn_aia.admin

About this task
Connect your 3CLogic voice service to a ServiceNow voice assistant using the WebSocket communication channel. When the integration is complete, incoming calls routed through 3CLogic are handled by the AI voice agent. When call handling is complete, the integration supports transferring the caller to a live agent queue.

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Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Assistant Designer** > **Assistants**.
2. Find the voice assistant that you want to connect to 3CLogic and select **Edit**.
3. Select **Communication channels** from the guided setup navigation.
4. In the **Provider application** field, select the provider application to deploy the voice assistant to.
5. Select the **Telephony provider** tab.
6. From the **Select communication channels** dropdown, select **WebSocket**.
7. From the **CCaaS provider** dropdown, select **3CLogic**.

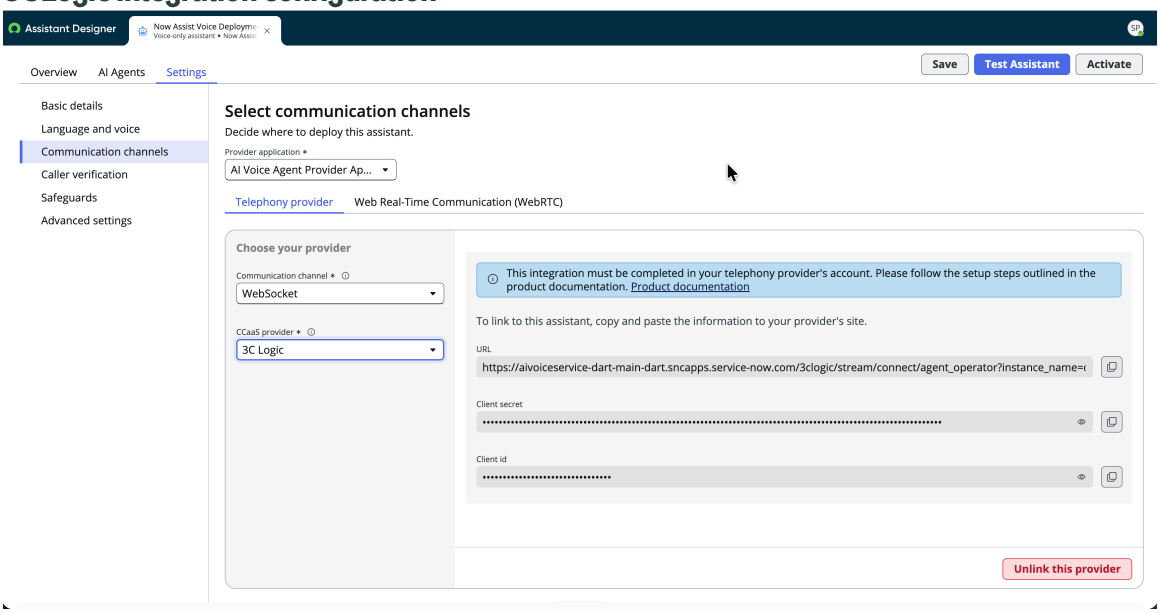
> **Note:** This integration must be completed in your telephony provider's account. Follow the setup steps outlined in the 3CLogic product documentation.

The following read-only fields are generated. Copy these values to your 3CLogic account to complete the integration.

3CLogic configuration fields

Field	Description
URL	Autogenerated WebSocket URL to connect the 3CLogic voice service to the voice assistant.
Client secret	Generated client secret to authenticate requests from 3CLogic to the voice assistant.
Client id	Generated client ID to authenticate requests from 3CLogic to the voice assistant.

3CLogic integration configuration



8. Enable context data persistence for the voice service.

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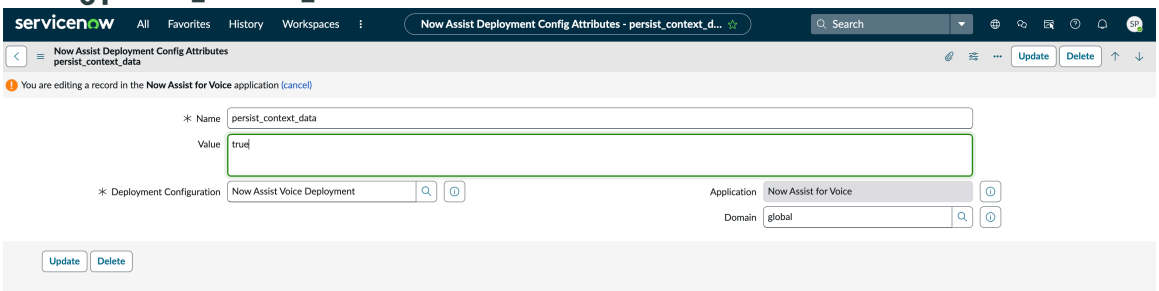
a. Navigate to `sys_now_assist_deployment_config_attributes.list` and check whether a `persist_context_data` attribute exists for your voice service.

b. If the attribute exists, open it and set **Value** to `true`.

Setting persist_context_data to true



c. If the attribute does not exist, navigate to `sys_now_assist_deployment_config.list`, open your voice assistant's deployment configuration record, and copy its `sys_id`.
To copy the `sys_id`, right-click the record header bar and select **Copy sys_id**.

d. Navigate to `sys_now_assist_deployment_config_attributes.list`, click **New**, set **Deployment Configuration** to the `sys_id` you copied, **Name** to `persist_context_data`, and **Value** to `true`, then click **Submit**.

When `persist_context_data` is enabled, the voice assistant saves the session context as an `interaction_context` record named `bot_context_data` after each call. For details about the stored fields, see Bot context data.

9. In your 3CLogic account, paste the **URL**, **Client secret**, and **Client id** into the corresponding fields.
10. Complete any additional configuration required in your 3CLogic account.
For provider-side configuration steps specific to your 3CLogic deployment, contact 3CLogic customer support.

Result

The 3CLogic voice service is connected to your ServiceNow voice assistant. Incoming calls routed through 3CLogic are handled by the AI voice agent, which responds with a greeting and processes the caller's requests.

Note: Call recording is not available for 3CLogic integrations.

What to do next

For live agent transfer configuration and advanced 3CLogic settings, contact 3CLogic customer support.

Integrate ServiceNow voice assistant with Amazon Connect

Enable users to get support from AI voice agents by integrating a ServiceNow voice assistant with Amazon Connect.

Before you begin

- Create a voice assistant. See Create an AI voice assistant for more information.
- Access to your Amazon Connect instance with permissions to create Lambda functions, configure contact flows, and manage Identity and Access Management (IAM) roles.

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Role required: sn_aia.admin

About this task

Connect your Amazon Connect contact center to a ServiceNow voice assistant using the Public Switched Telephone Network (PSTN) communication channel. When a call arrives, Amazon Connect invokes a Lambda function that retrieves a PSTN number from the ServiceNow Call Context API and transfers the call to the voice assistant. After the voice assistant handles the interaction, the Lambda function retrieves the interaction context and routes the call to a queue or ends the call.

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Assistant Designer** > **Assistants**.
2. Find the voice assistant to connect to Amazon Connect and select **Edit**.
3. Select the **Settings** tab.
4. Select **Communication channels** from the guided setup navigation.
5. In the **Provider application** field, select the provider application to deploy the voice assistant to.
6. Select the **Telephony provider** tab.
7. From the **Communication channels** drop-down list, select **Public Switched Telephone Network (PSTN)**.
8. From the **CCaaS provider** drop-down list, select **Amazon Connect**.

   The following read-only fields are generated in the **Call context service** section. Copy and save these values — you need them to configure the integration on the Amazon Connect side.

Amazon Connect configuration fields

Field	Description
Transfer method	Value set to **BYE** for Amazon Connect.
Call context API	The URL that Amazon Connect uses to send call context data to the voice assistant. Copy this value for use as the `call_context_api_path` and `voice_service_host_name` Lambda environment variables.
Client ID	Generated client ID for OAuth2 authentication. Copy this value for use in the AWS Parameter Store setup.
Client Secret	Generated client secret for OAuth2 authentication. Copy this value for use in the AWS Parameter Store setup.

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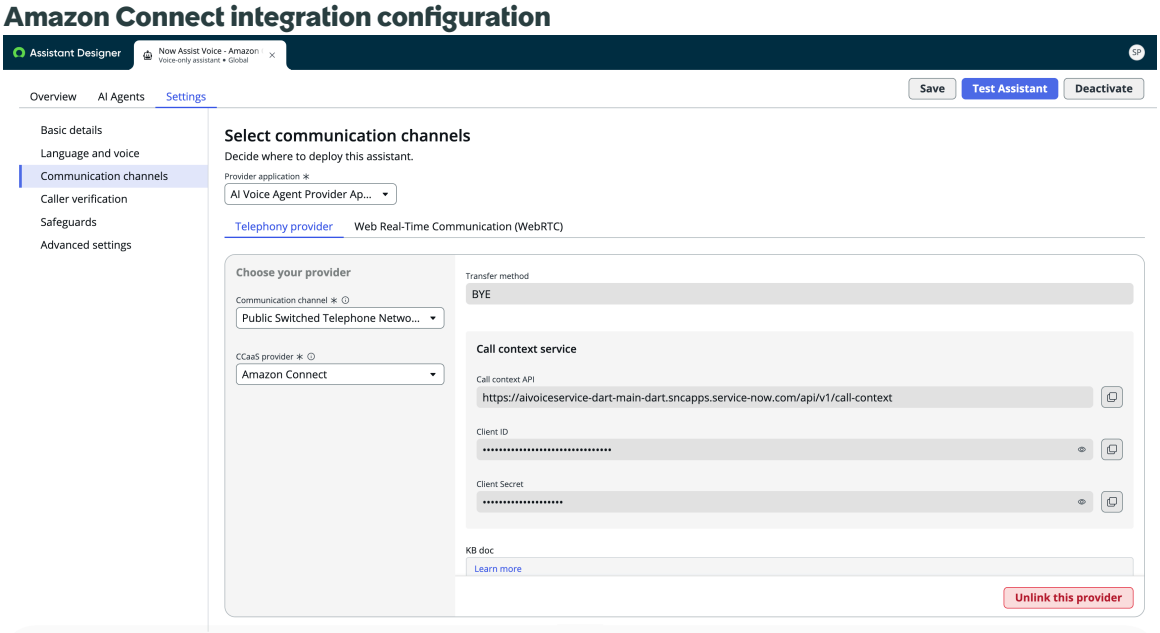


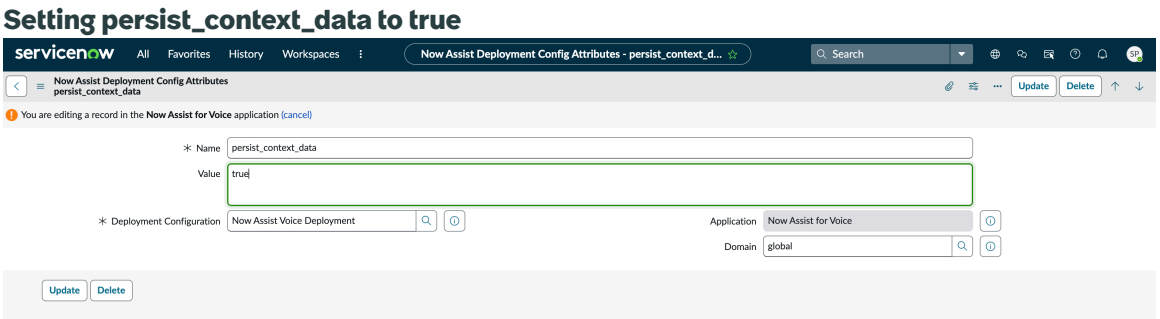
Also note the voice service sys_id, which you can find in the URL when viewing the voice service record. You need this value in the Amazon Connect configuration steps.

Note: The Call Context API uses client credentials OAuth 2.0. For more details, see Client Credentials.

9. Enable context data persistence for the voice service.

   a. Navigate to `sys_now_assist_deployment_config_attributes.list` and check whether a `persist_context_data` attribute exists for your voice service.

   b. If the attribute exists, open it and set **Value** to `true`.
   This setting allows the Lambda function to retrieve interaction context data from ServiceNow after the voice assistant completes the call.



   c. If the attribute does not exist, navigate to `sys_now_assist_deployment_config.list`, open your voice assistant's deployment configuration record, and copy its sys_id.
   To copy the sys_id, select and hold (or right-click) the record header bar and select **Copy sys_id**.

   d. Navigate to `sys_now_assist_deployment_config_attributes.list`, select **New**, set **Deployment Configuration** to the sys_id you copied, **Name** to `persist_context_data`, and **Value** to `true`, then select **Submit**.

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When `persist_context_data` is enabled, the voice assistant saves the session context as an `interaction_context` record named `bot_context_data` after each call. For details about the stored fields, see Bot context data.

10. In your AWS account, create the Lambda function that connects Amazon Connect to the voice assistant.

    a. From the AWS console, create a new Lambda function.
    In the **Runtime** field, select a Node.js version that AWS currently supports. For a list of supported versions, see https://docs.aws.amazon.com/lambda/latest/dg/lambda-nodejs.html.

    b. In the Lambda function code editor, replace the default handler code with the Lambda function code.
    See Amazon Connect Lambda function code.

    c. Set the following environment variables on the Lambda function.

Lambda environment variables

Variable	Value
`call_context_api_path`	The path portion of the ServiceNow call context URL — the part of the URL after `.com`.
`now_instance_host_name`	The ServiceNow instance URL, without the `https://` prefix.
`now_instance_name`	The name portion of your ServiceNow instance URL. For example, `myinstance`, not `myinstance.service-now.com`.
`ssm_oauth_path`	The base path for OAuth credentials in AWS Parameter Store: `/com.servicenow.cti/<sn-instance-id>`. For example: `/com.servicenow.cti/a1b2c3d4a1b2c3d4a1b2c3d4a1b2c3d4`.
`voice_service_host_name`	The hostname from the ServiceNow call context URL.

Note: Both `call_context_api_path` and `voice_service_host_name` are derived from the Call Context API URL in the voice service configuration. `voice_service_host_name` uses the hostname portion of that URL, and `call_context_api_path` uses the path portion after `.com`. For example, for a Call Context API URL of `https://instance.service-now.com/api/v1/call-context`, set `voice_service_host_name` to `instance.service-now.com` and `call_context_api_path` to `/api/v1/call-context`.

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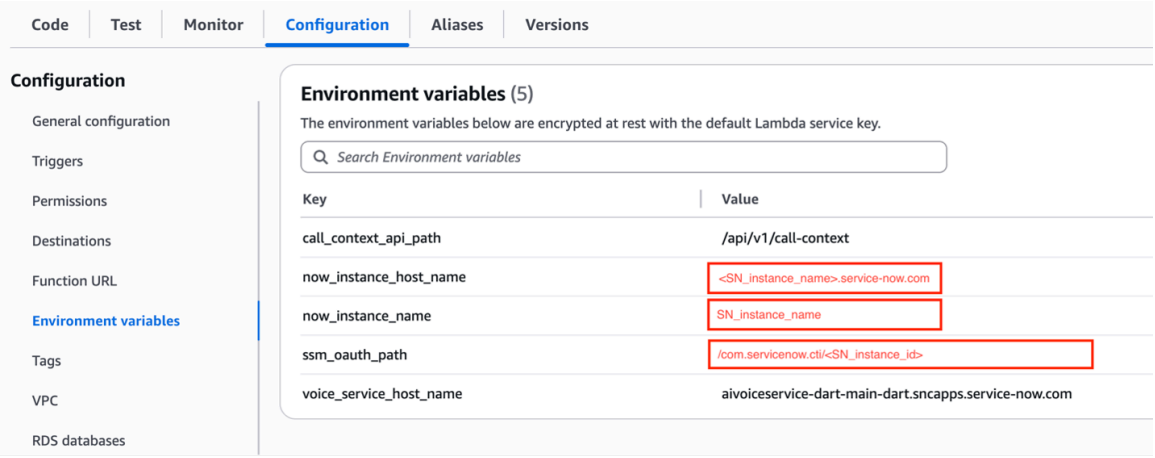
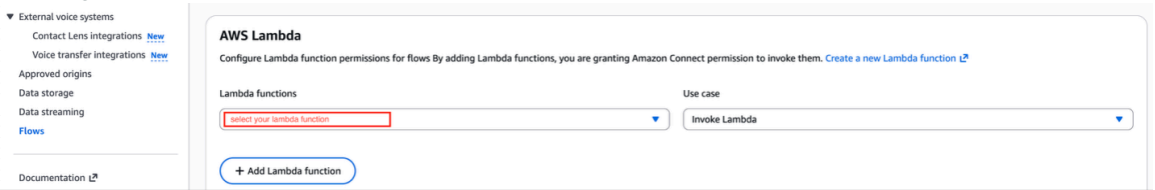
Lambda environment variables



d. Grant your Amazon Connect instance permission to invoke the Lambda function.

In the Amazon Connect console, navigate to your instance, select **Flows**, and under **AWS Lambda**, add the Lambda function with the Invoke Lambda use case. Confirm the policy was added in the Lambda console under **Configuration** > **Permissions**.

Adding a Lambda function in Amazon Connect



e. Replace the Lambda execution role permissions policy with the Identity and Access Management (IAM) policy.

See Amazon Connect Lambda Identity and Access Management (IAM) policy.

In the Lambda console, navigate to **Configuration** > **Permissions** > **Execution Role** and replace the existing permissions policy. Replace `<region>`, `<account-id>`, and `<lambda-function-name>` with your values.

f. Create a CloudWatch log group for the Lambda function.
In the AWS console, navigate to **CloudWatch** > **Log Management**. If no log group exists for your Lambda function, create one named `/aws/lambda/<your_Lambda_name>`.

g. Create the OAuth credentials in AWS Parameter Store.

From the AWS console, navigate to Parameter Store and create the following parameters using **SecureString** as the type.

Parameter Store entries

Name	Value
`/com.servicenow.cti/<sn-instance-id>/<voice-service-id>/client_id` Where `sn-instance-id` is the value of the `instance_id` system property (to find this value, navigate to `sys_properties.list`	Client ID from the ServiceNow voice service configuration.

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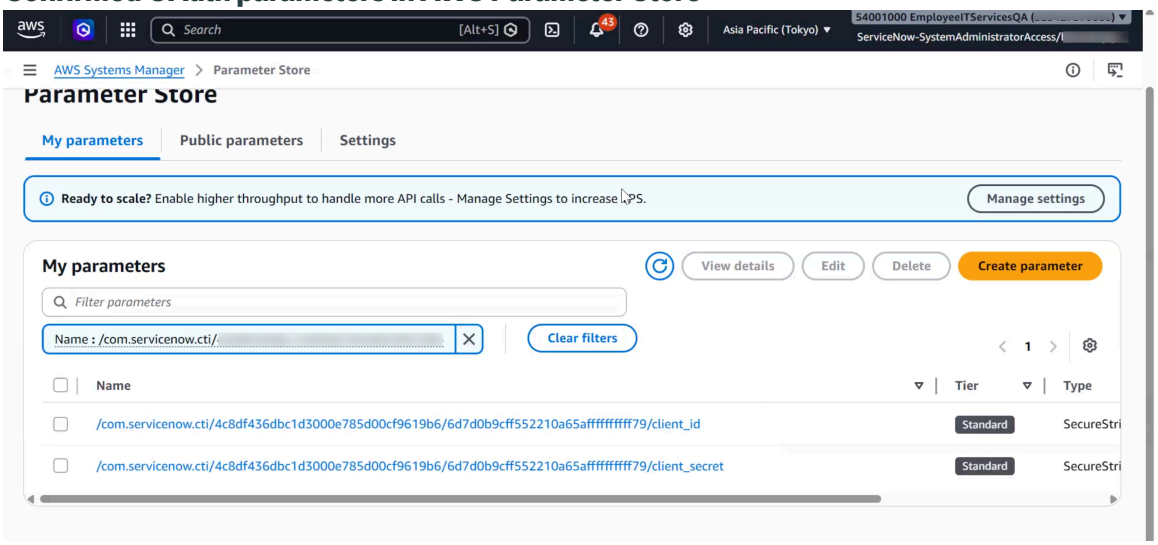
Name	Value
and search for `instance_id`), and `voice-service-id` is the voice service sys_id.	
`/com.servicenow.cti/<sn-instance-id>/<voice-service-id>/client_secret` Where `sn-instance-id` is the value of the `instance_id` system property (to find this value, navigate to `sys_properties.list` and search for `instance_id`), and `voice-service-id` is the voice service sys_id.	Client Secret from the ServiceNow voice service configuration.

Confirmed OAuth parameters in AWS Parameter Store



Note: For example, if your `instance_id` property value is `a1b2c3d4a1b2c3d4a1b2c3d4a1b2c3d4` and your voice service sys_id is `b5c6d7e8b5c6d7e8b5c6d7e8b5c6d7e8`, create parameters named `/com.servicenow.cti/a1b2c3d4a1b2c3d4a1b2c3d4a1b2c3d4/b5c6d7e8b5c6d7e8b5c6d7e8b5c6d7e8/client_id` and `/com.servicenow.cti/a1b2c3d4a1b2c3d4a1b2c3d4a1b2c3d4/b5c6d7e8b5c6d7e8b5c6d7e8b5c6d7e8/client_secret`.

h. Add the AWS PowerTools layer to the Lambda function.
In the Lambda console, navigate to the Lambda function and select **Layers**. Add the AWS layer `AWSLambdaPowertoolsTypeScriptV2`, version 2.33.0 or later.

11. Import and configure the Amazon Connect contact flow.

a. In your Amazon Connect instance, create a new contact flow by importing the Voice AI inbound flow JSON.

See Amazon Connect Voice AI inbound flow.

In the Amazon Connect console, navigate to **Routing** > **Flows**, select **Create flow**, then use the import option. Replace all placeholder values with your own before importing.

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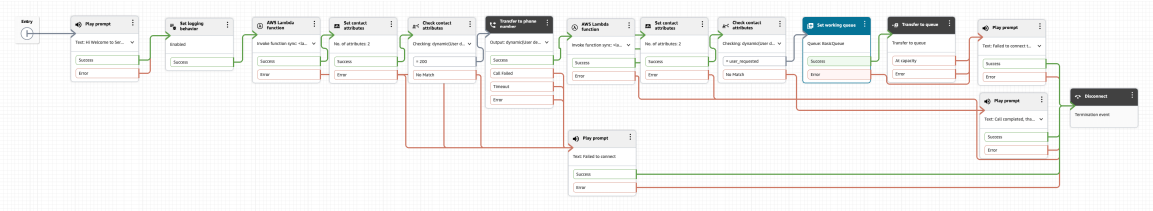
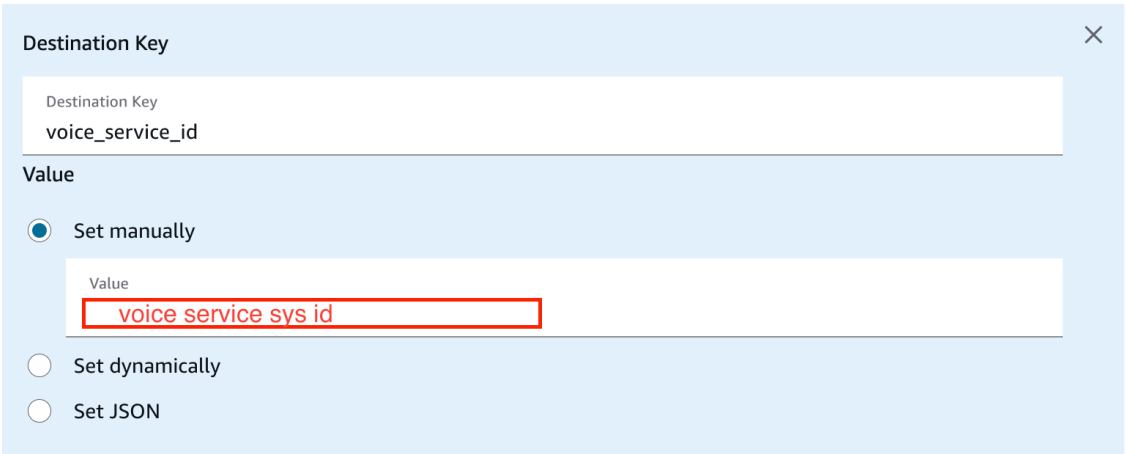
Imported Voice AI inbound contact flow



b. In both AWS Lambda function blocks, set the function ARN to your Lambda and set the `voice_service_id` parameter to the voice service sys_id.

Configuring an AWS Lambda function block



c. Save and publish the contact flow.

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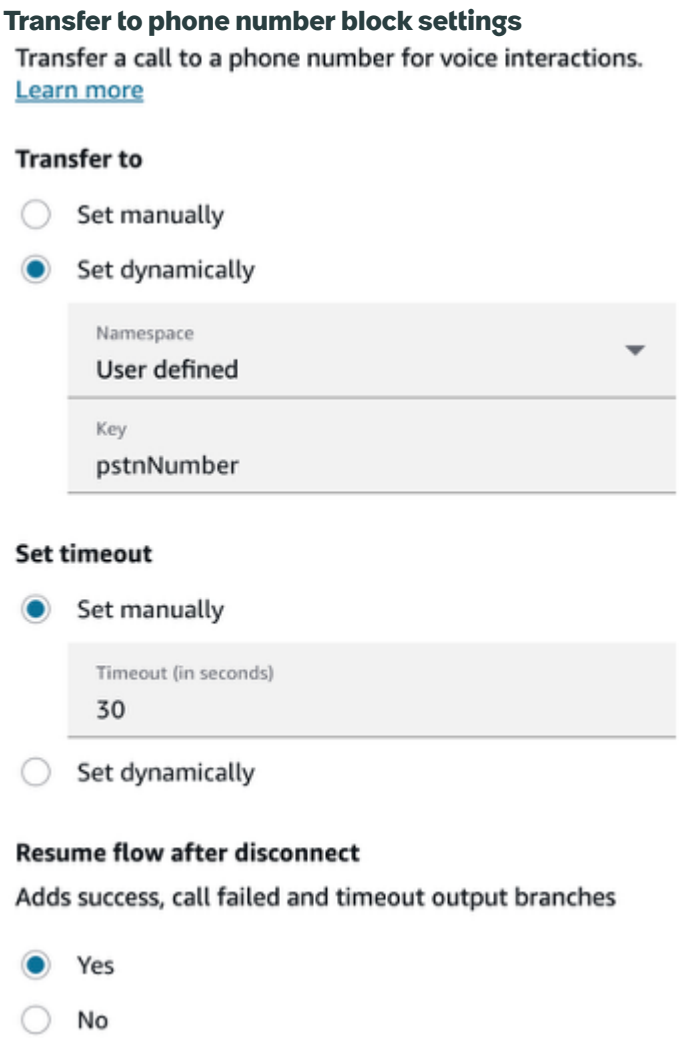
Note: When Amazon Connect transfers the call to ServiceNow, the contact flow must pass the original caller's phone number as the caller ID. Verify that your contact flow is configured to preserve the original caller ID during the transfer, not the Amazon Connect transfer number.



12. Associate a phone number with the contact flow.

    a. In the Amazon Connect service dashboard, navigate to **Channels** > **Phone numbers**.

    b. Claim a new number or select an existing number to associate with the contact flow. Associating a phone number with the contact flow enables incoming calls to be routed through the voice assistant.

Result

Amazon Connect is connected to your ServiceNow voice assistant. Incoming calls routed through Amazon Connect are handled by the AI voice agent, which responds with a greeting and processes the caller's requests. When call handling is complete, the contact flow routes the caller to a queue or ends the call.

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What to do next

Test the integration by placing a call through your Amazon Connect phone number and verifying that the voice assistant responds correctly. Review the CloudWatch logs for the Lambda function to troubleshoot any connection issues.

Integrate ServiceNow voice assistant with Five9

Enable users to get support from AI voice agents by integrating a ServiceNow voice assistant with Five9 voice service.

Before you begin

- Create a voice assistant. See Create an AI voice assistant for more information.

Role required: sn_aia.admin

About this task

Connect your Five9 contact center to a ServiceNow voice assistant using the Session Initiation Protocol (SIP) communication channel. After the integration is configured, Five9 routes calls to the ServiceNow SIP endpoint, where the AI voice agent handles the interaction. When call handling is complete, the integration supports transferring the caller to a live agent queue.

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Assistant Designer** > **Assistants**.
2. Find the voice assistant that you want to connect to Five9 and select **Edit**.
3. Select **Communication channels** from the guided setup navigation.
4. In the **Provider application** field, select the provider application to deploy the voice assistant to.
5. Select the **Telephony provider** tab.
6. From the **Select communication channels** dropdown, select **Session Initiation Protocol (SIP)**.
7. From the **CCaaS provider** dropdown, select **Five9**.

   The following read-only fields are generated. Use these values to configure the SIP trunk in your Five9 account.

Five9 configuration fields

Field	Description
Transfer method	Read-only. Set to **BYE** for Five9.
ServiceNow SIP Trunk information	Read-only. The ServiceNow SIP fully qualified domain name (FQDN) for your region, used to route calls from Five9 to the voice assistant. For SIP trunk configuration details including IP addresses and FQDNs per region, see KB3023612.
x-snc-param	Read-only. Generated token to send to your Five9 account to authenticate requests to the voice assistant.

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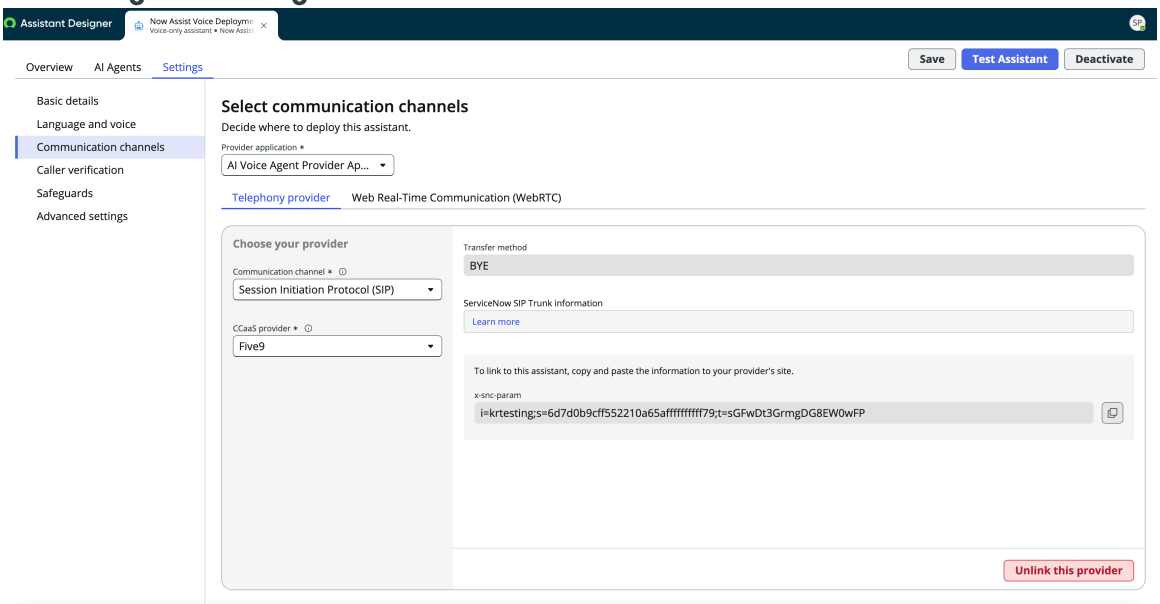
Five9 integration configuration

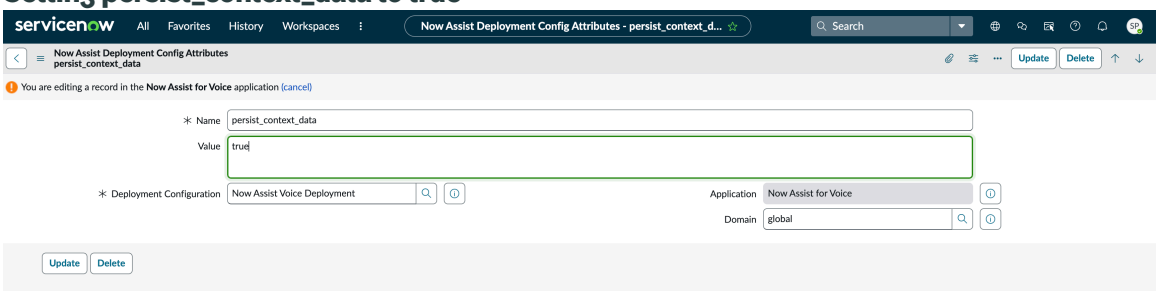


8. Enable context data persistence for the voice service.

   a. Navigate to `sys_now_assist_deployment_config_attributes.list` and check whether a `persist_context_data` attribute exists for your voice service.

   b. If the attribute exists, open it and set **Value** to `true`.

Setting persist_context_data to true



   c. If the attribute does not exist, navigate to `sys_now_assist_deployment_config.list`, open your voice assistant's deployment configuration record, and copy its `sys_id`.
   To copy the `sys_id`, right-click the record header bar and select **Copy sys_id**.

   d. Navigate to `sys_now_assist_deployment_config_attributes.list`, click **New**, set **Deployment Configuration** to the `sys_id` you copied, **Name** to `persist_context_data`, and **Value** to `true`, then click **Submit**.

   When `persist_context_data` is enabled, the voice assistant saves the session context as an `interaction_context` record named `bot_context_data` after each call. For details about the stored fields, see Bot context data.

9. In your Five9 IVR, add the **x-snc-param** as a SIP custom header using the Set Variable Module. In the Set Variable Module, use the following function to pass the **x-snc-param** value generated in the previous step:

```
PUT(ToIVA, "x-snc-param", "x-snc-param value")
```

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Result
Five9 is connected to your ServiceNow voice assistant. Incoming calls routed through Five9 are handled by the AI voice agent, which responds with a greeting and processes the caller's requests.

What to do next
For live agent transfer configuration and advanced SIP trunk settings, refer to the Five9 BYO SIP Trunk Integration Guide or contact Five9 support.

Integrate ServiceNow voice assistant with Nice CXone

Enable users to get support from AI voice agents by integrating a ServiceNow voice assistant with Nice CXone.

Before you begin
- Create a voice assistant. See Create an AI voice assistant for more information.
- Access to your CXone account with permissions to configure SIP trunks.
- Nice API credentials, including the API endpoint, token endpoint, access key ID, access key secret, client ID, and client secret. Work with your Nice account team to obtain the access key ID and secret. See the CXone developer documentation for more information.

Role required: sn_aia.admin

About this task
Connect your CXone contact center to a ServiceNow voice assistant using the Session Initiation Protocol (SIP) communication channel. After the integration is configured, CXone routes calls to the ServiceNow SIP endpoint, where the AI voice agent handles the interaction. When call handling is complete, the integration supports transferring the caller to a live agent queue using the SIP REFER transfer method.

Procedure
1. Navigate to **All** > **Conversational Interfaces** > **Assistant Designer** > **Assistants**.
2. Find the voice assistant that you want to connect to CXone and select **Edit**.
3. Select the **Settings** tab.
4. Select **Communication channels** from the guided setup navigation.
5. In the **Provider application** field, select the provider application to deploy the voice assistant to.
6. Select the **Telephony provider** tab.
7. From the **Communication channel** dropdown, select **Session Initiation Protocol (SIP)**.
8. From the **CCaaS provider** dropdown, select **Nice**.

   Enter the values in the **Nice API credentials** section.

Nice API credentials

Field	Description
API endpoint	The CXone API base URL. Must be a valid Nice domain, such as `https://cxone.niceincontact.com` or `https://cxone-gov.niceincontact.com`.
Token endpoint	The CXone OAuth token URL used to generate authentication tokens. Must be a valid Nice domain.

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Field	Description
Username	The access key ID from your CXone account. Work with your Nice account team to obtain this credential.
Password	The access key secret from your CXone account. This value is only displayed once when generated. Copy it before navigating away.
Client ID	The OAuth client ID from your CXone account.
Client Secret	The OAuth client secret from your CXone account.

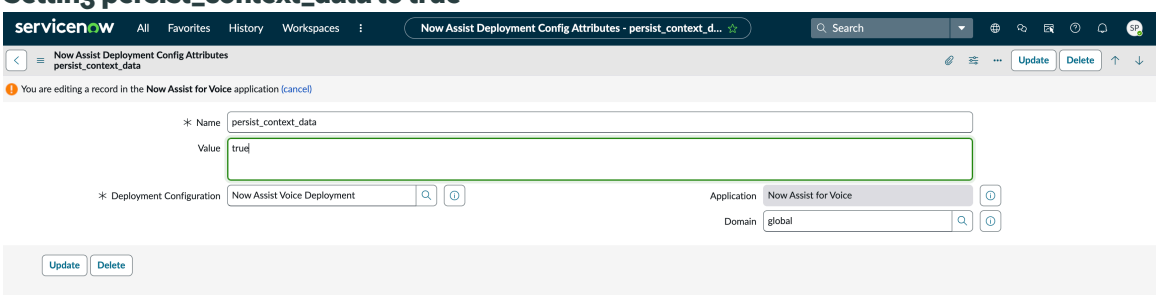
After saving the credentials, copy the generated **x-snc-param** value from the page. This is a token that authenticates requests from CXone to the voice assistant. Paste it in your CXone account when configuring the SIP trunk.

9. Enable context data persistence for the voice service.

   a. Navigate to `sys_now_assist_deployment_config_attributes.list` and check whether a `persist_context_data` attribute exists for your voice service.

   b. If the attribute exists, open it and set **Value** to `true`.

Setting persist_context_data to true



   c. If the attribute does not exist, navigate to `sys_now_assist_deployment_config.list`, open your voice assistant's deployment configuration record, and copy its `sys_id`.
   To copy the `sys_id`, right-click the record header bar and select **Copy sys_id**.

   d. Navigate to `sys_now_assist_deployment_config_attributes.list`, click **New**, set **Deployment Configuration** to the `sys_id` you copied, **Name** to `persist_context_data`, and **Value** to `true`, then click **Submit**.

   When `persist_context_data` is enabled, the voice assistant saves the session context as an `interaction_context` record named `bot_context_data` after each call. For details about the stored fields, see Bot context data.

10. In your CXone account, configure the SIP trunk using the **ServiceNow SIP FQDN** and pass the **x-snc-param** value copied in the previous step as a SIP header on outbound calls to the voice assistant.
    For SIP trunk configuration details including IP addresses and FQDNs per region, see KB3023612. For CXone-side SIP trunk configuration steps, see the CXone developer documentation.

Result

CXone is connected to your ServiceNow voice assistant. Incoming calls routed through CXone are handled by the AI voice agent, which responds with a greeting and processes the caller's

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requests. When call handling is complete, the voice assistant transfers the caller back to CXone using the REFER method.

What to do next

Configure the **Onsignal** event action flow in your CXone account. When a voice agent call ends or transfers to a live agent, ServiceNow automatically notifies CXone by sending a signal to the `/interactions/{contactId}/signal` API endpoint, which triggers the Onsignal event action flow. For configuration details, see the CXone developer documentation.

Integrate ServiceNow voice assistant with a custom SIP provider

Enable users to get support from AI voice agents by integrating a ServiceNow voice assistant with a custom Session Initiation Protocol (SIP) provider.

Before you begin

- Create a voice assistant. See Create an AI voice assistant for more information.
- Access to your SIP-capable telephony system with permissions to configure SIP trunks.

Role required: sn_aia.admin

About this task

Connect any SIP-capable telephony system to a ServiceNow voice assistant using the Custom provider option. Use this integration when your organization routes calls through its own SIP infrastructure rather than a named CCaaS provider. Inbound calls arrive over the provided SIP trunk and are handled by the AI voice agent. When call handling is complete, the integration supports transferring the caller back to your telephony system or terminating the call.

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Assistant Designer** > **Assistants**.
2. Find the voice assistant that you want to connect to your SIP provider and select **Edit**.
3. Select the **Settings** tab.
4. Select **Communication channels** from the guided setup navigation.
5. In the **Provider application** field, select the provider application to deploy the voice assistant to.
6. Select the **Telephony provider** tab.
7. From the **Communication channel** dropdown, select **Session Initiation Protocol (SIP)**.
8. From the **CCaaS provider** dropdown, select **Custom**.
9. Configure the transfer settings.

Transfer configuration fields

Field	Description
Transfer method	Select **REFER** or **BYE** depending on the transfer protocol supported by your telephony system. Select **REFER** to transfer the caller to a live agent queue using SIP REFER. Select **BYE** to terminate the SIP session when call handling is complete, which allows your telephony system to take over the call independently.
Transfer number/address	The SIP URI to transfer the call to your telephony system. Use the format `user@domain`. This field is visible only when **Transfer method** is set to **REFER**.

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10. Select a **Context transport format** to specify how the voice assistant passes conversation context when transferring or terminating a call.

Context transport format options

Option	Description
X-snc-context (default)	Passes conversation context using the ServiceNow proprietary SIP header. Maintains conversation state and session metadata across call transfers, handoffs, and interactions.
User-to-User (UUI)	Passes conversation context using the standard SIP User-to-User header, enabling transfers without losing conversation state. Use this option when your telephony system supports the SIP UUI header.
None	No session or interaction data is shared between systems.

Custom SIP configuration

11. Select **Save and continue**.

    The **ServiceNow SIP Trunk information** section displays a read-only **x-snc-param** value. Copy this token to use it when configuring your SIP trunk to authenticate requests to the voice assistant.

12. Configure your SIP-capable telephony system to route calls to the **ServiceNow SIP FQDN** for your region.
    For SIP trunk configuration details including IP addresses and FQDNs per region, see KB3023612.

13. Pass the **x-snc-param** value as a SIP header on outbound calls to the voice assistant.

Result

Your custom SIP provider is connected to the ServiceNow voice assistant. Incoming calls routed through your SIP trunk are handled by the AI voice agent. When call handling is complete, the voice assistant transfers or terminates the call according to the configured transfer method.

Integrate voice assistant with mobile app launcher

Configure your voice assistant to be accessible through the voice launcher functions in mobile app.

Before you begin

Role required: virtual_agent_admin or admin

- You must have a voice assistant created in Assistant Designer
- Mobile app voice launcher function must be configured using Now Assist for Mobile before you can assign it to an assistant. See Configure Mobile AI Voice Agent for more information.

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Assistant Designer** > **Assistants**.
2. Find the voice assistant that you want to connect to a mobile app voice launcher and select **Edit**.

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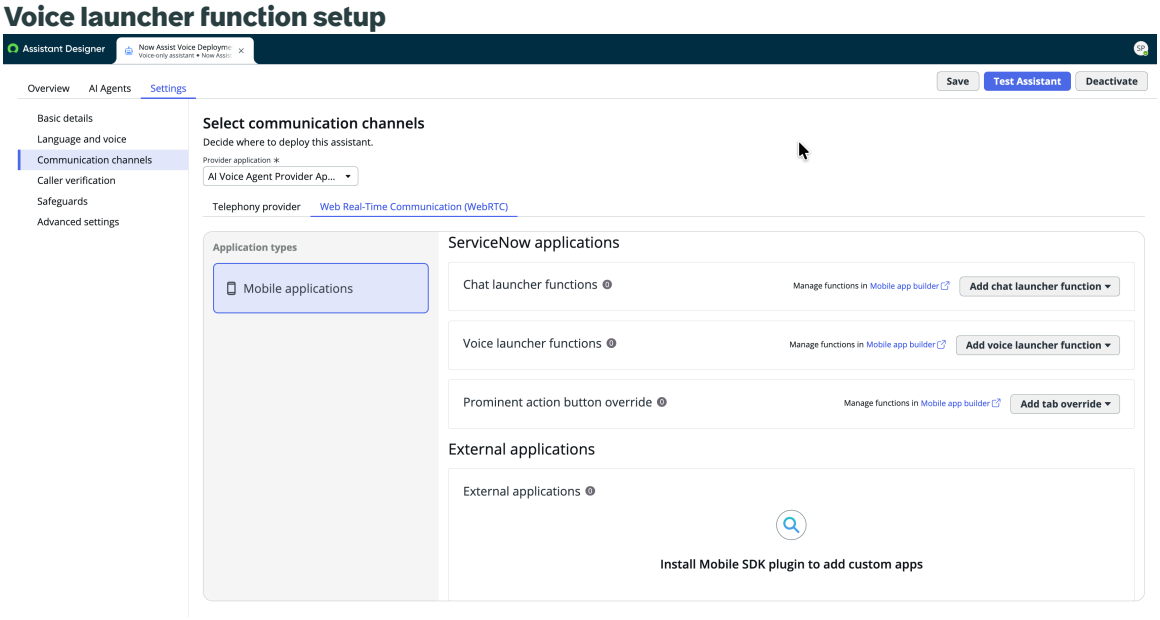
3. Select **Communication channels** in the Settings tab and select **Mobile channels** tab.



4. In Voice launcher functions, select from the **Add voice launcher function** drop-down to add a voice launcher function to open the assistant in voice mode.
5. **Optional:** In Chat launcher functions, select from the **Add chat launcher function** drop-down to add a chat launcher function to open the assistant in chat mode.
6. In Prominent action button override, select from the **Add tab override** drop-down to allow a prominent action button to launch the assistant.

   The prominent action button overrides what's been defined in the chat launcher and voice launcher functions. See Configuring a prominent action button for more information on configuring the prominent action button.

7. Select **Save** to save the configuration.

Test AI voice agents

Test your AI voice agents associated with a voice assistant from the Assistant Designer. You can make browser-based voice calls and view turn-by-turn analysis of AI voice agents invoked, tools executed, and latency data during the conversation.

Use the voice testing experience to evaluate how your AI voice agents handle real conversations before deploying them. You can access voice testing from Assistant Designer or from AI Agent Studio.

Test from Assistant Designer

Navigate to the voice assistant in Assistant Designer and select **Test** to open the voice testing interface. See for step-by-step instructions.

Test from AI Agent Studio

Launch the voice testing interface directly from the agent's channel configuration in AI Agent Studio. See for step-by-step instructions.

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AI voice agent analytics

The Voice dashboard page in the Analytics tab of Assistant Designer helps you monitor the usage and performance metrics for AI voice agents.

Accessing AI voice agent analytics

To view the dashboard, navigate to **All** > **Assistant Designer** > **Analytics** and select the **Voice** tab. See Voice page in assistant analytics for more information.

AI voice agent reference

Reference information for AI voice agents.

AI voice agent roles

The following table lists the roles installed with the ServiceNow Otto for Voice Agents plugin.

Roles	Description
sn_voice_aia.admin	Provides access to agents configuration flow
sn_voice_aia.guest	Enables employees to use AI voice agents without authentication
sn_voice_aia.integration	Enables access to integrations such as Oracle

AI voice agent attributes

The AI voice agent attributes enable you to configure the authentication functionality for AI voice agents. Navigate to **All** > **System Definition** > **Tables** and search for Now Assist Deployment Config Attributes table to view the attributes.

The following table lists the attributes related to AI voice agent configuration.

Attribute	Description
voice_max_retries	The maximum number of retries allowed for successful authentication before the user account is locked. The default value is 3.
voice_minutes_account_is_locked	The number of minutes the user account is locked for, following maximum retries. The default value is 1440 minutes.
persist_context_data	Controls whether interaction context data is persisted after a call ends. Set to `true` to enable context data storage. The default value is `false`. This attribute is scoped per voice assistant deployment. For details about the stored data, see the Bot context data section.

Bot context data

When the `persist_context_data` attribute is enabled, the voice assistant saves the session context as an `interaction_context` record after each call. The record includes the following fields.

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Bot context data interaction_context record fields

Field	Value
name	`bot_context_data`
interaction	sys_id of the related interaction record.
value	JSON string containing the session context. See the following tables for field descriptions.

The `value` field is a JSON string that contains the following base fields.

Bot context data base fields

Field	Type	Description
conversationId	string	Conversation identifier.
interactionId	string	sys_id of the related interaction record.
completed	boolean	Set to `true` when the bot session completed normally.
sessionVariables	object	Key-value pairs describing the session state. See the following table for details.

Bot context data sessionVariables fields

Key	Description
snStatusCode	HTTP status code from the voice session.
snTransferReason	Reason for the conversation end state. Set to `user_requested` when a live agent transfer is required.
snConversationId	sys_id of the conversation record for the call.
snInteractionId	sys_id of the interaction record for the call.
snIsAuthenticated	Indicates whether the caller was successfully authenticated.
snFirstName, snLastName	First and last name of the caller. Present only when the interaction is authenticated and the caller is verified.

Additional keys can appear in `sessionVariables` when custom data is added to the session cache by the voice agent.

The following example shows the JSON stored in the `value` field of a `bot_context_data` record.

```
{
  "conversationId": "e7dc929a3b714bd04eae2a8693e45afe",
  "interactionId": "27dcd29a3b714bd04eae2a8693e45a01",
  "completed": true,
  "sessionVariables": {
    "snStatusCode": "200",
    "snTransferReason": "auto_closed",
    "snConversationId": "e7dc929a3b714bd04eae2a8693e45afe",
    "snInteractionId": "27dcd29a3b714bd04eae2a8693e45a01",
    "snIsAuthenticated": "true",
```

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```
        "snFirstName":  "System",
        "snLastName":  "Administrator"
    }
}
```

AI voice agent system properties

The following table consists of system properties to set up AI voice agents.

Property	Description
sn_aia.enable_voice_agent_setup	The system property to enable AI voice agents. Set the value of the property to true to enable AI voice agents on the instance.
glide.voice.authenticate.mfa_mandatory	Controls whether multi-factor authentication is required for caller verification. Set to `false` to enable single factor authentication. Default value is `true`.

Configuration for custom AI voice agent provider

The following table captures the required configurations on your instance to support AI voice agents. These configurations are required only if you're creating a new messaging channel, provider channel, and provider channel identity for AI voice agents.

Field	Value
Messaging channel	
Type	Phone
Synchronous	True
Provider Channel	
Provider attributes action	sn_va_as_service.virtual_agent__bot_to_bot_provider_attribute
Sender subflow	sn_va_as_service.virtual_agent__bot_to_bot_contextual_action
Contextual action	sn_va_as_service.virtual_agent__bot_to_bot_contextual_action
Allow account linking	True
Account linking type	Verification question
Automatic link action	sn_va_as_service.virtual_agent__bot_to_bot_auto_link_account
Rich control mappings	
Control type	DefaultAction
Outbound transformer action	sn_va_as_service.virtual_agent__bot_to_bot_action_outbound_
Provider Channel Identity	
Message auth	Name of the message authentication that you created as part of
Provider Identity properties	
allow_storing_history_in_ongoing_conversation	True

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AI voice agent analytics indicators details

The following table maps the visualizations to the indicator sources and the calculation behind the metrics shown in the dashboard.

AI voice agent analytics indicator details

Visualization	Indicator type	Calculation	Available breakdowns	Frequency	Unit	Precision
Total voice conversations	Automated	Count of all voice calls	None	Daily	#	0
Calls completed without a live agent	Automated	Count of voice calls where Agent chat=false	None	Daily	#	0
Conversations transferred to a live agent	Automated	Count of voice calls where Agent chat=true	None	Daily	#	0
Number of tickets created	Automated	Count of Interaction Related Records where Agent chat = false and Interaction Virtual agent = true and Interaction Type = Phone and Interaction AI Voice = true	None	Daily	#	0
Conversations disconnected	Automated	Count of voice calls where State=Closed Abandoned	None	Daily	#	0
Inferred customer satisfaction (CSAT): average score (out of 5)	sn_na_analytics_insights table	Average of session CSAT	None	Daily	#	1
Average voice	Formula	[[AI Agent-Summed	None	Daily	Minutes	0

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AI voice agent analytics indicator details (continued)

Visualization	Indicator type	Calculation	Available breakdowns	Frequency	Unit	Precision
conversation duration		duration of calls]] / [[AI Agents-Total Calls]]				
Number of deflected conversations per AI agent	sn_na_analytics_insights table	Count of voice calls where Resolved is Yes	None	Daily	#	0

AI voice agent transcript and logs tables

The following tables contain details of the voice calls, from initiation and conversation details to agent actions and tool executions.

AI voice agent transcript and log tables

Table	Details
sn_aia_execution_plan	The sn_aia_execution_plan table stores execution plans associated with voice calls. Each record in this table represents a single execution plan and contains detailed information about the interactions and actions that occurred during the call.
sn_aia_tools_execution	The sn_aia_tools_execution table logs information related to tool executions during a voice call. Each record represents a single tool execution and captures details about the agent, the tool used, and the outcome of that execution.
sys_cs_conversation	The sys_cs_conversation table stores the conversation record created at the start of a voice call. Its creation timestamp marks the beginning of the call. This table contains metadata and transcripts associated with the conversation, like state, device type, and transcripts from the call. **Note:** Personally Identifiable Information (PII) data is redacted from transcripts before it is stored.
Interactions	The Interactions table is similar to sys_cs_conversation and is created at the same time as the conversation record. It contains much of the same information related to the voice call.

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AI voice agent transcript and log tables (continued)

Table	Details
sys_generative_ai_log	The sys_generative_ai_log table stores general-purpose logs for generative AI interactions during a voice call. If an agent uses an LLM (Large Language Model) during the call, this table records the relevant details such as prompt, response, and errors.

Amazon Connect Lambda function code

Use the following Lambda function code when creating the Lambda function for the Amazon Connect and ServiceNow voice assistant integration. Copy this code into the Lambda function code editor. All dynamic values are read from environment variables set on the Lambda function.

```
const https = require('https');
const { getParameter, setParameter } =
 require('@aws-lambda-powertools/parameters/ssm');

// ### Structured logger
############################################################

function log(level, message, context = {}) {
 console[level === 'ERROR' ? 'error' : level === 'WARN' ? 'warn' : 'log'](
  JSON.stringify({ level, message, ...context })
 );
}

// ### HTTP helper
#####################################################################

function sendHttpsRequest(options, postData) {
 return new Promise((resolve, reject) => {
  const req = https.request(options, (res) => {
   let body = '';
   res.on('data', (chunk) => { body += chunk; });
   res.on('end', () => {
    if (res.statusCode >= 200 && res.statusCode < 300) {
     resolve(body);
    } else {
     reject(new Error(`HTTP ${res.statusCode} for
 ${options.method} ${options.hostname}${options.path}`));
    }
   });
  });
  req.on('error', reject);
  if (postData) req.write(postData);
  req.end();
 });
}

// ### SSM
#####################################################################
#######
```

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```
async function writeSsmParam(name, value) {
 log('INFO', 'Writing SSM parameter', { param: name });
 try {
  await setParameter(name, { value, overwrite: true });
  log('INFO', 'SSM parameter written successfully', { param: name });
 } catch (err) {
  // Non-fatal: token was fetched; caching failure is logged but not re-thrown
  log('WARN', 'SSM write failed — token will not be cached', { param: name,
 error: err.message });
 }
}

// ### JWT
 ##################################################################
#######

function getJwtExpiryMs(jwt) {
 try {
  const parts = jwt.split('.');
  const payload =
 JSON.parse(Buffer.from(parts[1], 'base64url').toString('utf8'));
  if (typeof payload.exp !== 'number') throw new Error('exp claim is missing or
 not a number');
  return payload.exp * 1000;
 } catch (e) {
  throw new Error(
   `Failed to parse JWT exp claim — OAuth provider must issue
 JWT access tokens: ${e.message}`
  );
 }
}

// ### OAuth
 ##################################################################
#####

function fetchOauthToken(clientId, clientSecret) {
 const payload = new URLSearchParams({
  grant_type: 'client_credentials',
  client_id: clientId,
  client_secret: clientSecret
 }).toString();

 const options = {
  hostname: process.env.now_instance_host_name,
  path: '/oauth_token.do',
  method: 'POST',
  headers: {
   'Content-Type': 'application/x-www-form-urlencoded',
   'Content-Length': Buffer.byteLength(payload),
   'Accept': 'application/json'
  }
 };

 return sendHttpsRequest(options, payload);
}
```

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```
async function fetchClientIDSecret(basePath, voiceServiceId) {
 const clientIdPath     =
 `${basePath}/${voiceServiceId}/client_id`;
 const clientSecretPath =
 `${basePath}/${voiceServiceId}/client_secret`;
 try {
  const [clientId, clientSecret] = await Promise.all([
   getParameter(clientIdPath,     { decrypt: true }),
   getParameter(clientSecretPath, { decrypt: true })
  ]);
  return { clientId, clientSecret };
 } catch (err) {
  throw new Error(
   `Failed to fetch client credentials from SSM at
 ${basePath}/${voiceServiceId}: ${err.message}`
  );
 }
}

async function getAccessToken(basePath, voiceServiceId) {
 // ## 1. Try cache
############################################################
 const paramPath = `${basePath}/${voiceServiceId}/access_token`;
 let cachedRaw;
 try {
  cachedRaw = await getParameter(paramPath, { decrypt: true,
 maxAge: 10 });
 } catch (e) {
  log('WARN', 'SSM cache read failed — treating as cache miss', { param:
 paramPath, error: e.message });
 }

 if (cachedRaw) {
  try {
   const { access_token, expires_at } = JSON.parse(cachedRaw);
   const ttlMs = expires_at - Date.now();
   if (access_token && expires_at && ttlMs > 0) {
    log('INFO', 'Using cached access token', { expiresInMs: ttlMs });
    return access_token;
   }
   log('INFO', 'Cached token expired — refreshing', { expiresInMs: ttlMs });
  } catch (e) {
   log('WARN', 'Cached token parse failed — refreshing', { error:
 e.message });
  }
 }

 // ## 2. Fetch fresh token
#####################################################
 const { clientId, clientSecret } = await
 fetchClientIDSecret(basePath, voiceServiceId);

 let body;
 try {
  body = await fetchOauthToken(clientId, clientSecret);
 } catch (err) {
  throw new Error(`OAuth token request failed: ${err.message}`);
```

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```
 }

 let access_token;
 try {
  access_token = JSON.parse(body).access_token;
 } catch (err) {
  throw new Error(`Failed to parse OAuth response:
 ${err.message}`);
 }
 if (!access_token) throw new Error('OAuth response is missing access_token');

 const expires_at = getJwtExpiryMs(access_token);
 await writeSsmParam(paramPath, JSON.stringify({ access_token,
 expires_at }));
 return access_token;
}

// ### Call context
 ################################################################

async function getCallContext(accessToken, contactData,
 voiceServiceId) {
 const payload = JSON.stringify({
  call_correlation_id: contactData.ContactId,
  voice_service_id: voiceServiceId,
  ani: contactData.CustomerEndpoint?.Address ?? '',
  instance_name: process.env.now_instance_name
 });

 const options = {
  hostname: process.env.voice_service_host_name,
  path: process.env.call_context_api_path,
  method: 'POST',
  headers: {
   'Content-Type': 'application/json',
   'Authorization': `Bearer ${accessToken}`,
   'Content-Length': Buffer.byteLength(payload)
  }
 };

 log('INFO', 'Requesting call context', { contactId:
 contactData.ContactId, voiceServiceId });

 const RETRY_DELAYS_MS = [500, 800, 1000];
 const MAX_RETRIES = RETRY_DELAYS_MS.length;

 for (let attempt = 1; attempt <= MAX_RETRIES; attempt++) {
  try {
   const response = await sendHttpsRequest(options, payload);
   const { dnis, tracing_id } = JSON.parse(response);

   if (!dnis) {
    log('WARN', 'No dnis returned', { attempt, contactId:
 contactData.ContactId });
    if (attempt < MAX_RETRIES) {
     await new Promise(resolve => setTimeout(resolve,
 RETRY_DELAYS_MS[attempt - 1]));
```

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```
      continue;
     }
     log('ERROR', 'No dnis returned after all retries', { contactId:
 contactData.ContactId });
     return { statusCode: 502, body: JSON.stringify({ error: 'No dnis
returned after all retries' }) };
    }

    return response;
   } catch (e) {
    log('ERROR', 'getCallContext request failed', { attempt, error:
 e.message, contactId: contactData.ContactId });
    if (attempt < MAX_RETRIES) {
     await new Promise(resolve => setTimeout(resolve,
 RETRY_DELAYS_MS[attempt - 1]));
    } else {
     return { statusCode: 502, body: JSON.stringify({ error:
 `getCallContext failed after ${MAX_RETRIES} attempts:
 ${e.message}` }) };
    }
   }
 }
}

// ### Interaction context
 ##########################################################

function getInteractionContext(accessToken, ccaasCallId) {
 const path =
  `/api/now/table/interaction_context` +

 `?sysparm_query=interaction.client_session_id%3D
${ccaasCallId}%5Ename%3Dbot_context_data` +
  `&sysparm_fields=name%2Cvalue` +
  `&sysparm_limit=1`;

 const options = {
  hostname: process.env.now_instance_host_name,
  path,
  method: 'GET',
  headers: {
   'Authorization': `Bearer ${accessToken}`,
   'Accept': 'application/json'
  }
 };

 log('INFO', 'Requesting interaction context', { ccaasCallId });
 return sendHttpsRequest(options, null);
}

// ### Handler
 ##########################################################################
###

exports.handler = async (event) => {
 const contactData    = event.Details?.ContactData;
 const operation      = event.Details?.Parameters?.operation;
```

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```
const voiceServiceId =
event.Details?.Parameters?.voice_service_id;
const basePath       = process.env.ssm_oauth_path;

if (!basePath) {
 log('ERROR', 'Missing required env var: ssm_oauth_path');
 return { statusCode: 500, body: JSON.stringify({ error: 'Missing
env var ssm_oauth_path' }) };
}

// ## Obtain access token
#####################################################
let accessToken;
try {
 accessToken = await getAccessToken(basePath, voiceServiceId);
} catch (e) {
 log('ERROR', 'Failed to obtain access token', { error: e.message });
 return { statusCode: 500, body: JSON.stringify({ error:
e.message }) };
}

// ## getCallContext
#############################################################
if (operation === 'getCallContext') {
 if (!voiceServiceId) {
  log('ERROR', 'Missing voice_service_id for getCallContext');
  return { statusCode: 400, body: JSON.stringify({ error: 'Missing
voice_service_id in event Parameters' }) };
 }

 let callContextResponse;
 let dnis, tracing_id;
 try {
  callContextResponse = await getCallContext(accessToken,
contactData, voiceServiceId);
  ({ dnis, tracing_id } = JSON.parse(callContextResponse));
  log('INFO', 'Call context retrieved', { contactId:
contactData.ContactId });
 } catch (e) {
  log('ERROR', 'getCallContext request failed', { error: e.message,
contactId: contactData?.ContactId });
  return { statusCode: 502, body: JSON.stringify({ error:
`getCallContext failed: ${e.message}` }) };
 }

 return { statusCode: 200, dnis, tracing_id };
}

// ## getInteractionContext
#################################################
if (operation === 'getInteractionContext') {
 let interactionContextName  = null;
 let interactionContextValue = null;
 let interactionId           = null;
 let snTransferReason        = null;

 try {
```

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```
  const contextResponse = await
getInteractionContext(accessToken, contactData.ContactId);
  const record = JSON.parse(contextResponse).result?.[0] ??
null;

  interactionContextName  = record?.name  ?? null;
  interactionContextValue = record?.value ?? null;

  if (interactionContextValue) {
   const valueObj    = JSON.parse(interactionContextValue);
   interactionId     = valueObj?.interactionId ?? null;
   snTransferReason =
valueObj?.sessionVariables?.snTransferReason ?? null;
  }
  if(!interactionId) {
   throw new Error("Interaction context failed to retrive");
  }
  log('INFO', 'Interaction context retrieved', { contactId:
contactData.ContactId, interactionId });
 } catch (e) {
  // Non-fatal: return nulls so the contact flow can handle the missing data gracefully
  log('ERROR', 'Failed to fetch or parse interaction context', { error:
e.message, contactId: contactData?.ContactId });
  return { statusCode: 500, interactionId: null };
 }

 return {
  statusCode: 200,
  interactionContextName,
  interactionContextValue,
  interactionId,
  snTransferReason,
  body: JSON.stringify({ interactionContextName,
interactionContextValue, interactionId, snTransferReason })
 };
}

// ## Unknown operation
############################################################
log('ERROR', 'Unknown or missing operation', { operation });
return { statusCode: 400, body: JSON.stringify({ error: `Unknown
operation: ${operation}` }) };
};
```

Amazon Connect Lambda Identity and Access Management (IAM) policy

Replace the Lambda execution role permissions policy with the following. Replace `<region>`, `<account-id>`, and `<lambda-function-name>` with your values before applying.

```
{
    "Version": "2012-10-17",
    "Statement": [
        {
            "Action": [
                "kms:Decrypt",
                "kms:Encrypt"
            ],
```

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```
                "Resource": "*",
                "Effect": "Allow",
                "Sid": "InlinePolicy0"
            },
            {
                "Action": [
                    "logs:CreateLogStream",
                    "logs:PutLogEvents",
                    "ssm:PutParameter",
                    "ssm:GetParameter",
                    "ssm:GetParametersByPath"
                ],
                "Resource": [

   "arn:aws:logs:<region>:<account-id>:log-group:/aws/lambda/<lambda-function-name>:l
og-stream:*",
                    "arn:aws:ssm:<region>:<account-id>:parameter/com.servicenow.cti/*"
                ],
                "Effect": "Allow",
                "Sid": "InlinePolicy1"
            }
        ]
}
```

Amazon Connect Voice AI inbound flow

Import the following JSON to create the Voice AI inbound contact flow in Amazon Connect. Replace `<region>`, `<account-id>`, `<lambda-function-name>`, `<instance-id>`, `<queue-id>`, and `<voice-service-sys-id>` with your values before importing.

```
{
   "Version": "2019-10-30",
   "StartAction": "ed95af7d-fab7-4df3-86f0-e5b4226101eb",
   "Metadata": {
      "entryPointPosition": {
         "x": 40,
         "y": 40
      },
      "ActionMetadata": {
         "ed95af7d-fab7-4df3-86f0-e5b4226101eb": {
            "position": {
               "x": 188.8,
               "y": 39.2
            }
         },
         "08f00810-b884-4af5-99d2-cb8c18afaf8a": {
            "position": {
               "x": 2362.4,
               "y": 40.8
            }
         },
         "590a4c69-3afc-41ee-9421-e2dc55166991": {
            "position": {
               "x": 2603.2,
               "y": 48.8
            }
         },
```

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```
        "642abbac-6c23-441f-94a6-48e67082fa47": {
          "position": {
            "x": 2136.8,
            "y": 42.4
          },
          "parameters": {
            "QueueId": {
              "displayName": "BasicQueue"
            }
          },
          "queue": {
            "text": "BasicQueue"
          }
        },
        "36c1da1b-e95b-4685-bd6c-3cf4d22b06b7": {
          "position": {
            "x": 2608,
            "y": 243.2
          }
        },
        "0e65ca4c-6e0c-4cf5-ae90-91bb10a2c311": {
          "position": {
            "x": 440.8,
            "y": 44.8
          }
        },
        "ad63da6d-da3f-4ef2-ba91-31f8e8eb4238": {
          "position": {
            "x": 1911.2,
            "y": 42.4
          },
          "conditions": [],
          "conditionMetadata": [
            {
              "id": "93edeb32-3c74-4ffe-9716-1e4642038881",
              "operator": {
                "name": "Equals",
                "value": "Equals",
                "shortDisplay": "="
              },
              "value": "user_requested"
            }
          ]
        },
        "04052d59-7bba-4ca4-9aa6-597ee230c262": {
          "position": {
            "x": 1704.8,
            "y": 43.2
          },
          "dynamicParams": []
        },
        "4940e566-4c7a-4bb4-b938-305c7498cdbe": {
          "position": {
            "x": 1509.6,
            "y": 46.4
          },
          "parameters": {
```


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```
            "LambdaFunctionARN": {
               "displayName": "<lambda-function-name>"
            }
         },
         "dynamicMetadata": {
            "operation": false,
            "voice_service_id": false
         }
      },
      "8f634a38-6e73-45b5-8db9-0235190f33af": {
         "position": {
            "x": 2848.8,
            "y": 231.2
         }
      },
      "33608cd6-6e7a-47b9-8380-6977b3dcf123": {
         "position": {
            "x": 672,
            "y": 42.4
         },
         "parameters": {
            "LambdaFunctionARN": {
               "displayName": "<lambda-function-name>"
            }
         },
         "dynamicMetadata": {
            "operation": false,
            "voice_service_id": false
         }
      },
      "8ea17f75-2185-4a68-af81-e9f6908c47fb": {
         "position": {
            "x": 1292,
            "y": 39.2
         },
         "parameters": {
            "ThirdPartyPhoneNumber": {
               "countryCode": "",
               "useDynamic": true
            }
         }
      },
      "a7ea0786-08fa-41c7-aabb-0b2bdda36c64": {
         "position": {
            "x": 876.8,
            "y": 43.2
         },
         "dynamicParams": []
      },
      "fa2af8ef-be9d-4685-8bc5-f37166a06c0e": {
         "position": {
            "x": 1512.8,
            "y": 342.4
         }
      },
      "d0a02e42-281e-4068-91d5-ec81ef07f655": {
         "position": {
```


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```
            "x": 1086.4,
            "y": 43.2
         },
         "conditionMetadata": [
            {
               "id": "3e23d991-b5f1-48e8-a2be-76408086206c",
               "operator": {
                  "name": "Equals",
                  "value": "Equals",
                  "shortDisplay": "="
               },
               "value": "200"
            }
         ]
      }
   },
   "Annotations": [],
   "name": "Voice AI inbound flow",
   "description": "",
   "type": "contactFlow",
   "status": "published",
   "hash": {}
},
"Actions": [
   {
      "Parameters": {
         "SkipWhenDTMFBufferEnabled": "false",
         "Text": "Hi Welcome to ServiceNow"
      },
      "Identifier": "ed95af7d-fab7-4df3-86f0-e5b4226101eb",
      "Type": "MessageParticipant",
      "Transitions": {
         "NextAction": "0e65ca4c-6e0c-4cf5-ae90-91bb10a2c311",
         "Errors": [
            {
               "NextAction": "0e65ca4c-6e0c-4cf5-ae90-91bb10a2c311",
               "ErrorType": "NoMatchingError"
            }
         ]
      }
   },
   {
      "Parameters": {},
      "Identifier": "08f00810-b884-4af5-99d2-cb8c18afaf8a",
      "Type": "TransferContactToQueue",
      "Transitions": {
         "NextAction": "590a4c69-3afc-41ee-9421-e2dc55166991",
         "Errors": [
            {
               "NextAction": "590a4c69-3afc-41ee-9421-e2dc55166991",
               "ErrorType": "QueueAtCapacity"
            },
            {
               "NextAction": "590a4c69-3afc-41ee-9421-e2dc55166991",
               "ErrorType": "NoMatchingError"
            }
         ]
```


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```
        }
      },
      {
        "Parameters": {
          "SkipWhenDTMFBufferEnabled": "false",
          "Text": "Failed to connect to an agent"
        },
        "Identifier": "590a4c69-3afc-41ee-9421-e2dc55166991",
        "Type": "MessageParticipant",
        "Transitions": {
          "NextAction": "8f634a38-6e73-45b5-8db9-0235190f33af",
          "Errors": [
            {
              "NextAction": "8f634a38-6e73-45b5-8db9-0235190f33af",
              "ErrorType": "NoMatchingError"
            }
          ]
        }
      },
      {
        "Parameters": {

   "QueueId": "arn:aws:connect:<region>:<account-id>:instance/<instance-id>/queue/<que
ue-id>"
        },
        "Identifier": "642abbac-6c23-441f-94a6-48e67082fa47",
        "Type": "UpdateContactTargetQueue",
        "Transitions": {
          "NextAction": "08f00810-b884-4af5-99d2-cb8c18afaf8a",
          "Errors": [
            {
              "NextAction": "590a4c69-3afc-41ee-9421-e2dc55166991",
              "ErrorType": "NoMatchingError"
            }
          ]
        }
      },
      {
        "Parameters": {
          "SkipWhenDTMFBufferEnabled": "false",
          "Text": "Call completed, thank you"
        },
        "Identifier": "36c1da1b-e95b-4685-bd6c-3cf4d22b06b7",
        "Type": "MessageParticipant",
        "Transitions": {
          "NextAction": "8f634a38-6e73-45b5-8db9-0235190f33af",
          "Errors": [
            {
              "NextAction": "8f634a38-6e73-45b5-8db9-0235190f33af",
              "ErrorType": "NoMatchingError"
            }
          ]
        }
      },
      {
        "Parameters": {
          "FlowLoggingBehavior": "Enabled"
```


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```
        },
        "Identifier": "0e65ca4c-6e0c-4cf5-ae90-91bb10a2c311",
        "Type": "UpdateFlowLoggingBehavior",
        "Transitions": {
          "NextAction": "33608cd6-6e7a-47b9-8380-6977b3dcf123"
        }
      },
      {
        "Parameters": {
          "ComparisonValue": "$.Attributes.snTransferReason"
        },
        "Identifier": "ad63da6d-da3f-4ef2-ba91-31f8e8eb4238",
        "Type": "Compare",
        "Transitions": {
          "NextAction": "36c1da1b-e95b-4685-bd6c-3cf4d22b06b7",
          "Conditions": [
            {
              "NextAction": "642abbac-6c23-441f-94a6-48e67082fa47",
              "Condition": {
                "Operator": "Equals",
                "Operands": [
                  "user_requested"
                ]
              }
            }
          ],
          "Errors": [
            {
              "NextAction": "36c1da1b-e95b-4685-bd6c-3cf4d22b06b7",
              "ErrorType": "NoMatchingCondition"
            }
          ]
        }
      },
      {
        "Parameters": {
          "Attributes": {
            "snTransferReason": "$.External.snTransferReason",
            "interactionId": "$.External.interactionId"
          },
          "TargetContact": "Current"
        },
        "Identifier": "04052d59-7bba-4ca4-9aa6-597ee230c262",
        "Type": "UpdateContactAttributes",
        "Transitions": {
          "NextAction": "ad63da6d-da3f-4ef2-ba91-31f8e8eb4238",
          "Errors": [
            {
              "NextAction": "8f634a38-6e73-45b5-8db9-0235190f33af",
              "ErrorType": "NoMatchingError"
            }
          ]
        }
      },
      {
        "Parameters": {
```


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```
   "LambdaFunctionARN": "arn:aws:lambda:<region>:<account-id>:function:<lambda-functi
on-name>",
            "InvocationTimeLimitSeconds": "3",
            "InvocationType": "SYNCHRONOUS",
            "LambdaInvocationAttributes": {
               "operation": "getInteractionContext",
               "voice_service_id": "<voice-service-sys-id>"
            },
            "ResponseValidation": {
               "ResponseType": "STRING_MAP"
            }
         },
         "Identifier": "4940e566-4c7a-4bb4-b938-305c7498cdbe",
         "Type": "InvokeLambdaFunction",
         "Transitions": {
            "NextAction": "04052d59-7bba-4ca4-9aa6-597ee230c262",
            "Errors": [
               {
                  "NextAction": "8f634a38-6e73-45b5-8db9-0235190f33af",
                  "ErrorType": "NoMatchingError"
               }
            ]
         }
      },
      {
         "Parameters": {},
         "Identifier": "8f634a38-6e73-45b5-8db9-0235190f33af",
         "Type": "DisconnectParticipant",
         "Transitions": {}
      },
      {
         "Parameters": {

   "LambdaFunctionARN": "arn:aws:lambda:<region>:<account-id>:function:<lambda-functi
on-name>",
            "InvocationTimeLimitSeconds": "3",
            "InvocationType": "SYNCHRONOUS",
            "LambdaInvocationAttributes": {
               "operation": "getCallContext",
               "voice_service_id": "<voice-service-sys-id>"
            },
            "ResponseValidation": {
               "ResponseType": "STRING_MAP"
            }
         },
         "Identifier": "33608cd6-6e7a-47b9-8380-6977b3dcf123",
         "Type": "InvokeLambdaFunction",
         "Transitions": {
            "NextAction": "a7ea0786-08fa-41c7-aabb-0b2bdda36c64",
            "Errors": [
               {
                  "NextAction": "fa2af8ef-be9d-4685-8bc5-f37166a06c0e",
                  "ErrorType": "NoMatchingError"
               }
            ]
         }
```


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```
    },
    {
      "Parameters": {
        "ThirdPartyPhoneNumber": "$.Attributes.pstnNumber",
        "ThirdPartyConnectionTimeLimitSeconds": "30",
        "ContinueFlowExecution": "True"
      },
      "Identifier": "8ea17f75-2185-4a68-af81-e9f6908c47fb",
      "Type": "TransferParticipantToThirdParty",
      "Transitions": {
        "NextAction": "4940e566-4c7a-4bb4-b938-305c7498cdbe",
        "Errors": [
          {
            "NextAction": "fa2af8ef-be9d-4685-8bc5-f37166a06c0e",
            "ErrorType": "CallFailed"
          },
          {
            "NextAction": "fa2af8ef-be9d-4685-8bc5-f37166a06c0e",
            "ErrorType": "ConnectionTimeLimitExceeded"
          },
          {
            "NextAction": "fa2af8ef-be9d-4685-8bc5-f37166a06c0e",
            "ErrorType": "NoMatchingError"
          }
        ]
      }
    },
    {
      "Parameters": {
        "Attributes": {
          "pstnNumber": "$.External.dnis",
          "statusCode": "$.External.statusCode"
        },
        "TargetContact": "Current"
      },
      "Identifier": "a7ea0786-08fa-41c7-aabb-0b2bdda36c64",
      "Type": "UpdateContactAttributes",
      "Transitions": {
        "NextAction": "d0a02e42-281e-4068-91d5-ec81ef07f655",
        "Errors": [
          {
            "NextAction": "fa2af8ef-be9d-4685-8bc5-f37166a06c0e",
            "ErrorType": "NoMatchingError"
          }
        ]
      }
    },
    {
      "Parameters": {
        "SkipWhenDTMFBufferEnabled": "false",
        "Text": "Failed to connect"
      },
      "Identifier": "fa2af8ef-be9d-4685-8bc5-f37166a06c0e",
      "Type": "MessageParticipant",
      "Transitions": {
        "NextAction": "8f634a38-6e73-45b5-8db9-0235190f33af",
        "Errors": [
```


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```
                {
                    "NextAction": "8f634a38-6e73-45b5-8db9-0235190f33af",
                    "ErrorType": "NoMatchingError"
                }
            ]
        }
    },
    {
        "Parameters": {
            "ComparisonValue": "$.Attributes.statusCode"
        },
        "Identifier": "d0a02e42-281e-4068-91d5-ec81ef07f655",
        "Type": "Compare",
        "Transitions": {
            "NextAction": "fa2af8ef-be9d-4685-8bc5-f37166a06c0e",
            "Conditions": [
                {
                    "NextAction": "8ea17f75-2185-4a68-af81-e9f6908c47fb",
                    "Condition": {
                        "Operator": "Equals",
                        "Operands": [
                            "200"
                        ]
                    }
                }
            ],
            "Errors": [
                {
                    "NextAction": "fa2af8ef-be9d-4685-8bc5-f37166a06c0e",
                    "ErrorType": "NoMatchingCondition"
                }
            ]
        }
    }
  ]
}
```


Execute an agentic evaluation run

Evaluate agentic AI assets against datasets to monitor performance and compare benchmarks.

Before you begin

Evaluation runs require execution log data of the agentic AI asset you want to evaluate. You can create execution log data by testing in AI Agent Studio or triggering agentic AI. You can also create execution log data after setting up your evaluation run.

For more information about testing agentic workflows, see Manually test the execution of an agentic workflow.

For more information about getting started with agentic evaluations, see General guidelines for agentic evaluation runs.

Role required: sn_aia.admin

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Procedure

1. Navigate to **All** > **AI Skill Kit** > **Agentic Evaluations**.

   You can also start from the testing page of the AI Agent Studio. Navigate to **All** > **AI Agent Studio** > **Testing**. Select **Start automated evaluation** to access the guided setup.

2. On the evaluations home page, select **New evaluation run** to begin the guided setup.
3. In the modal, select **Chat agent or workflow**, then select **Proceed**.

   The following steps are for chat agentic AI assets. If you're evaluating an AI voice agentic asset, see Execute a run for an AI voice agentic asset. Many steps are similar, but there are aspects specific to AI voice agentic assets that require special attention.

4. In the **Add general info** step, add a name and select the agentic AI asset that you want to evaluate.

5. Select **Continue** to go to the next step.

   Each time you navigate through a step, the evaluation run is saved automatically as a draft. At any point, you can select **Save as draft**.

   If you want to exit the guided setup, you can select **Exit setup**. You're redirected to the Agentic Evaluations page.

   - If you select **Save and exit**, the evaluation run appears on the Agentic Evaluations page with the status of *Draft*.
   - If you select **Discard and exit**, the evaluation run draft is deleted.

6. Select your evaluation metric.

   Overall task completeness evaluation is selected by default. Running multiple evaluation metrics provides a comprehensive overview of the agentic AI asset's performance.

   To see more information about each plan, you can expand the card for each evaluation plan by selecting the chevron icon .

   Any custom metrics that you have published appear as options. If you don't see your custom metric, verify that it's published. See Create a custom metric for more information.

7. Configure your dataset.

   a. Choose between generating new execution logs by running the agent or workflow or using execution logs from previous runs.

   b. To create a dataset by generating new execution logs, start by selecting a table.

      Instead of making a new dataset from scratch, you can choose to use a past dataset that you used in a different evaluation by selecting **Select from a past dataset**. Once you select a dataset, you can review the details including source table, record count, and the last agentic AI asset that used the dataset.

      Note: If you're evaluating an agentic AI asset created with AI Agent Advisor, the options for your dataset are automatically filled in for you. You can still make edits to the values.

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Configure dataset form for new execution logs

Field name	Description
Table	The source table for records that the agentic AI asset uses to perform tasks and create executions.
Added filters	Conditions for narrowing down the list of records for the agentic AI asset to use to generate execution log data.
No. of records to use	The maximum number of records within the dataset for evaluation. If the dataset contains more records than the maximum, additional records are ignored.
Task	Utterance given to the agentic AI asset to execute. Use the pill picker to select dynamic inputs for the task. For example, set the starting instruction to `Help me resolve {{incident.number}}`. Inputs from the record must be written between double curly braces.
Additional details about the agent or workflow	Information given to the large language model (LLM) that supplements table record information. For example, a tuition reimbursement agentic workflow requires the normal reimbursement allowance, which could be provided through a knowledge article.
Run as user	The user associated with the table record to run the agentic AI asset. For example, depending on your use case, you can run the user as the requester or as the fulfiller.
Name	Name for the dataset. This can be useful if you plan on using the same dataset again.
Description	Description of the records contained within the dataset. This can be useful if you plan on using the same dataset again.

Note: If you're creating new execution logs, the user submitting the evaluation must pass the ACLs of the agentic AI asset and its components. Without correct role requirements, execution logs report access denial and the evaluation fails. See Security for agentic AI for more information.

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Configure dataset form for existing execution logs

Field name	Description
Added filters	Conditions for narrowing down the AI execution log records you want to include in the dataset. **Note:** Filter conditions aren't supported for creating datasets of AI voice agent execution logs.
No. of records to use	The maximum number of records within the dataset for evaluation. If the dataset contains more records than the maximum, additional records are ignored.

c. Select **See preview** to see a list of records based on the conditions you specified. You can narrow down the records by selecting specific records in the preview list. Unselected records won't be included in the dataset.

8. Review the agentic evaluation details in the last step of the guided setup.

   If you want to make changes, you can select **Back** to go to a previous step, or you can select the step in the sidebar.

9. Select **Start evaluation**.

Result

Your evaluation run executes. Completion time varies, but after completion you can select the evaluation from the Agentic Evaluations page to view results.

For more information on the metrics on the results page, see Agentic evaluation run results.

Create a custom metric for evaluating agentic workflows

Create a custom metric for evaluating AI agents and agentic workflows to test the outputs against expected responses.

Before you begin

Role required: sn_aia.admin

About this task

Custom metrics enable you to choose you measure your AI agents and agentic workflow for effectiveness. You can create custom metrics that apply to one agentic AI asset or multiple ones. Once created, you can select custom metrics in the guided setup for agentic evaluations. You can select both or either custom metrics and metrics installed with AI applications. Examples of custom metrics include:

- Testing that a certain phrase is in the response
- Measuring the length of a response to test verbosity

When writing the script, you have access to the output of a parser tool. See agentic evaluation parser tool for more details on how it works.

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Procedure

1. Navigate to **All** > **AI Skill Kit** > **Agentic Evaluations**.
2. Go to the Evaluation metrics tab and select **Create metric**.
3. In the **General information** step, enter a name and short description for your custom metric.

   You can navigate between steps in the guided setup with the **Continue** and **Back** buttons. After entering a name for your custom metric, you can skip directly to writing your script by selecting **Skip to Script Editor**. You can fill out the details later from the Metric settings tab in the Script Editor.

4. **Optional:** In the **Metric details** step, add information about the evaluation metric, how it works, and what the output format of the metric is.

   (Optional) If you select **Use this content**, then the details you provide are displayed along with the option in the guided setup for an agentic evaluation run.

   You do not have to fill in details, but you have the option to provide useful information and context to aid the custom metric development process. You can also add metric details from the **Metric settings** tab of the Script Editor.

5. After reviewing your metric information in the **Summary** step of the guided setup, select **Finish setup** to be redirected to the Script Editor.
6. **Optional:** Add metric inputs.

   (Optional) By default, the execution plan record sys_id is included as a metric input.

   The parser tool lets you access content from the execution plan log without having to parse through the XML or JSON content yourself. You can access the parser tool's outputs with `tool.output`.

   a. In the Metric inputs section, select the plus icon to open the Add metric input modal.

   b. Complete the form.

Field	Description
Input datatype	Drop-down selector to choose what data type and format the input is
Name	Short, user-friendly name for the input
Description	Description of the input. You can view the description of any input by selecting it in the Metric inputs section of the Script Editor.
Test values	Default input values used for testing your script in the Script Editor
Mandatory	Determines whether providing the input is necessary for the evaluation to run

   c. Select **Add**.

7. Write your script-based metric.

   The default code block in the Script Editor contains commented code that can guide you through the script-writing process.

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At any time, you can select **Metric output template** to see the code necessary for the output to display correctly when looking at the evaluation run results in Skill Kit. This content is also included in the default code block when you first open the Script Editor. If necessary, you can copy the template and paste it into the script. Be sure to change the values to the results of your custom metric.

You can review the details of the custom metric from the guided setup from the Metric settings tab.

When you have made changes, you can select the **Save** button to save your changes.

Important: Even if you save, the metric won't be available to use in agentic evaluation runs until you publish it.

8. Select **Run test** to open the Run test modal, enter your metric test inputs, and run the test.

   After you have run at least one test, you can review the response and request of both the overall execution and the parser tool.

   After you have run at least one test, you can select the **Run test** drop-down button and select **Run test history** to open a new sidebar with past test results. You can filter test runs by the user who executed the test.

9. Select **Publish metric** to save your script and activate the metric.

   Before publishing, ensure that your output matches the metric output template. If not, your metric may not work as expected or display correctly on the evaluation run results page.

Result
You have a new custom metric that can be used for evaluating agentic AI assets.

What to do next
Execute an evaluation run and select your custom metric in the guided setup. See Evaluate agentic AI for more information on executing an evaluation run.

If you do not see your custom metric in the guided setup for an evaluation run, make sure that you have published it.

Agentic evaluation parser tool

Use the outputs of the agentic evaluation parser tool in your scripts for custom metrics to customize the criteria for effective AI agents and agentic workflows.

Parser tool overview

The agentic evaluation parser tool extracts structured execution data from the execution logs of an agentic workflow or AI agent. You can use the information gathered by the tool to create custom metrics that use scripts to evaluate agentic workflows.

The parser tool returns structured AI agent or agentic workflow execution data within the `output.payload` object, which contains the following:

- `executionInputs`: A JSON object that contains initial workflow setup information, such as the names and instructions of agents and tools and the initial user utterance
- `executionOutputs`: A JSON object with AI agent actions and tool execution results

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- *executionMessages*: A JSON object array of user-facing conversation flow and system responses
- *executionPlanDetails*: A JSON object of execution metadata, such as status, sys_ids, and configuration values

```
{
     "output": {
 "payload": {
  "executionInputs": { ... },
  "executionOutputs": { ... },
  "executionMessages": [ ... ],
  "executionPlanDetails": { ... }
 }
}
```

Accessing the parser tool's output

To view the complete parser tool output for testing and development, perform the following steps.

- Navigate to the Script Editor view in your custom metric guided setup.
- Select **Run Test**.
- Wait for the test to complete.
- View the complete JSON output in the Tools section of the test results.

Reviewing the parser tool's output before designing your custom metric enables you to inspect the data structure before implementing any specific logic.

executionInputs data structure

The executionInputs attribute contains a JSON object with the following structure:

```
"executionInputs": {
 "agenticWorkflow": "(name of agentic workflow)",
 "description": "(descriptions for agentic workflow)",
 "instructions": "(list of steps for agentic workflow)",
 "utterance": "(initial user utterance)",
 "agents": [
  {
   "name": "(AI agent name)",
   "instructions": "(list of steps for AI agent)",
   "tools": [
    {
     "name": "(tool name)",
     "description": "(tool description)",
     "executionMode": "(execution mode, either Autonomous or
 Supervised)",
     "inputs": { ... }
    },
    { ... }, ...
   ]
  },
  { ... }, ...
```

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```
 ]
}
```

executionOutputs data structure

The executionOutputs attribute contains a JSON object with the following structure:

```
"executionOutputs": {
 "agents": [
  {
   "name": "(AI agent name)",
   "subTask": { ... },
   "tools": [
    {
     "name": "(tool name)",
     "inputs": { ... },
     "output": { ... }
    }
   ]
  },
  { ... }, ...
 ]
}
```

executionMessages data structure

The executionOutputs attribute contains an array of JSON objects with the following structure:

```
"executionMessages": [
 {
  "role": "(Message sender, either 'agent' or 'user')",
   "message": "(Content of message)",
   "order": "(Sequence number indicating order of message in the
 conversation)"
  },
  { ... }, ...
]
```

executionPlanDetails data structure

The executionPlanDetails attribute contains a JSON object with the following structure:

```
"executionPlanDetails": {
    "state": "(Current execution status)",
    "runType": "(Type of execution)",
    "conversationId": "(sys_id of conversation)",
    "relatedTask": "(sys_id of the associated task or record)",
    "relatedTaskTable": "(Table name where the related task is
 stored)",
    "context": { ... } (May be null)
    "builtInTools": [ { ... } ]
    }
```

This section provides execution metadata for tracking workflow performance, debugging issues, and correlating executions with specific tasks or conversations.

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The possibilities for runType include the following:

- API
- Chat
- Evaluation
- Testing
- Trigger

Using parser tool output in metric scripts

The parser tool data is available in your metric script through the *context* parameter. Access the structured data using the following code:

```
// Access the parser tool output from context
var parserToolOutput =
 context['AgenticExecutionParserTool.output'];
if (typeof parserToolOutput == "string") {
 parserToolOutput = JSON.parse(parserToolOutput);
}
var parserToolPayload = parserToolOutput.payload;
var parserToolStatus = parserToolOutput.status;

// Extract individual sections from payload
var inputs = parserToolPayload.executionInputs;
var outputs = parserToolPayload.executionOutputs;
var messages = parserToolPayload.executionMessages;
var planDetails = parserToolPayload.executionPlanDetails;
```

General guidelines for agentic AI asset evaluation

Learn about agentic evaluation runs and different recommendations for evaluating your agentic AI assets against datasets to check for completion, performance, and tool execution.

Overview of agentic evaluation runs

Agentic evaluations help you verify that your agentic AI assets perform as expected across different scenarios and data sets. Regular evaluation helps maintain quality and identify areas for improvement as you develop your agentic AI assets.

The evaluation process uses automated testing to measure how well your agentic AI assets performs. Metrics for evaluation include complete tasks, execute tools correctly, and maintain performance standards. You can also create your own custom metrics to evaluate agentic AI asset responses and tasks in other ways.

When to run agentic evaluations

Run agentic evaluations at key points in your development and maintenance cycle to verify performance and catch issues early.

Run after you have manually tested basic execution

Before running an automated evaluation, manually test the execution of an AI agent or agentic workflow. Manual testing helps you identify obvious issues and verify that the basic functionality works before investing time in automated evaluation.

Run agentic evaluations when you make significant changes

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After making updates to the agentic workflow, execute an agentic evaluation run to track the efficacy of the new version. This includes changes to prompts and tool configurations that might affect performance.

Run evaluations before deploying to production

Evaluate your agentic AI assets in a test environment before deploying them to production. This helps verify that changes work correctly and maintain expected performance levels.

Run periodic evaluations for ongoing monitoring

Schedule regular evaluation runs to monitor the ongoing performance of your agentic AI assets. This helps detect performance degradation over time and ensures consistent quality.

Run evaluations after data source changes

When the underlying data sources or schemas change, run evaluations to verify that your agentic AI assets continue to function correctly with the new data structure.

Choosing an evaluation method

Select evaluation methods based on what aspects of your agentic AI asset performance you want to measure. Different methods provide insights into different aspects of functionality.

Review the evaluation method options

The agentic evaluation guided setup provides information about each evaluation method, including what they're measuring and how they work. You can also review the common questions in the sidebar for answers about the available metrics. Take time to understand each method before selecting which ones to use.

Use multiple evaluation methods at a time

Choosing multiple evaluation methods can provide a better overall picture of the agentic AI asset's performance. Different methods measure different aspects, such as task completion rates, response accuracy, and tool execution success.

Consider task completion metrics for workflow validation

Task completion metrics help you verify that your agentic workflows successfully complete their intended tasks and validate end-to-end workflow functionality.

Apply tool execution metrics for technical validation

Tool execution metrics verify that your agentic AI assets correctly use the tools and APIs they're configured to access. This method helps ensure that integrations work as expected.

Creating a dataset

Create targeted datasets that represent the scenarios and data your agentic AI assets will encounter in production. Well-designed datasets provide more meaningful evaluation results.

Use filters to target the right data

Add filters to the execution logs to control exactly what you're measuring your agentic workflow against. You can select **See preview** to see a list of records. You can also use the check boxes to select individual records to measure against.

Generate new execution data for your evaluation run

When going through the agentic evaluation guided setup, you can create new execution logs on multiple records before the evaluation begins. Use this option to reduce time and ensure you have fresh data for evaluation.

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Include diverse scenarios in your dataset

Create datasets that include various scenarios your agentic AI assets might encounter, including edge cases and error conditions. Comprehensive datasets help identify potential issues before they affect users.

Maintain dataset quality and relevance

Regularly review and update your evaluation datasets to ensure they remain relevant to current use cases. Remove outdated scenarios and add new ones that reflect changing requirements or data patterns.

Consider data volume for meaningful results

Include sufficient data volume in your datasets to generate statistically meaningful results. Small datasets might not reveal performance patterns or issues that become apparent with larger data sets.

Interpreting evaluation results

Understanding evaluation results helps you make informed decisions about improving your agentic AI assets and identifying areas that need attention.

Analyze trends across multiple evaluation runs

Compare results from multiple evaluation runs to identify trends in performance. Look for patterns that indicate improving or declining performance over time.

Focus on metrics that align with business objectives

Prioritize the evaluation metrics that most closely align with your business objectives and user requirements. Not all metrics carry equal weight for your specific use case.

Investigate unexpected results

When evaluation results differ significantly from expectations, investigate the identified issues and their traces. This might reveal issues with the agentic AI asset configuration, data quality, or evaluation setup.

General guidelines for effective evaluation

Follow these general guidelines to maximize the value of your agentic evaluation efforts and ensure reliable results.

Establish baseline performance metrics

Create baseline measurements when you first deploy your agentic AI assets. These baselines provide reference points for comparing future evaluation results and tracking improvements.

Monitor evaluation performance over time

Track how your evaluation processes themselves perform over time. This includes evaluation run times, resource usage, and the reliability of the evaluation infrastructure.

Validate evaluation methods periodically

Periodically review and validate your evaluation methods to ensure they continue to provide meaningful insights. Update methods as your agentic AI assets evolve and requirements change.

Examples of using AI agents

Review different ways that you can leverage the Now Assist AI agents application in agentic workflows across the platform.

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AI agents Overview

AI agents in the Now Assist application provide automated solutions for a wide range of business processes and operational challenges. These agents can work independently or as part of hierarchical structures to handle complex workflows, reduce manual effort, and improve service delivery efficiency. You can leverage AI agents across multiple departments including IT Service Management, Customer Service Management, and Human Resources.

Incident Management and Resolution

AI agents can automate the entire incident lifecycle from initial triage to resolution. When an incident is created and assigned to a designated service desk user, the agent automatically retrieves incident details, searches for similar historical incidents, and analyzes relevant knowledge base articles. Based on this research, the agent determines an appropriate resolution path.

If the agent has high confidence in the solution, it posts the resolution in the work notes and closes the incident automatically. When confidence is lower, the agent documents its findings and reassigns the incident to a technical support specialist for review. This approach reduces mean time to resolution while ensuring quality control for complex issues.

Case Management Automation

Similar to incident management, AI agents can handle case workflows in customer service scenarios. Agents analyze case details, match them with historical cases, search knowledge articles, and provide recommended solutions or next steps. This automation helps customer service teams handle higher volumes of cases while maintaining consistent quality in responses.

Cross-Functional Process Automation

AI agents can orchestrate workflows that span multiple departments and systems. For instance, an onboarding agent might coordinate tasks across HR, IT, facilities, and finance departments, ensuring new employees receive proper access, equipment, workspace setup, and orientation materials. The agent can track progress, send reminders, escalate delays, and provide status updates to stakeholders throughout the process.

Knowledge Management and Content Discovery

AI agents can assist users in finding relevant information by analyzing queries, searching across multiple knowledge sources, and presenting contextualized results. These agents understand the user's intent, consider their role and permissions, and deliver targeted information that helps them complete tasks or resolve issues independently.

Virtual Agent Enhancement

AI agents can work behind the scenes to enhance Virtual Agent conversations by providing intelligent responses, retrieving relevant information, and executing actions on behalf of users. This integration creates more capable and helpful conversational experiences that can handle complex queries and multi-step processes.

Implementation Considerations

When implementing AI agents, organizations should consider the following factors:

- Start with well-defined, repetitive processes that have clear success criteria
- Ensure adequate training data and knowledge base content for agents to reference

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- Define appropriate confidence thresholds for automated actions versus human review
- Establish monitoring and quality assurance processes to track agent performance
- Plan for iterative improvements based on agent interaction data and outcomes
- Configure memory sharing appropriately for different hierarchy structures
- Consider scalability requirements when designing complex agent hierarchies

Resolve an incident

Help your live agents resolve an incident faster with Now Assist AI agents by using the Now Assist panel.

https://player.vimeo.com/video/1098087911?h=d89ede16f9&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Role required: none

Procedure

1. Navigate to **All** > **Incidents** > **Assigned to you** and open an incident that you would like to resolve.
   When you open an incident, the Now Assist application checks if a plan is available by using AI agents and displays the `Now Assist has a plan for solving INCXXXXXXX. Open Now Assist Panel to view the plan.` message in a banner.

   Note: You can select the banner and directly go to the conversation on the Now Assist panel to complete the task.

2. Open the Now Assist panel by using the Now Assist icon.
   Now Assist provides the resolution steps for the incident.
3. On the Now Assist panel, enter `Yes`.
   When the live agent enters `Yes`, they can proceed with the execution plan that is proposed by the Now Assist AI agents. The live agent checks the conversation and adds further inputs, if needed, to resolve the incident.

Review and update tickets with the Ticket Status AI agent

Review the status of your tickets and take standard ticket actions, such as adding comments, using the Ticket Status AI agent in Now Assist in Virtual Agent.

Before you begin

Role required: By default, any authenticated user with access to the portal the Ticket Status AI agent is enabled for can access the AI agent. There may be additional roles required depending on the configuration by your administrator.

Procedure

1. Navigate to your Service Portal and open Virtual Agent to start a new conversation.

   Depending on the configuration, you may also be able to access this AI agent in the Now Assist panel or Microsoft Teams with myBot.

2. Enter one of the following utterances:
   - Can you list all open tickets I've created?
   - What's the current status of my incident INC001?

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- Add comment to INC001 "I need your help in fixing this request ASAP. Please prioritize this."
- Can you check the latest progress on my most recent request?

3. Answer any follow-up questions.

Result
The Ticket Status AI agent used various tools to check and update your tickets.

ServiceNow Otto AI agents reference

Find more information about user roles, tables, and the different properties that are installed in ServiceNow Otto AI agents.

AI agents roles

The following roles are installed with ServiceNow Otto AI agents with a compatible ServiceNow Otto application.

Roles required to configure or monitor AI agents

Role	Description
AI Agent admin [sn_aia.admin]	Administrator of the application. A user with the sn_aia_admin role can create, read, update, and delete records.
AI Agent Viewer [sn_aia.viewer]	Read-only access to the application. A user with the sn_aia_viewer role has read and report access on all tables. **Note:** The sn_aia.admin and the sn_aia.viewer roles should not be given to the same user. If a user has both roles, then AI Agent Studio will only be accessible in read-only mode for that user.
agent_role_config_admin	With this role, user can access and modify Agent role configurations with AI Agent admin [sn_aia_admin] being the parent role.
agent_role_config_viewer	Can view the Agent role configurations with AI Agent Viewer [sn_aia_viewer] being the parent role.
itil_admin or itil	Access to ITSM tables and workflows. Agents working with incident, Request, Change, Problem, CMDB records.
knowledge_admin	Access to Knowledge Management tables and tools - Knowledge agents; KB article retrieval tools.
Custom role (e.g., custom_table.admin)	Access to custom tables and fields. Agents accessing tables outside ITSM, Knowledge, or other standard modules.

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Roles required to configure or monitor AI agents (continued)

Role	Description
snc_internal	Overly permissive system role, use only if agent requires true system-level privileges (rare). **Note:** Don't use as fallback.

Note: The roles can be assigned manually through the user record directly. For the assigned roles to take effect, logout and login back to the application.

AI agents system properties

The following are system properties that define default values and behavior.

System properties to use for configuring AI agents

Property	Description
glide.ai_record_activity.validation.feature.enabled	Enables UI validation for agentic AI and skills at the instance level. If this feature is enabled, then any UI validation, such as required fields, must be met before the AI process is completed. The following properties are context-specific gates that determine where validation is done when the feature is enabled: • glide.ai_record_activity.ai_detection.nap.enabled: ServiceNow Otto panel executions • glide.ai_record_activity.ai_detection.skill.enabled: generative AI skill execution with UI actions or in Virtual Agent • glide.ai_record_activity.ai_agent.validation.enabled: agentic AI-initiated record updates with UI actions or in Virtual Agent If you want to enable these gates of the UI validation feature, you must create the system property and set the value to *true*. You don't need to enable this feature for individual skills or agentic AI assets.
sn_aia.agent_llm_provider	Defines the (large language model) LLM service provider for AI agents. Default value: **azure_openai**.
sn_aia.agent_tool_supported_data_types	Defines a comma-separated list of supported data types for tools that are used by agents for IntegrationHub spoke. Each value

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System properties to use for configuring AI agents (continued)

Property	Description
	corresponds to the name field of records in the Field classes table [sys_glide_object].
sn_aia.analytics_dashboard_sysid	Provides the sys_id for the AI Agents Analytics dashboard. read_roles: sn_aia.admin and sn_aia.viewer
sn_aia.continuous_communicator_output_limit	Defines the maximum number of continuous outputs that the AI Agent Orchestrator can trigger to show to users. Default value: **3**
sn_aia.continuous_tool_execution_limit	Defines the maximum consecutive number of uses for the same tool. Default value: **7**
sn_aia.enable_usecase_tool_execution_mode_override	Enables running agentic workflows fully autonomously, overriding any non-automated tools in the agentic workflow. Default value: **false**
sn_aia.ltm.category.auto_create	Enables AI-generated categories if no matching categories exist. Default value: **false**
sn_aia.ltm.enable_long_term_memory	Enables long-term memory for AI agents. All previous user interactions are used as context for the LLM. Default value: **false**
sn_aia.maximum_agent_tools	Defines the maximum number of tools that can be assigned to an AI agent. Default value: **20**
sn_aia.max_scheduled_trigger_query	Defines how many records are processed when a scheduled trigger is detected. Default value: **10** Write_role: admin
sn_aia.mid_skill_switch_enabled	Enables mid-skill switching. Default value: **false**
sn_aia.react_failure_retry_max_limit	Defines the maximum number of retries in case of an execution failure.

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System properties to use for configuring AI agents (continued)

Property	Description
	Default value: **3**
sn_nowassist_va.router_redirect_va_agentic	Determines AI agent discovery in Virtual Agent. If set to *NEVER*, Virtual Agent continues Q&A without any agentic AI. Default: *ROUTER_DECISION*
com.glide.cs.dynamic.capability.timeout	Defines the Timeout for AIA Proficiency Descriptor. Default value: **180**. Write_role: admin.
sn_aia.enable_follow_up	Enables users to continue the conversation with follow-ups after the agentic workflow execution is complete. Default value: **true**.
sn_aia.follow_up_message	Defines a follow-up message sent after execution is completed. Default Value: **How otherwise can I help you?**
sn_aia.allow_context_sharing	Enables the sharing of short-term memory, allowing context to persist across execution within the same conversation. Default Value: **true**
sn_aia.agent_strategy_choice_enabled	Enables to show the LLM reasoning strategy in the agent setup screen. Default Value: **false**
sn_aia.context_sharing_strategy	This property defines the strategy to use for storing short-term memory for an execution. Default Value: **summarise**
sn_aia.enable_agent_tool_input_value_overrides	Enables you to override the agent tool description. Default Value: **true**.
sn_aia.follow_up_qna_failure_limit	Defines the limit to exit execution if the number of consecutive questions and answers aren't available in the follow-up. Default value: **1**.

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System properties to use for configuring AI agents (continued)

Property	Description
sn_aia.ltm.use_memory_for_ai_agent	Enables long-term memory for AI agent interactions. When enabled, stored user memories are utilized in AI agent interactions. Default value: **true.**
sn_aia.quick_mode_failure_retry_max_limit	Defines maximum limit for retries in case of a failure in Quick Mode execution. Default value: **3**.
sn_aia.user_context_data	Defines a comma-separated list of user context data to be used with AI Agents. The list is used to pick the data available from knowledge graph API: getUserContext. List of available user information: • profile • manager • reportees • assets The user information can also be customized by overriding the method `getUserContext` via `UserContextUtil`. If customized, the property must define the comma separated list of keys generated by the customized `getUserContext` method. Default value: **profile**.
sn_aia.external_agents.enabled	Set to `true` to enable external agent features
sn_aia.external_agents.parallel_conversations.enabled	Enables or disables multiple simultaneous conversations per user
sn_mcp_client.cursor.max_iterations	Specifies the maximum number of cursor-based pagination iterations to perform when fetching MCP tools. Helps prevent excessive looping or API calls during data retrieval. **Note:** Set this value to 0 to disable pagination iteration limits.
com.glide.agentic_processes_view.enabled	Enables the in-product experience for agentic workflows in the AI Workflows panel. Verify that this is set to `true` if you plan on using UI actions to run agentic workflows.

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System properties to use for configuring AI agents (continued)

Property	Description
sys_generative_ai_prompt_config	References a config record via the generative AI Config field.

Global properties used for episodic memory or agent learning

System property	Description
sn_aia.enable_episodic_memory	Enables episodic memory. When enabled, episodic memories from past interactions are collected and stored in sn_aia_memory and utilized in future interactions to enhance the overall experience Default value: **true**. .
sn_aia.enable_memory_limit	Maximum number of episodic memories to inject into prompt when an agent is invoked. **Note:** The maximum number of values allowed is less than or equal to 5.
sn_aia.use_episodic_memory_for_ai_agent	Enables episodic memory injection for AI agent interactions. When enabled, stored user memories are utilized in AI agent interactions. Default value: **true**.

Properties on the Agent Properties table

The following properties are on the Agent Properties [sn_aia_property] table. These properties affect different AI agent behaviors.

General properties on the Agent Properties table

Name	Description	Default value
alert.assist_spike_hours_to_check	Time interval, in hours, between running the scheduled job that checks for spikes in assist usage	3
alert.assist_spike_usage_percentage_threshold	Percentage increase required from previous job results	0.5 (50%)

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General properties on the Agent Properties table (continued)

Name	Description	Default value
	to trigger the spike in assist usage notification	
alert.assist_spike_usage_threshold	Minimum number of assists to trigger the spike in assist usage notification	5000
alert.consecutive_error_count	Consecutive number of latency errors to trigger the latency notification	3
alert.llm_latency_threshold	Time taken, in seconds, for the LLM to respond before sending a latency error	10
alert.tool_latency_threshold	Time taken, in seconds, for a tool to finish executing before sending a latency error	300
enable_agent_tool_input_value_overrides	Determines whether tool input values can be overriden by the AI agent or other tools for use by another tool	false

execution_task.latency_thresholds	Determines thresholds on LLM and tool execution times and response tokens/ character	<pre>{
		"llm": {
		"timeBoundaries": [
		5000,
		10000
		],</pre>

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General properties on the Agent Properties table (continued)

Name	Description	Default value
	counts for tool calling	<pre>"tokenLimit": 500 }, "tool": { "timeBoundaries": [200000, 300000], "outputCharLimit": 10000 } }</pre>
follow_up_behaviour	Actions to take by the agentic workflow after it has finished executing. Each record applies to only one agentic workflow.	no_followup_close_conversation
show_citations	Determines whether agentic AI-generated responses in ServiceNow Otto panel or in Virtual Agent add citations for their output.	false
mcp_guardian_check	Determines whether AI Guardian runs on MCP tool executions.	You can enable guardian check for MCP Client when the value is set to **true**. The default value is **false**.

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General properties on the Agent Properties table (continued)

Name	Description	Default value
	Note: To enable guardian check for MCP Client, ensure that you enable AI Guardian on **AI Agent Studio** > **Settings** page.	
kill_switch.mode	Controls how the feature responds to a detected breach.	warn_only Other values include: • off • enforce
kill_switch.consecutive_windows_duration	The total look back span.	4320
kill_switch.max_fires_per_window	Fires per record that mark it as breaching.	5
kill_switch.min_distinct_records	Breaching records needed for the window to count as runaway.	25
kill_switch.window_size	Length of one observation window.	1440

The following properties are used to detect and avoid infinite recursion or execution loops. If you reach the max executions that match the query within the time window, any new executions matching the query will abort. You can adjust these values if you want to lower the threshold for detecting recursion.

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Recursive check properties on the Agent Properties table

recursive_check.create_max_executions	Maximum number of matching executions creating records	50
recursive_check.create_time_window	Time window, in minutes, for checking for matching executions creating records	15
recursive_check.query_for_create_record	Query for the fields of execution plans to create records to check if executions are repeating	objective={objective}^agent={agent}^ORusecase={usec
recursive_check.query_for_update_record	Query for the fields of execution plans to update records to check if executions are repeating	related_task_record={related_task_record}^objective={c
recursive_check.update_max_executions	Maximum number of matching executions updating a record	5
recursive_check.update_time_window	Time window, in minutes, for checking	15

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Recursive check properties on the Agent Properties table

(continued)

	for matching execution updates

AI agents tables installed

The following tables are installed so AI agents work as expected:

Tables used for configuring AI agents

Table	Description
Agentic workflows [sn_aia_usecase]	List of configured agentic workflows.
AI Agents [sn_aia_agent]	List of configured AI agents.
Tools [sn_aia_tool]	List of tools used by an AI agent.
Strategies [sn_aia_strategy]	List of strategies used by an AI agent.
Teams [sn_aia_team]	Team that is a group of listed agents.
Team members [sn_aia_team_member]	List of teams mapped to an agent.
Agent Tools [sn_aia_agent_tool_m2m]	List of tools mapped to an AI agent.
AIA Trigger Configurations [sn_aia_trigger_configuration]	List of triggers created for an agentic workflow.
Execution Tasks [sn_aia_execution_task]	List of tasks by execution plan ID.
Messages [/sn_aia_message]	List of messages recorded in AI agent conversations to and from the human users.
Tools Executions [sn_aia_tools_execution]	List of tools executed by the plan ID. **Note:** The records in the Tools Executions table expire and is set to unavailable after a period of 13 months.
Execution Plans [sn_aia_execution_plan]	List of plan executions by conversation ID.
Agent Tools [sn_aia_agent_tool_m2m]	List of tools and maximum automatic executions.
AI Agent configs [sn_aia_agent_config]	List of active AI agents configured for the proficiency that they'll be used in.
Agent properties [sn_aia_property]	Various properties that affect AI agent behavior.
Gen AI Metadata M2M [sn_aia_gen_ai_m2m]	List of Gen AI metadata and the maximum automatic executions.Maintains the mapping between sn_aia_execution_task and Gen AI log metadata.

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Tables used for configuring AI agents (continued)

Table	Description
	If two large language model (LLM) calls are made to the sn_aia_execution_task, then the sn_aia_gen_ai_m2m table has two records.
Report metrics [sn_aia_report_metric]	List of the report metrics.
Agent Access Role Configurations [sys_agent_access_role_configuration]	List of agent access roles. You can also create agent access roles from this table.
generative AI Configurations [sys_generative_ai_config]	Record that points to the actual model.
Invocation Sources [sn_aia_invocation_source]	Functions as a registry of entry points and helps track and define the different contexts or surfaces from which an AI agent can be invoked or triggered.
generative AI Log [sys_generative_ai_log]	Used for logging and auditing generative AI activity.

Tables used for Group Action Framework

See **Group Action Framework** *for more information.*

Table	Description
GAF record group [sn_gaf_record_group]	Stores the output of the grouping skill. Each record represents a cluster of related records. You can open each record group record to discover which records were included within the cluster.
GAF record group detail [sn_gaf_record_group_detail]	Contains the individual records that belong to each group GAF record group. You can also find if a record is marked to act as a representative of the cluster on these records.
GAF action strategy result [sn_gaf_action_strategy_result]	Holds the results of the Action Strategy skill, which selects representative records from each group for downstream processing.
GAF action mapper results [sn_gaf_action_mapper_result]	Stores the output of the Mapper skill, which maps new records to existing clusters.
GAF action reducer results [sn_gaf_action_reducer_result]	Stores the result of the Action Reducer skill. The results include insights for entire clusters. For example, how to resolve incidents similar to those gathered in a cluster.

Domain separation in AI Agent Studio

Domain separation is supported for AI agents in the AI Agent Studio. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

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Domain Separation Overview

AI agents use basic domain separation capabilities to help protect your users' data. Domain separation support for AI agents is applied at design time and run time.

Design-time support

Refers to creating or updating agentic workflows, agents, tools, trigger configurations, and so on. AI agent configurations can be made domain-specific for individual agents and the actual agentic workflows. Administrators can apply specific domains to those records. Similar to other basic domain separations, records in the AI agents tables are accessible if the user belongs to the same or a higher domain than those records.

Run-time support

Refers to the agentic conversation on the ServiceNow Otto panel, web client, or any conversational channel. In the agentic conversations, the user that the agent impersonates functions as an agent with any AI agents who initiate the conversation on demand. For example, if the conversation is happening via a trigger mentioned on the *Run as* field on the Trigger form of an agentic workflow. If the user that the agent impersonates belongs to the same or a higher domain, that agent can access and use configurations that are associated with that domain.

The domain visibility for an agentic workflow is resolved during run time based on the *Run as* attribute in the agentic workflow trigger condition. For more information, see defining a trigger for an agentic workflow.

When an agentic conversation is triggered on demand, the domain visibility is applied to the particular agent in action. When an agentic conversation is initiated through a trigger, the domain visibility is applied to the user who resolves the caller (in an incident record where the *Run as* attribute is set to *Caller*), when the conversation runs against the incident record.

Note: The **sys_domain** field is added to all AI agent tables to achieve domain separation in AI Agent Studio. The sys_domain_path, which is available for domain separation, is enabled on your instance.

To understand more about the ServiceNow domain separation, see Exploring domain separation.

How domain separation works in AI Agent Studio

Process separation is enabled through the use of the sys_overrides column in domain-aware tables. Any table that contains both the sys_domain and the sys_overrides fields can be configured to have different processes from the parent domain.

AI Agents support only configuration tables to be process separated. Below are the list of tables that are process separated:

- sn_aia_agent_config
- sn_aia_usecase_config_override

Domain separation in AI agents supports:

- Agentic workflow discovery.
- AI agent and its tools can be active in the X domain and inactive in the Y domain.
- Memory category can be active in the X domain and inactive in the Y domain.

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- sn_aia_property can be overridden in a different domain.
- Triggers can be overridden in different domain.

Note: AI agent and agentic workflow details can't be overridden in the different domains.

Related topics

Domain separation for service providers

AI Agent Analytics dashboard

Track the AI agent use and efficiency gain on your instance through the AI Agent Analytics dashboard. The dashboard can reveal trends in how AI agents are used to improve the time to resolution and the number of tasks closed.

Required ServiceNow AI Platform roles

To use the AI Agent Analytics dashboard, you must have either the sn_aia.viewer or the sn_aia.admin role.

If you want to change the dashboard, you must duplicate it and apply changes to the copy. You can redirect the Analytics page in AI Agent Studio to the new dashboard by replacing the dashboard sys_id in the system property *sn_aia.analytics_dashboard_sysid*.

Accessing the AI Agent Analytics dashboard

To open the dashboard, navigate to **All** > **AI Agent Studio** > **Analytics**.

You can also access the dashboard from the AI Agent Studio overview page. Go to the Recent agentic workflows and AI agents activity section and select the **View analytics** link.

Indicators

Most indicators are updated daily. The latency indicators are updated every 15 minutes.

Once you have installed AI agents, you can collect initial data by running the [Now Assist AI Agents] Historical Data Collection job. The other data collection jobs, [Now Assist AI Agents] Daily Data Collection and [Now Assist AI Agents] Periodic Data Collection, update the indicators.

Automated indicators for AI agents

Name	Description
Agentic workflow latency	Time taken for an agentic workflow to complete.
AI agent execution plan P90 latency	Time taken for 90% of AI agent execution plans in a system to be processed.
AI agent execution plan P95 latency	Time taken for 95% of AI agent executions plans in a system to be processed.

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Automated indicators for AI agents

(continued)

Name	Description
AI agent execution plan P99 latency	Time taken for 99% of AI agent execution plans in a system to be processed.
AI agent latency	Time taken for an AI agent in a system to be processed.
All agentic workflows	Total number of agentic workflows created before today.
All AI agents	Total number of AI agents created before today.
All tools	Total number of tools created before today.
LLM P90 latency	Time taken for 90% of LLM requests in a system to be processed.
LLM P95 latency	Time taken for 95% of LLM requests in a system to be processed.
LLM P99 latency	Time taken for 99% of LLM requests in a system to be processed.
Number of closed tasks	Total number of tasks closed.
Number of closed tasks with AI agent assist	Total number of tasks closed today that were closed with agentic workflows or AI agents.
Summed duration of closed tasks	Total time taken to close tasks.
Summed duration of closed tasks with AI agent assist	Total time taken to close tasks today that were closed with agentic workflows or AI agents.
Tool execution P90 latency	Time taken for 90% of tool executions in a system to be processed.
Tool execution P95 latency	Time taken for 95% of tool executions in a system to be processed.
Tool execution P99 latency	Time taken for 99% of tool executions in a system to be processed.

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Automated indicators for AI agents (continued)

Name	Description
Tool latency	Time taken for a tool in a system to be processed.
Total number of CS conversations	Total number of conversations in ServiceNow Otto panel or Virtual Agent.
Total number of execution plans	Total number of execution plans created by agentic workflows and AI agents today.
Total number of execution tasks	Total number of tasks executed by agentic workflows and AI agents today.
Total number of tool executions	Total number of tool executions in agentic workflows and AI agents today.
Use case execution plan P90 latency	Time taken for 90% of agentic workflows in a system to be processed.
Use case execution plan P95 latency	Time taken for 95% of agentic workflows in a system to be processed.
Use case execution plan P99 latency	Time taken for 99% of agentic workflows in a system to be processed.

Formula indicators for AI agents

Name	Description
% of conversations with an AI agent or agentic workflow defined	Number of conversations in ServiceNow Otto panel or Virtual Agent with a defined AI agentic or agentic workflow divided by the total number of conversations.
Average time to close a task	Average time taken for a task to go from creation to closure.
Average time to close a task with AI agent assist	Average time taken for a task to go from creation to closure with an agentic workflow or AI agent involved.

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Formula indicators for AI agents

(continued)

Name	Description
Efficiency gain	Percentage efficiency gain comparing average time taken to close a task with AI agent assist against a task closed without AI agent assist.
Percentage of tasks closed using AI agents	Number of tasks closed using AI agents and agentic workflows divided by the total number of tasks.

Breakdowns

Different breakdowns enable you to divide the data differently to track specific aspects of the AI agent usage. Not all breakdowns are available for all indicators.

- Agentic workflow
- AI agent
- AI agent execution status
- Latency metric
- Tool
- Tool latency metric

Filters

You can filter data to review a subset of trends. The following table lists the available filters on the AI Agent Analytics dashboard.

Filters on the AI Agent Analytics dashboard pages

Page	Available filters
Status	Time created
Insights	• Time created • Agentic workflow • AI agent • AI Agent Type
Assist consumption	• Time created • Agentic workflow • AI agent • AI Agent Type

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Filters on the AI Agent Analytics dashboard pages (continued)

Page	Available filters
Performance	• Time created • Agentic workflow • AI agent • AI Agent Type • Tool
Troubleshooting	Time created

Data visualizations

Visualizations are graphic elements that can be used to see data trends, percentages, and scores. The AI Agent Analytics dashboard includes the following visualizations.

Data visualizations on the AI Agent Analytics dashboard overview page

Title	Type	Description
Average inferred CSAT for AI agents in last 7 days	Score card	AI-generated score estimating what a customer would rate the AI response. 1 being the user is extremely dissatisfied and 5 being the user is extremely satisfied with the interaction.
Execution tasks in last 7 days	Pie chart	Execution tasks divided by status (Success, Ongoing, Cancelled, Queued).
AI Agent errors in last 90 days	Line graph	Number of errors seen by AI agents within the last 90 days broken down by week.
AI agent tool type	Pie chart	Tools divided by type. Example: Script, Flow action, Subflow, and so on.
AI agent tool execution mode	Pie chart	Tools divided by either autonomous or supervised execution mode.
Execution plans in last 7 days	Pie chart	Execution plans divided by status (Completed, Terminated, Wrap Up, or In Progress)

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Data visualizations on the AI Agent Analytics dashboard overview page (continued)

Title	Type	Description
AI agent executions	List	List of AI agent executions. The list is broken down by AI agent and AI agent execution status. Columns span for multiple weeks, and there are change percentages and trend lines comparing the current against the previous week.
Number of agentic workflows	Trend line	Total number of agentic workflows. The agentic workflows created in the last day and a trend line are shown.
Number of AI agents	Trend line	Total number of AI agents. The AI agents created in the last day and a trend line are shown.
Number of tools	Trend line	Total number of tools. The tools created in the last day and a trend line are shown.
AI agent execution plans	List	List of AI agent execution plans. The list is broken down by agentic workflow. Columns span for multiple weeks, and there are change percentages and trend lines comparing the current against the previous week.

Data visualizations on the AI Agent Analytics dashboard status page

Title	Type	Description
AI agent execution plans	Score cards	Four score cards, one for each execution plan status (Ready, In progress right now, Completed, and Terminated).
AI agent executions	Score cards	Four score cards, one for each execution plan status (In progress right now, Completed, Successful, and Errors/Cancelled).
AI agent/ tool executions	List	List of AI agent and tool executions. The list is broken down by AI agent and tool, and there are columns for each status (Cancelled, Ongoing, Queued, and Success).

Data visualizations on the AI Agent Analytics dashboard insights page

Title	Type	Description
Tasks closed using AI agents	Trend line	Percentage of tasks closed using AI agents. Trend line is shown.

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Data visualizations on the AI Agent Analytics dashboard insights page (continued)

Title	Type	Description
Task closure efficiency gain using AI agents	Trend line	Percentage efficiency gained with agentic workflows and AI agents. Trend line is shown.
Average close time assisted by AI agents	Trend line	Average time taken for a task to go from creation to closure with the involvement of an AI agent or agentic workflow. Trend line is shown.
Inferred CSAT of AI agents	Score card	Estimated CSAT score calculated using AI based on the subjective quality of the AI agents' responses. 1 being the user is extremely dissatisfied and 5 being the user is extremely satisfied with the interaction.
Inferred Session CSAT	Score card	Estimated CSAT score calculated using AI based on the overall session interactions of a user. 1 being the user is extremely dissatisfied and 5 being the user is extremely satisfied with the interaction.
Top user intents when using agentic solutions	Bar chart	Most common user intents as interpreted by the LLM. Intents are grouped by Group Action Framework.
Average AI agent CSAT by intent	Bar chart	Average CSAT score for each user intent interpreted by the LLM. Intents are grouped by Group Action Framework.
Transfers and escalations using AI agents	Bar chart	An estimated score using AI that indicates whether the user requested an escalation or there was a transfer to another AI agent or human.
User effort required with AI agents	Bar chart	Counts of AI-generated scores that measure the time and energy users had to put in during their interaction with an AI agent. Values are on a 3-point scale of low, medium, and high.
AI agent recommended next steps	Bar chart	Counts of AI-generated scores that indicate whether the AI agent recapped the outcome and provided clear instructions or guidance on what the customer should do next, if applicable. Values are on a 3-point scale of low, medium, and high.
AI agent resolved the users request	Score card	An AI-generated score that indicates whether the AI agent resolved the user's request. Values can be yes, no or unknown.

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Data visualizations on the AI Agent Analytics dashboard insights page (continued)

Title	Type	Description
User frustration with AI agents	Bar chart	An AI-generated score that indicates whether the user expressed frustration at any point in the conversation.
AI agent empathy	Score card	An AI-generated score that indicates whether the AI agent was empathetic and friendly. Values are on a 3-point scale of low, medium, and high.
User or AI agent confusion	Bar chart	Counts of an AI-generated score that indicates whether the user or AI agent is confused at any point of the conversation.
Top 10 agentic workflows with highest session CSAT	Bar chart	Top 10 agentic workflows by highest CSAT score.
Bottom 10 agentic workflows with highest session CSAT	Bar chart	Bottom 10 agentic workflows by CSAT score.
Top 10 AI agents with highest session CSAT	Bar chart	Top 10 AI agents by highest CSAT score.
Bottom 10 AI agents with highest session CSAT	Bar chart	Bottom 10 AI agents by CSAT score.
AI agent conversations daily	Trend line	Total number of AI agent conversations in ServiceNow Otto panel or Virtual Agent. Trend line is shown.
% of conversations using AI agents	Trend line	Percentage of AI agent conversations in ServiceNow Otto panel or Virtual Agent that used agentic workflows or AI agents. Trend line is shown.
Efficiency gain supporting indicators	List	List of indicators. The list is broken down by indicator. Columns span across a time span.

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Data visualizations on the AI Agent Analytics dashboard assist consumption page

Title	Type	Description
Sum of AI agent assists	Score card	Total number of assists used on the instance for both AI agents and agentic workflows.
Sum of AI agent assists per tier	Pie chart	Totals and percentages of assists divided by tier. An assist is marked as small until the number of tool executions exceeds 20.
Count of AI agent executions per assist tier.	Pie chart	Count of assist tiers for both AI agents and agentic workflows. An assist is marked as small until the number of tool executions exceeds 20.
Top 10 agentic workflows consuming assists	Pie chart	Percentages of assists consumed among the top 10 agentic workflows consuming assists.
Sum of AI agents assists	Bar chart	Total number of assists used by AI agents broken down by day.
Count of AI agent executions per assist tier	Bar chart	Count of assists used by AI agents broken down by assist tier and day.
Count of AI agent executions per agentic workflow	Bar chart	Count of assists used by AI agents broken down by agentic workflow.
Sum of AI agent assists per AI agent	Bar chart	Number of assists used by AI agents broken down by AI agent.
Average tool execution count per agentic workflow	List	Count of tools executed by an agentic workflow broken down by agentic workflow and day.
Average tool execution count per assist tier	List	Count of tools executed by an agentic workflow broken down by assist tier and day.

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Data visualizations on the AI Agent Analytics dashboard performance page

Title	Type	Description
P90 agentic workflow latency	Score card	Time in seconds of 90% of agentic workflows in a system to be processed.
P95 agentic workflow latency	Score card	Time in seconds of 95% of agentic workflows in a system to be processed.
P99 agentic workflow latency	Score card	Time in seconds of 99% of agentic workflows in a system to be processed.
Total agentic workflows executed per hour	Bar chart	Visualization of what time of day agentic workflows have been executed by hour.
Total agentic workflows errors per hour	Bar chart	Visualization of what time of day agentic workflows have been executed and experienced an error by hour.
Agentic workflow latency	Line chart	Agentic workflow latency over time. Uses 3 different indicators: P90 tracks the fastest 90% of executions, P95 tracks the fastest 95% of executions, and P99 tracks the fastest 99% of executions.
Agentic workflow latency (weekly average)	Line chart	Agentic workflow latency over time. Uses 3 different indicators: P90 tracks the fastest 90% of executions, P95 tracks the fastest 95% of executions, and P99 tracks the fastest 99% of executions.
Agentic workflow latency (daily average)	Table	Average agentic workflow latency today. Each row is an agentic workflow and each column is a different latency metric. Uses 3 different indicators: P90 tracks the fastest 90% of executions, P95 tracks the fastest 95% of executions, and P99 tracks the fastest 99% of executions.

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Data visualizations on the AI Agent Analytics dashboard performance page (continued)

Title	Type	Description
P90 AI agent latency	Score card	Time in seconds of 90% of AI agent executions in a system to be processed.
P95 AI agent latency	Score card	Time in seconds of 95% of AI agent executions in a system to be processed.
P99 AI agent latency	Score card	Time in seconds of 99% of AI agent executions in a system to be processed.
Total AI agents executed per hour	Bar chart	Visualization of what time of day AI agent executions have been executed by hour.
Total AI agent errors per hour	Bar chart	Visualization of what time of day AI agent executions have been executed and experienced an error by hour.
AI agent latency	Line chart	AI agent latency within the time filter. Uses 3 different indicators: P90 tracks the fastest 90% of executions, P95 tracks the fastest 95% of executions, and P99 tracks the fastest 99% of executions.
AI agent latency (weekly average)	Line chart	AI agent latency over time by week. Uses 3 different indicators: P90 tracks the fastest 90% of executions, P95 tracks the fastest 95% of executions, and P99 tracks the fastest 99% of executions.
AI agent latency (daily average)	Table	Average AI agent latency today. Each row is an AI agent and each column is a different latency metric. Uses 3 different indicators: P90 tracks the fastest 90% of executions, P95 tracks the fastest 95% of executions, and P99 tracks the fastest 99% of executions.
P90 tool latency	Score card	Time in seconds of 90% of tool executions in a system to be processed.
P95 tool latency	Score card	Time in seconds of 95% of tool executions in a system to be processed.

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Data visualizations on the AI Agent Analytics dashboard performance page (continued)

Title	Type	Description
P99 tool latency	Score card	Time in seconds of 99% of tool executions in a system to be processed.
Total tools executed per hour	Bar chart	Visualization of what time of day tool executions have been executed by hour.
Total tool errors per hour	Bar chart	Visualization of what time of day tool executions have been executed and experienced an error by hour.
Tool latency	Line chart	Tool latency within the time filter. Uses 3 different indicators: P90 tracks the fastest 90% of executions, P95 tracks the fastest 95% of executions, and P99 tracks the fastest 99% of executions.
Tool latency (weekly average)	Line chart	Tool latency over time by week. Uses 3 different indicators: P90 tracks the fastest 90% of executions, P95 tracks the fastest 95% of executions, and P99 tracks the fastest 99% of executions.
Tool latency (daily average)	Table	Average tool latency today. Each row is a tool and each column is a different latency metric. Uses 3 different indicators: P90 tracks the fastest 90% of executions, P95 tracks the fastest 95% of executions, and P99 tracks the fastest 99% of executions.
P90 LLM latency	Score card	Time in seconds of 90% of LLM requests in a system to be processed.
P95 LLM latency	Score card	Time in seconds of 95% of LLM requests in a system to be processed.
P99 LLM latency	Score card	Time in seconds of 99% of LLM requests in a system to be processed.
LLM latency	Line chart	Tool latency within the time filter. Uses 3 different indicators: P90 tracks the fastest 90% of executions, P95 tracks the fastest 95% of executions, and P99 tracks the fastest 99% of executions.
LLM latency (weekly average)	Line chart	Tool latency over time by week. Uses 3 different indicators: P90 tracks the fastest 90% of executions, P95 tracks the fastest 95% of executions, and P99 tracks the fastest 99% of executions.

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Data visualizations on the AI Agent Analytics dashboard performance page (continued)

Title	Type	Description
LLM calls per hour	Bar chart	Visualization of what time of day LLM calls have been made by hour.
LLM errors per hour	Bar chart	Visualization of what time of day LLM calls have been made and experienced an error by hour.

Data visualizations on the AI Agent Analytics dashboard troubleshooting page

Name	Type	Description
Agentic workflow errors	List	List of agentic workflow errors.

For more information on security controls for agentic AI, see Security for AI agents.

Data visualizations on the AI Agent Analytics dashboard security page

Name	Type	Description
Total blocked executions	Score card	Total number of agentic AI executions blocked because of security controls.
Total blocked executions	List	List of executions blocked.
Top agentic workflows with blocked executions	List	List of agentic workflows with the most blocked executions.
Top AI agents with blocked executions	List	List of AI agents with the most blocked executions.
Agentic Workflows w/o ACL defined	Score card	Total number of agentic workflows missing an ACL for user access.
Agentic Workflows ACLs	Pie chart	Pie chart displaying the percentage of agentic workflows with and without ACLs for user access.
Agentic Workflows w/o ACL defined	List	List of agentic workflows missing an ACL for user access.

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Data visualizations on the AI Agent Analytics dashboard security page (continued)

Name	Type	Description
AI agents with no ACLs defined	Score card	Total number of AI agents missing an ACL for user access.
AI agent ACLs	Pie chart	Pie chart displaying the percentage of AI agents with and without ACLs for user access.
AI agents w/o ACL defined	List	List of AI agents missing an ACL for user access.
Agentic workflows without role masking	Score card	Total number of agentic workflows without roles identified for role masking and data access.
Agentic workflows without role masking	List	List of agentic workflows without roles identified for role masking and data access.
AI agents without role masking	Score card	Total number of AI agents without roles identified for role masking and data access.
AI agents without role masking	List	List of AI agents without roles identified for role masking and data access.
Agentic workflows running as dynamic user	Score card	Total number of agentic workflows running as a dynamic user.
Agentic workflows running as dynamic user	List	List of agentic workflows running as a dynamic user.
AI agents running as dynamic user	Score card	Total number of AI agents running as a dynamic user.
AI agents running as dynamic user	List	List of AI agents running as a dynamic user.
Agentic workflows running as AI user	Score card	Total number of agentic workflows running as an AI user.
Agentic workflows running as AI user	List	List of agentic workflows running as an AI user.
AI agents running as AI user	Score card	Total number of AI agents running as an AI user.

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Data visualizations on the AI Agent Analytics dashboard security page (continued)

Name	Type	Description
AI agents running as AI user	List	List of AI agents running as an AI user.

Agentic evaluation run results

Learn about agentic evaluation runs and the meaning behind different evaluation scores from the agentic evaluation results page.

Agentic evaluations overview

Agentic evaluations measure how well AI agents and agentic workflows are accomplishing their objectives. A Now LLM Service model judges the AI agent or agentic workflow based on the execution logs. The results page of an evaluation run shows multiple metrics and scores measuring task completeness and tool use.

If you run an overall task completion evaluation, the results page shows recommended actions for the AI agent or agentic workflow. Recommended actions give you suggestions for deployment or improvement to help verify that the agentic workflows that you deploy are performing up to your standards.

After you've reviewed your evaluation results, you can archive your evaluation or copy it to run another evaluation with the same parameters and dataset.

You can export the evaluation results as a report. The report is formatted as a .csv file that includes the individual sys_ids of the execution records and the metric scores for each.

For more information on AI agent usage and other analytics, you can review the AI Agent Analytics dashboard in the AI Agent Studio.

Evaluation results overview

For each evaluation method that you execute, the results page displays an overall score for the agentic workflow with a percentage of successful record evaluations and a label of Excellent, Good, Moderate, or Poor. You can change the metric thresholds for each label by selecting **Customize metric thresholds**.

In addition to the overall task completeness results, you can review a summary of the results of the other metrics.

Overall task completeness evaluation run results

Label	Description	Recommended action	Default threshold
Excellent	Tasks were consistently performed at a high standard. The agentic workflow or AI agent is working well.	Proceed with confidence	90%–100%

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Overall task completeness evaluation run results (continued)

Label	Description	Recommended action	Default threshold
Good	Most tasks were performed successfully, but some performance inconsistencies suggest areas for improvement.	Deploy with caution	70%–89%
Moderate	A significant number of tasks weren't fully completed. Performance is below the desired level.	Investigate the root causes of poor task completion	50%–69%
Poor	The agentic workflow is consistently failing to complete tasks adequately. Major issues are present.	Do not deploy	0%–49%

Individual record metric scores

Evaluations are run against the log tables of agentic workflow executions. Each record is individually scored for each evaluation plan that you run. Individual record evaluations are scored according to the following metrics.

Overall task completeness record metric scores

The overall task completeness metric assesses whether an AI agent successfully completes its assigned task. It evaluates the execution logs of the agent, ensuring that all required steps were taken and the task was logically and effectively completed.

Number	Score	Description
3	Successful	The main task was fully completed. All subtasks were resolved, and the steps followed a logical sequence with no critical errors.
2	Partially successful	The task was partially completed. Some subtasks remain unresolved or inefficiencies affected the process.
1	Unsuccessful	The task wasn't completed. Critical subtasks were abandoned or unresolved or the execution failed entirely.

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Tool performance record metric scores

The tool performance evaluation metric assesses an AI agent's ability to select the most appropriate tool for each step while completing a task.

Number	Score	Description
1	True	The right tool was chosen for the action in the plan.
0	False	The right tool wasn't chosen.

Tool calling records metric scores

The tool calling evaluation metric assesses whether an AI agent correctly constructs tool calls by validating the accuracy, completeness, and formatting of the inputs it provides.

Number	Score	Description
1	True	Input key completeness, input value correctness, and input format correctness are all successful. • *`Input key completeness`*: 1 - True – All required parameters are present with exact name matches, and no unexpected parameters are included. • *`Input value correctness`*: 1 - True – Tool input values are correctly mapped. • *`Input format correctness`*: 1 - True – Tool inputs are in the correct format.
0	False	One or more of input key completeness, input value completeness, or input format completeness wasn't successful. • *`Input key completeness`*: 0 - False – A mandatory parameter is either missing, its name doesn't match exactly, or an unexpected parameter was found. • *`Input value correctness`*: 0 - False – Tool input values are not correctly mapped. • *`Input format correctness`*: 0 - False – Tool inputs are not in the correct format.

Note: The values of the sub-metrics are aggregated using an AND operator. If any one value is 0, then the entire tool calling records metric score will be 0.

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Model Context Protocol Client

The ServiceNow® Model Context Protocol Client (MCP Client) enables you to access the Model Context Protocol tools that are hosted externally and published using an MCP Server in the ServiceNow® AI Agent Studio.

Get started

Explore

Learn more about MCP Client

Configure

Configure the Model Context Protocol Client in AI Agent Studio

Add MCP Server in AI Agent Studio

Add MCP Servers in AI Agent Studio

Reference

Learn more about the user roles, tables, and properties in MCP Client

Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-

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making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

For more information, see the Now Assist documentation.

Exploring Model Context Protocol Client

The Model Context Protocol (MCP) is a standardized client-server protocol that enables AI applications to discover and interact seamlessly with external tools, data sources, and services. MCP facilitates communication between an AI host application (like AI Agent Studio), an MCP Client embedded in the host, and one or more MCP Servers that expose specific capabilities such as tools.

Model Context Protocol Client terminology

- **MCP Host**: The AI application environment where the tasks are initiated.
- **MCP Client**: Manages communication between the host and the MCP Servers, handling the requests and responses.

  The MCP Client architecture enables AI agents to extend their capabilities by invoking external systems dynamically, enabling tasks like accessing APIs, databases, or file systems in a standardized way.
- **MCP Server**: Provides external functionalities by exposing tools for AI agents to use.
- **MCP Tools**: The external tools exposed by the MCP Servers to be used by AI agents.

Why use MCP Tools

MCP tools enable seamless integration to:

- Connect your AI agent with a wide variety of external tools with minimal setup.
- Add multiple MCP tools to an AI agent to perform a broader range of tasks.
- Review and edit tool input parameters as needed before saving.

Configuring Model Context Protocol Client

Configure the MCP Client to execute agentic workflows with AI agents and mapped tools.

Configuring MCP Client enables you to:

- Incorporate external tools in AI agents built on ServiceNow.
- Access tools offered on external MCP Servers.
- Integrate MCP Client with the AI Agent Studio.

By setting up MCP Servers, AI agents in your environment can leverage external tools efficiently, enhancing their ability to perform complex tasks with up-to-date information.

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Install Model Context Protocol Client

Install the MCP Client application on your ServiceNow instance to enable using the tools from the MCP Server in AI agents.

Before you begin

Role required: sn_mcp_client.admin

Verify that you:

- Install the AI Agent Studio plugin [com.snc.sn_aia] and the Generative AI Controller plugin [com.sn.generative.ai] to use the MCP Client.
- Enable the MCP Tool experience in your instance by setting the *sn_aia.enable_mcp_tool* system property to **true**.

Note: ServiceNow supports Protocol version 2025-03-26 of the MCP Servers for MCP Client.

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for Model Context Protocol Client plugin [sn_mcp_client].
3. Select **Install**.

Adding an MCP Server in AI Agent Studio

An MCP Server hosts the APIs and tools required by an AI application, enabling it to receive and process calls from MCP Clients to govern ingress traffic and to promote secure and efficient access to tools. Adding an MCP Server in the AI Agent Studio helps you to leverage the Model Context Protocol as a tool in an AI agent.

Connecting an MCP Server with the AI Agent Studio simplifies the integration process, making it easier to discover and invoke services. This connection enhances security and governance, providing a streamlined setup experience for administrators.

Adding an MCP Server requires you to add an MCP Server in the AI Agent Studio. You can add an MCP Server with one of the following authentication options:

1. **OAuth 2.1**: Helps add an MCP Server with an authentication code. For more information, see Add an MCP Server with OAuth 2.1.
2. **API Key**: Helps add an MCP Server with an API Key. For more information, see Add an MCP Server with API Key.
3. **Others**: Helps add an MCP Server in a manual way by selecting a Connection and Credential Alias record. For more information, see Add an MCP Server with Connection and Credential Alias.

Note: You must authenticate the users with the MCP Server to add the MCP tool to an AI agent and without prior authentication, you can't add the MCP Servers.

Add an MCP Server with OAuth 2.1

Add an MCP Server with OAuth 2.1 in the AI Agent Studio.

Before you begin

Role required: sn_mcp_client.admin

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About this task

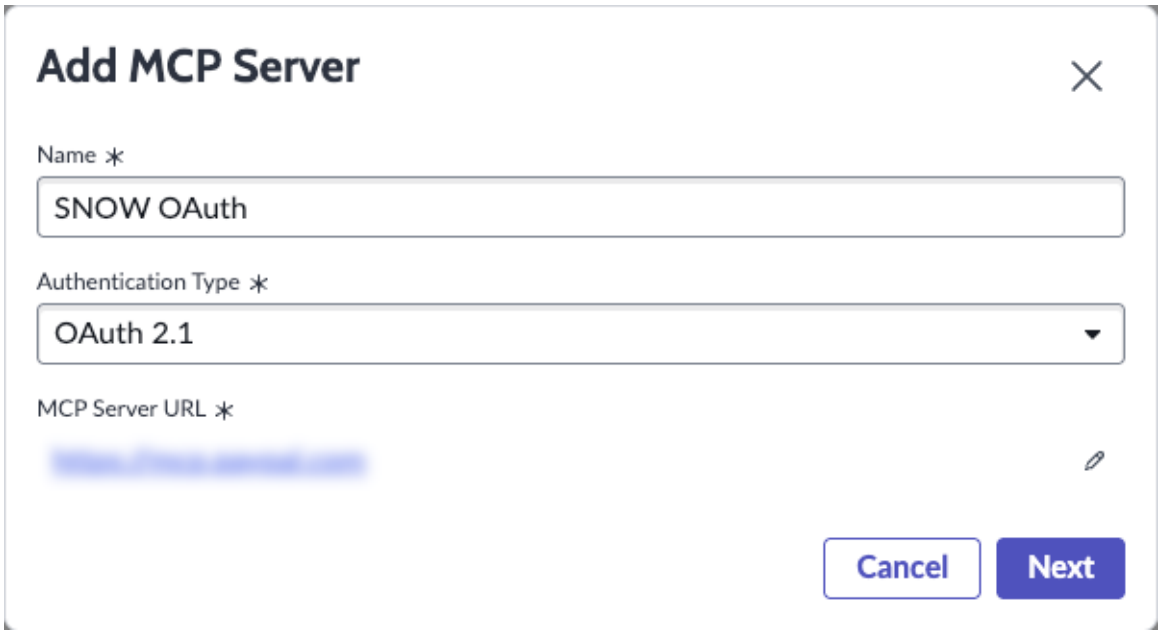
OAuth is the usual method to authenticate the MCP servers. If your MCP server supports it, choose OAuth 2.1 in the Authentication method.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Settings**.
2. Navigate to **Manage MCP Servers** and select **New**.
3. On the form, fill in the fields.

Add MCP Server

Field	Description
Name	Name for your MCP Server.
Authentication Type	The authentication type with which you want to add your MCP Server. Select **OAuth 2.1**.
MCP Server URL	The web address of your MCP Server.



4. Select **Next**.
   The form extends with the registration details.
5. On the form, fill in the fields:

   The dynamic client registration auto-populates the data in the form fields.

> **Note:** If dynamic registration is supported by the MCP Server, you'll be prompted to confirm the grant type and other inputs. If dynamic registration isn't supported, you can continue with the Manual Registration method in Step 6.

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Dynamic Client Registration

Field	Description
Grant Type	The way you want to obtain an access token for accessing protected resources. One of the following two options is used here with auto-populated data. ○ **Authorization Code**: A system-generated code that is used for granting access to an application or resource. ○ **Client Credentials**: Access token provided by the administrator to access the application directly.
Token Authentication Method	Unique token granted to access resources. Select the value from the drop-down list.
Auth Scopes	Define the specific permissions for an application. **Note:** The Auth scopes must be comma-separated values.
Authentication Token for Client Registration	Authentication token used to verify client's identity and grant it permission to register with an authorization token. Provide the following values: ○ **Header**: Authorization header. ○ **Value**: Authentication password.
Authorization URL	Web address of your server to direct authorization.
Token URL	Web address containing the token.
Token Revocation URL	Web address to revoke the previously provided token.

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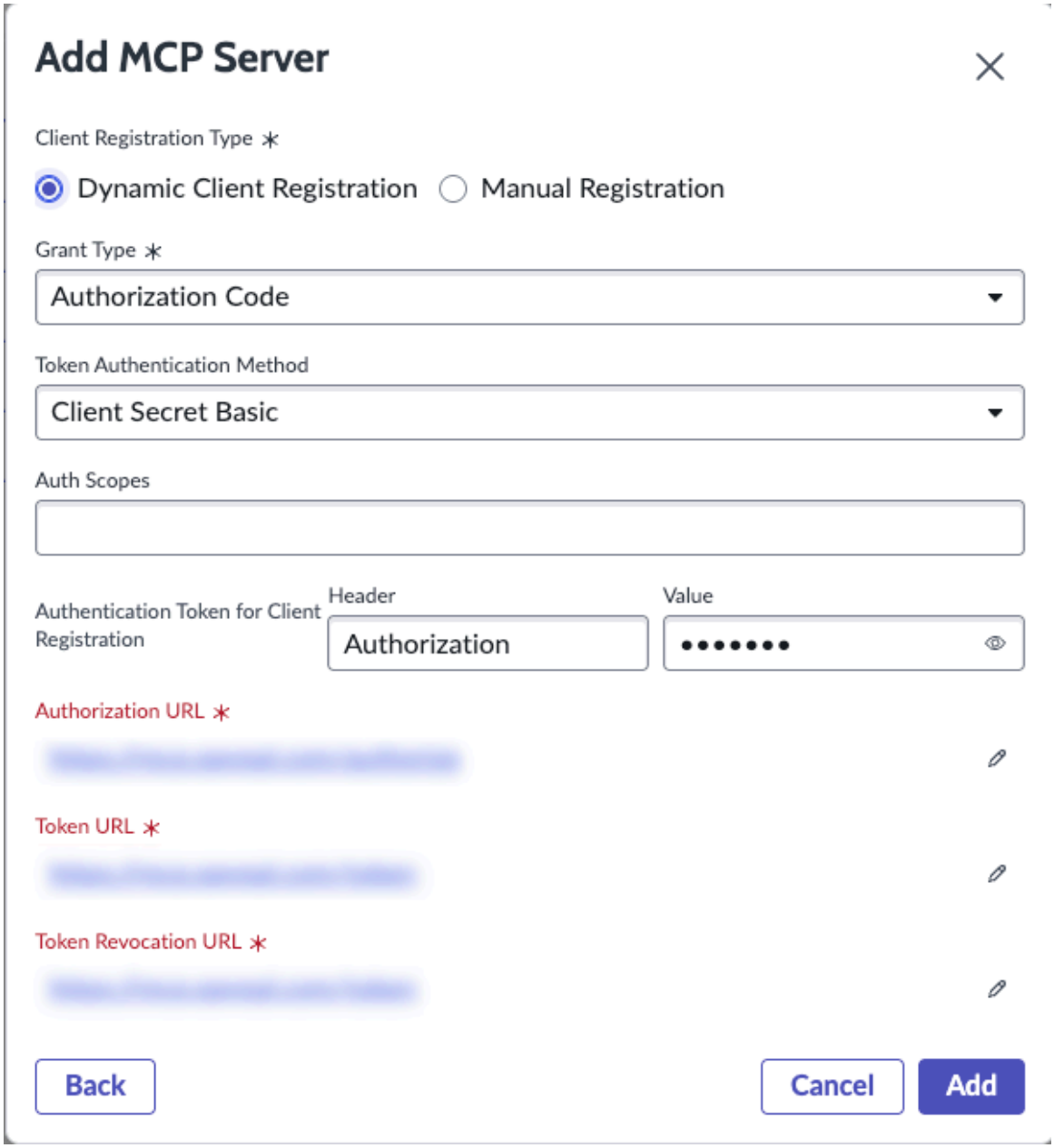

The MCP Server with dynamic client registration is added as a simple connection and credential alias.

6. On the form, fill in the fields:

Note:

- If your MCP Server doesn't support Dynamic Client Registration, then you can register the OAuth client for AI agents in your MCP Server manually and update those client details in AI Agent Studio.
- The manual client registration doesn't auto-populate the data in the form fields and must be manually provided.

Manual Registration

Field	Description
Grant Type	The way you want to obtain an access token for accessing protected resources.

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Field	Description
	You can select one of the two options: ○ **Authorization Code**: A system-generated code that is used for grating access to an application or resource. ○ **Client Credentials**: Access token provided by the administrator to access the application directly.
Token Authentication Method	Unique token granted to access resources. Select the value from the drop-down list.
Client ID	Unique ID for authentication and authorization purposes.
Client Secret	Unique credentials used for authentication.
Auth Scopes	Define the specific permissions for an application. **Note:** The Auth scopes must be comma-separated values.
Authentication Token for Client Registration	Authentication token used to verify client's identity and grant it permission to register with an authorization token. Provide the following values: ○ **Header**: Authorization header. ○ **Value**: Authentication password.
Authorization URL	Web address of your server to direct authorization.
Token URL	Web address containing the token.
Token Revocation URL	Web address to revoke the previously provided token.

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7. Select **Add**.
   Selecting Add takes you to the MCP Server record where you must authenticate it for adding an MCP tool to an AI agent.
8. Select **Authenticate**.

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Selecting **Authenticate** takes you to the third-party authorization page where you must select a workspace and select **Authorize**.

Note: When the OAuth access or refresh tokens aren't available, you must authenticate the OAuth configuration on the MCP Server record to add it as a tool to an AI agent.

Add an MCP Server with API Key

Add an MCP Server with an API Key in the AI Agent Studio.

Before you begin

Role required: sn_mcp_client.admin

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Settings**.
2. Navigate to **Manage MCP Servers** and select **New**.
3. On the form, fill in the fields.

Add MCP Server

Field	Description
Name	Name for your MCP Server.
Authentication Type	The authentication type with which you want to add your MCP Server. Select **API Key**.
MCP Server URL	The web address of your MCP Server.
API Key	A unique code or password to identify and authenticate the user or application when accessing the API. **Note:** The API Key adds a Connection alias dynamically at runtime and maps with the MCP Server.

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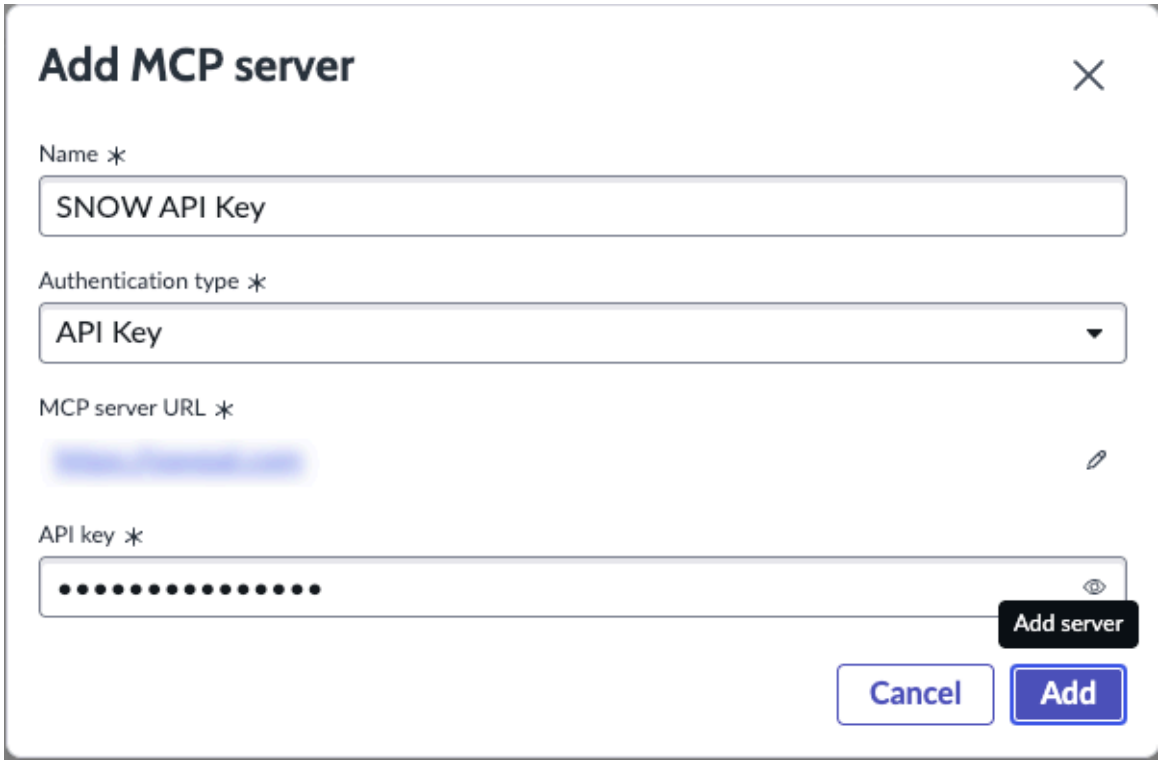

4. Select **Add**.

Result
An MCP Server with the name you provided appears in the list of MCP Servers.

Add an MCP Server with Connection and Credential Alias

Add an MCP Server by selecting a Connection and Credential Alias record.

Before you begin

- Role required: sn_mcp_client.admin
- Verify that you have a Connection and Credential alias record created before adding an MCP Server with Others as the option.

  For more information, see Create a Connection & Credential alias.

About this task
For using the Authentication methods not supported in MCP Server, you can use the Connection and Credential Alias method to create the Alias manually and then update it in the MCP Server. For using OAuth based authentication method, first create the OAuth entity profile and then create the Connection and Credential Alias. For other authentication methods like API Key, Basic Auth, AWS Credentials, SSH Credentials, create the connection and credential Alias directly.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Settings**.
2. Navigate to **Manage MCP Servers** and select **New**.
3. On the form, fill in the fields.

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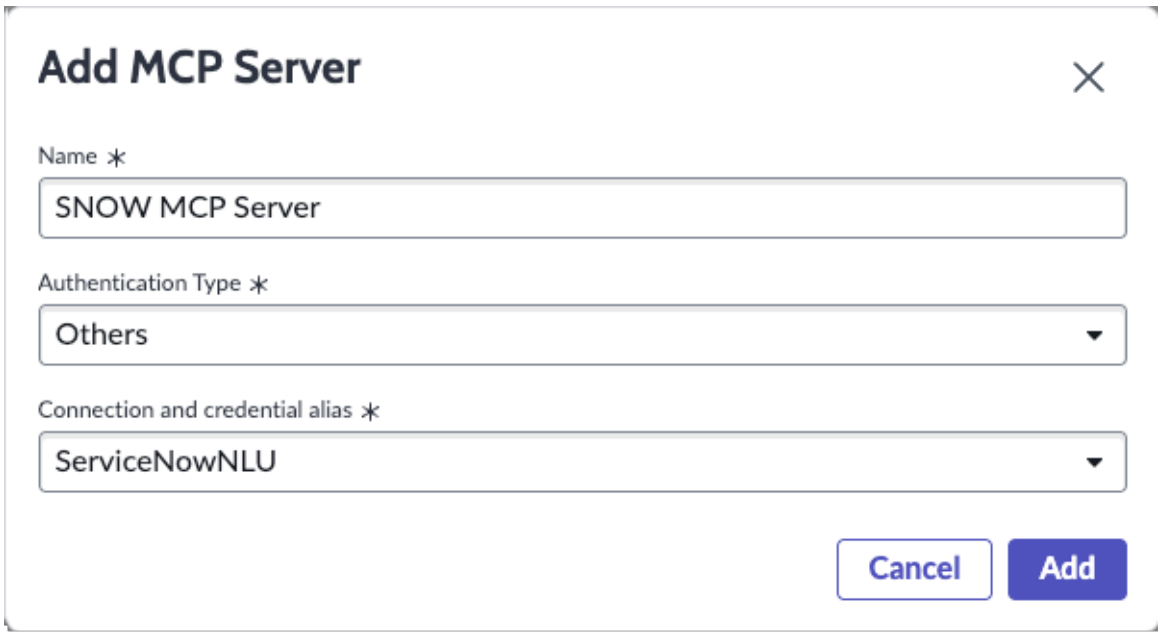
Add MCP Server

Field	Description
Name	Name for your MCP Server.
Authentication Type	The authentication type with which you want to add your MCP Server. Select **Others**.
Connection and credential alias	Select a Connection and credential alias record to map with your MCP Server.



4. Select **Add**.

Note: Authenticate the MCP Server if you see the message requiring it.

Result
An MCP Server with the name you provided appears in the list of MCP Servers.

Add a Model Context Protocol to an AI agent

Add a Model Context Protocol tool to an AI agent in the AI Agent Studio so that your users can access the MCP Server.

Before you begin
Role required: sn_aia.admin

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **AI agents**.
2. Open the AI agent that you want to add a Model Context Protocol tool to and navigate to the Add tools and information section.
3. In the Add tool drop-down list, select **MCP server tool**.
4. On the form, fill in the fields.

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Add a Model Context Protocol Tool

Field	Description
Select Model Context Protocol Server	The Model Context Protocol Server that you want to add to the tool. **Note:** Verify that the MCP Server is authenticated before adding the MCP tool to an AI agent. If the MCP Server isn't authenticated, then you receive an error message - "Authentication is needed to display tools. Open the MCP server record to authenticate."
Select Tool	The tool that you want to add from the Model Context Protocol Server.
Name	Name of the Model Context Protocol tool.
Tool and Description	Description of the Model Context Protocol and what it's going to do to assist your AI agent. **Note:** This description is sent to the LLM (LLM).
Execution Mode	Mode of execution for your selected Model Context Protocol tool: ○ **Supervised**: Inputs from your live agent are required during the execution of this Model Context Protocol tool while the AI agent runs. ○ **Autonomous**: Doesn't require any input from your live agent during the execution of this Model Context Protocol tool while the AI agent runs.
Display output	Permission to display the output of the execution in the Now Assist panel or in Virtual Agent: ○ **Yes** ○ **No**
Processing message	Message to display to users when the tool is running.
Output transformation strategy	Style for the LLM to present the results. ○ None ○ Concise ○ Paragraph ○ Verbose ○ Custom

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5. Select **Add**.
   A Model Context Protocol tool is added in the Model Context Protocol Tools list on the Add tools and information page.

Test an AI agent

Analyze the performance of an AI agent with a Model Context Protocol tool added to it to verify that it functions the way that you defined it.

Before you begin

Role required: sn_aia.admin

About this task

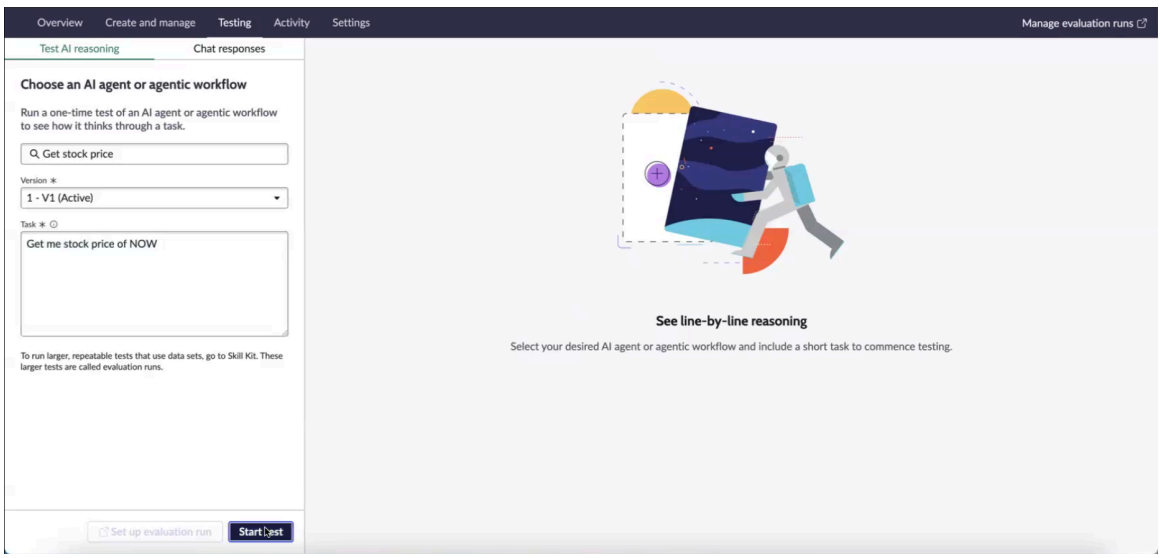
After you create an AI agent and a Model Context Protocol to it as a tool, test it to see that it functions the way that you defined it. Search for the AI agent that you want to test and select the version from the Version drop-down and provide a task with a concise summary and a reference number in the **Task** field to begin testing the AI agent.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. In the **Test AI reasoning** tab, use the Search bar to search and select the AI agent that you want to test.
3. In the Version drop-down list, select the version of the AI agent.
4. In the **Task** field, provide a concise summary of the task to be achieved.

   Note: In the task summary, include a reference number or specific record for better results during your testing.

5. Select **Start test**.



You're directed to the **Chat responses** tab, where you can see Now Assist executing operations to test the AI agent.

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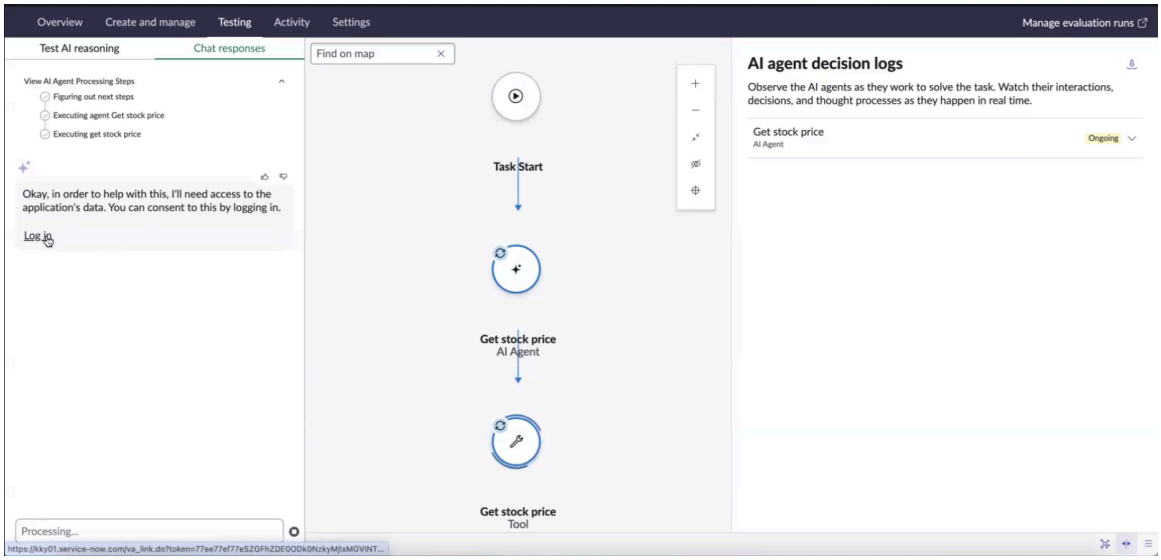
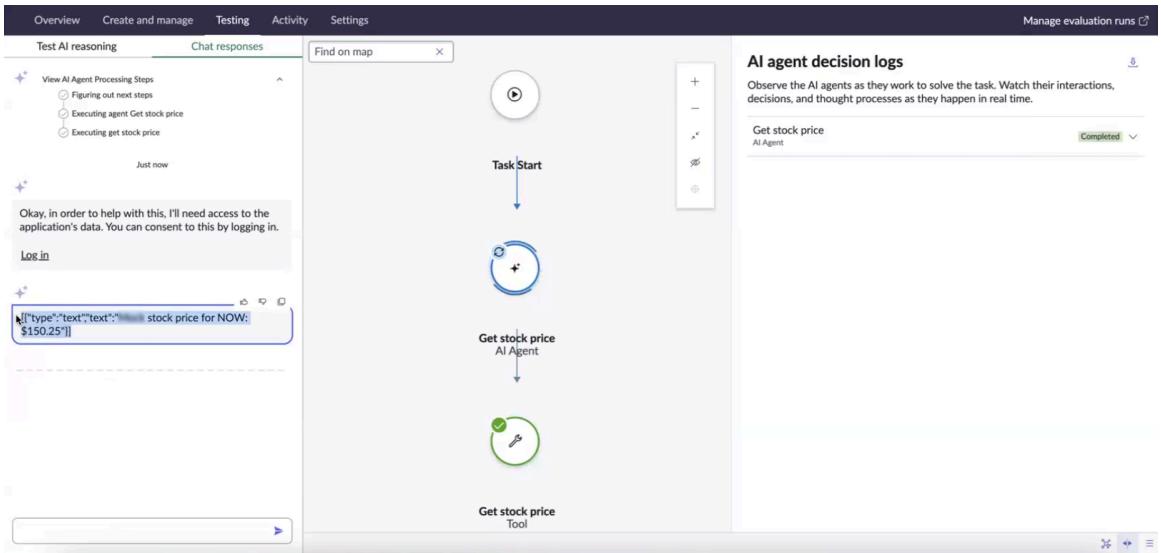


6. Select **Log in** and authenticate the MCP server to complete the testing.

Note:

- Log in will be visible only if the server isn't authenticated.
- Enabling access to the MCP Server refreshes the whole Testing page and resumes testing in the Chat responses tab. The OAuth token used for the authentication is saved in the OAuth Credentials table [oauth_credential].



Model Context Protocol Client reference

Find more information about user roles, tables, and the different properties that are installed with the Model Context Protocol Client application.

MCP Client Roles

The following roles are installed with the Model Context Protocol Client plugin [sn_mcp_client].

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Roles used in MCP Client

Role	Description
MCP Client Admin [sn_mcp_client.admin]	Administrator of the application. A user with the sn_mcp-client.admin role can create, read, update, and delete records. **Note:** The sn_aia.admin role contains the sn_mcp_client.admin role, a role inheritance on plugin activation.
MCP Client Viewer [sn_mcp_client.viewer]	Read-only access to the application. A user with the sn_mcp_client.viewer role has read and report access on all tables. **Note:** The sn_aia.viewer role contains the sn_mcp_client.viewer role, a role inheritance on plugin activation.

MCP Client system properties

The following system properties are installed with the Model Context Protocol Client plugin [sn_mcp_client].

System properties used for configuring MCP Client

System property	Description
sn_aia.enable_mcp_tool	Enables access to the MCP Client tool on your ServiceNow instance. Default value: **false**

MCP Client tables

The following tables are installed by default with the installation of the Model Context Protocol Client plugin [sn_mcp_client].

Tables used for configuring MCP Client

Table	Description
MCP Execution Logs [sn_mcp_execution_logs]	Lists the request and response, the method (tool call or tool list) that was carried out along with the mapped session. The execution logs table also helps to debug and shows if there are any errors.
MCP Client Server Session Mappings[sn_mcp_client_server_session_mapping]	Lists the sessions mapped to the server based on the capabilities support.
Model Context Protocol Severs [sn_mcp_server]	Lists the MCP Servers.

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Autonomous Workforce

AI specialists in your Autonomous Workforce are designed to handle high-volume, routine requests end to end, giving your team room to focus on the tasks only people can solve.

https://player.vimeo.com/video/1214617271?h=05fec0e551&badge=0&autopause=0&player_id=0&app_id=58479

Learn more about AI specialists in your Autonomous Workforce, their benefits and features, and their role in your organization.

Contact your account manager for information about accessing this product.

Get started

Explore Discover AI specialists and their potential for automating your business processes.	Configure Configure the basic details, profiles, and tasks of an AI specialist.
Use Onboard, preview, and monitor the performance of AI specialists as they accomplish tasks.	Reference Review roles associated with AI specialists.

Autonomous Workforce consists of your AI specialists that augment entire roles, not just individual business processes. As pre-trained, agentic AI, they arrive equipped with the capabilities and tasks enabled to handle jobs without needing to iterate on prompts.

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Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

Helpful resources

Some ServiceNow resources that can provide you with helpful information are:

ServiceNow Community

ServiceNow Community

Developer

developer.servicenow.com

ServiceNow

http://servicenow.com

ServiceNow Store

http://servicenow.com

Support

- https://support.servicenow.com/now
- Known Error Portal

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Exploring Autonomous Workforce

Learn more about Autonomous Workforce and review the benefits AI specialists can provide for different users in your organization.

Autonomous Workforce overview

Your autonomous workforce is made up of AI specialists. Each specialist combines individual AI agents that solve discrete tasks, such as prioritizing an incident or identifying similar records. Working together, these agents tackle bigger goals like task triage or updating requesters with solutions that worked for similar issues. The AI specialist performs tasks and is capable of functioning as a reliable extension of your workforce, taking on work that would bottleneck your team. Spend less time on ticket volume and more time delivering meaningful resolutions.

Assign your AI specialist to specific assignment groups and roles to limit the scope of its work and the data it can access. Once configured, you can test your AI specialist to confirm it behaves as expected before putting it to work. After activation, your AI specialist runs against real records, and you can monitor its performance and activity over time to confirm it continues to meet your needs.

Accessing AI specialists

To access AI specialists, you must have the following plugins installed:

- Zero Touch Service Desk plugin [sn_ztsd] version 2.3.19+
- ServiceNow Otto AI Agents [sn_aia] version 7.1+
- AI Engagement Experience [sn_now_canvas_ai] version 3.1.1+

Your instance must also be at least on Zurich Patch 10 or Australia Patch 3.

Autonomous Workforce users

Different users interact with Autonomous Workforce in various ways depending on their role and responsibilities.

Users

User	Role	Description
AI administrator	sn_aia.admin	The AI administrator can configure and activate AI specialists using AI Agent Studio. After AI specialists are activated, they can monitor their performance and activity to track their effectiveness, efficiency, and customer satisfaction.
Service Desk manager	sn_sow_itsm_common.sn_service_desk_manager	Service Desk managers have the capabilities of a standard Service Desk Agent (sn_service_desk_agent) and team level oversight and task resolution. They can view and manage

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Users (continued)

User	Role	Description
		team performance reports, analytics, and tasks and onboard an AI specialist to the team in Service Operations Workspace.
Service Desk agent	sn_itsm_common.sn_service_desk_agent	Service Desk agents resolve tasks, such as incidents and cases, using their knowledge, research, and experience. They have access to the Service Operations Workspace, where they can view the work of an AI specialist on a record.

Autonomous Workforce workflow

Follow this workflow to implement and manage AI specialists in your organization.

For more information about considerations to make before deployment, see General guidelines for deploying AI specialists.

1. Onboard an AI specialist.

   As an AI administrator, you can use AI Agent Studio to configure your AI specialists.

   After installing the applications and plugins and activating the sn_aia.enable_ai_workers system property, you can activate an AI specialist as-is or configure any of the following:

   - Basic details, including name, profile icon, department, and description
   - Profile, including the roles and assignment groups
   - Tasks, things the AI specialist can do
   - Triggers, for running the AI specialist after specified events occur
2. Manually assign tickets to your AI specialist to see how it works. Once you have built trust, create assignment rules or configure Advanced Work Assignment to route work to your AI specialist automatically.
3. Monitor AI specialist activity. You can review the records that the AI specialist has worked on individually to check how it's doing.
4. Track AI specialist performance. Analytics for AI specialists that track their effectiveness, efficiency, and value can be found in AI Agent Studio and Service Operations Workspace. Use the analytics routinely to confirm that the AI specialist keeps up if things change. If performance isn't where you want it to be, you can configure it again at any time.

Autonomous Workforce benefits

Autonomous Workforce provides specific benefits for different types of users in your organization.

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Autonomous Workforce benefits

Benefit	Feature
Automate high-volume, repeatable requests to reduce manual effort and free up agents for complex work	AI specialist capabilities
Classify and triage incoming work to route requests to the right team faster	AI specialist tasks
Investigate related records to surface relevant context and accelerate resolution	AI specialist tasks
Communicate with requesters throughout the lifecycle of a request to keep them informed	AI specialist tasks
Monitor team and AI specialist performance to track efficiency and identify areas for improvement	Performance metrics
Test AI specialist behavior before activation to validate outcomes and reduce risk	AI specialist guided setup in AI Agent Studio
Simplified agentic AI setup reduces configuration complexity and helps accelerate time to value	AI specialist guided setup in AI Agent Studio
Enforce data security for agentic AI by assigning roles to control what each AI specialist can access and act on	AI specialist assigned roles

What to explore next

To learn more about configuring and using Autonomous Workforce, see:

- Configure AI specialist profiles
- Edit AI specialist tasks
- Test AI specialists
- Monitor AI specialist activity
- Track AI specialist performance

Related products

For more information about the AI specialist for ServiceNow Otto for IT Service Management (ITSM), see L1 IT Service Desk AI Specialist.

General guidelines for deploying an autonomous workforce

AI specialists, like other agentic AI, benefit from strategic planning for testing, deploying, and monitoring performance. Learn guiding principles to help your AI specialists achieve their highest chances of success.

Overview of deploying an autonomous workforce

AI specialists use artificial intelligence to perform work, but they don't require extensive knowledge about AI to set up and use. The possible tasks available to an AI specialist come pre-configured. You can choose which ones apply, test to verify that the AI specialist works as you expect, and then activate.

Like all AI, strategic planning for autonomous workforce implementation can be key to getting the most out of your AI specialists.

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Questions to ask before you begin activating AI specialists might be:

- What problems do I want my AI specialist to solve, and why?
- Would an AI specialist be the best solution for these problems, or would they be better solved with an AI skill, AI agent, or agentic workflow?
- What counts as success in terms of AI specialist effectiveness, efficiency, and customer satisfaction?
- How do I want my team members to interact with an AI specialist?

AI specialists perform best under the following conditions:

- Strong knowledge base: Well-maintained, procedural knowledge articles with clear self-service instructions for end users
- High-volume of similar issues: Incidents with a single dominant root cause and clear resolution paths
- Existing catalog items: Well-defined catalog items for accurate redirection of misclassified incidents
- Clear policy rules: Approve/reject criteria that are explicit and well-documented

AI specialists don't perform well under the following conditions:

- Sparse or outdated knowledge: knowledge articles that are incomplete, out of date, or written for internal audiences
- Complex multi-step troubleshooting: issues that require orchestration across multiple external systems or remote device access
- Undocumented internal knowledge: resolutions that depend on tacit knowledge not captured in formal systems
- Highly sensitive categories: Personally identifying information, security incidents, or areas with severe cost of error should be avoided

Configuring AI specialists in your autonomous workforce

When configuring an AI specialist, there are several important aspects to consider.

Within the AI specialist's profile, the sections each relate to different aspects of the AI specialist's suitability for certain work:

Assignment groups: the work the AI specialist is assigned

The AI specialist can't work on tasks not assigned to those assignment groups. If you don't want the AI specialist to work on certain tasks, confirm that the correct assignment groups are selected.

Roles: what data the AI specialist has access to

See the section Data access security for AI specialists.

The AI specialist's tasks specify the actions that it can take to solve problems within the domains. Each task has different options to configure the actions further. For more information about the different tasks available, see Edit the tasks of an AI specialist.

Operating modes: from supervised to autonomous

Supervised (Copilot) mode

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The AI specialist researches and drafts a proposed solution, but a person reviews and approves it before it reaches the requester. Use this mode when you don't yet have confidence in autonomous resolution for a given category.

Autonomous mode

The AI specialist resolves and communicates independently, escalating to a human when its confidence is low.

Move an AI specialist to autonomous operation as soon as it has proven itself in testing. See the following section for guidance on when to hold a category back.

Confidence, cost of error, and escalation

Before posting a resolution, an AI specialist scores its proposed solution and compares that score against a confidence threshold you configure. If the score meets the threshold, the solution is posted; if it falls short, the work routes to a human fulfiller instead. That score is informed by how well the solution is supported by evidence, how closely it fits the specific task, how likely it is to resolve the issue, and the AI specialist's overall certainty.

Not every category carries the same risk, so weigh cost of error alongside confidence: financial impact if the resolution is wrong, sensitivity if the category involves personally identifying information or security data, and whether the resolution is internal-facing or reaches a customer directly. Categories with a higher cost of error should stay in supervised mode, or stay outside the AI specialist's assignment groups, regardless of how well-suited they otherwise seem.

Data access security for AI specialists

AI specialists only have access to the data that you specify. AI specialists can be assigned roles to limit their data access to certain scopes. Verify that the roles granted to the AI specialist are enough to enable it to complete its tasks, but not enough to access data it shouldn't. The roles function the same as the roles for a human user.

Consider these security principles when configuring AI specialist roles:

- Apply the principle of least privilege by granting only the minimum roles necessary for the AI specialist to perform its assigned tasks.
- Review role assignments regularly to verify they remain appropriate as your AI specialist's responsibilities evolve.
- Test role configurations in a non-production environment before deploying to production.

Important: AI specialists can access and modify data based on their assigned roles. Verify that role assignments align with your organization's data governance and security policies.

Assigning work to the AI specialist

Tasks must be assigned to the AI specialist. You can assign tasks to the AI specialist like any other user. Manual assignment, business rules or other triggers, and Advanced Work Assignment (AWA) all work. AWA allows you to select rules for assigning work so that work can be assigned automatically when the record is created or updated.

The User record associated with the AI specialist can be found on its profile. You can use business rules, triggers, or AWA to assign work to the AI specialist referencing that User record.

When setting up assignment rules, consider these factors:

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- Volume and complexity of work to confirm the AI specialist can handle the assigned workload
- Priority levels to determine which tasks the AI specialist should handle first
- Escalation paths for cases where the AI specialist can't complete a task

Common failure modes to validate against

Certain conditions are reliable early warnings that a deployment will encounter issues. Validate against each of these before activating an AI specialist.

- Task states that don't change during AI specialist execution, which can suggest extensive customizations that fall outside foundational readiness. Run the AI Readiness Evaluation application to assess foundational readiness before proceeding.
- Task states that don't change during AI specialist execution, which can also suggest a state model that isn't mapped to the AI specialist's processing states. See Edit the tasks of an AI specialist in the legacy AI Agent Studio for steps to configure state mapping.
- Test queries that return no results or surface internal-only content, which points to a knowledge base that isn't ready. Complete a knowledge audit and enforce audience separation before proceeding.
- Poor knowledge base search results despite a ready knowledge base, which points to an AI Search profile misconfiguration. Inspect and adjust the Zero Touch Service Desk (ZTSD) search profile and AI Search configuration to target the right content for the AI specialist to rely on.
- Zero assignments after activation, which points to an assignment rule or routing misconfiguration. Validate routing in a non-production environment and run a test task through the full routing chain across all intake channels.
- A spike in reopened tasks, which points to accuracy issues. Start with thorough testing and gate any move to autonomous operation on whether you consistently meet the expected thresholds.
- Work that sits with the AI specialist for more than 2 hours with no state change, which points to a broken escalation path. Validate escalation and run escalation test cases before activation.

Previewing your AI specialist

Previewing your AI specialist on multiple records can show you what to expect when the AI specialist is activated and running.

Important: Changes made by the AI specialist during previews are actually made to the record.

Follow these testing guidelines to validate your AI specialist's performance:

- Use representative tasks for initial validation. Selecting tasks that mirror the ones the AI specialist will handle enable you to check basic functions. You could also create dummy tasks that simulate active ones.

  Note: The AI specialist won't send any communications to users during tests.

- Test across different incident and case categories. Testing multiple categories allows you to confirm that the AI specialist is working effectively in multiple domains.
- Run at least 5 to 10 tests before activating. Try to create tests that cover all situations assigned to the AI specialist.

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- Test edge cases and unusual scenarios to see how the AI specialist handles unexpected situations.
- Validate that the AI specialist respects data access controls and role-based permissions during testing.

Improving AI specialist performance with feedback

AI specialists can make mistakes. With feedback or changes to the sources they access, you can improve their performance for next time.

Use these methods to monitor and improve AI specialist performance:

- Administrators and Service Desk managers can review the individual steps an AI specialist took to reach its conclusions, in either Service Operations Workspace or the Core UI.
- AI administrators and Service Desk managers can view an AI specialist's activity in AI Agent Studio. You can see the different tasks that your AI specialist has worked on. In the list, there is the option to provide granular feedback of either *Helpful* or *Not helpful*. You can open the record, check the AI specialist's work, and then submit the feedback in the activity list.
- If the AI specialist makes errors based on knowledge articles that contain outdated or faulty information, knowledge administrators can update the articles to improve AI specialist performance.

Establish regular performance review cycles to:

- Analyze AI specialist activity logs and success rates
- Identify patterns in errors or suboptimal performance
- Update knowledge base content based on AI specialist performance
- Adjust AI specialist configuration based on performance data

Ongoing monitoring and optimization

After deploying your AI specialist, continuous monitoring helps maintain optimal performance and identify opportunities for improvement. You can track the performance analytics of an AI specialist by selecting them in AI Agent Studio. See View AI specialist performance metrics.

Key metrics include:

- Task completion rates and mean time to resolution
- User satisfaction scores and feedback
- Escalation rates to human agents
- Durable auto-resolve rate: the percentage of work the AI specialist resolves with no reopen during the post-resolution monitoring window
- AI coverage rate: the percentage of eligible volume the AI specialist is actually eligible to handle, which keeps scaling honest rather than cherry-picking easy work
- Time to value: how quickly enough production data exists to quantify impact after go-live

Regular optimization activities should include:

- Refining assignment rules to improve work distribution
- Updating knowledge base content to address new scenarios
- Adjusting role assignments based on security reviews and changing requirements

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Domain separation in Autonomous Workforce

Domain separation is unsupported for Autonomous Workforce.

Support level: No support

- The domain field may exist on data tables but there is no business logic to manage the data.
- This level is not considered domain-separated.

For more information on support levels, see Application support for domain separation.

Related topics

Domain separation for service providers

Configuring AI specialists

Configure the name, profile icon, capabilities, assignment groups, tasks, and language proficiencies of AI specialists in AI Agent Studio.

Configuration overview

See General guidelines for AI specialists for more information about setting up your autonomous workforce.

1. Configure AI specialist profile

   Configure the name, icon, roles, and assignment groups of an AI specialist.

2. Configure AI specialist tasks

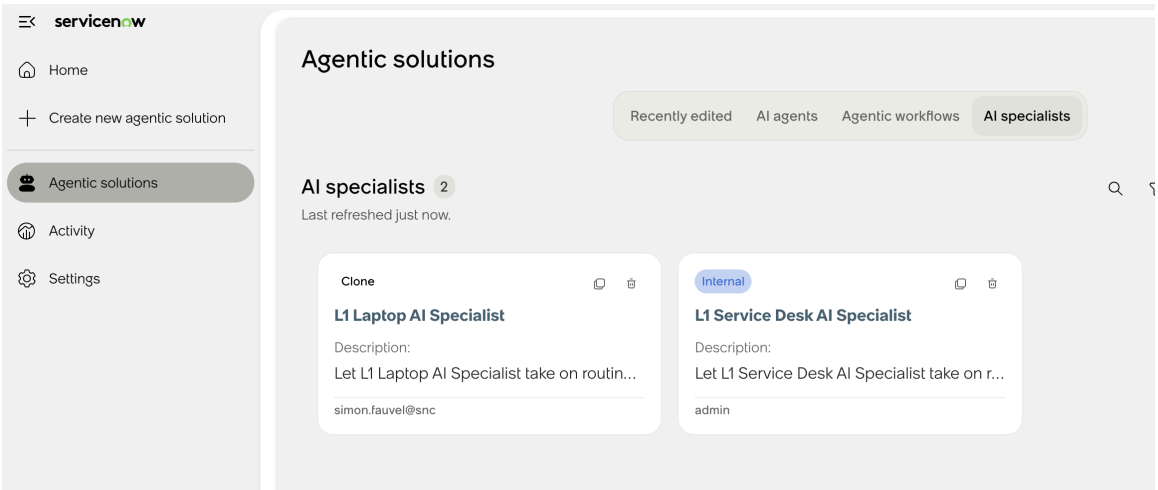
   Configure the tasks that an AI specialist is capable of.

3. Test an AI specialist

   Run the AI specialist on a specific record to check how it functions.

Configure AI specialists in AI Agent Studio

Configure your AI specialists in your autonomous workforce in AI Agent Studio.



The following is the basic workflow for configuring an AI specialist.

1. **Profile**

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Set basic details like the AI specialist's name, icon, role, and assignment groups. Assignment groups are the most important setting because they determine which groups the AI specialist can act on behalf of.

2. **Tasks**

   Define what the AI specialist can do, such as triaging incoming work, researching context, and responding to requesters.

4. **Preview the AI specialist**

   Test the AI specialist on an actual record, not a simulation, to see how it reasons and what actions it takes.

Edit the profile of an AI specialist in AI Agent Studio

Modify the profile of an AI specialist in AI Agent Studio to set its name, description, roles, and assignment groups.

Before you begin

Role required: sn_aia.admin

About this task

AI specialists profiles determine the unique specialties of the AI specialist. Choosing the right roles helps give your AI specialist the context necessary to accomplish its tasks.

To learn how to modify the tasks that an AI specialist is capable of, see Edit the tasks of an AI specialist.

Procedure

1. Navigate to the **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the AI specialist you want to modify.
3. In the node view, select the first node of the AI specialist.

   The first node contains the main configuration settings for the AI specialist. The other nodes represent the individual agents that comprise the underlying architecture and don't require modification to change the profile of the AI specialist.

4. Update the name, profile icon, title, and description of your AI specialist.

   The user ID must match the ID of an existing record on the User table with the AI user type.

5. Choose your AI specialist's assignment groups.

   The assignment groups determine what work the AI specialist can pick up. Multiple teams can use the same AI specialist, but you can create copies of a AI specialist if you want to fine-tune an AI specialist for different teams. See Create a copy of an AI specialist for more information.

   If you remove your team from the list of assignment groups, the AI specialist won't handle your team's tickets.

6. Select your AI specialist's role(s).

   Roles determine what data access your AI specialist has. For example, if the AI specialist has a role that grants it access to the Incident table, it can work on incidents. If the role(s) don't grant access to a necessary table, the AI specialist can't pick up work on that table, even if it's within the assignment group's domain.

   Review the full list of roles granted to the AI specialist to check your AI specialist has access only to what it needs to accomplish tasks.

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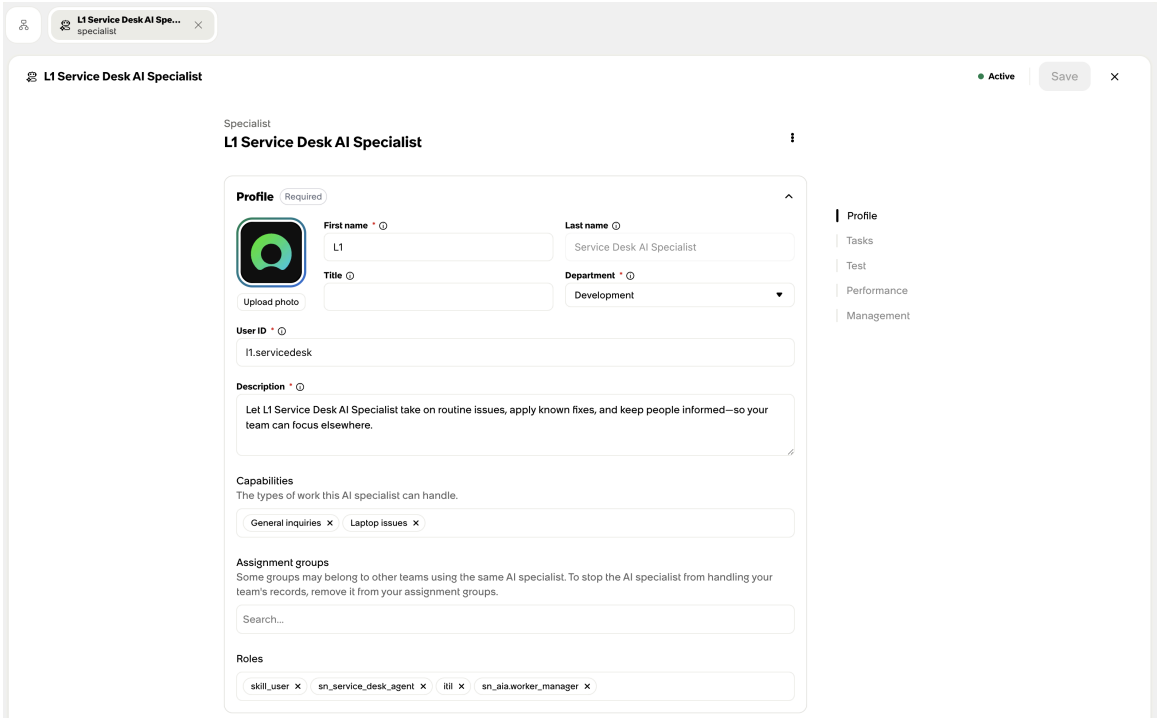

7. Select **Save** to save your changes.

   You can make additional changes to your AI specialist before selecting save.

   If you don't select **Save** before navigating to a new page or closing the browser, your changes are lost.

Edit the tasks of an AI specialist in AI Agent Studio

Select tasks that an AI specialist can perform in the new AI Agent Studio.

Before you begin

Role required: sn_aia.admin

About this task

AI specialist tasks determine what they can do. Choosing the correct tasks provides your AI specialist with the tools required to complete complex goals autonomously.

To learn how to modify the roles and capabilities that an AI specialist has, see Edit the profile of an AI specialist.

Procedure

1. Navigate to the **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the AI specialist you want to modify.
3. In the node view, select the first node of the AI specialist.

   The first node contains the main configuration settings for the AI specialist. The other nodes represent the individual agents that comprise the underlying architecture and don't require modification for task configuration.

4. Scroll down to the **Tasks** section in the AI specialist guided setup to view the full list of tasks that the AI specialist can perform.

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5. Select the card of a task to review, select the pencil icon, and make changes to the specific details of the task configuration.

   The following tasks are available to the L1 IT Service Desk AI Specialist. These are presented as examples. Different AI specialists may have different tasks.

   Classify and assign: Configure how the AI specialist identifies incidents, classifies them, and assigns a specific incident type for follow-up.

   - *Table*: Select the table in which the AI specialist operates and resolution workflows are executed.
   - *Fields to classify on the record*: Enter the fields that the AI specialist should classify if empty.
   - *Routing*: Add and manage the routing criteria that determine which records the AI specialist handles. For more information, see Manage the routing criteria of an AI specialist.

   Triage and diagnose: Configure the details for how the AI specialist analyzes incidents for accurate handling.

   - *Field to use as Task objective*: Select the record fields which the AI specialist uses to analyze and determine the next steps.
   - *Use attachment content*: Enable the option for the AI specialist to review the content of attached files as part of incident triage and diagnosis.
   - *Map AI specialist states to record states*: Map the states of the AI specialist's execution to the states of the incident record. For example, the AI specialist's *Awaiting information* state can be mapped to the incident record *On Hold* state. If you have customized state values for your Incident table, you can map them to the AI specialist's states here.
   - *Default routing decision*: Select the routing decision that the AI specialist falls back to when an incident matches none of the routing criteria. Select either *Attempt resolution* or *Reassign*.
   - *Routing criteria*: Add criteria that determine which records the AI specialist handles. Criteria are grouped into two sections:
     - *Reassign for*: When an incident matches one of these criteria, the incident is reassigned to a human.
     - *Attempt resolution for*: When an incident matches one of these criteria, the AI specialist attempts to resolve it.

     To add a criterion, select **Add reassigned criteria** or **Add attempted criteria**, depending on which decision you want the criterion to trigger. Complete the following required fields and then select **Add routing criteria**.

     - *Name*: Enter a name that identifies the criterion, such as `AD account access blocked`.
     - *Routing instructions for LLM*: Describe which incidents the criterion applies to, including any scope that limits it. The AI specialist uses

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these instructions to determine whether an incident matches the criterion. Enter up to 4,000 characters.

- *Routing Decision*: Set by the button that you selected, either *Reassign* or *Attempt resolution*.

Each criterion appears as a labeled item in its section, showing only the name. To change a criterion, select its name to reopen the dialog box. To remove a criterion, select the **X** next to its name and then select **Delete** to confirm.

Investigate and resolve: Configure the following details on how the AI specialist investigates to find relevant solutions and resolve the issue.

- *Knowledge sources*: Select search profiles and knowledge base *sys_ids* to define how the AI specialist retrieves knowledge articles. AI search profiles can include sources such as knowledge articles, ServiceNow documentation, or specific tables. You can create AI Search profiles specifically for your AI specialists. To customize what information your AI specialist accesses, add search profiles with the pre-installed ones or remove the pre-installed ones. You must have at least one search profile selected for the AI specialist to complete the *Investigate and resolve* task.

  Note: If you include a table as a search source but don't grant the AI specialist access through its assigned roles, it can't search that table.

- *Automatically create KFT records*: Enable if you want the AI specialist to create a KB Feedback Task record after proposing a solution without an existing knowledge article.
- *Research depth*: Select how extensively the AI specialist must gather and analyze data during investigation.
- *Pre resolution condition*: The conditions that must be true before the AI specialist will resolve the ticket. These are fields that get filled in after a ticket has been submitted.
- *Execution mode*: Determine how autonomously the AI specialist should act. *Autopilot* mode grants the AI specialist the ability to mark a ticket as resolved once resolution steps are sent. *Copilot* mode requires human acceptance of its resolution proposal.
- *Auto-submit catalog requests*: Enable AI specialists to submit catalog items on behalf of the user without an additional confirmation step.

Response formatting: Configure the details on how the AI specialist communicates to keep requesters informed through communication channels.

- *Inbound channels*: Select the inbound channels such as Activity stream through which the AI specialist can receive messages from requesters.
- *Outbound Channels*: Select the outbound channels the AI specialist uses to send responses or notifications. You can select channels such as Activity stream, email, portal, or phone.
- *Internal communication when confidence is low*: Enable the AI specialist to log its solution as a work note rather than proposing it directly.
- *Response templates*: Write the template for what the AI specialist should say to communicate to the user. You can set response templates for three different AI specialist states: Awaiting Info, Solution Proposed, and Reassign to Human. You can format your message using the editor to include things like bold text, specific fonts, tables, highlighting, links, and bullets.

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Reassign: Configure the following details on how the AI specialist directs unresolved incidents to the correct team or agent for timely resolution.

- *Maximum number of interactions before escalation*: Set how many times to contact the requester before sending to a human agent. Enter a number greater than zero.
- *Reassign on follow-up question*: Enable this option to send the ticket to a human agent when the requester asks a follow-up question. Turning off the option lets the AI specialist handle follow-ups.
- *Choose where to reassign records*: Select the assignment group to reassign the ticket after an AI specialist has reviewed it and chosen to reassign it.
- *Cross-group reassignment*: Enable the AI specialist to recommend reassigning an incident to a different assignment group. The AI specialist never reassigns an incident to a different assignment group on its own.
- *Cross-group confidence threshold*: Set the confidence threshold for whether an incident belongs to a specific other assignment group.

6. Select **Save** to save your changes.

   You can make additional changes to your AI specialist before selecting save. Changing tabs in the AI specialist guided setup won't lose your changes.

   If you don't select **Save** before navigating to a new page or closing the browser, your changes are lost.

Preview an AI specialist in the new AI Agent Studio

Run a preview of your AI specialist in the new AI Agent Studio on a single record to preview how it works and verify it matches your intentions.

Before you begin

Role required: sn_aia.admin

About this task

You can test an execution of the AI specialist on a single record to preview its capabilities.

Note: Previewing an AI specialist, depending on the tasks configured, can actually make changes to the record. Previews aren't simulations.

Procedure

1. Navigate to the **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the AI specialist you want to preview.
3. In the node view, select the first node of the AI specialist.

   The first node contains the main configuration settings for the AI specialist. The other nodes represent the individual agents that comprise the underlying architecture and do not require modification to preview an AI specialist.

4. Scroll down to the **Test** section in the AI specialist guided setup.
5. In the dropdown menu, select a record you want to preview the AI specialist on.

   Once a record is chosen, you can select the open link button to open the record in a new browser tab to check the details.

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Note: Choose records that you can safely make changes to. The work is actually being done on the record during the preview.

6. Select **Run** to begin the preview.

   The test begins on the record. You can watch what fields it updates and any comments or work notes it generates.

   When the test is complete, you can review all the changes made.

7. Verify that the AI specialist's performance meets your expectations.

   See the Testing section in General guidelines for AI specialists for more information about how to test your AI specialist.

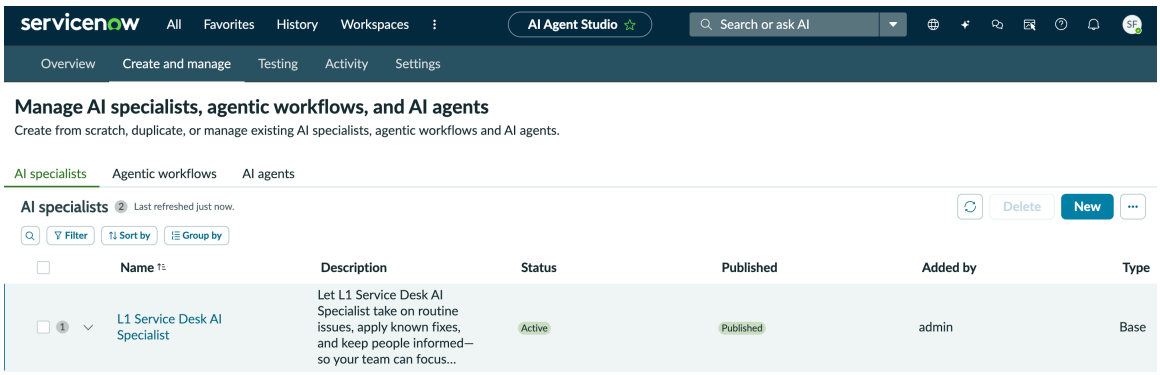
Result
Your AI specialist has worked on a specific record or records of your choice.

What to do next
You can return to the **Profile** or **Tasks** sections by scrolling up in the guided setup to make changes if necessary. Once the changes are made, you can preview the AI specialist again.

If you're satisfied with the AI specialist's performance after making changes, you can select **Save** to save changes or **Activate** to let the AI begin work.

Configure AI specialists in the legacy AI Agent Studio

Configure your AI specialists in your autonomous workforce in the legacy AI Agent Studio.



The following is the basic workflow for configuring an AI specialist.

1. **Basic details**

   Set basic details like the AI specialist's name, icon, and role.

2. **Profile**

   Set basic details like the AI specialist's capabilities and assignment groups. Assignment groups are the most important setting here, since they determine which groups the AI specialist can act on behalf of.

3. **Tasks**

   Define what the AI specialist can do, such as triaging incoming work, researching context, and responding to requesters.

4. **Preview the AI specialist**

   Test the AI specialist on an actual record, not a simulation, to see how it reasons and what actions it takes.

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Edit the profile of an AI specialist in the legacy AI Agent Studio

Modify the profile of an AI specialist in the legacy AI Agent Studio to set its name, description, roles, and assignment groups.

Before you begin

Role required: sn_aia.admin

About this task

AI specialists profiles determine the unique specialties of the AI specialist. Choosing the right roles helps give your AI specialist the context necessary to accomplish its tasks.

To learn how to modify the tasks that an AI specialist is capable of, see Edit the tasks of an AI specialist.

Procedure

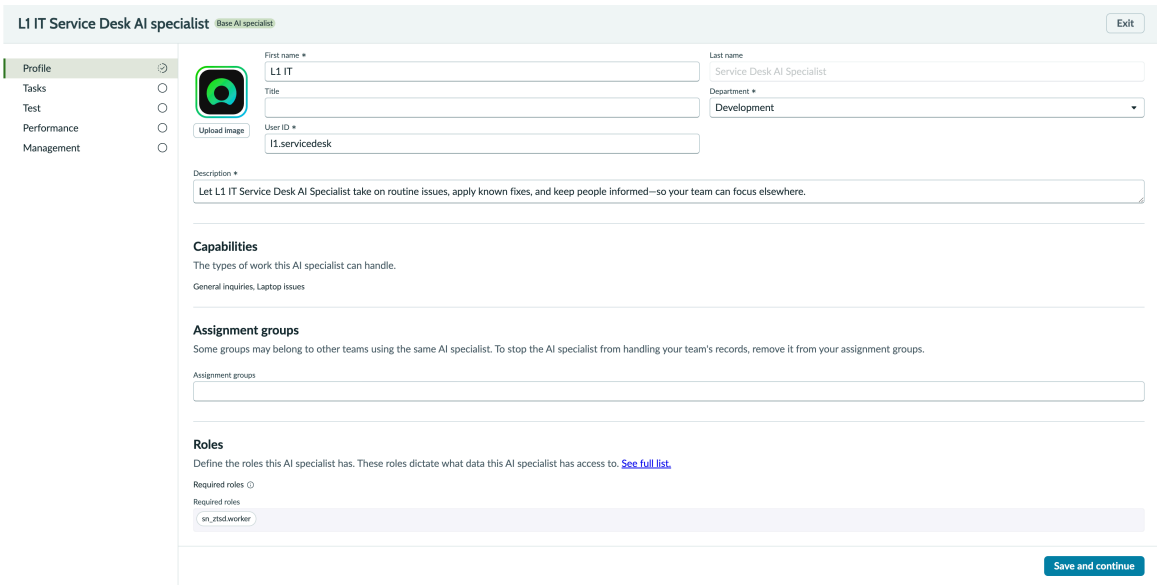
1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. In the **AI specialists** tab, select the AI specialist you want to edit.
3. In the **Profile** tab, select the edit icon next to the name of the AI specialist.
4. Choose your AI specialist's assignment groups.

   The assignment groups determine what work the AI specialist can pick up. Multiple teams can use the same AI specialist. If you remove your team from the list of assignment groups, the AI specialist won't handle your team's tickets.

5. Select your AI specialist's role(s).

   Roles determine what data access your AI specialist has. For example, if the AI specialist has a role that grants it access to the Incident table, it can work on incidents. If the role(s) don't grant access to a specific table, the AI specialist can't pick up work on that table, even if it is within the domain of its capabilities and assignment group.

   Review the full list of roles granted to the AI specialist to check your AI specialist has access only to what it needs to accomplish tasks.



6. Select **Save** to save your changes.

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You can make additional changes to your AI specialist before selecting save. Changing tabs in the AI specialist guided setup won't lose your changes.

If you don't select **Save** before navigating to a new page or closing the browser, your changes are lost.

Result

Your AI specialist profile is updated. Your AI specialist has the updated context for understanding its role when accomplishing tasks.

Edit the tasks of an AI specialist in the legacy AI Agent Studio

Select tasks that an AI specialist can perform in the legacy AI Agent Studio.

Before you begin

Role required: sn_aia.admin

About this task

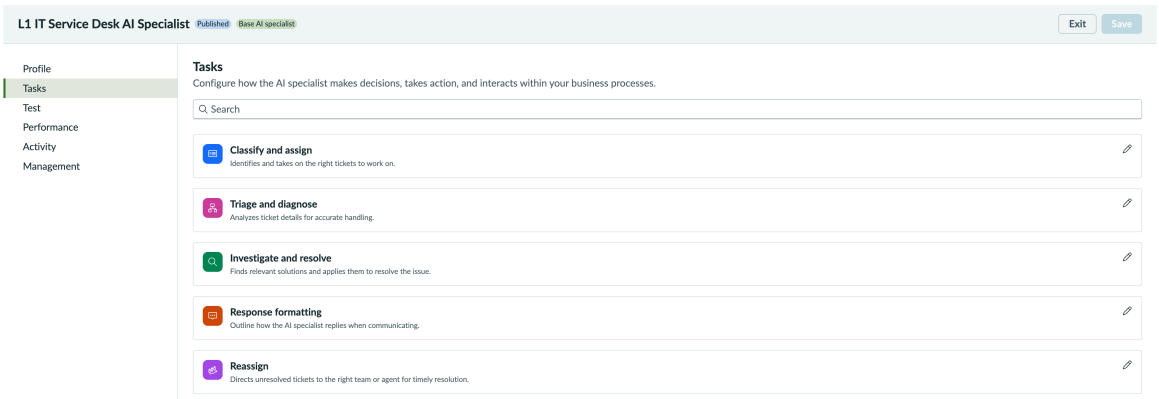
AI specialist tasks determine what they can do. Choosing the correct tasks provides your AI specialist with the tools required to complete complex goals autonomously.

To learn how to modify the roles and capabilities that an AI specialist has, see Edit the profile of an AI specialist.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. In the **AI specialists** tab, select the AI specialist you want to edit.
3. Navigate to the **Tasks** tab in the AI specialist guided setup to view the full list of tasks that the AI specialist can perform.
4. Select the card of a task to review and make changes to the specific details of the task configuration.

   The following tasks are available to the L1 IT Service Desk AI Specialist. These are presented as examples. Different AI specialists may have different tasks.



Classify and assign: Configure how the AI specialist identifies incidents, classifies them, and assigns a specific incident type for follow-up.

- *`Table`*: Select the table in which the AI specialist operates and resolution workflows are executed.
- *`Fields to predict`*: Enter the fields that the AI specialist should classify if empty.

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- *Similar records search profile*: Select the AI Search profile that should be used for gathering records similar to the assigned record.
- *Override existing field values with predictions*: Enable this setting to let the AI specialist use predictions from similar records to replace existing values. Fields that can potentially be overridden are *Service*, *Offering*, and *CI*. Turn off if you only want the AI specialist to fill in empty fields.

Triage and diagnose: Configure the details for how the AI specialist analyzes incidents for accurate handling.

- *Field to use as Task objective*: Select the record fields which the AI specialist uses to analyze and determine the next steps.
- *Use attachment content*: Enable the option for the AI specialist to review the content of attached files as part of incident triage and diagnosis.
- *Map AI specialist states to record states*: Map the states of the AI specialist's execution to the states of the incident record. For example, the AI specialist's *Awaiting information* state can be mapped to the Incident record *On Hold* state. If you have customized state values for your Incident table, you can map them to the AI specialist's states here.
- *Default routing decision*: Determine whether an AI specialist should attempt to resolve a case outside of the assignment group's scope or reassign it to another assignment group. You can also specify in the following routing criteria section different categories of tasks for the AI specialist to attempt or reassign.
- *Default routing decision*: Select the routing decision that the AI specialist falls back to when an incident matches none of the routing criteria. Select one of the following options:
  - *Resolve without root cause analysis*
  - *Perform root cause analysis*
  - *Ask the caller for more information*
  - *Route to the service desk team*
- *Routing criteria*: Add criteria that determine which records the AI specialist handles. Criteria are grouped into two sections:
  - *Attempt resolution for*: When an incident matches one of these criteria, the AI specialist attempts to resolve it.
  - *Reassign for*: When an incident matches one of these criteria, the incident is reassigned to a human.

  To add a criterion, select **Add attempted criteria** or **Add reassigned criteria**, depending on which decision you want the criterion to trigger. In the **New routing criteria** dialog box, enter a name in the *Criteria* field and explain in the *Description* field which incidents belong to the criterion.

  Select **Submit** to add the criterion. The criterion appears as a labeled item in its section.

  To change a criterion, select its name to reopen the dialog box. To remove a criterion, select the **X** next to its name and then select **Delete** to confirm. A removed criterion is no longer used when the AI specialist routes work.

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- *Default routing decision*: Select the routing decision that the AI specialist falls back to when an incident matches none of the routing criteria. Select one of the following options:
  - *Resolve without root cause analysis*
  - *Perform root cause analysis*
  - *Ask the caller for more information*
  - *Route to the service desk team*

Investigate and resolve: Configure the following details on how the AI specialist investigates to find relevant solutions and resolve the issue.

- *Knowledge sources*: Select search profiles and/or knowledge base *sys_ids* to define how the AI specialist retrieves knowledge articles. AI search profiles can include sources such as knowledge articles, ServiceNow documentation, or specific tables. You can create AI Search profiles specifically for your AI specialists. To customize what information your AI specialist accesses, add search profiles with the pre-installed ones or remove the pre-installed ones. You must have at least one search profile selected for the AI specialist to complete the *Investigate and resolve* task.

  Note: If you include a table as a search source but don't grant the AI specialist access through its assigned roles, it can't search that table.

- *Automatically create KFT records*: Enable if you want the AI specialist to create a KB Feedback Task record after proposing a solution without an existing knowledge article.
- *Research depth*: Select how extensively the AI specialist must gather and analyze data during investigation.
- *Pre resolution condition*: The conditions that must be true before the AI specialist will resolve the ticket. These are fields that get filled in after a ticket has been submitted.
- *Execution mode*: Determine how autonomously the AI specialist should act. *Autopilot* mode grants the AI specialist the ability to mark a ticket as resolved once resolution steps are sent. *Copilot* mode requires human acceptance of its resolution proposal.
- *Auto-submit catalog requests*: Enable AI specialists to submit catalog items on behalf of the user without an additional confirmation step.

Response formatting: Configure the details on how the AI specialist communicates to keep requesters informed through communication channels.

- *Inbound channels*: Select the inbound channels such as Activity stream through which the AI specialist can receive messages from requesters.
- *Outbound Channels*: Select the outbound channels the AI specialist uses to send responses or notifications. You can select channels such as Activity stream, email, portal, or phone.
- *Internal communication when confidence is low*: Enable to allow the AI specialist to log its solution as a work note rather than proposing it directly.
- *Response templates*: Write the template for what the AI specialist should say to communicate to the user. You can set response templates for three

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different AI specialist states: Awaiting Info, Solution Proposed, and Reassign to Human. You can format your message using the WYSIWYG editor to include things like bold text, specific fonts, tables, highlighting, links, and bullets.

Reassign: Configure the following details on how the AI specialist directs unresolved incidents to the correct team or agent for timely resolution.

- *Maximum number of interactions before escalation*: Set how many times to contact the requester before sending to a human agent. Enter a number greater than zero.
- *Reassign on follow-up question*: Enable this option to send the ticket to a human agent when the requester asks a follow-up question. Turning off the option lets the AI specialist handle follow-ups.
- *Choose where to reassign records*: Select the assignment group to reassign the ticket after an AI specialist has reviewed it and chosen to reassign it.
- *Cross-group reassignment*: Enable the AI specialist to recommend reassigning an incident to a different assignment group. The AI specialist never reassigns an incident to a different assignment group on its own.
- *Cross-group confidence threshold*: Set the confidence threshold for whether an incident belongs to a specific other assignment group.

5. Select **Save** to save your changes.

   You can make additional changes to your AI specialist before selecting save. Changing tabs in the AI specialist guided setup won't lose your changes.

   If you don't select **Save** before navigating to a new page or closing the browser, your changes are lost.

Result
Your AI specialist tasks are updated. After being assigned work, your AI specialist performs the actions necessary to complete those tasks on the relevant records.

Preview an AI specialist in the legacy AI Agent Studio

Run a preview of your AI specialist in the legacy AI Agent Studio on a single record to preview how it works and verify it matches your intentions.

Before you begin
Role required: sn_aia.admin

About this task
You can test an execution of the AI specialist on a single record to preview its capabilities.

Note: Previewing an AI specialist, depending on the tasks configured, can actually make changes to the record. Previews are not simulations.

Procedure
1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. In the **AI specialists** tab, select the AI specialist you want to preview.
3. Navigate to the **Preview** tab in the AI specialist guided setup.
4. Choose a record to run the preview on.

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Recommended records for preview are selected based on their relevance to the capabilities and tasks available to the AI specialist.

Once a record is chosen, you can select the open link button to open the record in a new browser tab to check the details.

Note: Choose records that you can safely make changes to. The work is actually being done on the record during the preview.

5. Select **Run** to begin the preview.

   The test begins on the record. You can watch what fields it updates and any comments or work notes it generates.

   When the test is complete, you can review all the changes made.

6. Verify that the AI specialist's performance meets your expectations.

   See the Testing section in General guidelines for AI specialists for more information about how to test your AI specialist.

Result
Your AI specialist has worked on a specific record or records of your choice.

What to do next
You can return to the **Profile** or **Tasks** tabs in the guided setup to make changes if necessary. Once the changes are made, you can preview the AI specialist again.

If you are satisfied with the AI specialist's performance after making changes, you can select **Save** to save changes or **Activate** to let the AI begin work.

Assigning work to an AI specialist

You can assign work to an AI specialist in one of three ways, depending on your current work assignment procedures.

AI specialists can't assign themselves work, even if they've been put into an assignment group. There are three ways you can assign work to an AI specialist.

1. Manual assignment. You can change the user in the **Assigned to** field to your AI specialist on a record form or list. A service desk manager or team lead can assign work to the AI specialist just as they would assign work to human agents on their team.

2. Assignment rules. Assignment rules automatically assign work on your instance based on predefined conditions. They are applied whenever a task that isn't already assigned is created or updated. If you have multiple assignment rules, the one with the lowest order takes precedence.

3. Advanced Work Assignment (AWA). AWA assigns work based on more context than simple assignment rules, such as an agent's availability, capacity, and skills. Configuring AWA involves creating and managing service channels, work item queues, routing conditions, and assignment criteria.

With manual assignment, you control exactly which records an AI specialist works on. This works best when doing initial testing to see how an AI specialist handles a particular task type or

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subject. After you've established trust, you can allow the AI specialist to work at a larger scale by creating assignment rules or configuring AWA.

To have AWA assign work to an AI specialist, configure AWA first. You can then add the AI specialist to existing work queues, like another member of the team. If you don't already have AWA set up on your instance, assignment rules require less configuration than setting up AWA for AI specialists alone.

Manually assign work to an AI specialist

Manually assign specific records to an AI specialist by changing the Assigned to field when you need to override automatic assignment rules.

Before you begin

Role required: itil_admin

Procedure

1. Navigate to the table containing the record to assign.
   You can assign AI specialists to records in tables such as the Incident [incident] table.
2. Open the record for the AI specialist to work on.
3. In the **Assigned to** field, enter the name of the AI specialist.

   Trouble?
   If the AI specialist does not appear in the **Assigned to** list, verify that the AI specialist is active and has the appropriate capabilities configured for this record type.
4. Save the record.

Result

The record is assigned to the AI specialist. The AI specialist processes the record according to its configured capabilities and workflows.

Create an assignment rule for an AI specialist

Create an assignment rule to route matching tasks to an AI specialist automatically, without setting the Assigned to field on each record.

Before you begin

Role required: assignment_rule_admin or admin

Procedure

1. Navigate to **All** > **System Policy** > **Rules** > **Assignment**.
2. Select **New**.
3. In the **Name** field, enter a name for your assignment rule, such as `AI L1 Service Desk`.
4. In the **Applies to** tab, select the table and filter conditions that identify the tasks for the AI specialist to handle.
5. In the **Assign to** tab, enter the name of the AI specialist in the **User** field.
6. Select **Submit** to create the assignment rule.

Result

The assignment rule routes matching tasks to the AI specialist automatically.

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Configure Advanced Work Assignment for an AI specialist

Add an AI specialist to an existing Advanced Work Assignment (AWA) assignment rule so that it can receive work items alongside your human agents.

Before you begin

This procedure applies when service channels and work item queues are already configured in AWA. For instructions on creating new ones, see Create a service channel and Create a work item queue.

Role required: awa_admin

Procedure

1. Confirm that the AI specialist has the awa_agent role.

   Navigate to **All** > **User Administration** > **Users**, find and open the user record for the AI specialist, and check the roles in the Roles related list.

2. Navigate to **All** > **Advanced Work Assignment** > **Home** > **Assignment rules**.
3. Select **New** to open the new record form or open an existing assignment rule.
4. In the **Auto-assign handling** tab, select **Enable auto-assign work items**.
5. In the **Manage AI agents** tab, select **Include AI agents**.
6. **Optional:** In the **Manage AI agents** tab, select **Prioritize AI agents**.

   (Optional) Choosing to prioritize AI agents routes relevant work to the AI specialist first. The AI specialist then triages the task and determines whether it can propose an acceptable solution. If the AI specialist can't propose a solution, or if the task is outside its configured capabilities, it can reassign the task to a human agent or a different assignment group. For steps on configuring the routing criteria for reassignment, see Configure AI specialist tasks.

   If you don't choose to prioritize AI agents, the AI specialist can still be assigned work from the work item queue.

7. Select **Save**.
8. **Optional:** Set the maximum capacity for the AI specialist.

   (Optional) See Override agent capacity for selected agents.

Result

Your AI specialist is added to the AWA assignment rule as an eligible assignee.

What to do next

You can track an AI specialist's performance and the records it works on in AI Agent Studio. See View performance and View activity.

Using AI specialists

AI specialists are autonomous, hierarchical AI agents designed to serve as team members who can accomplish complex tasks. Onboard AI specialists to your team to use AI for role-based automation.

Use AI specialists in AI Agent Studio

Onboard and view the performance and activity of AI specialists in AI Agent Studio.

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Review the performance of an AI specialist in AI Agent Studio

Review the performance analytics of an AI specialist to track their task execution success. You can use the analytics to tune the AI specialist to suit your business needs.

Before you begin

Role required: sn_aia.admin

About this task

Monitoring AI specialist performance helps you identify where your AI specialist succeeds or fails. The analytics help you decide whether to change aspects of the AI specialist's profile or tasks to improve performance. Regular monitoring helps you identify areas of concern.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the AI specialist you want to preview.
3. In the node view, select the first node of the AI specialist.

   The first node contains the main configuration settings for the AI specialist. The other nodes represent the individual agents that comprise the underlying architecture and aren't required to view the AI specialist's performance.
4. Scroll down to the **Performance** section in the AI specialist guided setup.
5. Review the performance analytics of the AI specialist.

   You can filter all metrics by date and assignment group.

Overview AI specialist performance metrics

See how your AI specialist is performing overall.

Section name	Individual metrics
At a glance	○ *`Durable auto-resolve rate (%)`*: Percentage of incidents the AI specialist resolved without reassigning to a human agent, and not reopened. ○ *`Coverage rate (%)`*: Percentage of assigned incidents that the AI specialist attempted to resolve.
Routing journey	○ *`1. Closed incidents in eligible assignment group(s)`*: All incidents in assignment group(s) the AI specialist is part of. ○ *`2. Closed incidents assigned to AI specialist`*: Based on AWA or assignment rules, incidents assigned to the AI Specialist for triage. ○ *`3. Closed incidents attempted by AI specialist`*: Incidents where the AI specialist has the confidence level to propose a solution or take autonomous action.
Incident outcomes	○ *`All incident outcomes`*: Percentage and counts of results of the AI specialist's attempts: resolved, reassigned to a human agent, reopened, generated a new ticket, or in-progress ○ *`Incident outcomes over time`*: Trend of AI specialist result outcomes

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Section name	Individual metrics
Resolution details	○ *Mean time to resolution*: Average time between the incident being assigned to the AI specialist and the time a response was generated that was later accepted ○ *Mean time to first response*: Average time between the incident being assigned to the AI specialist and the time a response was generated
Reassignment reasons	○ *Reasons for reassignment*: Percentage and total counts of incidents that were reassigned to a human agent broken down by cause ○ *Reasons for reassignment over time*: Trend of AI specialist reassignment broken down by reason
Follow-ups	○ *Follow up rate (%)*: Percentage of attempted incidents where the AI specialist needed a follow-up to ask for further information. ○ *Count of incidents that required a follow up*: Count of incident records that required at least one additional message by the AI specialist

Quality performance metrics

Monitor the quality of performance for different categories of tasks and identify coaching opportunities.

Section name	Individual metrics
Review how the AI Specialist measures up in each quality area	○ *Assessments for closed incidents*: Generated quality assessments for completed AI specialist tasks ○ *Quality score trend*: Trend line of quality scores based on assessments. ○ *All opportunities*: Identified coaching opportunities for the AI specialist

Detailed view AI specialist performance metrics

Identify the services or categories that require the most attention.

Section name	Individual metrics
AI-handled incidents by service	○ *Incident outcomes (%) by service*: Outcomes of the AI specialist's attempt (resolved, reassigned, new, and reopened) broken down by service ○ *Incident outcomes by service*: Total count of AI specialist outcomes broken down by service. Selecting a number from the Count field opens a list of the ZTSD Task Execution table filtered by that service and outcome.

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Section name	Individual metrics
	○ *Reassignment reasons for unresolved incidents by service*: Percentage and total counts of incidents that were reassigned to a human agent broken down by cause and service ○ *Average exchanges for resolved incidents by service*: Average number of responses by the AI specialist before a final outcome
Proposed solution similarity by service	*Average proposed solution similarity by service*: Shows the average AI judge score comparing proposed solutions and final resolutions for each service.

Value and feedback AI specialist performance metrics

Evaluate adoption trend, customer sentiment, and feedback to identify opportunities to improve the AI specialist experience.

Section name	Individual metrics
Assess impact and user satisfaction	○ *Aggregated sentiment analysis*: Shows the overall tone (from negative to positive) of user messages in incidents handled by the AI specialist. ○ *Adoption coverage*: Shows how many relevant assignment groups have adopted and used the AI specialist to handle incidents. ○ *Direct user feedback*: Graphical representation of the direct user feedback provided by customers in response to the incident resolved by the AI specialist.

KB articles AI specialist performance metrics

See which articles are retrieved, cited in responses, or left unused. Identify which content is driving successful resolutions and where gaps exist.

Section name	Individual metrics
KB article usage summary	○ *KB articles used*: Number of distinct KB articles the AI specialist referenced during the selected period. ○ *Total records*: Total number of records (incidents, problems, interactions, etc) resolved using at least one KB article retrieval. ○ *Shown in citations*: KB articles the AI specialist included in a response to the user. A higher count suggests the AI specialist is actively surfacing relevant content. ○ *Retrieved only*: KB articles the AI specialist retrieved internally but did not include in a response. A high count may indicate retrieval quality issues worth investigating. ○ *Unused articles*: KB articles that were not retrieved or cited during the selected period. Review these to identify outdated or hard-to-discover content.

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Section name	Individual metrics
KB article list	○ *All used articles*: Lists all KB articles the AI specialist has used, showing usage frequency (how often the article was cited after retrieval) and reopen rate (percentage of incidents resolved using the article that were later reopened). ○ *Unused articles*: Lists KB articles with no references during the selected period.

What to do next

If you want to make changes to your AI specialist based on the performance analytics, see Edit the profile of an AI specialist or Edit the tasks of an AI specialist.

View the activity of an AI specialist in AI Agent Studio

View the task execution history of an AI specialist in the new AI Agent Studio to track where and when it plans and attempts executions. You can also give feedback on its performance.

Before you begin

Role required: sn_aia.admin

About this task

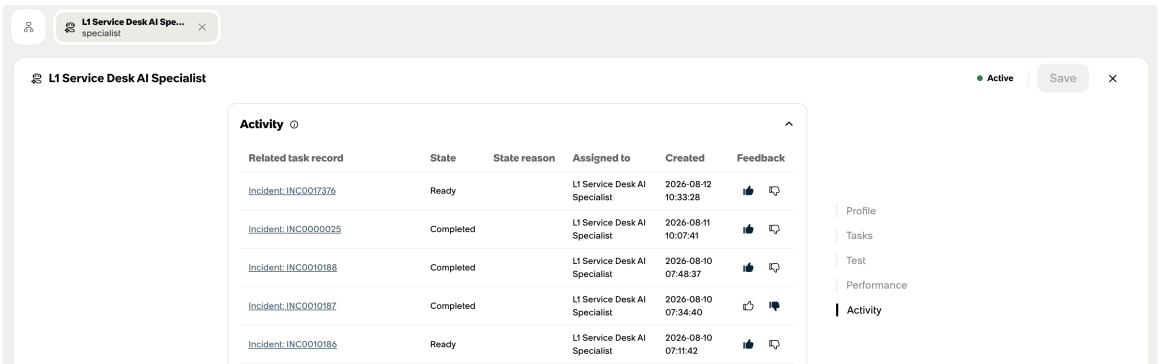
Monitoring AI specialist activity allows you to identify where your AI specialist is being used on which records.

For a given execution, you can rate the work of the AI specialist as either helpful (thumbs up) or not helpful (thumbs down) in the *Feedback* field of the list.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the AI specialist you want to preview.
3. In the node view, select the first node of the AI specialist.

   The first node contains the main configuration settings for the AI specialist. The other nodes represent the individual agents that comprise the underlying architecture and don't require access to view the AI specialist's activity.
4. Scroll down to the **Activity** section in the AI specialist guided setup.



5. Review the activity of the AI specialist.

   AI specialist activity is presented as a filtered list that includes all records related to the AI specialist. You can add more filters to narrow down the activity further.

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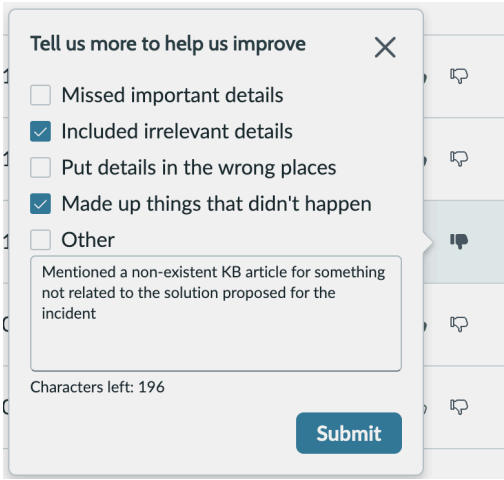
You can sort by any of the list columns by selecting the column name.

If the execution state is not *Completed*, a reason is given to explain the state. Possible reasons include "failed execution" or "no activity."

You can give feedback on any given activity item. Select the thumbs up icon for positive feedback or the thumbs down icon to give negative feedback. If you select the thumbs down icon, you can specify exactly why you have given it that rating. After selecting a reason, you can also add a comment to detail the issue further.



Possible reasons for negative feedback include:

- Missed important details
- Included irrelevant details
- Put details in wrong places
- Made up things that didn't happen
- Other

What to do next

If you want to change which records the AI specialist picks up, you can change the capabilities or assignment groups in the AI specialist's profile. See Edit the profile of an AI specialist for more information.

To learn more about changing the specific tasks that the AI specialist performs on a record, see Edit the tasks of an AI specialist.

You can test the AI specialist on a specific record of your choosing by previewing the AI specialist.

Manage access to an AI specialist in AI Agent Studio

Control workspace access, user roles, and publishing settings for your AI specialist and its copies configured for specific teams.

Before you begin

Verify that you have an AI specialist created and configured.

Role required: sn_aia.admin

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About this task

Configure access settings to control which workspaces and users can interact with your AI specialist. You can also manage different copies of AI specialists configured for specific assignment groups or teams with varying access requirements.

Access management includes workspace permissions, role-based security, publishing status, and copy creation privileges. These settings determine the operational scope and security boundaries for your AI specialist.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the AI specialist you want to configure from the available list.
3. In the node view, select the first node representing the AI specialist.

   The first node contains the main configuration settings for the AI specialist. The other nodes represent the individual agents that comprise the underlying architecture and do not require modification for access management.
4. Scroll down to the **Management** section in the AI specialist guided setup.

   The Management section contains all access control and operational settings for the AI specialist.
5. Configure workspace access by defining the workspaces where the AI specialist can operate.

   Workspace access determines where agents can monitor the progress and activity of the AI specialist. Users can only interact with the AI specialist within the specified workspaces.
6. Configure role-based access by selecting which roles have permission to use the AI specialist.

   Users without the specified roles cannot invoke the AI specialist or review its work. Role configuration ensures that only authorized users can interact with the AI specialist.
7. Set the publishing status by selecting whether to publish the AI specialist.

   Publishing controls whether the AI specialist can perform work on records. An unpublished AI specialist remains inactive even if it meets all other access requirements.
8. Configure copy creation permissions by selecting whether users with the defined roles can create copies of the AI specialist.

   Copy creation allows teams to customize AI specialist behavior for specific assignment groups or use cases. Different copies can have varying configurations while maintaining the same core functionality.

   For example, you can configure an AI specialist copy for one assignment group to perform specific tasks that differ from those assigned to another group. For more information, see Create a copy of an AI specialist.
9. Select **Save** to apply your access configuration changes.

   You can modify additional AI specialist settings before saving. All changes are applied when you select **Save**.

   ⚠ **Warning:** If you navigate to a different page or close the browser without selecting **Save**, your changes are lost and must be reconfigured.

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Result
Your AI specialist now has configured workspace access, role-based security, publishing status, and copy creation permissions. Users can interact with the AI specialist according to the access settings you defined.

What to do next
Verify that the access configuration works as expected by testing the AI specialist with users who have the required roles in the specified workspaces. Monitor AI specialist activity to confirm that access restrictions are properly enforced.

Create a copy of an AI specialist in AI Agent Studio

Create a new copy of an AI specialist to configure different settings for different assignment groups

Before you begin
Role required: sn_aia.admin

About this task
The base AI specialist can be configured to cover general or the most likely situations. Creating a copy of an AI specialist allows you to make specific changes for different assignment groups, such as different capabilities. You can also specify exactly which roles have access to the copy.

You can't change the tasks of an AI specialist at the copy level. Tasks must be configured for the base AI specialist.

Procedure
1. Navigate to **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the AI specialist you want to copy.
3. In the node view, select the first node of the AI specialist.

   The first node contains the main configuration settings for the AI specialist. The other nodes represent the individual agents that comprise the underlying architecture and do not require access or modification to create a copy of an AI specialist.
4. Scroll down to the **Management** section in the AI specialist guided setup to configure the different access settings.
5. In the Copies section, select **Add copy**.
6. Review the basic details and profile of the base AI specialist, then make changes for the specific copy.

   For example, you may want to change the name of the AI specialist or its department or description.
7. Assign the copy of the AI specialist to an assignment group.
8. Select a manager for the AI specialist.

   A manager might be the Service Desk Manager whose team the AI specialist will be a part of.
9. Select the roles to access this copy of the AI specialist.

Result
A new instance of an AI specialist is configured for a new assignment group.

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What to do next
The copy of the AI specialist can be made available to users by publishing and activating the base AI specialist.

Deactivate an AI specialist in AI Agent Studio

Deactivate an AI specialist in AI Agent Studio so that it no longer acts on records.

Before you begin
Role required: sn_aia.admin

Procedure
1. Navigate to **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the AI specialist you want to deactivate.
3. Select the pencil icon to open the AI specialist's setup.
4. By the **Save** button, select the more options icon , then select **Deactivate**.

Result
Your AI specialist is turned off.

What to do next
You can make changes to your AI specialist, such as changing the profile or modifying the tasks, to affect its behavior. Once you have made edits, you can preview the AI specialist and reactivate it later.

Use AI specialists in the legacy AI Agent Studio

Onboard and view the performance and activity of AI specialists in the legacy AI Agent Studio.

Review the performance of an AI specialist in the legacy AI Agent Studio

Review the performance analytics of an AI specialist to track their task execution success. You can use the analytics to tune the AI specialist to suit your business needs.

Before you begin
Role required: sn_aia.admin

About this task
Monitoring AI specialist performance helps you identify where your AI specialist succeeds or fails. The analytics help you decide whether to change aspects of the AI specialist's profile or tasks to improve performance. Regular monitoring helps you identify areas of concern.

Procedure
1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. In the **AI specialists** tab, select the AI specialist you want to view the performance of.
3. Navigate to the **Performance** tab in the AI specialist guided setup.
4. Review the performance analytics of the AI specialist.

   You can filter all metrics by date and assignment group.

Overview AI specialist performance metrics

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See how your AI specialist is performing overall.

Section name	Individual metrics
At a glance	○ *Durable auto-resolve rate (%)*: Percentage of incidents the AI specialist resolved without reassigning to a human agent, and not reopened. ○ *Coverage rate (%)*: Percentage of assigned incidents that the AI specialist attempted to resolve.
Routing journey	○ *1. Closed incidents in eligible assignment group(s)*: All incidents in assignment group(s) the AI specialist is part of. ○ *2. Closed incidents assigned to AI specialist*: Based on AWA or assignment rules, incidents assigned to the AI Specialist for triage. ○ *3. Closed incidents attempted by AI specialist*: Incidents where the AI specialist has the confidence level to propose a solution or take autonomous action.
Incident outcomes	○ *All incident outcomes*: Percentage and counts of results of the AI specialist's attempts: resolved, reassigned to a human agent, reopened, generated a new ticket, or in-progress ○ *Incident outcomes over time*: Trend of AI specialist result outcomes
Resolution details	○ *Mean time to resolution*: Average time between the incident being assigned to the AI specialist and the time a response was generated that was later accepted ○ *Mean time to first response*: Average time between the incident being assigned to the AI specialist and the time a response was generated
Reassignment reasons	○ *Reasons for reassignment*: Percentage and total counts of incidents that were reassigned to a human agent broken down by cause ○ *Reasons for reassignment over time*: Trend of AI specialist reassignment broken down by reason
Follow-ups	○ *Follow up rate (%)*: Percentage of attempted incidents where the AI specialist needed a follow-up to ask for further information. ○ *Count of incidents that required a follow up*: Count of incident records that required at least one additional message by the AI specialist

Detailed view AI specialist performance metrics

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Identify the services or categories that require the most attention.

Section name	Individual metrics
AI-handled incidents by service	○ *Incident outcomes (%) by service*: Outcomes of the AI specialist's attempt (resolved, reassigned, new, and reopened) broken down by service ○ *Incident outcomes by service*: Total count of AI specialist outcomes broken down by service. Selecting a number from the Count field opens a list of the ZTSD Task Execution table filtered by that service and outcome. ○ *Reassignment reasons for unresolved incidents by service*: Percentage and total counts of incidents that were reassigned to a human agent broken down by cause and service ○ *Average exchanges for resolved incidents by service*: Average number of responses by the AI specialist before a final outcome
Proposed solution similarity by service	*Average proposed solution similarity by service*: Shows the average AI judge score comparing proposed solutions and final resolutions for each service.

Value and feedback AI specialist performance metrics

Evaluate adoption trend, customer sentiment, and feedback to identify opportunities to improve the AI specialist experience.

Section name	Individual metrics
Assess impact and user satisfaction	○ *Aggregated sentiment analysis*: Shows the overall tone (from negative to positive) of user messages in incidents handled by the AI specialist. ○ *Adoption coverage*: Shows how many relevant assignment groups have adopted and used the AI specialist to handle incidents. ○ *Direct user feedback*: Graphical representation of the direct user feedback provided by customers in response to the incident resolved by the AI specialist.

KB articles AI specialist performance metrics

See which articles are retrieved, cited in responses, or left unused. Identify which content is driving successful resolutions and where gaps exist.

Section name	Individual metrics
KB article	○ *KB articles used*: Number of distinct KB articles the AI specialist referenced during the selected period. ○ *Total records*: Total number of records (incidents, problems, interactions, etc) resolved using at least one KB article retrieval.

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Section name	Individual metrics
usage summary	○ *Shown in citations*: KB articles the AI specialist included in a response to the user. A higher count suggests the AI specialist is actively surfacing relevant content. ○ *Retrieved only*: KB articles the AI specialist retrieved internally but did not include in a response. A high count may indicate retrieval quality issues worth investigating. ○ *Unused articles*: KB articles that were not retrieved or cited during the selected period. Review these to identify outdated or hard-to-discover content.
KB article list	○ *All used articles*: Lists all KB articles the AI specialist has used, showing usage frequency (how often the article was cited after retrieval) and reopen rate (percentage of incidents resolved using the article that were later reopened). ○ *Unused articles*: Lists KB articles with no references during the selected period.

What to do next

If you want to make changes to your AI specialist based on the performance analytics, see Edit the profile of an AI specialist or Edit the tasks of an AI specialist.

View the activity of an AI specialist in the legacy AI Agent Studio

View the task execution history of an AI specialist in AI Agent Studio to track where and when it plans and attempts executions. You can also give feedback on its performance.

Before you begin

Role required: sn_aia.admin

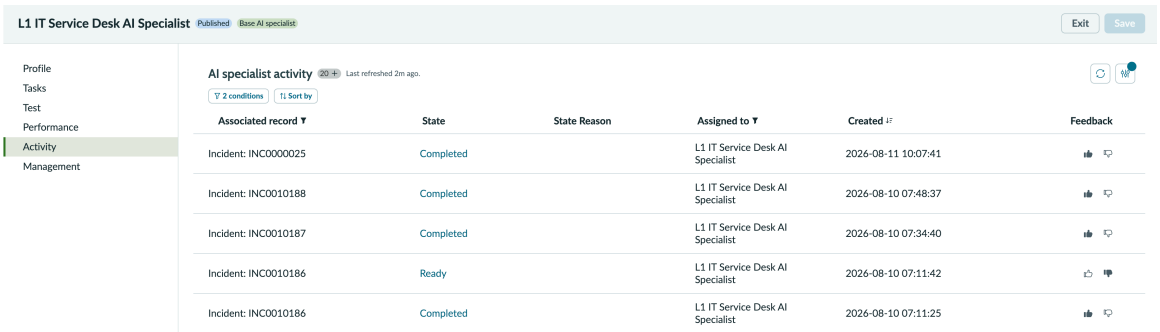
About this task

Monitoring AI specialist activity allows you to identify where your AI specialist is being used on which records.

For a given execution, you can rate the work of the AI specialist as either helpful (thumbs up) or not helpful (thumbs down) in the *Feedback* field.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. In the **AI specialists** tab, select the AI specialist you want to view the activity of.
3. Navigate to the **Activity** tab in the AI specialist guided setup.



4. Review the activity of the AI specialist.

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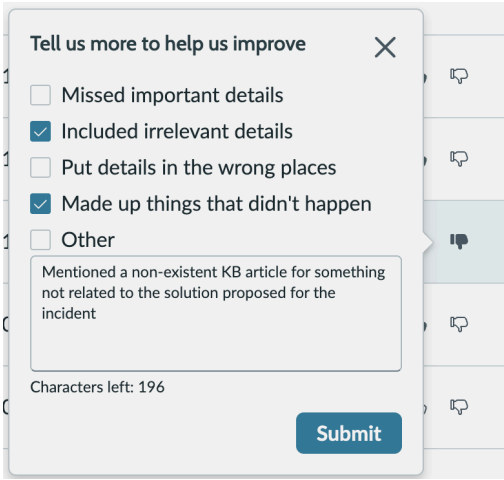
AI specialist activity is presented as a filtered list that includes all records related to the AI specialist. You can add more filters to narrow down the activity further.

You can sort by any of the list columns by selecting the column name.

If the execution state is not *Completed*, a reason is given to explain the state. Possible reasons include "failed execution" or "no activity."

You can give feedback on any given activity item. Select the thumbs up icon for positive feedback or the thumbs down icon to give negative feedback. If you select the thumbs down icon, you can specify exactly why you have given it that rating. After selecting a reason, you can also add a comment to detail the issue further.



Possible reasons for negative feedback include:

- Missed important details
- Included irrelevant details
- Put details in wrong places
- Made up things that didn't happen
- Other

What to do next

If you want to change which records the AI specialist picks up, you can change the capabilities or assignment groups in the AI specialist's profile. See Edit the profile of an AI specialist for more information.

To learn more about changing the specific tasks that the AI specialist performs on a record, see Edit the tasks of an AI specialist.

You can test the AI specialist on a specific record of your choosing by previewing the AI specialist.

Manage access to an AI specialist in the legacy AI Agent Studio

Control workspace access, user roles, and publishing settings for your AI specialist and its copies configured for specific teams.

Before you begin

Verify that you have an AI specialist created and configured.

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Role required: sn_aia.admin

About this task

Configure access settings to control which workspaces and users can interact with your AI specialist. You can also manage different copies of AI specialists configured for specific assignment groups or teams with varying access requirements.

Access management includes workspace permissions, role-based security, publishing status, and copy creation privileges. These settings determine the operational scope and security boundaries for your AI specialist.

Procedure

1. Navigate to **AI Agent Studio** > **Create and manage**.
2. Select the AI specialist you want to configure from the available list.
3. Select the **Management** tab in the AI specialist guided setup.

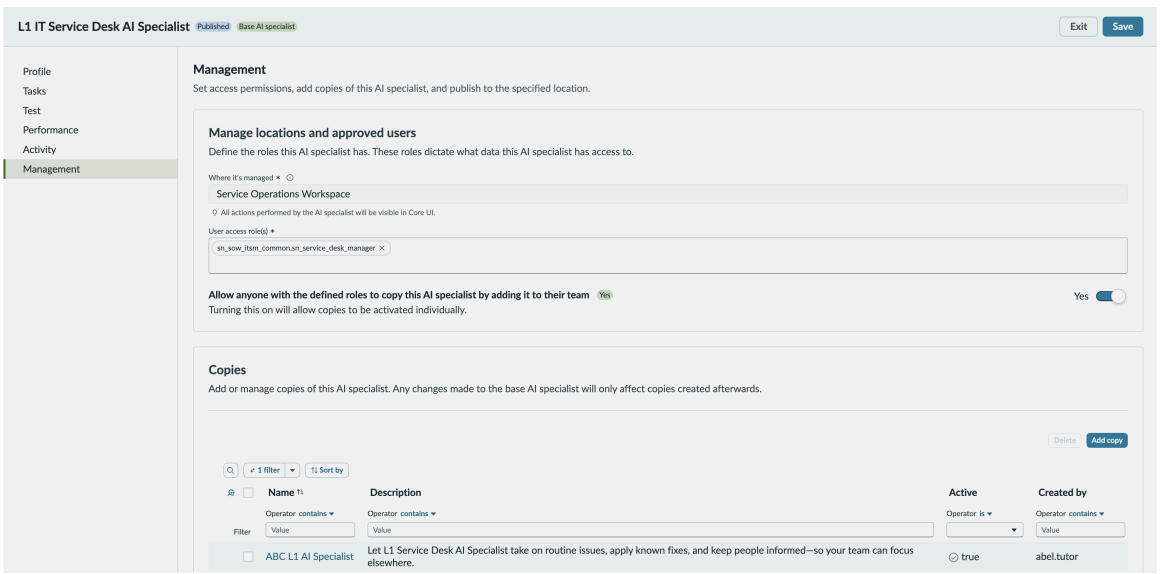
   The Management tab contains all access control and operational settings for the AI specialist.
4. Configure workspace access by defining the workspaces where the AI specialist can operate.

   Workspace access determines where agents can monitor the progress and activity of the AI specialist. Users can only interact with the AI specialist within the specified workspaces.
5. Configure role-based access by selecting which roles have permission to use the AI specialist.

   Users without the specified roles cannot invoke the AI specialist or review its work. Role configuration ensures that only authorized users can interact with the AI specialist.
6. Configure copy creation permissions by selecting whether users with the defined roles can create copies of the AI specialist.

   Copy creation allows teams to customize AI specialist behavior for specific assignment groups or use cases. Different copies can have varying configurations while maintaining the same core functionality.

   For example, you can configure an AI specialist copy for one assignment group to perform specific tasks that differ from those assigned to another group. For more information, see Create a copy of an AI specialist.



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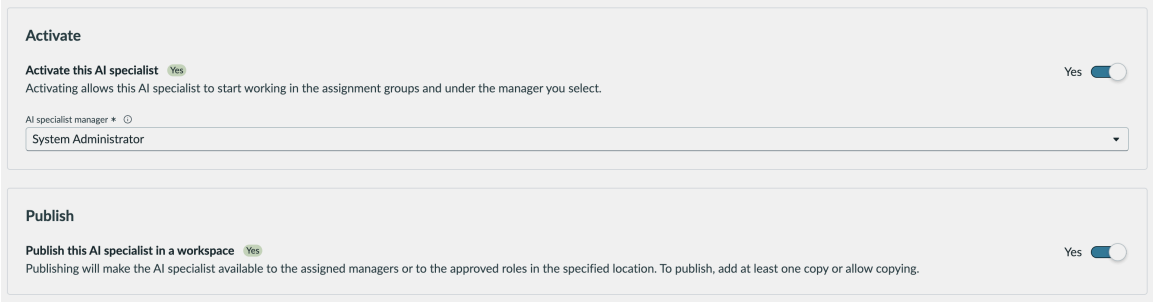
7. Set the active status of the AI specialist.

   Activation controls whether the AI specialist performs work. If an AI specialist is inactive, it won't work on any tasks, even if it is published.

8. Set the publishing status by selecting whether to publish the AI specialist.

   Publishing controls whether the AI specialist can be seen in workspaces and be assigned to a manager. An unpublished AI specialist remains inactive even if it meets all other access requirements.

   If an AI specialist is unpublished, then it will not be visible for Service Desk Managers or other members of the assignment group, even if it is active.



9. Select **Save** to apply your access configuration changes.

   You can modify additional AI specialist settings before saving. All changes are applied when you select **Save**.

> ⚠ **Warning:** If you navigate to a different page or close the browser without selecting **Save**, your changes are lost and must be reconfigured.

Result
Your AI specialist now has configured workspace access, role-based security, publishing status, and copy creation permissions. Users can interact with the AI specialist according to the access settings you defined.

What to do next
Verify that the access configuration works as expected by testing the AI specialist with users who have the required roles in the specified workspaces. Monitor AI specialist activity to confirm that access restrictions are properly enforced.

Create a copy of an AI specialist in the legacy AI Agent Studio

Create a copy of an AI specialist to configure different settings for different assignment groups

Before you begin
Role required: sn_aia.admin

About this task
The base AI specialist can be configured to cover general or the most likely situations. Creating a copy of an AI specialist allows you to make specific changes for different assignment groups. You can also specify exactly which roles have access to the copy.

You can't change the kinds of tasks an AI specialist has at the copy level, only their configurations.

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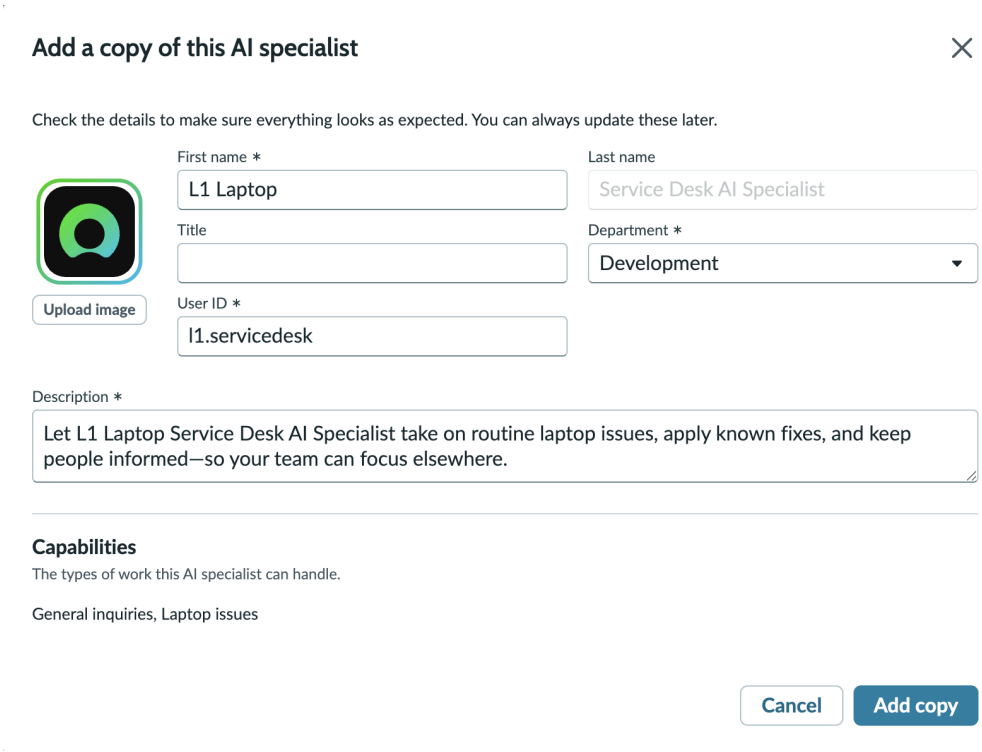
Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select the AI specialist you want to preview.
3. Select the **Management** tab in the AI specialist guided setup to configure the different access settings.
4. In the Copies section, select **Add copy**.
5. Review the basic details and profile of the base AI specialist, then make changes for the specific copy.

   For example, you may want to change the name of the AI specialist or its department or description.



6. Assign the copy of the AI specialist to an assignment group.
7. Select a manager for the AI specialist.

   A manager might be the Service Desk Manager whose team the AI specialist will be a part of.
8. Select the roles to access this copy of the AI specialist.

Result

A new instance of an AI specialist is configured for a new assignment group.

What to do next

The copy of the AI specialist can be made available to users by publishing and activating the base AI specialist.

Deactivate an AI specialist in the legacy AI Agent Studio

Deactivate an AI specialist in the legacy AI Agent Studio so that it no longer acts on records and lists.

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Before you begin
Role required: sn_aia.admin

Procedure
1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. In the **AI specialists** tab, select the AI specialist you want to view the activity of.
3. Select the more options button ⋯ to open the drop-down menu.
4. Select **Deactivate**.

Result
Your AI specialist is turned off.

What to do next
You can make changes to your AI specialist, such as changing the profile or modifying the tasks, to affect its behavior. Once you have made edits, you can preview the AI specialist and reactivate it later.

Reference for Autonomous Workforce

Reference for Autonomous Workforce provides additional information about the roles associated with AI specialists.

AI Specialist Manager role

The AI Specialist Manager role enables editing, testing, and monitoring AI specialists in AI Agent Studio and Service Operations Workspace.

Contains Roles

List of roles contained within the role.

- *sn_aia.viewer*
- *skill_manager*

Autonomous Workforce

AI specialists in your Autonomous Workforce are designed to handle high-volume, routine requests end to end, giving your team room to focus on the tasks only people can solve.

https://player.vimeo.com/video/1214617271?h=05fec0e551&badge=0&autopause=0&player_id=0&app_id=58479

Learn more about AI specialists in your Autonomous Workforce, their benefits and features, and their role in your organization.

Contact your account manager for information about accessing this product.

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Get started

Explore

Discover AI specialists and their potential for automating your business processes.

Configure

Configure the basic details, profiles, and tasks of an AI specialist.

Use

Onboard, preview, and monitor the performance of AI specialists as they accomplish tasks.

Reference

Review roles associated with AI specialists.

Autonomous Workforce consists of your AI specialists that augment entire roles, not just individual business processes. As pre-trained, agentic AI, they arrive equipped with the capabilities and tasks enabled to handle jobs without needing to iterate on prompts.

Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

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Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

Helpful resources

Some ServiceNow resources that can provide you with helpful information are:

ServiceNow Community

ServiceNow Community

Developer

developer.servicenow.com

ServiceNow

http://servicenow.com

ServiceNow Store

http://servicenow.com

Support

- https://support.servicenow.com/now
- Known Error Portal

Exploring Autonomous Workforce

Learn more about Autonomous Workforce and review the benefits AI specialists can provide for different users in your organization.

Autonomous Workforce overview

Your autonomous workforce is made up of AI specialists. Each specialist combines individual AI agents that solve discrete tasks, such as prioritizing an incident or identifying similar records. Working together, these agents tackle bigger goals like task triage or updating requesters with solutions that worked for similar issues. The AI specialist performs tasks and is capable of functioning as a reliable extension of your workforce, taking on work that would bottleneck your team. Spend less time on ticket volume and more time delivering meaningful resolutions.

Assign your AI specialist to specific assignment groups and roles to limit the scope of its work and the data it can access. Once configured, you can test your AI specialist to confirm it behaves as expected before putting it to work. After activation, your AI specialist runs against real records, and you can monitor its performance and activity over time to confirm it continues to meet your needs.

Accessing AI specialists

To access AI specialists, you must have the following plugins installed:

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- Zero Touch Service Desk plugin [sn_ztsd] version 2.3.19+
- ServiceNow Otto AI Agents [sn_aia] version 7.1+
- AI Engagement Experience [sn_now_canvas_ai] version 3.1.1+

Your instance must also be at least on Zurich Patch 10 or Australia Patch 3.

Autonomous Workforce users

Different users interact with Autonomous Workforce in various ways depending on their role and responsibilities.

Users

User	Role	Description
AI administrator	sn_aia.admin	The AI administrator can configure and activate AI specialists using AI Agent Studio. After AI specialists are activated, they can monitor their performance and activity to track their effectiveness, efficiency, and customer satisfaction.
Service Desk manager	sn_sow_itsm_common.sn_service_desk_manager	Service Desk managers have the capabilities of a standard Service Desk Agent (sn_service_desk_agent) and team level oversight and task resolution. They can view and manage team performance reports, analytics, and tasks and onboard an AI specialist to the team in Service Operations Workspace.
Service Desk agent	sn_itsm_common.sn_service_desk_agent	Service Desk agents resolve tasks, such as incidents and cases, using their knowledge, research, and experience. They have access to the Service Operations Workspace, where they can view the work of an AI specialist on a record.

Autonomous Workforce workflow

Follow this workflow to implement and manage AI specialists in your organization.

For more information about considerations to make before deployment, see General guidelines for deploying AI specialists.

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1. Onboard an AI specialist.

   As an AI administrator, you can use AI Agent Studio to configure your AI specialists.

   After installing the applications and plugins and activating the sn_aia.enable_ai_workers system property, you can activate an AI specialist as-is or configure any of the following:

   - Basic details, including name, profile icon, department, and description
   - Profile, including the roles and assignment groups
   - Tasks, things the AI specialist can do
   - Triggers, for running the AI specialist after specified events occur
2. Manually assign tickets to your AI specialist to see how it works. Once you have built trust, create assignment rules or configure Advanced Work Assignment to route work to your AI specialist automatically.
3. Monitor AI specialist activity. You can review the records that the AI specialist has worked on individually to check how it's doing.
4. Track AI specialist performance. Analytics for AI specialists that track their effectiveness, efficiency, and value can be found in AI Agent Studio and Service Operations Workspace. Use the analytics routinely to confirm that the AI specialist keeps up if things change. If performance isn't where you want it to be, you can configure it again at any time.

Autonomous Workforce benefits

Autonomous Workforce provides specific benefits for different types of users in your organization.

Autonomous Workforce benefits

Benefit	Feature
Automate high-volume, repeatable requests to reduce manual effort and free up agents for complex work	AI specialist capabilities
Classify and triage incoming work to route requests to the right team faster	AI specialist tasks
Investigate related records to surface relevant context and accelerate resolution	AI specialist tasks
Communicate with requesters throughout the lifecycle of a request to keep them informed	AI specialist tasks
Monitor team and AI specialist performance to track efficiency and identify areas for improvement	Performance metrics
Test AI specialist behavior before activation to validate outcomes and reduce risk	AI specialist guided setup in AI Agent Studio
Simplified agentic AI setup reduces configuration complexity and helps accelerate time to value	AI specialist guided setup in AI Agent Studio
Enforce data security for agentic AI by assigning roles to control what each AI specialist can access and act on	AI specialist assigned roles

What to explore next

To learn more about configuring and using Autonomous Workforce, see:

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- Configure AI specialist profiles
- Edit AI specialist tasks
- Test AI specialists
- Monitor AI specialist activity
- Track AI specialist performance

Related products

For more information about the AI specialist for ServiceNow Otto for IT Service Management (ITSM), see L1 IT Service Desk AI Specialist.

General guidelines for deploying an autonomous workforce

AI specialists, like other agentic AI, benefit from strategic planning for testing, deploying, and monitoring performance. Learn guiding principles to help your AI specialists achieve their highest chances of success.

Overview of deploying an autonomous workforce

AI specialists use artificial intelligence to perform work, but they don't require extensive knowledge about AI to set up and use. The possible tasks available to an AI specialist come pre-configured. You can choose which ones apply, test to verify that the AI specialist works as you expect, and then activate.

Like all AI, strategic planning for autonomous workforce implementation can be key to getting the most out of your AI specialists.

Questions to ask before you begin activating AI specialists might be:

- What problems do I want my AI specialist to solve, and why?
- Would an AI specialist be the best solution for these problems, or would they be better solved with an AI skill, AI agent, or agentic workflow?
- What counts as success in terms of AI specialist effectiveness, efficiency, and customer satisfaction?
- How do I want my team members to interact with an AI specialist?

AI specialists perform best under the following conditions:

- Strong knowledge base: Well-maintained, procedural knowledge articles with clear self-service instructions for end users
- High-volume of similar issues: Incidents with a single dominant root cause and clear resolution paths
- Existing catalog items: Well-defined catalog items for accurate redirection of misclassified incidents
- Clear policy rules: Approve/reject criteria that are explicit and well-documented

AI specialists don't perform well under the following conditions:

- Sparse or outdated knowledge: knowledge articles that are incomplete, out of date, or written for internal audiences
- Complex multi-step troubleshooting: issues that require orchestration across multiple external systems or remote device access

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- Undocumented internal knowledge: resolutions that depend on tacit knowledge not captured in formal systems
- Highly sensitive categories: Personally identifying information, security incidents, or areas with severe cost of error should be avoided

Configuring AI specialists in your autonomous workforce

When configuring an AI specialist, there are several important aspects to consider.

Within the AI specialist's profile, the sections each relate to different aspects of the AI specialist's suitability for certain work:

Assignment groups: the work the AI specialist is assigned

The AI specialist can't work on tasks not assigned to those assignment groups. If you don't want the AI specialist to work on certain tasks, confirm that the correct assignment groups are selected.

Roles: what data the AI specialist has access to

See the section Data access security for AI specialists.

The AI specialist's tasks specify the actions that it can take to solve problems within the domains. Each task has different options to configure the actions further. For more information about the different tasks available, see Edit the tasks of an AI specialist.

Operating modes: from supervised to autonomous

Supervised (Copilot) mode

The AI specialist researches and drafts a proposed solution, but a person reviews and approves it before it reaches the requester. Use this mode when you don't yet have confidence in autonomous resolution for a given category.

Autonomous mode

The AI specialist resolves and communicates independently, escalating to a human when its confidence is low.

Move an AI specialist to autonomous operation as soon as it has proven itself in testing. See the following section for guidance on when to hold a category back.

Confidence, cost of error, and escalation

Before posting a resolution, an AI specialist scores its proposed solution and compares that score against a confidence threshold you configure. If the score meets the threshold, the solution is posted; if it falls short, the work routes to a human fulfiller instead. That score is informed by how well the solution is supported by evidence, how closely it fits the specific task, how likely it is to resolve the issue, and the AI specialist's overall certainty.

Not every category carries the same risk, so weigh cost of error alongside confidence: financial impact if the resolution is wrong, sensitivity if the category involves personally identifying information or security data, and whether the resolution is internal-facing or reaches a customer directly. Categories with a higher cost of error should stay in supervised mode, or stay outside the AI specialist's assignment groups, regardless of how well-suited they otherwise seem.

Data access security for AI specialists

AI specialists only have access to the data that you specify. AI specialists can be assigned roles to limit their data access to certain scopes. Verify that the roles granted to the AI specialist are

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enough to enable it to complete its tasks, but not enough to access data it shouldn't. The roles function the same as the roles for a human user.

Consider these security principles when configuring AI specialist roles:

- Apply the principle of least privilege by granting only the minimum roles necessary for the AI specialist to perform its assigned tasks.
- Review role assignments regularly to verify they remain appropriate as your AI specialist's responsibilities evolve.
- Test role configurations in a non-production environment before deploying to production.

Important: AI specialists can access and modify data based on their assigned roles. Verify that role assignments align with your organization's data governance and security policies.

Assigning work to the AI specialist

Tasks must be assigned to the AI specialist. You can assign tasks to the AI specialist like any other user. Manual assignment, business rules or other triggers, and Advanced Work Assignment (AWA) all work. AWA allows you to select rules for assigning work so that work can be assigned automatically when the record is created or updated.

The User record associated with the AI specialist can be found on its profile. You can use business rules, triggers, or AWA to assign work to the AI specialist referencing that User record.

When setting up assignment rules, consider these factors:

- Volume and complexity of work to confirm the AI specialist can handle the assigned workload
- Priority levels to determine which tasks the AI specialist should handle first
- Escalation paths for cases where the AI specialist can't complete a task

Common failure modes to validate against

Certain conditions are reliable early warnings that a deployment will encounter issues. Validate against each of these before activating an AI specialist.

- Task states that don't change during AI specialist execution, which can suggest extensive customizations that fall outside foundational readiness. Run the AI Readiness Evaluation application to assess foundational readiness before proceeding.
- Task states that don't change during AI specialist execution, which can also suggest a state model that isn't mapped to the AI specialist's processing states. See Edit the tasks of an AI specialist in the legacy AI Agent Studio for steps to configure state mapping.
- Test queries that return no results or surface internal-only content, which points to a knowledge base that isn't ready. Complete a knowledge audit and enforce audience separation before proceeding.
- Poor knowledge base search results despite a ready knowledge base, which points to an AI Search profile misconfiguration. Inspect and adjust the Zero Touch Service Desk (ZTSD) search profile and AI Search configuration to target the right content for the AI specialist to rely on.
- Zero assignments after activation, which points to an assignment rule or routing misconfiguration. Validate routing in a non-production environment and run a test task through the full routing chain across all intake channels.

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- A spike in reopened tasks, which points to accuracy issues. Start with thorough testing and gate any move to autonomous operation on whether you consistently meet the expected thresholds.
- Work that sits with the AI specialist for more than 2 hours with no state change, which points to a broken escalation path. Validate escalation and run escalation test cases before activation.

Previewing your AI specialist

Previewing your AI specialist on multiple records can show you what to expect when the AI specialist is activated and running.

Important: Changes made by the AI specialist during previews are actually made to the record.

Follow these testing guidelines to validate your AI specialist's performance:

- Use representative tasks for initial validation. Selecting tasks that mirror the ones the AI specialist will handle enable you to check basic functions. You could also create dummy tasks that simulate active ones.

  Note: The AI specialist won't send any communications to users during tests.

- Test across different incident and case categories. Testing multiple categories allows you to confirm that the AI specialist is working effectively in multiple domains.
- Run at least 5 to 10 tests before activating. Try to create tests that cover all situations assigned to the AI specialist.
- Test edge cases and unusual scenarios to see how the AI specialist handles unexpected situations.
- Validate that the AI specialist respects data access controls and role-based permissions during testing.

Improving AI specialist performance with feedback

AI specialists can make mistakes. With feedback or changes to the sources they access, you can improve their performance for next time.

Use these methods to monitor and improve AI specialist performance:

- Administrators and Service Desk managers can review the individual steps an AI specialist took to reach its conclusions, in either Service Operations Workspace or the Core UI.
- AI administrators and Service Desk managers can view an AI specialist's activity in AI Agent Studio. You can see the different tasks that your AI specialist has worked on. In the list, there is the option to provide granular feedback of either *Helpful* or *Not helpful*. You can open the record, check the AI specialist's work, and then submit the feedback in the activity list.
- If the AI specialist makes errors based on knowledge articles that contain outdated or faulty information, knowledge administrators can update the articles to improve AI specialist performance.

Establish regular performance review cycles to:

- Analyze AI specialist activity logs and success rates
- Identify patterns in errors or suboptimal performance

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- Update knowledge base content based on AI specialist performance
- Adjust AI specialist configuration based on performance data

Ongoing monitoring and optimization

After deploying your AI specialist, continuous monitoring helps maintain optimal performance and identify opportunities for improvement. You can track the performance analytics of an AI specialist by selecting them in AI Agent Studio. See View AI specialist performance metrics.

Key metrics include:

- Task completion rates and mean time to resolution
- User satisfaction scores and feedback
- Escalation rates to human agents
- Durable auto-resolve rate: the percentage of work the AI specialist resolves with no reopen during the post-resolution monitoring window
- AI coverage rate: the percentage of eligible volume the AI specialist is actually eligible to handle, which keeps scaling honest rather than cherry-picking easy work
- Time to value: how quickly enough production data exists to quantify impact after go-live

Regular optimization activities should include:

- Refining assignment rules to improve work distribution
- Updating knowledge base content to address new scenarios
- Adjusting role assignments based on security reviews and changing requirements

Domain separation in Autonomous Workforce

Domain separation is unsupported for Autonomous Workforce.

Support level: No support

- The domain field may exist on data tables but there is no business logic to manage the data.
- This level is not considered domain-separated.

For more information on support levels, see Application support for domain separation.

Related topics

Domain separation for service providers

Configuring AI specialists

Configure the name, profile icon, capabilities, assignment groups, tasks, and language proficiencies of AI specialists in AI Agent Studio.

Configuration overview

See General guidelines for AI specialists for more information about setting up your autonomous workforce.

1. Configure AI specialist profile

   Configure the name, icon, roles, and assignment groups of an AI specialist.

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2. Configure AI specialist tasks

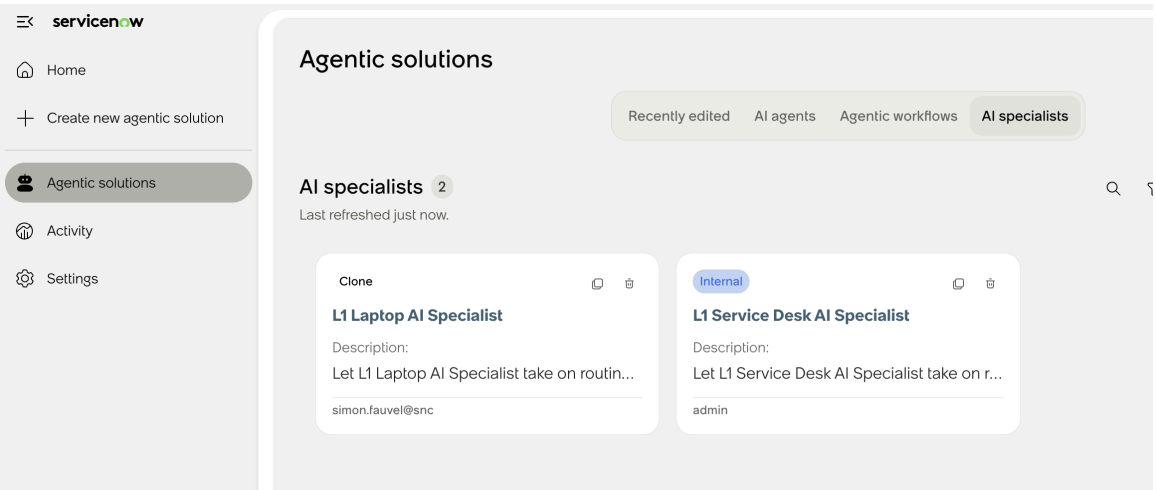
   Configure the tasks that an AI specialist is capable of.

3. Test an AI specialist

   Run the AI specialist on a specific record to check how it functions.

Configure AI specialists in AI Agent Studio

Configure your AI specialists in your autonomous workforce in AI Agent Studio.



The following is the basic workflow for configuring an AI specialist.

1. **Profile**

   Set basic details like the AI specialist's name, icon, role, and assignment groups. Assignment groups are the most important setting because they determine which groups the AI specialist can act on behalf of.

2. **Tasks**

   Define what the AI specialist can do, such as triaging incoming work, researching context, and responding to requesters.

4. **Preview the AI specialist**

   Test the AI specialist on an actual record, not a simulation, to see how it reasons and what actions it takes.

Edit the profile of an AI specialist in AI Agent Studio

Modify the profile of an AI specialist in AI Agent Studio to set its name, description, roles, and assignment groups.

Before you begin

Role required: sn_aia.admin

About this task

AI specialists profiles determine the unique specialties of the AI specialist. Choosing the right roles helps give your AI specialist the context necessary to accomplish its tasks.

To learn how to modify the tasks that an AI specialist is capable of, see Edit the tasks of an AI specialist.

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Procedure

1. Navigate to the **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the AI specialist you want to modify.
3. In the node view, select the first node of the AI specialist.

   The first node contains the main configuration settings for the AI specialist. The other nodes represent the individual agents that comprise the underlying architecture and don't require modification to change the profile of the AI specialist.

4. Update the name, profile icon, title, and description of your AI specialist.

   The user ID must match the ID of an existing record on the User table with the AI user type.

5. Choose your AI specialist's assignment groups.

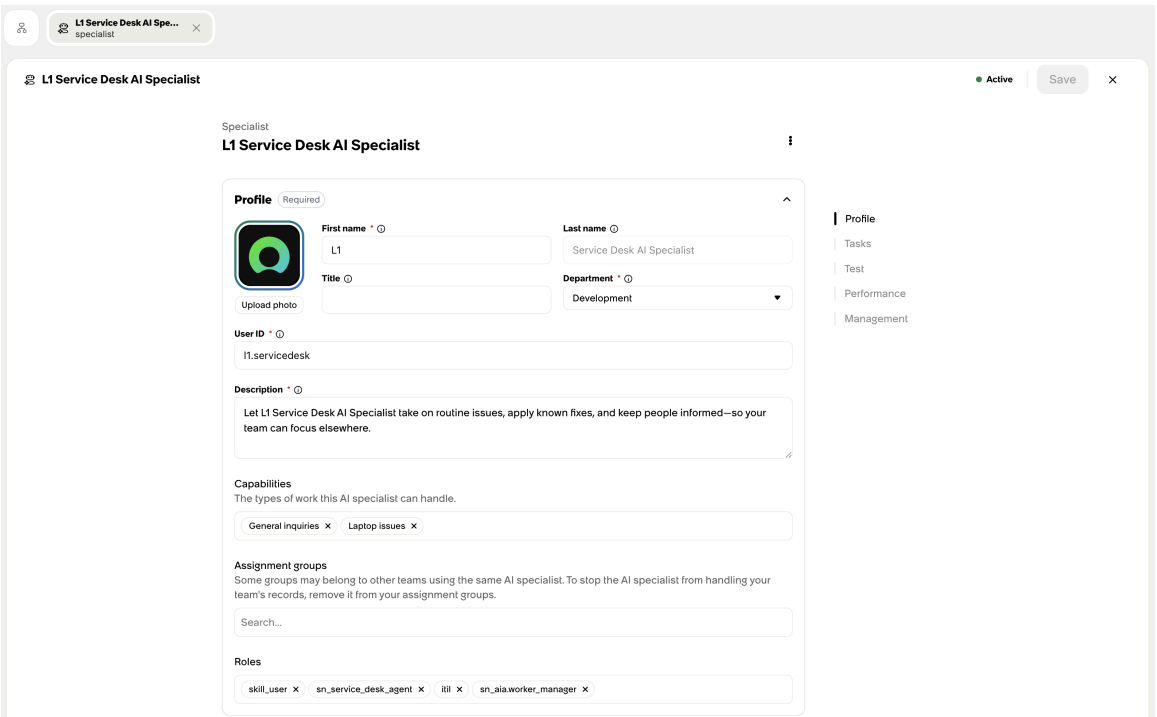
   The assignment groups determine what work the AI specialist can pick up. Multiple teams can use the same AI specialist, but you can create copies of a AI specialist if you want to fine-tune an AI specialist for different teams. See Create a copy of an AI specialist for more information.

   If you remove your team from the list of assignment groups, the AI specialist won't handle your team's tickets.

6. Select your AI specialist's role(s).

   Roles determine what data access your AI specialist has. For example, if the AI specialist has a role that grants it access to the Incident table, it can work on incidents. If the role(s) don't grant access to a necessary table, the AI specialist can't pick up work on that table, even if it's within the assignment group's domain.

   Review the full list of roles granted to the AI specialist to check your AI specialist has access only to what it needs to accomplish tasks.



7. Select **Save** to save your changes.

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You can make additional changes to your AI specialist before selecting save.

If you don't select **Save** before navigating to a new page or closing the browser, your changes are lost.

Edit the tasks of an AI specialist in AI Agent Studio

Select tasks that an AI specialist can perform in the new AI Agent Studio.

Before you begin

Role required: sn_aia.admin

About this task

AI specialist tasks determine what they can do. Choosing the correct tasks provides your AI specialist with the tools required to complete complex goals autonomously.

To learn how to modify the roles and capabilities that an AI specialist has, see Edit the profile of an AI specialist.

Procedure

1. Navigate to the **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the AI specialist you want to modify.
3. In the node view, select the first node of the AI specialist.

   The first node contains the main configuration settings for the AI specialist. The other nodes represent the individual agents that comprise the underlying architecture and don't require modification for task configuration.

4. Scroll down to the **Tasks** section in the AI specialist guided setup to view the full list of tasks that the AI specialist can perform.
5. Select the card of a task to review, select the pencil icon, and make changes to the specific details of the task configuration.

   The following tasks are available to the L1 IT Service Desk AI Specialist. These are presented as examples. Different AI specialists may have different tasks.

   Classify and assign: Configure how the AI specialist identifies incidents, classifies them, and assigns a specific incident type for follow-up.

   - *`Table`*: Select the table in which the AI specialist operates and resolution workflows are executed.
   - *`Fields to classify on the record`*: Enter the fields that the AI specialist should classify if empty.
   - *`Routing`*: Add and manage the routing criteria that determine which records the AI specialist handles. For more information, see Manage the routing criteria of an AI specialist.

   Triage and diagnose: Configure the details for how the AI specialist analyzes incidents for accurate handling.

   - *`Field to use as Task objective`*: Select the record fields which the AI specialist uses to analyze and determine the next steps.
   - *`Use attachment content`*: Enable the option for the AI specialist to review the content of attached files as part of incident triage and diagnosis.

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- *Map AI specialist states to record states*: Map the states of the AI specialist's execution to the states of the incident record. For example, the AI specialist's *Awaiting information* state can be mapped to the incident record *On Hold* state. If you have customized state values for your Incident table, you can map them to the AI specialist's states here.
- *Default routing decision*: Select the routing decision that the AI specialist falls back to when an incident matches none of the routing criteria. Select either *Attempt resolution* or *Reassign*.
- *Routing criteria*: Add criteria that determine which records the AI specialist handles. Criteria are grouped into two sections:
  - *Reassign for*: When an incident matches one of these criteria, the incident is reassigned to a human.
  - *Attempt resolution for*: When an incident matches one of these criteria, the AI specialist attempts to resolve it.

  To add a criterion, select **Add reassigned criteria** or **Add attempted criteria**, depending on which decision you want the criterion to trigger. Complete the following required fields and then select **Add routing criteria**.

  - *Name*: Enter a name that identifies the criterion, such as `AD account access blocked`.
  - *Routing instructions for LLM*: Describe which incidents the criterion applies to, including any scope that limits it. The AI specialist uses these instructions to determine whether an incident matches the criterion. Enter up to 4,000 characters.
  - *Routing Decision*: Set by the button that you selected, either *Reassign* or *Attempt resolution*.

  Each criterion appears as a labeled item in its section, showing only the name. To change a criterion, select its name to reopen the dialog box. To remove a criterion, select the **X** next to its name and then select **Delete** to confirm.

Investigate and resolve: Configure the following details on how the AI specialist investigates to find relevant solutions and resolve the issue.

- *Knowledge sources*: Select search profiles and knowledge base *sys_ids* to define how the AI specialist retrieves knowledge articles. AI search profiles can include sources such as knowledge articles, ServiceNow documentation, or specific tables. You can create AI Search profiles specifically for your AI specialists. To customize what information your AI specialist accesses, add search profiles with the pre-installed ones or remove the pre-installed ones. You must have at least one search profile selected for the AI specialist to complete the *Investigate and resolve* task.

  Note: If you include a table as a search source but don't grant the AI specialist access through its assigned roles, it can't search that table.

- *Automatically create KFT records*: Enable if you want the AI specialist to create a KB Feedback Task record after proposing a solution without an existing knowledge article.
- *Research depth*: Select how extensively the AI specialist must gather and analyze data during investigation.

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- *Pre resolution condition*: The conditions that must be true before the AI specialist will resolve the ticket. These are fields that get filled in after a ticket has been submitted.
- *Execution mode*: Determine how autonomously the AI specialist should act. *Autopilot* mode grants the AI specialist the ability to mark a ticket as resolved once resolution steps are sent. *Copilot* mode requires human acceptance of its resolution proposal.
- *Auto-submit catalog requests*: Enable AI specialists to submit catalog items on behalf of the user without an additional confirmation step.

Response formatting: Configure the details on how the AI specialist communicates to keep requesters informed through communication channels.

- *Inbound channels*: Select the inbound channels such as Activity stream through which the AI specialist can receive messages from requesters.
- *Outbound Channels*: Select the outbound channels the AI specialist uses to send responses or notifications. You can select channels such as Activity stream, email, portal, or phone.
- *Internal communication when confidence is low*: Enable the AI specialist to log its solution as a work note rather than proposing it directly.
- *Response templates*: Write the template for what the AI specialist should say to communicate to the user. You can set response templates for three different AI specialist states: Awaiting Info, Solution Proposed, and Reassign to Human. You can format your message using the editor to include things like bold text, specific fonts, tables, highlighting, links, and bullets.

Reassign: Configure the following details on how the AI specialist directs unresolved incidents to the correct team or agent for timely resolution.

- *Maximum number of interactions before escalation*: Set how many times to contact the requester before sending to a human agent. Enter a number greater than zero.
- *Reassign on follow-up question*: Enable this option to send the ticket to a human agent when the requester asks a follow-up question. Turning off the option lets the AI specialist handle follow-ups.
- *Choose where to reassign records*: Select the assignment group to reassign the ticket after an AI specialist has reviewed it and chosen to reassign it.
- *Cross-group reassignment*: Enable the AI specialist to recommend reassigning an incident to a different assignment group. The AI specialist never reassigns an incident to a different assignment group on its own.
- *Cross-group confidence threshold*: Set the confidence threshold for whether an incident belongs to a specific other assignment group.

6. Select **Save** to save your changes.

   You can make additional changes to your AI specialist before selecting save. Changing tabs in the AI specialist guided setup won't lose your changes.

   If you don't select **Save** before navigating to a new page or closing the browser, your changes are lost.

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Preview an AI specialist in the new AI Agent Studio

Run a preview of your AI specialist in the new AI Agent Studio on a single record to preview how it works and verify it matches your intentions.

Before you begin
Role required: sn_aia.admin

About this task
You can test an execution of the AI specialist on a single record to preview its capabilities.

Note: Previewing an AI specialist, depending on the tasks configured, can actually make changes to the record. Previews aren't simulations.

Procedure

1. Navigate to the **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the AI specialist you want to preview.
3. In the node view, select the first node of the AI specialist.

   The first node contains the main configuration settings for the AI specialist. The other nodes represent the individual agents that comprise the underlying architecture and do not require modification to preview an AI specialist.
4. Scroll down to the **Test** section in the AI specialist guided setup.
5. In the dropdown menu, select a record you want to preview the AI specialist on.

   Once a record is chosen, you can select the open link button to open the record in a new browser tab to check the details.

   Note: Choose records that you can safely make changes to. The work is actually being done on the record during the preview.
6. Select **Run** to begin the preview.

   The test begins on the record. You can watch what fields it updates and any comments or work notes it generates.

   When the test is complete, you can review all the changes made.
7. Verify that the AI specialist's performance meets your expectations.

   See the Testing section in General guidelines for AI specialists for more information about how to test your AI specialist.

Result
Your AI specialist has worked on a specific record or records of your choice.

What to do next
You can return to the **Profile** or **Tasks** sections by scrolling up in the guided setup to make changes if necessary. Once the changes are made, you can preview the AI specialist again.

If you're satisfied with the AI specialist's performance after making changes, you can select **Save** to save changes or **Activate** to let the AI begin work.

Configure AI specialists in the legacy AI Agent Studio

Configure your AI specialists in your autonomous workforce in the legacy AI Agent Studio.

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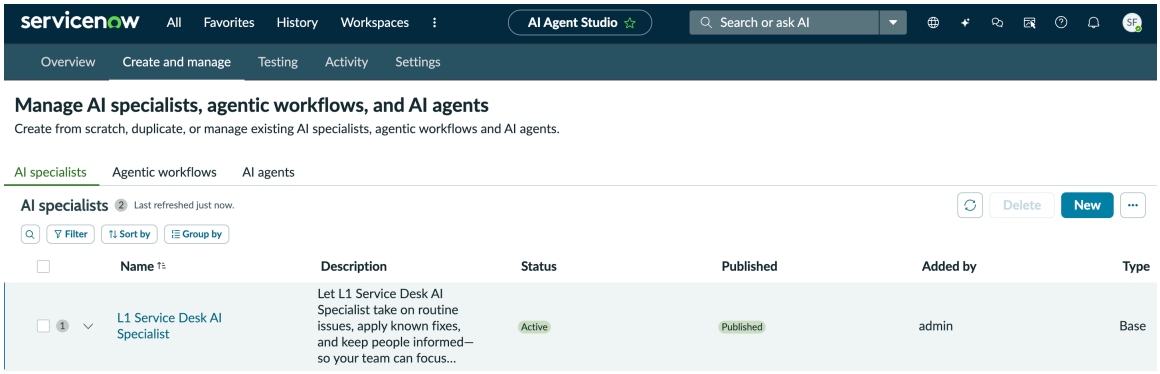

The following is the basic workflow for configuring an AI specialist.

1. **Basic details**

   Set basic details like the AI specialist's name, icon, and role.

2. **Profile**

   Set basic details like the AI specialist's capabilities and assignment groups. Assignment groups are the most important setting here, since they determine which groups the AI specialist can act on behalf of.

3. **Tasks**

   Define what the AI specialist can do, such as triaging incoming work, researching context, and responding to requesters.

4. **Preview the AI specialist**

   Test the AI specialist on an actual record, not a simulation, to see how it reasons and what actions it takes.

Edit the profile of an AI specialist in the legacy AI Agent Studio

Modify the profile of an AI specialist in the legacy AI Agent Studio to set its name, description, roles, and assignment groups.

Before you begin

Role required: sn_aia.admin

About this task

AI specialists profiles determine the unique specialties of the AI specialist. Choosing the right roles helps give your AI specialist the context necessary to accomplish its tasks.

To learn how to modify the tasks that an AI specialist is capable of, see Edit the tasks of an AI specialist.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. In the **AI specialists** tab, select the AI specialist you want to edit.
3. In the **Profile** tab, select the edit icon next to the name of the AI specialist.
4. Choose your AI specialist's assignment groups.

   The assignment groups determine what work the AI specialist can pick up. Multiple teams can use the same AI specialist. If you remove your team from the list of assignment groups, the AI specialist won't handle your team's tickets.

5. Select your AI specialist's role(s).

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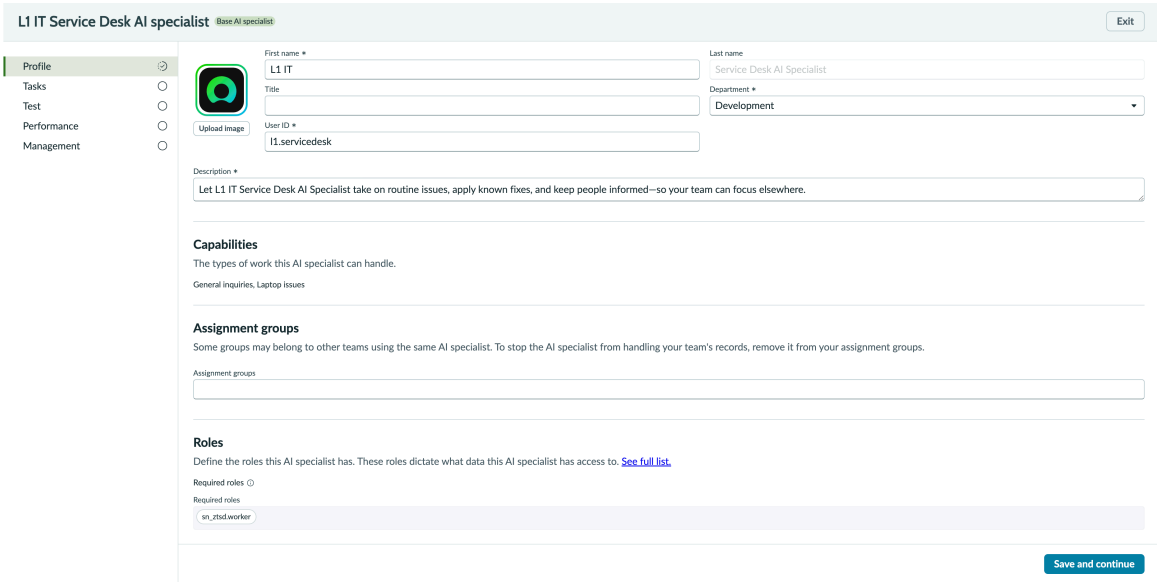
Roles determine what data access your AI specialist has. For example, if the AI specialist has a role that grants it access to the Incident table, it can work on incidents. If the role(s) don't grant access to a specific table, the AI specialist can't pick up work on that table, even if it is within the domain of its capabilities and assignment group.

Review the full list of roles granted to the AI specialist to check your AI specialist has access only to what it needs to accomplish tasks.



6. Select **Save** to save your changes.

   You can make additional changes to your AI specialist before selecting save. Changing tabs in the AI specialist guided setup won't lose your changes.

   If you don't select **Save** before navigating to a new page or closing the browser, your changes are lost.

Result

Your AI specialist profile is updated. Your AI specialist has the updated context for understanding its role when accomplishing tasks.

Edit the tasks of an AI specialist in the legacy AI Agent Studio

Select tasks that an AI specialist can perform in the legacy AI Agent Studio.

Before you begin

Role required: sn_aia.admin

About this task

AI specialist tasks determine what they can do. Choosing the correct tasks provides your AI specialist with the tools required to complete complex goals autonomously.

To learn how to modify the roles and capabilities that an AI specialist has, see Edit the profile of an AI specialist.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. In the **AI specialists** tab, select the AI specialist you want to edit.

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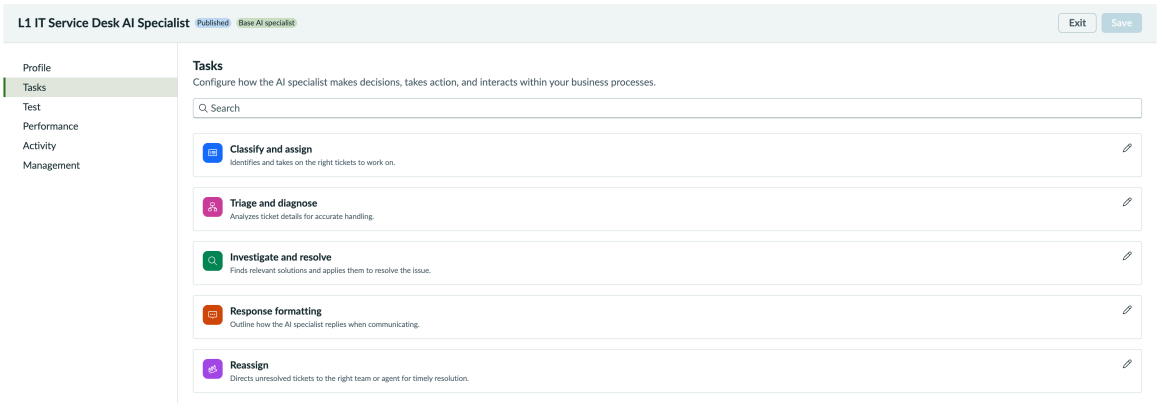
3. Navigate to the **Tasks** tab in the AI specialist guided setup to view the full list of tasks that the AI specialist can perform.
4. Select the card of a task to review and make changes to the specific details of the task configuration.

   The following tasks are available to the L1 IT Service Desk AI Specialist. These are presented as examples. Different AI specialists may have different tasks.



Classify and assign: Configure how the AI specialist identifies incidents, classifies them, and assigns a specific incident type for follow-up.

- *`Table`*: Select the table in which the AI specialist operates and resolution workflows are executed.
- *`Fields to predict`*: Enter the fields that the AI specialist should classify if empty.
- *`Similar records search profile`*: Select the AI Search profile that should be used for gathering records similar to the assigned record.
- *`Override existing field values with predictions`*: Enable this setting to let the AI specialist use predictions from similar records to replace existing values. Fields that can potentially be overridden are *`Service`*, *`Offering`*, and *`CI`*. Turn off if you only want the AI specialist to fill in empty fields.

Triage and diagnose: Configure the details for how the AI specialist analyzes incidents for accurate handling.

- *`Field to use as Task objective`*: Select the record fields which the AI specialist uses to analyze and determine the next steps.
- *`Use attachment content`*: Enable the option for the AI specialist to review the content of attached files as part of incident triage and diagnosis.
- *`Map AI specialist states to record states`*: Map the states of the AI specialist's execution to the states of the incident record. For example, the AI specialist's *`Awaiting information`* state can be mapped to the Incident record *`On Hold`* state. If you have customized state values for your Incident table, you can map them to the AI specialist's states here.
- *`Default routing decision`*: Determine whether an AI specialist should attempt to resolve a case outside of the assignment group's scope or reassign it to another assignment group. You can also specify in the following routing criteria section different categories of tasks for the AI specialist to attempt or reassign.

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- *Default routing decision*: Select the routing decision that the AI specialist falls back to when an incident matches none of the routing criteria. Select one of the following options:
  - *Resolve without root cause analysis*
  - *Perform root cause analysis*
  - *Ask the caller for more information*
  - *Route to the service desk team*
- *Routing criteria*: Add criteria that determine which records the AI specialist handles. Criteria are grouped into two sections:
  - *Attempt resolution for*: When an incident matches one of these criteria, the AI specialist attempts to resolve it.
  - *Reassign for*: When an incident matches one of these criteria, the incident is reassigned to a human.

  To add a criterion, select **Add attempted criteria** or **Add reassigned criteria**, depending on which decision you want the criterion to trigger. In the **New routing criteria** dialog box, enter a name in the *Criteria* field and explain in the *Description* field which incidents belong to the criterion.

  Select **Submit** to add the criterion. The criterion appears as a labeled item in its section.

  To change a criterion, select its name to reopen the dialog box. To remove a criterion, select the **X** next to its name and then select **Delete** to confirm. A removed criterion is no longer used when the AI specialist routes work.

- *Default routing decision*: Select the routing decision that the AI specialist falls back to when an incident matches none of the routing criteria. Select one of the following options:
  - *Resolve without root cause analysis*
  - *Perform root cause analysis*
  - *Ask the caller for more information*
  - *Route to the service desk team*

Investigate and resolve: Configure the following details on how the AI specialist investigates to find relevant solutions and resolve the issue.

- *Knowledge sources*: Select search profiles and/or knowledge base *sys_ids* to define how the AI specialist retrieves knowledge articles. AI search profiles can include sources such as knowledge articles, ServiceNow documentation, or specific tables. You can create AI Search profiles specifically for your AI specialists. To customize what information your AI specialist accesses, add search profiles with the pre-installed ones or remove the pre-installed ones. You must have at least one search profile selected for the AI specialist to complete the *Investigate and resolve* task.

  Note: If you include a table as a search source but don't grant the AI specialist access through its assigned roles, it can't search that table.

- *Automatically create KFT records*: Enable if you want the AI specialist to create a KB Feedback Task record after proposing a solution without an existing knowledge article.

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- *Research depth*: Select how extensively the AI specialist must gather and analyze data during investigation.
- *Pre resolution condition*: The conditions that must be true before the AI specialist will resolve the ticket. These are fields that get filled in after a ticket has been submitted.
- *Execution mode*: Determine how autonomously the AI specialist should act. *Autopilot* mode grants the AI specialist the ability to mark a ticket as resolved once resolution steps are sent. *Copilot* mode requires human acceptance of its resolution proposal.
- *Auto-submit catalog requests*: Enable AI specialists to submit catalog items on behalf of the user without an additional confirmation step.

Response formatting: Configure the details on how the AI specialist communicates to keep requesters informed through communication channels.

- *Inbound channels*: Select the inbound channels such as Activity stream through which the AI specialist can receive messages from requesters.
- *Outbound Channels*: Select the outbound channels the AI specialist uses to send responses or notifications. You can select channels such as Activity stream, email, portal, or phone.
- *Internal communication when confidence is low*: Enable to allow the AI specialist to log its solution as a work note rather than proposing it directly.
- *Response templates*: Write the template for what the AI specialist should say to communicate to the user. You can set response templates for three different AI specialist states: Awaiting Info, Solution Proposed, and Reassign to Human. You can format your message using the WYSIWYG editor to include things like bold text, specific fonts, tables, highlighting, links, and bullets.

Reassign: Configure the following details on how the AI specialist directs unresolved incidents to the correct team or agent for timely resolution.

- *Maximum number of interactions before escalation*: Set how many times to contact the requester before sending to a human agent. Enter a number greater than zero.
- *Reassign on follow-up question*: Enable this option to send the ticket to a human agent when the requester asks a follow-up question. Turning off the option lets the AI specialist handle follow-ups.
- *Choose where to reassign records*: Select the assignment group to reassign the ticket after an AI specialist has reviewed it and chosen to reassign it.
- *Cross-group reassignment*: Enable the AI specialist to recommend reassigning an incident to a different assignment group. The AI specialist never reassigns an incident to a different assignment group on its own.
- *Cross-group confidence threshold*: Set the confidence threshold for whether an incident belongs to a specific other assignment group.

5. Select **Save** to save your changes.

   You can make additional changes to your AI specialist before selecting save. Changing tabs in the AI specialist guided setup won't lose your changes.

   If you don't select **Save** before navigating to a new page or closing the browser, your changes are lost.

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Result
Your AI specialist tasks are updated. After being assigned work, your AI specialist performs the actions necessary to complete those tasks on the relevant records.

Preview an AI specialist in the legacy AI Agent Studio

Run a preview of your AI specialist in the legacy AI Agent Studio on a single record to preview how it works and verify it matches your intentions.

Before you begin
Role required: sn_aia.admin

About this task
You can test an execution of the AI specialist on a single record to preview its capabilities.

Note: Previewing an AI specialist, depending on the tasks configured, can actually make changes to the record. Previews are not simulations.

Procedure
1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. In the **AI specialists** tab, select the AI specialist you want to preview.
3. Navigate to the **Preview** tab in the AI specialist guided setup.
4. Choose a record to run the preview on.

   Recommended records for preview are selected based on their relevance to the capabilities and tasks available to the AI specialist.

   Once a record is chosen, you can select the open link button to open the record in a new browser tab to check the details.

   Note: Choose records that you can safely make changes to. The work is actually being done on the record during the preview.

5. Select **Run** to begin the preview.

   The test begins on the record. You can watch what fields it updates and any comments or work notes it generates.

   When the test is complete, you can review all the changes made.

6. Verify that the AI specialist's performance meets your expectations.

   See the Testing section in General guidelines for AI specialists for more information about how to test your AI specialist.

Result
Your AI specialist has worked on a specific record or records of your choice.

What to do next
You can return to the **Profile** or **Tasks** tabs in the guided setup to make changes if necessary. Once the changes are made, you can preview the AI specialist again.

If you are satisfied with the AI specialist's performance after making changes, you can select **Save** to save changes or **Activate** to let the AI begin work.

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Assigning work to an AI specialist

You can assign work to an AI specialist in one of three ways, depending on your current work assignment procedures.

AI specialists can't assign themselves work, even if they've been put into an assignment group. There are three ways you can assign work to an AI specialist.

1. Manual assignment. You can change the user in the **Assigned to** field to your AI specialist on a record form or list. A service desk manager or team lead can assign work to the AI specialist just as they would assign work to human agents on their team.

2. Assignment rules. Assignment rules automatically assign work on your instance based on predefined conditions. They are applied whenever a task that isn't already assigned is created or updated. If you have multiple assignment rules, the one with the lowest order takes precedence.

3. Advanced Work Assignment (AWA). AWA assigns work based on more context than simple assignment rules, such as an agent's availability, capacity, and skills. Configuring AWA involves creating and managing service channels, work item queues, routing conditions, and assignment criteria.

With manual assignment, you control exactly which records an AI specialist works on. This works best when doing initial testing to see how an AI specialist handles a particular task type or subject. After you've established trust, you can allow the AI specialist to work at a larger scale by creating assignment rules or configuring AWA.

To have AWA assign work to an AI specialist, configure AWA first. You can then add the AI specialist to existing work queues, like another member of the team. If you don't already have AWA set up on your instance, assignment rules require less configuration than setting up AWA for AI specialists alone.

Manually assign work to an AI specialist

Manually assign specific records to an AI specialist by changing the Assigned to field when you need to override automatic assignment rules.

Before you begin

Role required: itil_admin

Procedure

1. Navigate to the table containing the record to assign.
   You can assign AI specialists to records in tables such as the Incident [incident] table.
2. Open the record for the AI specialist to work on.
3. In the **Assigned to** field, enter the name of the AI specialist.

   Trouble?
   If the AI specialist does not appear in the **Assigned to** list, verify that the AI specialist is active and has the appropriate capabilities configured for this record type.
4. Save the record.

Result

The record is assigned to the AI specialist. The AI specialist processes the record according to its configured capabilities and workflows.

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Create an assignment rule for an AI specialist

Create an assignment rule to route matching tasks to an AI specialist automatically, without setting the Assigned to field on each record.

Before you begin

Role required: assignment_rule_admin or admin

Procedure

1. Navigate to **All** > **System Policy** > **Rules** > **Assignment**.
2. Select **New**.
3. In the **Name** field, enter a name for your assignment rule, such as `AI L1 Service Desk`.
4. In the **Applies to** tab, select the table and filter conditions that identify the tasks for the AI specialist to handle.
5. In the **Assign to** tab, enter the name of the AI specialist in the **User** field.
6. Select **Submit** to create the assignment rule.

Result

The assignment rule routes matching tasks to the AI specialist automatically.

Configure Advanced Work Assignment for an AI specialist

Add an AI specialist to an existing Advanced Work Assignment (AWA) assignment rule so that it can receive work items alongside your human agents.

Before you begin

This procedure applies when service channels and work item queues are already configured in AWA. For instructions on creating new ones, see Create a service channel and Create a work item queue.

Role required: awa_admin

Procedure

1. Confirm that the AI specialist has the awa_agent role.

   Navigate to **All** > **User Administration** > **Users**, find and open the user record for the AI specialist, and check the roles in the Roles related list.

2. Navigate to **All** > **Advanced Work Assignment** > **Home** > **Assignment rules**.
3. Select **New** to open the new record form or open an existing assignment rule.
4. In the **Auto-assign handling** tab, select **Enable auto-assign work items**.
5. In the **Manage AI agents** tab, select **Include AI agents**.
6. **Optional:** In the **Manage AI agents** tab, select **Prioritize AI agents**.

   (Optional) Choosing to prioritize AI agents routes relevant work to the AI specialist first. The AI specialist then triages the task and determines whether it can propose an acceptable solution. If the AI specialist can't propose a solution, or if the task is outside its configured capabilities, it can reassign the task to a human agent or a different assignment group. For steps on configuring the routing criteria for reassignment, see Configure AI specialist tasks.

   If you don't choose to prioritize AI agents, the AI specialist can still be assigned work from the work item queue.

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7. Select **Save**.
8. **Optional:** Set the maximum capacity for the AI specialist.

   (Optional) See Override agent capacity for selected agents.

Result
Your AI specialist is added to the AWA assignment rule as an eligible assignee.

What to do next
You can track an AI specialist's performance and the records it works on in AI Agent Studio. See View performance and View activity.

Using AI specialists

AI specialists are autonomous, hierarchical AI agents designed to serve as team members who can accomplish complex tasks. Onboard AI specialists to your team to use AI for role-based automation.

Use AI specialists in AI Agent Studio

Onboard and view the performance and activity of AI specialists in AI Agent Studio.

Review the performance of an AI specialist in AI Agent Studio

Review the performance analytics of an AI specialist to track their task execution success. You can use the analytics to tune the AI specialist to suit your business needs.

Before you begin
Role required: sn_aia.admin

About this task
Monitoring AI specialist performance helps you identify where your AI specialist succeeds or fails. The analytics help you decide whether to change aspects of the AI specialist's profile or tasks to improve performance. Regular monitoring helps you identify areas of concern.

Procedure
1. Navigate to **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the AI specialist you want to preview.
3. In the node view, select the first node of the AI specialist.

   The first node contains the main configuration settings for the AI specialist. The other nodes represent the individual agents that comprise the underlying architecture and aren't required to view the AI specialist's performance.

4. Scroll down to the **Performance** section in the AI specialist guided setup.
5. Review the performance analytics of the AI specialist.

   You can filter all metrics by date and assignment group.

   #### Overview AI specialist performance metrics

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See how your AI specialist is performing overall.

Section name	Individual metrics
At a glance	○ *Durable auto-resolve rate (%)*: Percentage of incidents the AI specialist resolved without reassigning to a human agent, and not reopened. ○ *Coverage rate (%)*: Percentage of assigned incidents that the AI specialist attempted to resolve.
Routing journey	○ *1. Closed incidents in eligible assignment group(s)*: All incidents in assignment group(s) the AI specialist is part of. ○ *2. Closed incidents assigned to AI specialist*: Based on AWA or assignment rules, incidents assigned to the AI Specialist for triage. ○ *3. Closed incidents attempted by AI specialist*: Incidents where the AI specialist has the confidence level to propose a solution or take autonomous action.
Incident outcomes	○ *All incident outcomes*: Percentage and counts of results of the AI specialist's attempts: resolved, reassigned to a human agent, reopened, generated a new ticket, or in-progress ○ *Incident outcomes over time*: Trend of AI specialist result outcomes
Resolution details	○ *Mean time to resolution*: Average time between the incident being assigned to the AI specialist and the time a response was generated that was later accepted ○ *Mean time to first response*: Average time between the incident being assigned to the AI specialist and the time a response was generated
Reassignment reasons	○ *Reasons for reassignment*: Percentage and total counts of incidents that were reassigned to a human agent broken down by cause ○ *Reasons for reassignment over time*: Trend of AI specialist reassignment broken down by reason
Follow-ups	○ *Follow up rate (%)*: Percentage of attempted incidents where the AI specialist needed a follow-up to ask for further information. ○ *Count of incidents that required a follow up*: Count of incident records that required at least one additional message by the AI specialist

Quality performance metrics

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Monitor the quality of performance for different categories of tasks and identify coaching opportunities.

Section name	Individual metrics
Review how the AI Specialist measures up in each quality area	○ *`Assessments for closed incidents`*: Generated quality assessments for completed AI specialist tasks ○ *`Quality score trend`*: Trend line of quality scores based on assessments. ○ *`All opportunities`*: Identified coaching opportunities for the AI specialist

Detailed view AI specialist performance metrics

Identify the services or categories that require the most attention.

Section name	Individual metrics
AI-handled incidents by service	○ *`Incident outcomes (%) by service`*: Outcomes of the AI specialist's attempt (resolved, reassigned, new, and reopened) broken down by service ○ *`Incident outcomes by service`*: Total count of AI specialist outcomes broken down by service. Selecting a number from the Count field opens a list of the ZTSD Task Execution table filtered by that service and outcome. ○ *`Reassignment reasons for unresolved incidents by service`*: Percentage and total counts of incidents that were reassigned to a human agent broken down by cause and service ○ *`Average exchanges for resolved incidents by service`*: Average number of responses by the AI specialist before a final outcome
Proposed solution similarity by service	*`Average proposed solution similarity by service`*: Shows the average AI judge score comparing proposed solutions and final resolutions for each service.

Value and feedback AI specialist performance metrics

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Evaluate adoption trend, customer sentiment, and feedback to identify opportunities to improve the AI specialist experience.

Section name	Individual metrics
Assess impact and user satisfaction	○ *Aggregated sentiment analysis*: Shows the overall tone (from negative to positive) of user messages in incidents handled by the AI specialist. ○ *Adoption coverage*: Shows how many relevant assignment groups have adopted and used the AI specialist to handle incidents. ○ *Direct user feedback*: Graphical representation of the direct user feedback provided by customers in response to the incident resolved by the AI specialist.

KB articles AI specialist performance metrics

See which articles are retrieved, cited in responses, or left unused. Identify which content is driving successful resolutions and where gaps exist.

Section name	Individual metrics
KB article usage summary	○ *KB articles used*: Number of distinct KB articles the AI specialist referenced during the selected period. ○ *Total records*: Total number of records (incidents, problems, interactions, etc) resolved using at least one KB article retrieval. ○ *Shown in citations*: KB articles the AI specialist included in a response to the user. A higher count suggests the AI specialist is actively surfacing relevant content. ○ *Retrieved only*: KB articles the AI specialist retrieved internally but did not include in a response. A high count may indicate retrieval quality issues worth investigating. ○ *Unused articles*: KB articles that were not retrieved or cited during the selected period. Review these to identify outdated or hard-to-discover content.
KB article list	○ *All used articles*: Lists all KB articles the AI specialist has used, showing usage frequency (how often the article was cited after retrieval) and reopen rate (percentage of incidents resolved using the article that were later reopened). ○ *Unused articles*: Lists KB articles with no references during the selected period.

What to do next

If you want to make changes to your AI specialist based on the performance analytics, see Edit the profile of an AI specialist or Edit the tasks of an AI specialist.

View the activity of an AI specialist in AI Agent Studio

View the task execution history of an AI specialist in the new AI Agent Studio to track where and when it plans and attempts executions. You can also give feedback on its performance.

Before you begin

Role required: sn_aia.admin

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About this task

Monitoring AI specialist activity allows you to identify where your AI specialist is being used on which records.

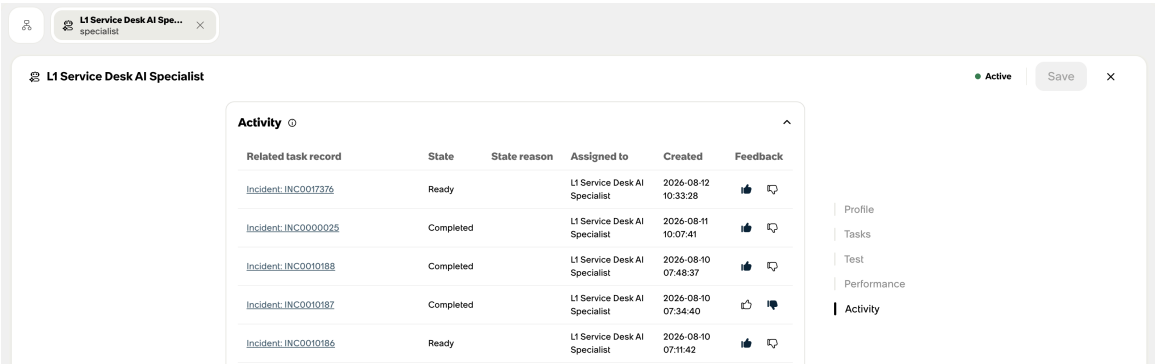
For a given execution, you can rate the work of the AI specialist as either helpful (thumbs up) or not helpful (thumbs down) in the *Feedback* field of the list.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the AI specialist you want to preview.
3. In the node view, select the first node of the AI specialist.

   The first node contains the main configuration settings for the AI specialist. The other nodes represent the individual agents that comprise the underlying architecture and don't require access to view the AI specialist's activity.

4. Scroll down to the **Activity** section in the AI specialist guided setup.



5. Review the activity of the AI specialist.

   AI specialist activity is presented as a filtered list that includes all records related to the AI specialist. You can add more filters to narrow down the activity further.

   You can sort by any of the list columns by selecting the column name.

   If the execution state is not *Completed*, a reason is given to explain the state. Possible reasons include "failed execution" or "no activity."

   You can give feedback on any given activity item. Select the thumbs up icon for positive feedback or the thumbs down icon to give negative feedback. If you select the thumbs down icon, you can specify exactly why you have given it that rating. After selecting a reason, you can also add a comment to detail the issue further.

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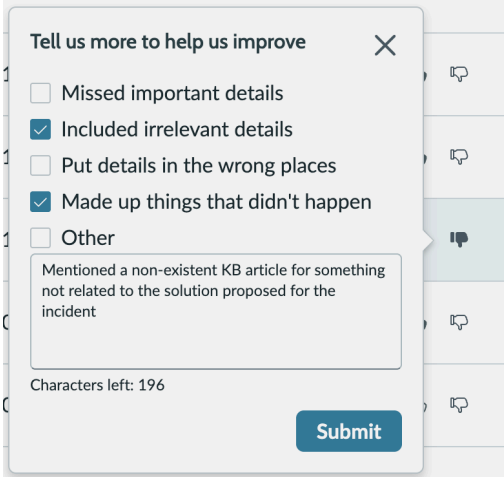

Possible reasons for negative feedback include:

- Missed important details
- Included irrelevant details
- Put details in wrong places
- Made up things that didn't happen
- Other

What to do next

If you want to change which records the AI specialist picks up, you can change the capabilities or assignment groups in the AI specialist's profile. See Edit the profile of an AI specialist for more information.

To learn more about changing the specific tasks that the AI specialist performs on a record, see Edit the tasks of an AI specialist.

You can test the AI specialist on a specific record of your choosing by previewing the AI specialist.

Manage access to an AI specialist in AI Agent Studio

Control workspace access, user roles, and publishing settings for your AI specialist and its copies configured for specific teams.

Before you begin

Verify that you have an AI specialist created and configured.

Role required: sn_aia.admin

About this task

Configure access settings to control which workspaces and users can interact with your AI specialist. You can also manage different copies of AI specialists configured for specific assignment groups or teams with varying access requirements.

Access management includes workspace permissions, role-based security, publishing status, and copy creation privileges. These settings determine the operational scope and security boundaries for your AI specialist.

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Procedure

1. Navigate to **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the AI specialist you want to configure from the available list.
3. In the node view, select the first node representing the AI specialist.

   The first node contains the main configuration settings for the AI specialist. The other nodes represent the individual agents that comprise the underlying architecture and do not require modification for access management.
4. Scroll down to the **Management** section in the AI specialist guided setup.

   The Management section contains all access control and operational settings for the AI specialist.
5. Configure workspace access by defining the workspaces where the AI specialist can operate.

   Workspace access determines where agents can monitor the progress and activity of the AI specialist. Users can only interact with the AI specialist within the specified workspaces.
6. Configure role-based access by selecting which roles have permission to use the AI specialist.

   Users without the specified roles cannot invoke the AI specialist or review its work. Role configuration ensures that only authorized users can interact with the AI specialist.
7. Set the publishing status by selecting whether to publish the AI specialist.

   Publishing controls whether the AI specialist can perform work on records. An unpublished AI specialist remains inactive even if it meets all other access requirements.
8. Configure copy creation permissions by selecting whether users with the defined roles can create copies of the AI specialist.

   Copy creation allows teams to customize AI specialist behavior for specific assignment groups or use cases. Different copies can have varying configurations while maintaining the same core functionality.

   For example, you can configure an AI specialist copy for one assignment group to perform specific tasks that differ from those assigned to another group. For more information, see Create a copy of an AI specialist.
9. Select **Save** to apply your access configuration changes.

   You can modify additional AI specialist settings before saving. All changes are applied when you select **Save**.

   ⚠ **Warning:** If you navigate to a different page or close the browser without selecting **Save**, your changes are lost and must be reconfigured.

Result

Your AI specialist now has configured workspace access, role-based security, publishing status, and copy creation permissions. Users can interact with the AI specialist according to the access settings you defined.

What to do next

Verify that the access configuration works as expected by testing the AI specialist with users who have the required roles in the specified workspaces. Monitor AI specialist activity to confirm that access restrictions are properly enforced.

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Create a copy of an AI specialist in AI Agent Studio

Create a new copy of an AI specialist to configure different settings for different assignment groups

Before you begin
Role required: sn_aia.admin

About this task
The base AI specialist can be configured to cover general or the most likely situations. Creating a copy of an AI specialist allows you to make specific changes for different assignment groups, such as different capabilities. You can also specify exactly which roles have access to the copy.

You can't change the tasks of an AI specialist at the copy level. Tasks must be configured for the base AI specialist.

Procedure
1. Navigate to **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the AI specialist you want to copy.
3. In the node view, select the first node of the AI specialist.

   The first node contains the main configuration settings for the AI specialist. The other nodes represent the individual agents that comprise the underlying architecture and do not require access or modification to create a copy of an AI specialist.
4. Scroll down to the **Management** section in the AI specialist guided setup to configure the different access settings.
5. In the Copies section, select **Add copy**.
6. Review the basic details and profile of the base AI specialist, then make changes for the specific copy.

   For example, you may want to change the name of the AI specialist or its department or description.
7. Assign the copy of the AI specialist to an assignment group.
8. Select a manager for the AI specialist.

   A manager might be the Service Desk Manager whose team the AI specialist will be a part of.
9. Select the roles to access this copy of the AI specialist.

Result
A new instance of an AI specialist is configured for a new assignment group.

What to do next
The copy of the AI specialist can be made available to users by publishing and activating the base AI specialist.

Deactivate an AI specialist in AI Agent Studio

Deactivate an AI specialist in AI Agent Studio so that it no longer acts on records.

Before you begin
Role required: sn_aia.admin

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Procedure

1. Navigate to **All** > **AI Agent Studio** > **Agentic solutions**.
2. Select the AI specialist you want to deactivate.
3. Select the pencil icon to open the AI specialist's setup.
4. By the **Save** button, select the more options icon , then select **Deactivate**.

Result
Your AI specialist is turned off.

What to do next
You can make changes to your AI specialist, such as changing the profile or modifying the tasks, to affect its behavior. Once you have made edits, you can preview the AI specialist and reactivate it later.

Use AI specialists in the legacy AI Agent Studio

Onboard and view the performance and activity of AI specialists in the legacy AI Agent Studio.

Review the performance of an AI specialist in the legacy AI Agent Studio

Review the performance analytics of an AI specialist to track their task execution success. You can use the analytics to tune the AI specialist to suit your business needs.

Before you begin
Role required: sn_aia.admin

About this task
Monitoring AI specialist performance helps you identify where your AI specialist succeeds or fails. The analytics help you decide whether to change aspects of the AI specialist's profile or tasks to improve performance. Regular monitoring helps you identify areas of concern.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. In the **AI specialists** tab, select the AI specialist you want to view the performance of.
3. Navigate to the **Performance** tab in the AI specialist guided setup.
4. Review the performance analytics of the AI specialist.

   You can filter all metrics by date and assignment group.

Overview AI specialist performance metrics

See how your AI specialist is performing overall.

Section name	Individual metrics
At a glance	○ *`Durable auto-resolve rate (%)`*: Percentage of incidents the AI specialist resolved without reassigning to a human agent, and not reopened. ○ *`Coverage rate (%)`*: Percentage of assigned incidents that the AI specialist attempted to resolve.

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Section name	Individual metrics
Routing journey	○ *1. Closed incidents in eligible assignment group(s)*: All incidents in assignment group(s) the AI specialist is part of. ○ *2. Closed incidents assigned to AI specialist*: Based on AWA or assignment rules, incidents assigned to the AI Specialist for triage. ○ *3. Closed incidents attempted by AI specialist*: Incidents where the AI specialist has the confidence level to propose a solution or take autonomous action.
Incident outcomes	○ *All incident outcomes*: Percentage and counts of results of the AI specialist's attempts: resolved, reassigned to a human agent, reopened, generated a new ticket, or in-progress ○ *Incident outcomes over time*: Trend of AI specialist result outcomes
Resolution details	○ *Mean time to resolution*: Average time between the incident being assigned to the AI specialist and the time a response was generated that was later accepted ○ *Mean time to first response*: Average time between the incident being assigned to the AI specialist and the time a response was generated
Reassignment reasons	○ *Reasons for reassignment*: Percentage and total counts of incidents that were reassigned to a human agent broken down by cause ○ *Reasons for reassignment over time*: Trend of AI specialist reassignment broken down by reason
Follow-ups	○ *Follow up rate (%)*: Percentage of attempted incidents where the AI specialist needed a follow-up to ask for further information. ○ *Count of incidents that required a follow up*: Count of incident records that required at least one additional message by the AI specialist

Detailed view AI specialist performance metrics

Identify the services or categories that require the most attention.

Section name	Individual metrics
AI-handled incidents by service	○ *Incident outcomes (%) by service*: Outcomes of the AI specialist's attempt (resolved, reassigned, new, and reopened) broken down by service ○ *Incident outcomes by service*: Total count of AI specialist outcomes broken down by service. Selecting a number from the Count field opens a list of the ZTSD Task Execution table filtered by that service and outcome.

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Section name	Individual metrics
	○ *Reassignment reasons for unresolved incidents by service*: Percentage and total counts of incidents that were reassigned to a human agent broken down by cause and service ○ *Average exchanges for resolved incidents by service*: Average number of responses by the AI specialist before a final outcome
Proposed solution similarity by service	*Average proposed solution similarity by service*: Shows the average AI judge score comparing proposed solutions and final resolutions for each service.

Value and feedback AI specialist performance metrics

Evaluate adoption trend, customer sentiment, and feedback to identify opportunities to improve the AI specialist experience.

Section name	Individual metrics
Assess impact and user satisfaction	○ *Aggregated sentiment analysis*: Shows the overall tone (from negative to positive) of user messages in incidents handled by the AI specialist. ○ *Adoption coverage*: Shows how many relevant assignment groups have adopted and used the AI specialist to handle incidents. ○ *Direct user feedback*: Graphical representation of the direct user feedback provided by customers in response to the incident resolved by the AI specialist.

KB articles AI specialist performance metrics

See which articles are retrieved, cited in responses, or left unused. Identify which content is driving successful resolutions and where gaps exist.

Section name	Individual metrics
KB article usage summary	○ *KB articles used*: Number of distinct KB articles the AI specialist referenced during the selected period. ○ *Total records*: Total number of records (incidents, problems, interactions, etc) resolved using at least one KB article retrieval. ○ *Shown in citations*: KB articles the AI specialist included in a response to the user. A higher count suggests the AI specialist is actively surfacing relevant content. ○ *Retrieved only*: KB articles the AI specialist retrieved internally but did not include in a response. A high count may indicate retrieval quality issues worth investigating. ○ *Unused articles*: KB articles that were not retrieved or cited during the selected period. Review these to identify outdated or hard-to-discover content.

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Section name	Individual metrics
KB article list	○ *`All used articles`*: Lists all KB articles the AI specialist has used, showing usage frequency (how often the article was cited after retrieval) and reopen rate (percentage of incidents resolved using the article that were later reopened). ○ *`Unused articles`*: Lists KB articles with no references during the selected period.

What to do next

If you want to make changes to your AI specialist based on the performance analytics, see Edit the profile of an AI specialist or Edit the tasks of an AI specialist.

View the activity of an AI specialist in the legacy AI Agent Studio

View the task execution history of an AI specialist in AI Agent Studio to track where and when it plans and attempts executions. You can also give feedback on its performance.

Before you begin

Role required: sn_aia.admin

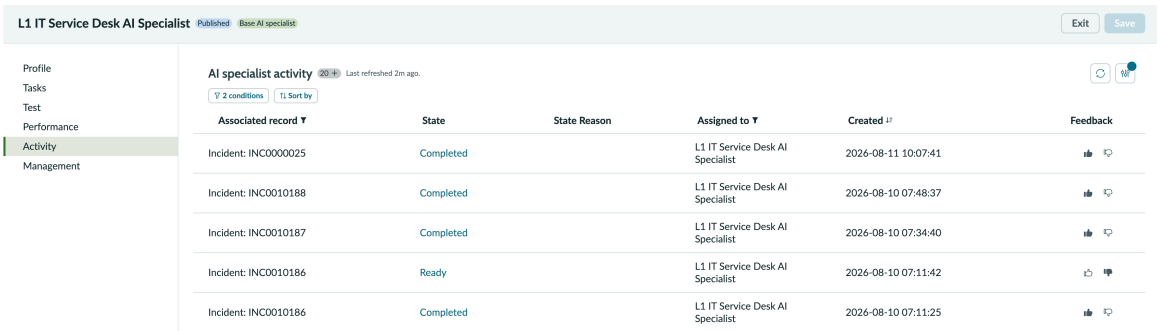
About this task

Monitoring AI specialist activity allows you to identify where your AI specialist is being used on which records.

For a given execution, you can rate the work of the AI specialist as either helpful (thumbs up) or not helpful (thumbs down) in the *`Feedback`* field.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. In the **AI specialists** tab, select the AI specialist you want to view the activity of.
3. Navigate to the **Activity** tab in the AI specialist guided setup.



4. Review the activity of the AI specialist.

   AI specialist activity is presented as a filtered list that includes all records related to the AI specialist. You can add more filters to narrow down the activity further.

   You can sort by any of the list columns by selecting the column name.

   If the execution state is not *`Completed`*, a reason is given to explain the state. Possible reasons include "failed execution" or "no activity."

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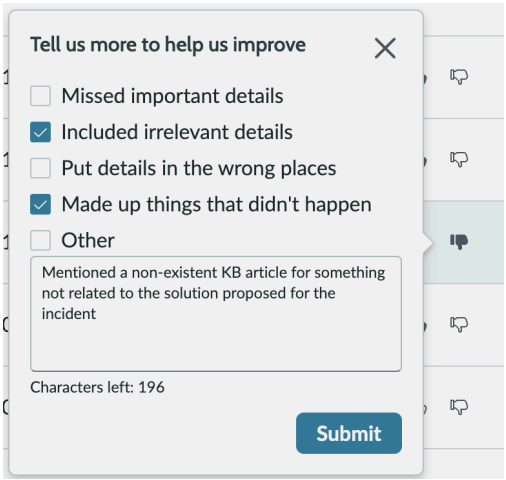
You can give feedback on any given activity item. Select the thumbs up icon for positive feedback or the thumbs down icon to give negative feedback. If you select the thumbs down icon, you can specify exactly why you have given it that rating. After selecting a reason, you can also add a comment to detail the issue further.



Possible reasons for negative feedback include:

- Missed important details
- Included irrelevant details
- Put details in wrong places
- Made up things that didn't happen
- Other

What to do next

If you want to change which records the AI specialist picks up, you can change the capabilities or assignment groups in the AI specialist's profile. See Edit the profile of an AI specialist for more information.

To learn more about changing the specific tasks that the AI specialist performs on a record, see Edit the tasks of an AI specialist.

You can test the AI specialist on a specific record of your choosing by previewing the AI specialist.

Manage access to an AI specialist in the legacy AI Agent Studio

Control workspace access, user roles, and publishing settings for your AI specialist and its copies configured for specific teams.

Before you begin

Verify that you have an AI specialist created and configured.

Role required: sn_aia.admin

About this task

Configure access settings to control which workspaces and users can interact with your AI specialist. You can also manage different copies of AI specialists configured for specific assignment groups or teams with varying access requirements.

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Access management includes workspace permissions, role-based security, publishing status, and copy creation privileges. These settings determine the operational scope and security boundaries for your AI specialist.

Procedure

1. Navigate to **AI Agent Studio** > **Create and manage**.
2. Select the AI specialist you want to configure from the available list.
3. Select the **Management** tab in the AI specialist guided setup.

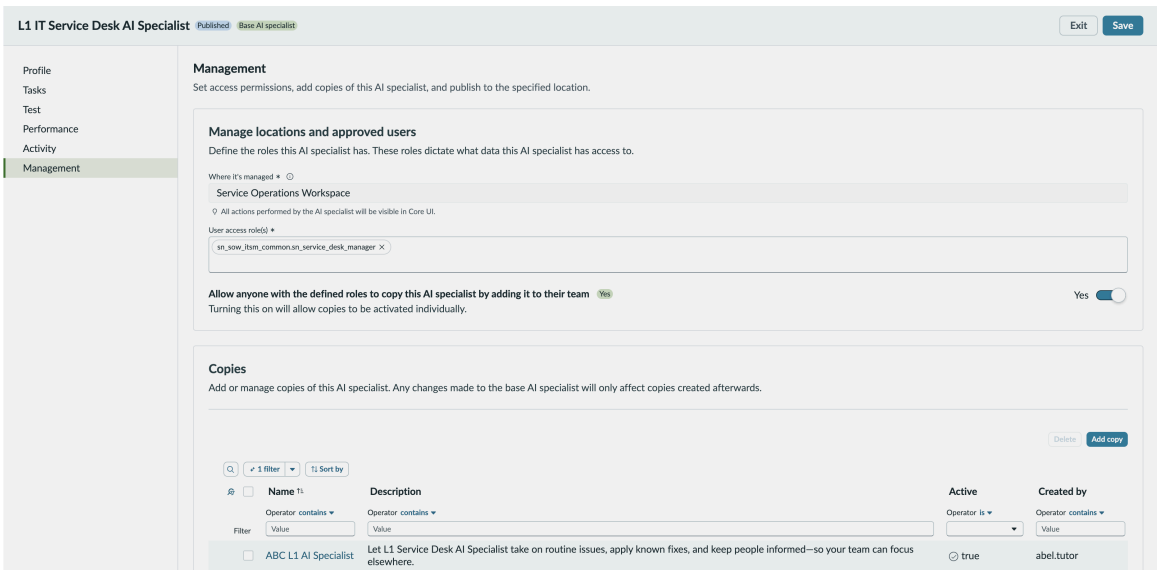
   The Management tab contains all access control and operational settings for the AI specialist.
4. Configure workspace access by defining the workspaces where the AI specialist can operate.

   Workspace access determines where agents can monitor the progress and activity of the AI specialist. Users can only interact with the AI specialist within the specified workspaces.
5. Configure role-based access by selecting which roles have permission to use the AI specialist.

   Users without the specified roles cannot invoke the AI specialist or review its work. Role configuration ensures that only authorized users can interact with the AI specialist.
6. Configure copy creation permissions by selecting whether users with the defined roles can create copies of the AI specialist.

   Copy creation allows teams to customize AI specialist behavior for specific assignment groups or use cases. Different copies can have varying configurations while maintaining the same core functionality.

   For example, you can configure an AI specialist copy for one assignment group to perform specific tasks that differ from those assigned to another group. For more information, see Create a copy of an AI specialist.



7. Set the active status of the AI specialist.

   Activation controls whether the AI specialist performs work. If an AI specialist is inactive, it won't work on any tasks, even if it is published.
8. Set the publishing status by selecting whether to publish the AI specialist.

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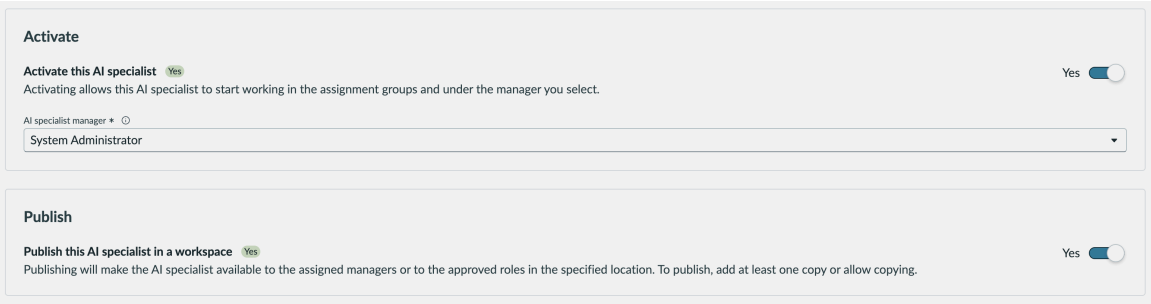
Publishing controls whether the AI specialist can be seen in workspaces and be assigned to a manager. An unpublished AI specialist remains inactive even if it meets all other access requirements.

If an AI specialist is unpublished, then it will not be visible for Service Desk Managers or other members of the assignment group, even if it is active.



9. Select **Save** to apply your access configuration changes.

   You can modify additional AI specialist settings before saving. All changes are applied when you select **Save**.

   Warning: If you navigate to a different page or close the browser without selecting **Save**, your changes are lost and must be reconfigured.

Result
Your AI specialist now has configured workspace access, role-based security, publishing status, and copy creation permissions. Users can interact with the AI specialist according to the access settings you defined.

What to do next
Verify that the access configuration works as expected by testing the AI specialist with users who have the required roles in the specified workspaces. Monitor AI specialist activity to confirm that access restrictions are properly enforced.

Create a copy of an AI specialist in the legacy AI Agent Studio

Create a copy of an AI specialist to configure different settings for different assignment groups

Before you begin
Role required: sn_aia.admin

About this task
The base AI specialist can be configured to cover general or the most likely situations. Creating a copy of an AI specialist allows you to make specific changes for different assignment groups. You can also specify exactly which roles have access to the copy.

You can't change the kinds of tasks an AI specialist has at the copy level, only their configurations.

Procedure
1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select the AI specialist you want to preview.
3. Select the **Management** tab in the AI specialist guided setup to configure the different access settings.

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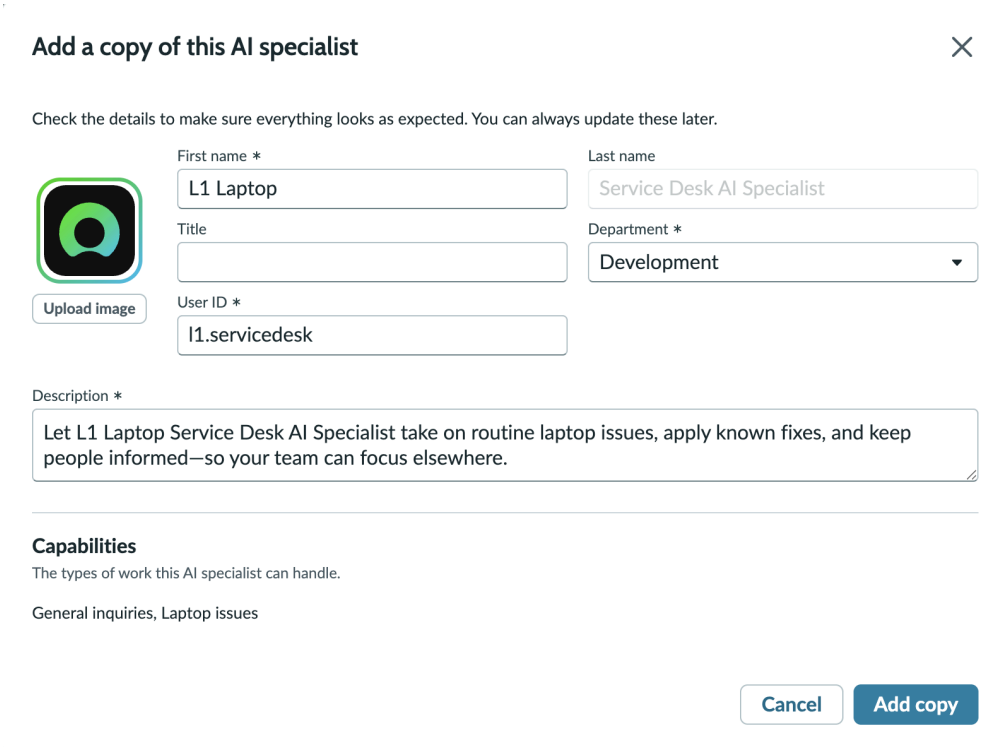
4. In the Copies section, select **Add copy**.
5. Review the basic details and profile of the base AI specialist, then make changes for the specific copy.

   For example, you may want to change the name of the AI specialist or its department or description.



6. Assign the copy of the AI specialist to an assignment group.
7. Select a manager for the AI specialist.

   A manager might be the Service Desk Manager whose team the AI specialist will be a part of.
8. Select the roles to access this copy of the AI specialist.

Result
A new instance of an AI specialist is configured for a new assignment group.

What to do next
The copy of the AI specialist can be made available to users by publishing and activating the base AI specialist.

Deactivate an AI specialist in the legacy AI Agent Studio

Deactivate an AI specialist in the legacy AI Agent Studio so that it no longer acts on records and lists.

Before you begin
Role required: sn_aia.admin

Procedure
1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. In the **AI specialists** tab, select the AI specialist you want to view the activity of.

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3. Select the more options button ⋯ to open the drop-down menu.
4. Select **Deactivate**.

Result
Your AI specialist is turned off.

What to do next
You can make changes to your AI specialist, such as changing the profile or modifying the tasks, to affect its behavior. Once you have made edits, you can preview the AI specialist and reactivate it later.

Reference for Autonomous Workforce

Reference for Autonomous Workforce provides additional information about the roles associated with AI specialists.

AI Specialist Manager role

The AI Specialist Manager role enables editing, testing, and monitoring AI specialists in AI Agent Studio and Service Operations Workspace.

Contains Roles

List of roles contained within the role.

- *sn_aia.viewer*
- *skill_manager*

Agentic workflows

Agentic workflows are AI-driven workflow orchestrations that use one or more AI agents to achieve a specific outcome. They go beyond single-step automation by dynamically planning, executing, and adapting actions based on context, data, and intermediate results.

Agentic workflows handle routine but variable procedures, such as investigation, remediation, and analysis, where the exact steps may differ from case to case.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Agentic workflows overview

Agentic workflows use multiple AI agents to achieve specific outcomes. Different workflows offer different available tasks. Many agentic workflow templates are available for you to activate, duplicate, or customize. For more information, see Activate an agentic workflow template and Duplicate an agentic workflow.

For more information about the in-product agentic AI experience, see In-product agentic AI. You can create UI actions for your agentic workflows in AI Agent Studio. Open the agentic workflow, navigate to the Select channels and access step in the guided setup, and create a UI action.

What an agentic workflow does

Agentic workflows can:

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- Achieve an outcome, not just complete a task

  The workflow focuses on resolving a business problem or completing a goal, rather than executing a single action.

- Coordinate multiple AI agents and skills

  Agentic workflows can invoke generative AI skills and AI agents as needed to gather information, reason over data, take action, and verify results.

- Adapt to variability

  Workflows can adjust execution paths based on conditions, findings, or system responses, making them suitable for non-deterministic scenarios such as troubleshooting or analysis.

- Operate across systems and records

  Agentic workflows interact with the ServiceNow AI Platform and connected systems to read data, update records, and trigger downstream actions.

How agentic workflows are used

Agentic workflows are commonly used to:

- Resolve tasks that follow a repeatable decision pattern but vary in execution.
- Investigate issues by gathering and analyzing contextual data.
- Execute remediation steps based on findings.
- Assist users with analytical or exploratory workflows.

Depending on the product and configuration, agentic workflows can be triggered automatically or initiated by a user through a contextual UI or action.

Available agentic workflows

The following tables describe the available agentic workflows that are included in the ServiceNow applications, grouped by workflow area.

IT and digital operations

Product	Available agentic workflows
Enterprise Asset Management	• Help repair enterprise assets • Help manage enterprise asset requests
IT Operations Management	ITOM Visibility • Pattern diagnostic • Analyze potential impact • Firewall management task creation ITOM AIOps

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Product	Available agentic workflows
	• Triage and analyze alerts • Analyze alert impact • Analyze potential impact • Manage alerts autonomously • Agent Client Collector (ACC) diagnostic workflow
Now Assist for Operational Technology Service Management (OTSM)	Generate OT KB articles agentic workflow
Operational Technology (OT) Manager Foundation	Import the OT device spreadsheet into OT CMDB
ServiceNow Otto for Enterprise Architecture (EA)	Generate enterprise architecture diagram
ServiceNow Otto for Hardware Asset Management (HAM)	• Help manage hardware asset requests • Help repair hardware assets
ServiceNow Otto for IT Service Management (ITSM)	• Assess conflicts for a change request • Assess quality of a change request • Create outages for a change request • Create standard change request • Create standard change template proposal • DEX issue diagnosis and resolution • Explain SLA • Generate change request plans • Generate post incident reviews • Incident assist • Investigate and resolve ITSM incidents • Manage Microsoft 365 group members • Notify users with Twilio • Schedule a change • Suggest configuration items for a change request • Triage and categorize ITSM incidents • Who is On Call • Wrap-up and resolve ITSM incidents

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Product	Available agentic workflows
ServiceNow Otto for Software Asset Management (SAM)	• Create software reclamation rule • Evaluate software removal candidate • Help manage software asset requests
ServiceNow Otto for Strategic Portfolio Management	• Generate Agile stories • Monitor project tasks

Security and Risk

Product	Available agentic workflows
ServiceNow Otto for Integrated Risk Management (IRM)	• Generate regulatory action plans • Get regulatory analysis • Identify risks for an entity • Optimize issue resolution
ServiceNow Otto for Operational Sustainability Management	Generate carbon calculations for metrics
ServiceNow Otto for Security Incident Response (SIR)	• Analyze security operations metrics • Close security incident • Generate SIR shift handover report • Resolve security incident
Vulnerability Response	• Retrieve Vulnerability and exposure data with generative AI • Assess your exposure to vulnerabilities • Analyze vulnerability remediation status • Security Exposure 360

Customer experiences (CRM)

Product	Available agentic workflows
Financial Services Operations (FSO)	Help resolve friendly fraud disputes

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Product	Available agentic workflows
ServiceNow Otto for Customer Service Management (CSM)	• Accelerate complaint case handling • Provide Customer 360 insights • Triage cases
Field Service Management	Create a work order
ServiceNow Otto for Manufacturing Commercial Operations (MCO)	Execute recall campaigns faster
ServiceNow Otto for Public Sector Digital Services (PSDS)	Help manage public information requests
Sales Customer Relationship Management	Help nurture new leads
Customer Success Management	• Analyze risk and recommend solutions • Draft and schedule touchpoint meetings • Monitor engagement health • Support renewals and expansions
Telecommunications, Media, and Technology (TMT)	• Analyze network incident • Customer voice quality issue resolutions • Help remediate bill issues • Service test and repair • Smart Actions for Telecom
Service Exchange	• Service Exchange Knowledge Assistant • Service Exchange onboarding
ServiceNow Otto for Care Team Operations	Request care team assistance

Employee experiences

Product	Available agentic workflows
Now Assist for Finance and Supply Chain (FSC)	Conversational intake for sourcing and procurement
Purchase Order Management	• Define PO exception mitigation strategy • Email Intent to Action

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Product	Available agentic workflows
Contract Management Pro	• Conversational contract search and insights • Manage contract repository
ServiceNow Otto for Core Business Suite (CBS)	CBS setup
ServiceNow Otto for Health and Safety	• Create actions for safety incidents • Help resolve health and safety cases agentic workflow • Health safety incident patterns assistant agentic workflow
ServiceNow Otto for HR Service Delivery (HRSD)	• Help resolve tuition requests • Help resolve tuition reimbursement requests • Predict service and transfer HR cases • Resolve noncritical HR cases • Resolve critical HR cases • Generate onboarding ramp-up plan • Recommend catalog and order guide tasks in Onboarding Journey • Offboarding knowledge transfer plan generation • Schedule interviews
Legal Service Delivery	• Conversational contract search and insights • Triage legal requests
ServiceNow Otto for Supplier Lifecycle Operations (SLO)	Email intent to action
ServiceNow Otto for Workplace Service Delivery (WSD)	• Automate map updates • Help manage workplace reservations • Manage temporary space closures • Optimize cleaning activities • Process images for new tasks • Workplace Concierge

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AI Platform

Product	Available agentic workflows
Now Assist for Zero Copy Connector	Explore ERP models
Now Assist in Notifications	Email Intent to Action
Now Assist Platform	• Analyze incident trends • Classify tasks • Error Analysis and Remediation workflow • Generate my work plan • Generate resolution plans • Help optimize team productivity • Identify ways to improve services • Investigate IT problems • Notification agent • Process images for tasks • Suggest survey responses
ServiceNow Otto for Configuration Management Database (CMDB)	• Create configuration item • Provide advice on CMDB governance • Search CMDB
ServiceNow Otto for Vault	• Access observer configuration • Classify assets with ServiceNow Vault agents • Field encryption and auto-generate access policies • Field encryption with Vault module • Securing custom apps with Vault agents • Summarize access observer logs

App development

Product	Available agentic workflows
Build Agent	Create in-app agents, skills, and workflows
ServiceNow Otto for Creator	Create a theme using ServiceNow Otto®

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In-product experience for agentic workflows

Dedicated spaces in workspaces and in the Core UI enable you to use agentic workflows directly in record forms. You can view agentic workflow progress and previous executions, and you can answer follow-up questions for ones that require human supervision.

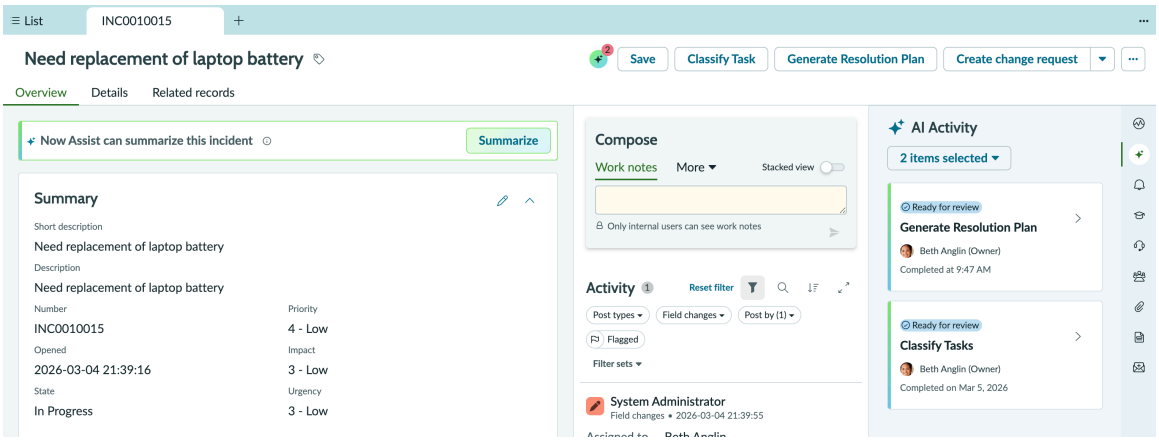
Agentic AI in the Core UI and workspaces

Agentic workflows can help you accomplish complex tasks, such as generating resolution notes for cases and incidents or investigating problems and root causes. You can view agentic workflows running on a record in the AI Workflows panel, available in both the Core UI form and in workspaces. For agentic workflows that require human supervision, you can answer questions, approve next steps, or provide other input. In addition to monitoring current progress, you can review historical runs to compare results.

To create UI actions for your agentic workflows, open the agentic workflow in AI Agent Studio, navigate to the Select channels and access step in the guided setup, and create a UI action.

If the AI Workflows panel is not visible, check the following:

- Ensure that the property *com.glide.agentic_processes_view.enabled* is set to `true`.
- Check whether the Workspace user preferences have **Show the sidebar** toggled on. If this setting is not enabled, the AI Workflows panel will not display. To access this setting, select the profile icon at the top right of the screen, then select **Preferences**. The setting is located on the Workspace tab.



Agentic workflow execution list

The list of agentic workflow cards can be filtered by execution state, and you can change the active filters at any time.

Note: The *Ready for review* state differs from the *Completed* state in that the former indicates the workflow has generated some output. Agentic workflows without an output are marked only as *Completed*.

The *Supervised by* field identifies the user responsible for answering follow-up questions. Only the specified user can provide answers to progress the agentic workflow, though others can view the questions asked.

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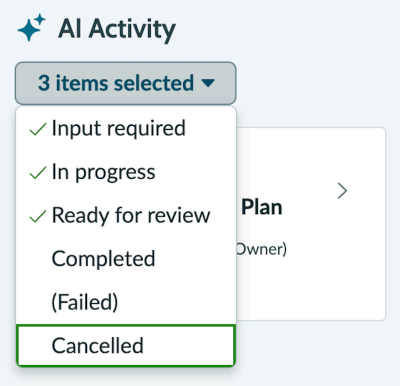


Each card displays the current or final processing message. To view the full list of processing messages, select the agentic workflow card to open the details.

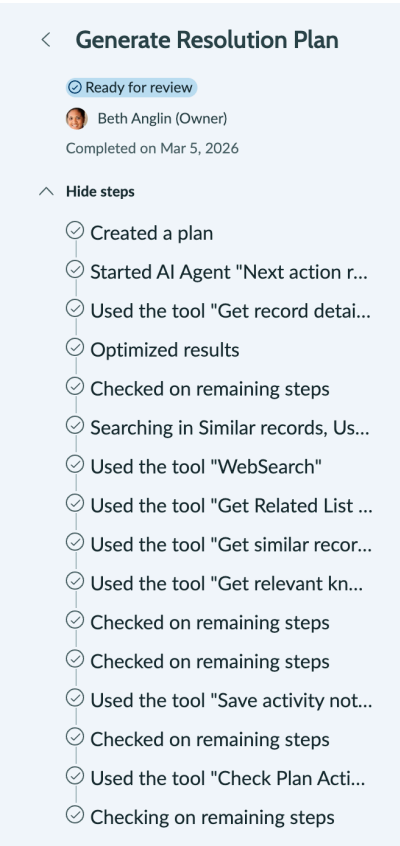
For currently running workflows, time estimates based on previous executions are displayed. For completed workflows, the cards show the total time taken.

The execution list also displays the results of any workflows triggered in the ServiceNow Otto panel or triggered automatically by events, once they are complete.

Agentic workflow execution details

When you select a specific agentic workflow, you can view its processing messages and history. Processing messages indicate which steps the agentic workflow has already completed and which are still in progress.

You can modify the processing messages for an AI agent or tool in AI Agent Studio. For an AI agent, open the AI agent and go to the Select channels and access step. For a tool, open the AI agent, go to the Add tools and information step, and select the tool to open the form modal.



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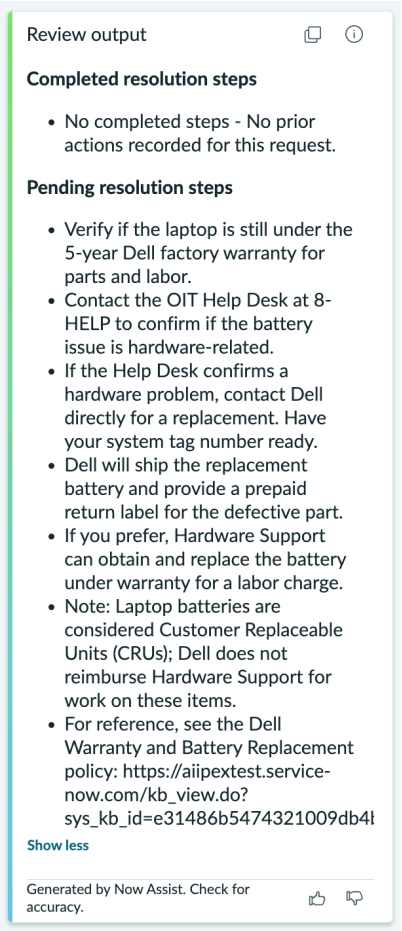
The history section of the card can display previous answers to follow-up questions. For completed agentic workflows, you can review the final output in the history if one exists. When an output is available, you can view the sources behind the AI's reasoning by selecting the information icon. Citations can include Knowledge Base articles and lists of records.

To copy the text of the final output of an agentic workflow, select the copy icon.



Fields updated with agentic AI

When an agentic workflow changes the value of a field, ServiceNow Otto displays a label beneath the field value indicating that the value was modified by AI.

AI presence indicator

While an agentic workflow is in progress on a record, an icon appears at the top of the record form alongside other UI actions. Selecting it shows how many agentic workflows are running on the record and the general status of each.

To cancel an agentic workflow that is in progress, select the more options icon on the agentic workflow card, and then select **Cancel**.

Alerts for agentic workflow status changes and required input

When an agentic workflow changes states, such as when it completes or has a follow-up question, an alert appears at the top of the screen. If the workflow generates an output, you can select the **Review** button to view the final result.

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Enable the in-product experience for agentic workflows

Enable the AI Workflows panel and UI actions for agentic workflows on forms in the Core UI and workspaces to track agentic AI executions.

Before you begin
Role required: admin

About this task
Agentic workflows can perform work on certain records, and you can track their progress or provide input in the AI Workflows panel available for forms and workspaces. See In-product agentic AI for more details about the functions and features of the AI Workflows panel.

The following task describes the process for enabling the system property that allows you to see the AI Workflows panel and see UI actions for agentic workflows: *`com.glide.agentic_processes_view.enabled`*.

To enable users to access agentic workflows with UI actions, you can open the agentic workflow in AI Agent Studio and navigate to the **Select channels and access** step. You can select a UI action as a possible way to access the workflow. See Select channels and access for agentic workflows for more information.

Procedure
1. Navigate to **All** > **System Properties** > **All Properties**.
2. Select **New**.
3. In the *Name* field, enter `com.glide.agentic_processes_view.enabled`.
4. In the *Value* field, enter `true`.

Result
The In-product agentic experience, including the AI Workflows panel, is available.

What to do next
Monitor agentic workflow execution on forms in the Core UI and workspaces, or create UI actions to grant users access.

Platform agentic workflows

You can use the available Platform agentic workflows to achieve business outcomes with self-executing autonomous AI agents.

Use the following agentic workflows that are available with ServiceNow AI Platform.

Available agentic workflows for Platform

Agentic workflow name	Description	Available AI agents
Analyze task trends	Detects recurring patterns, predicts disruptions, and enables proactive resolutions with actionable recommendations.	Issue trend analysis AI Agent

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Available agentic workflows for Platform (continued)

Agentic workflow name	Description	Available AI agents
Classify tasks	Triages tasks by updating fields, evaluating sentiment, and summarizing.	Record field value prediction AI agent
Generate my work plan	Provides a personalized work plan based on current work and historical data of previous work.	Prioritize work AI agent
Generate resolution plan	Analyzes tasks, generates resolution summaries, and updates comments or work notes.	• Next best action recommendation AI agent • Resolution Action AI Agent
Help optimize team productivity	Identifies backlog items, evaluates team member performance on previous assignments, and allocates work based on similarity to those previous assignments.	Work Allocator AI Agent
Identify escalation signals	Assesses and reports tickets that are at risk of escalation.	Proactive Escalation AI agent
Identify ways to improve service	Analyzes feedback, trends, and metrics and provides recommendations to help optimize processes.	Survey Analysis AI agent
Investigate problems	Provides insights from incident or problem details.	Problem investigation AI agent
Process images for tasks	Processes images and converts them to tasks.	• Image Processor Agent • Document and visual insights AI agent
Process task closure	Triages tickets for closure eligibility and guides through reviewing, documenting, and closing them.	Task Closure Eligibility AI Agent

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Available agentic workflows for Platform

(continued)

Agentic workflow name	Description	Available AI agents
Propose survey responses	Suggests answers for survey questions.	• Survey response suggestion AI agent • Survey filling data collection AI agent

Important: By default, all agentic workflows and AI agent records are read only.

To run the AI agents autonomously, you must either activate the agentic workflow template or duplicate the agentic workflow, and then proceed with the following steps:

- Activate the agentic workflow.
- Activate all agents within the agentic workflow.
- Activate the trigger to invoke the agentic workflow automatically. If you prefer to invoke it manually, activating the trigger isn't necessary.

Tools mapped to AI agents in agentic workflows

To find the tools mapped to AI agents used in the agentic workflows, you can perform the following steps:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**
2. In the Agentic workflows tab, select the agentic workflow.
3. In the **Describe and connect** step of the guided setup, select the AI agent you want to see the tools for.
4. Go to the **Add tools and information** step.
5. Review the tools mapped to the AI agent.
6. Repeat for all AI agents in the agentic workflow.

Agentic workflows and UI actions

To enable users to access agentic workflows with UI actions, you can open the agentic workflow in AI Agent Studio and navigate to the **Select channels and access** step. You can select a UI action as a possible way to access the workflow

If you don't see your UI actions after configuring it in AI Agent Studio, ensure that the property *com.glide.agentic_processes_view.enabled* is set to `true`.

There might be AI agents installed on your instance that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

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Platform Analyze task trends agentic workflow

Use the Platform Analyze task trends agentic workflow to detect recurring task patterns so that you can understand the root cause and get recommendations to prevent them from happening in future.

Analyze task trends overview

The Analyze task trends agentic workflow enhances task management by detecting recurring patterns, predicting disruptions, and suggesting proactive resolution to reduce downtime and improve reliability. Tasks are grouped and analyzed by AI to analyze common recurring issues and root causes, and there are citations for representative records for each group. The LLM then generates resolution recommendations based on the analysis and displays it to you.

After the analysis is generated, you can continue the conversation to do the following:

- Get a summary of each group analysis. You have to specify which group you would like to get a summary of.
- Download the analysis as a PDF or Word document.
- Get more information by asking follow-up questions. For example, you can ask why certain suggestions were generated.
- Analyze the next ten groups. Each analysis is done for ten groups at a time. You can continue analyzing more groups with the same filters within the same conversation, but the other actions for the previous group are no longer available.

The exact options for follow-up actions available can be configured.

By default, the Analyze task trends agentic workflow only analyzes closed tasks, but you can configure it to also investigate open tasks. See the *`Additional configuration`* section for how to enable that option.

The default input fields considered for analysis are the following:

- Short Description
- Description
- Resolution Notes
- Resolution Code
- Subcategory
- Category

You can con figure additional input fields using a Now Assist Skill Config Var Set [sn_nowassist_skill_config_var_set]. See the Additional configuration section for more information.

The agents, tools, and triggers associated with the Analyze task trends agentic workflow are provided by AI applications. You can activate the agentic workflow template by making triggers active and setting the display settings to include the ServiceNow Otto panel. If you want to change this agentic workflow's instructions, you must duplicate it, adjust the settings to suit your specific needs, and activate the duplicated version instead.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

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Prerequisites and setup

To access this workflow, you must have ServiceNow Otto for Platform installed on your instance. You can get this by installing any other AI application.

For this agentic workflow to behave as expected, you should have at least 500 records on your task table.

You must also configure Group Action Framework (GAF). See Group Action Framework for more information on what GAF is and how to set it up. The Incident, Case and HR Case tables use the default GAF records, but you can configure GAF for other task tables.

GAF is set up for certain applications for you. If you want the agentic workflow to have its own system of categorization different from the main application, you can clone an existing action strategy skill and use the clone in the var set described in the *Additional configuration* section. This enables you to train the groupings differently for different agentic resources.

Note: If you create a clone of an action strategy skill, ensure that *Optimized prediction* is enabled to use AI Search as your fallback. You can leave it unchecked if you don't use AI Search on your instance.

Role filtering

Required role: sn_uxc_gen_ai.platform_ai_analyze_trnds.

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with your applications have specific roles that come included with the application. If you select *Users with specific roles* for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

In the data access settings, you must also add the necessary roles to enable reading of the tables for the records you want to access for trend analysis. For example, you can add the itil role to the agentic workflow's list of approved roles so that it can access Incident records.

Additional configuration

You can change different settings related to the agentic workflow by changing values for the Now Assist Skill Config Var Set. To access the variable set and make changes, do the following while in the Platform AI Agents and Skills scope:

- Go to the Now Assist Skill Config [sn_nowassist_skill_config] table.
- Open the record named *Analyze Task Trends*.
- In the Now Assist Skill Config Var Set related list, select *Task Trends Input Config*.
- Edit the variable values.
- Save or update the record.

Time is a required filter specification in the user utterance. If you want users to be able to filter tasks by fields other than time, you can configure a *Task Table Config* var set. One for the Task table is provided as part of the application. If you want to create one for a specific table, you can create a Now Assist Skill Config Var Set [sn_nowassist_skill_config_var_set]. The *Skill Config* is `Analyze Task Trends`, and the *Config Type* is `Prompt Parameter Configuration`.

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Task Trends Input Config configuration

Config field	Description	Default value
Post Analysis Actions	List of possible follow-up actions a user can take before the agentic workflow completes.	• Get a summary • Get more info • Analyze next 10 groups • Download analysis
Analysis Time Frame	Range of time, in months, for the trends analyzer to look at records to identify trends. You can specify smaller ranges when running the agentic workflow, but this value defines the maximum limit.	3
Active record analysis	Enable this setting for the agentic workflow to include open tasks in its analysis. **Note:** If you select this option, you need to set the sn_uxc_gen_ai.active_records_enabled_tables system property and run a Group Action Framework script to ensure that the open tasks are grouped and accessible for analysis. 1. Go to the System Properties [sys_properties] table, then open the record for *sn_uxc_gen_ai.active_records_enabled_tables*. The **Value** should be set to `Incident`. Other tables for active records are not supported at this time. 2. Go to the GAF scheduled script execution [sn_gaf_sysauto_script] table, then open the record *GAF - Active Records Run Offline Flow*. Select **Execute now** to run the script. The job may take some time to complete.	False
GAF Record Limit	Number of records analyzed per GAF record grouping. See the previous *Prerequisites and setup* section.	8

Prompt parameter configuration

Config field	Description	Default value
Input Table	Table that these potential filter conditions belong to	Task

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Prompt parameter configuration (continued)

Config field	Description	Default value
Input Fields	Additional fields that the agentic workflow can consider as context for its analysis	None
Filter Fields	Fields that users can include when invoking the agentic workflow If you want to add new fields, use the dot-walked display-label format like the default values.	• Assignment group.Name • Service.Name • Configuration item.Name
Group Skill ID	The Group Action Framework grouping skill dedicated to arranging records into categories	No default
Action Skill ID	The Group Action Framework action skill dedicated to selecting and mapping representative records for each group and summarizing them See Group Action Framework for information about setting up GAF.	No default
Auto Classify Frequency	When the grouping and action skills run again to incorporate new records for analysis	No default **Note:** If you provide a Group Skill ID and an Action Skill ID but leave the Auto Classify Frequency empty, it will default to 24 hours.

Accessing the Analyze task trends agentic workflow

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Analyze task trends**.

The first step of the guided setup includes a complete list of included AI agents. Selecting the name of an AI agent opens it in a new browser tab, where you can see the full description, role, list of steps, and tools. Tools are displayed in the second step of the AI agent guided setup, Add tools and information.

In-product agentic AI and UI actions

Agentic workflows can be accessed in the Core UI and in workspaces in the AI Activity panel. From there, you can track their progress, provide or review input, and see the results of the work

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performed. For more information, see In-product agentic AI for more details about the AI Activity panel.

To enable users to access agentic workflows with UI actions, you can open the agentic workflow in AI Agent Studio and navigate to the **Select channels and access** step. You can select a UI action as a possible way to access the workflow

If you don't see your UI actions after configuring it in AI Agent Studio, ensure that the property *com.glide.agentic_processes_view.enabled* is set to `true`. See Enable the in-product experience for agentic workflows.

Testing the Analyze task trends agentic workflow

You can manually test an agentic workflow execution or access on the Testing page of AI Agent Studio if you have the sn.aia_admin role and all other roles configured in the security controls. Start a manual test, select a test type and the name of the workflow, and use utterances in the Task field like the following samples. See Test an agentic workflow execution.

If you want to evaluate the agentic workflow over many different execution logs, run an automated evaluation.

Sample utterance

After the workflow has been activated in AI Agent Studio, use similar queries to the following to run the agentic workflow in the *ServiceNow Otto* panel. You can also run this workflow on the Testing page of AI Agent Studio with the same utterance in the Task field if you have the sn.aia_admin role.

Each utterance must include the name of the table and the time frame to analyze. If the utterance doesn't include these things, the agentic workflow prompts you for more information.

The time frame specified by the user can't exceed the maximum value set by the Analysis time frame configuration.

When invoking the agentic workflow, if you want to use additional filters, such as assignment group, use the name of the field in the utterance. For example, "Analyze incident trends assigned to the Hardware group" is more likely to analyze the correct records than "Analyze Hardware incident trends."

- Analyze incident trends related to payment issues within the last two months
- Analyze case trends within the last month
- Analyze HR case trends with High Priority within the last two years
- Analyze incident and problem trends within the last two weeks

Troubleshooting

When running this agentic workflow, it's possible to see an error that states "I couldn't analyze as I didn't have the required resources." This error occurs when GAF isn't configured for the table you want to analyze. See Configure Group Action Framework for steps to configure GAF for the table. If you're still having issues after GAF is configured, reach out to Now Support.

AI agents used in the Analyze task trends agentic workflow

The following table lists the agents that are used in the Analyze task trends agentic workflow.

Important: In the Select channels and status step of each AI agent's guided setup, make sure that the Status toggle is enabled to activate the AI agent.

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AI agents names and descriptions in the Analyze task trends agentic workflow

AI agent name	AI agent description	Role required
Issue trend analysis AI agent	Analyzes grouped task data to identify recurring issues and root causes. Provides detailed, actionable recommendations using structured analysis.	sn_uxc_gen_ai.platform_ai_analyze_trnds

Other Platform agentic workflows

For more information on other agentic workflows that are associated with the Platform workflow, see Platform agentic workflows.

Platform Classify tasks agentic workflow

Use the Platform Classify tasks agentic workflow to gather relevant information about tasks automatically and make decisions about priorities and assignments.

Classify tasks overview

The Classify tasks agentic workflow can help improve efficiency and accuracy by automatically gathering information, prioritizing tasks, assigning teams, detecting sentiment, and generating task summaries.

The agents, tools, and triggers that are associated with the Classify tasks agentic workflow are provided by AI applications. You can activate the agentic workflow template by making triggers active and setting the display settings to include the ServiceNow Otto panel. If you want to change this agentic workflow's instructions, you must duplicate it, adjust the settings to suit your specific needs, and activate the duplicated version of the agentic workflow instead.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Prerequisites and setup

To access this workflow, you must have ServiceNow Otto for Platform installed on your instance, which you can get if you install any other AI application.

For this agentic workflow to behave as expected, you must also configure Group Action Framework (GAF). See Set up AI Search for Group Action Framework and Configure Group Action Framework for more information on getting started with GAF.

Role filtering

Required role: sn_uxc_gen_ai.platform_ai_classify_tasks

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with your applications have specific roles that come included with the application. If you select *`Users with specific roles`* for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

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In the data access settings, you must also add the necessary roles to enable reading of the tables for the records you want to classify. For example, you can add the itil role to the agentic workflow's list of approved roles so that it can access Incident records.

Additional configuration

You can change different settings related to the agentic workflow by changing values for the Now Assist Skill Config Var Set. To access the variable set and make changes, do the following while in the Platform AI Agents and Skills scope:

- Go to the Now Assist Skill Config [sn_nowassist_skill_config] table.
- Open the record named *`Task Classify Tasks Skill Config`*.
- In the Now Assist Skill Config Var Set related list, select *`Field Predictor`*.
- Edit the variable values.
- Save or update the record.

The Classify tasks configuration variable set includes the following variables. You can configure either the AIS fields or the GAF field for determining how the agentic workflow gathers what work the user has. If you configure both, GAF takes priority when running the agentic workflow. For more information about GAF, see Group Action Framework.

Classify tasks configuration

Config field	Description
Search Mode	Options include Keyword, Semantic, or Hybrid. Keyword-based searches look at individual phrases, while semantic-based searches rely on the phrasing of utterances as well. Hybrid utilizes both strategies. Default: Keyword
AIS Search Fields	Fields used by AI Search operations to find similar records for improved prediction context
Capability	OneExtend capability for enhanced field prediction functionality. See Generative AI Controller reference for more details.
GAF Config	Skill configuration for Group AI Framework (GAF).
AIS Return Fields	Fields returned by AI Search to the agentic workflow to base decisions on
GAF Config	Group Action Framework grouping configuration record, which is a collection of groups of records to make searching easier

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Classify tasks configuration (continued)

Config field	Description
AIS Search Profile	Profile for AI search, such as ServiceNow Otto for Virtual Agent.
Capability Payload	Server-side script to generate custom payloads for OneExtend capability integration
AIS Fallback Table	Table used if GAF is not configured
Return Fields	Field values returned from identified relevant records
Check for Issue Readiness	Uses the information provided by the Issue Readiness AI agent ⚠ **Warning:** Only enable if the Issue Readiness AI agent is active on your instance. Otherwise, the agentic workflow will not execute.
Fields	Field values to predict and update
Table	Table where you want to execute the agentic workflow on
Search Term Source	Options include Record-based and Utterance-based. Record-based derives search terms for generating context from the record itself. Utterance-based relies on the user-submitted utterance for search term options. Default: Record-based

Accessing the Classify tasks agentic workflow

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Classify tasks**.

The first step of the guided setup includes a complete list of included AI agents. Selecting the name of an AI agent opens it in a new browser tab, where you can see the full description, role, list of steps, and tools. Tools are displayed in the second step of the AI agent guided setup, Add tools and information.

In-product agentic AI and UI actions

Agentic workflows can be accessed in the Core UI and in workspaces in the AI Activity panel. From there, you can track their progress, provide or review input, and see the results of the work

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performed. For more information, see In-product agentic AI for more details about the AI Activity panel.

To enable users to access agentic workflows with UI actions, you can open the agentic workflow in AI Agent Studio and navigate to the **Select channels and access** step. You can select a UI action as a possible way to access the workflow

If you don't see your UI actions after configuring it in AI Agent Studio, ensure that the property *com.glide.agentic_processes_view.enabled* is set to `true`. See Enable the in-product experience for agentic workflows.

Testing the Classify tasks agentic workflow

You can manually test an agentic workflow execution or access on the Testing page of AI Agent Studio if you have the sn.aia_admin role and all other roles configured in the security controls. Start a manual test, select a test type and the name of the workflow, and use utterances in the Task field like the following samples. See Test an agentic workflow execution.

If you want to evaluate the agentic workflow over many different execution logs, run an automated evaluation.

Sample utterance

After the workflow has been activated in AI Agent Studio, enter these or similar phrases in the ServiceNow Otto panel to trigger the workflow. You must have the sn.now_assist_panel_user role to run the workflow. You can also run this workflow on the Testing page of AI Agent Studio with the same utterance in the Task field if you have the sn.aia_admin role.

- Populate the priority and assignment group for INC0001
- Populate the empty fields on INC0001
- Find the priority for INC001

AI agents used in the Classify tasks agentic workflow

The following table lists the agents that are used in the Classify tasks agentic workflow.

Important: In the Define availability step of each AI agent's guided setup, make sure that the Status toggle is enabled to activate the AI agent.

AI agents names and descriptions in the Classify tasks agentic workflow

AI agent name	AI agent description	Role required
Record field value prediction AI agent	Fetches, predicts, creates, and updates records with the provided details. Provides summary and justification for recommendations.	sn_uxc_gen_ai.platform_ai_field_predictor

Other Platform agentic workflows

For more information on other agentic workflows that are associated with the Platform workflow, see Platform agentic workflows.

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Platform Generate my work plan agentic workflow

Use the Platform Generate my work plan agentic workflow to create personalized work plans for currently assigned work.

Generate my work plan overview

The Generate my work plan agentic workflow creates personalized work plans based on current assigned work. This reduces manual effort and guesswork in work planning. The AI agents identify and retrieve all work assigned to the user, predict effort required to complete work, and generate an actionable work plan. Effort is estimated based on historical records related to the open work items. Generated work plans emphasize the highest priority work by examining the following information and can result in faster resolution and fewer missed SLAs.

- User sentiment
- Short description
- Priority
- Description
- Due date
- Escalation
- State
- Updated
- Number
- Impact
- SLA

Along with the plan itself, the agentic workflow also provides reasoning behind its decisions for creating the plan.

The agents, tools, and triggers associated with the Generate my work plan agentic workflow are provided by AI applications. You can activate the agentic workflow template by adding triggers and setting the display settings to include the ServiceNow Otto panel. To change this agentic workflow's instructions, duplicate it, adjust the settings to suit your specific needs, and activate the duplicated version instead.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Prerequisites and setup

To access this workflow, you must have ServiceNow Otto for Platform installed on your instance. You can get this by installing any other AI application.

Now LLM is not a supported LLM provider for the Generate my work plan agentic workflow.

Role filtering

Required role: sn_uxc_gen_ai.platform_ai_work_planner.

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with your applications have specific roles that come included with the application. If you select *`Users with specific roles`* for user access, you must

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configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

In the data access settings, add the necessary roles to enable reading of the tables for the records you want to access for potential work plans. For example, add the itil role to the agentic workflow's list of approved roles so that it can access Incident records.

Additional configuration

Change different settings related to the agentic workflow by changing values for the Now Assist Skill Config Var Set. To access the variable set and make changes, do the following while in the Platform AI Agents and Skills scope:

- Go to the Now Assist Skill Config [sn_nowassist_skill_config] table.
- Open the record named *`Generate my work plan config`*.
- In the Now Assist Skill Config Var Set related list, select *New*.
- Enter a name for your Config Var Set.
- Set Config Type to be either `User schedule` or `Generate my work plan`.
- Save the Var Set record.
- Set the variables for the config type.
- Save the Var Set.

The work plan config var set includes general variables for running the agentic workflow.

Work plan config type configurations

Config field	Description
Schedule job	Creates a scheduled job that automatically runs, allowing users to see updated prioritization suggestions after making progress in their work. Default: Unselected.
Schedule job frequency	How long after a record in the original work plan is updated for the agentic workflow to run again. Default: 30 minutes
Predict estimates	Predict estimated time to complete work per record.
Exclude task table	By default, certain fields are used for prioritizing work on the Task table. You can configure what fields to use on individual tables, such as the Incident table. Enable this to only plan for tables configured and not other records which are task or extension of task tables.
Max tasks	The maximum number of tasks that can be recommended to a user for their work plan. Default: 30 tasks

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The Incident config var set includes the following variables. Configure either the AIS fields or the GAF field for determining how the agentic workflow gathers what work the user has. If you configure GAF, it takes priority when running the agentic workflow. For more information about GAF, see Group Action Framework.

Use this config var set as a template to change any values for other tables, such as the Case or HR Case tables.

Note: If you select *Exclude task table* in the work plan config var set, only the tables that have these var sets configured are included for work in the suggested work plan.

Incident table config type configuration

Config field	Description
Table	Table for record types that someone can work on
Conditions	Filter criteria for determining eligible tasks
Record fields	Fields passed to the workflow for analysis
Time worked	Custom or edited field for specifying time worked. By default, the agentic workflow uses the *Time worked* field.
AIS Search Profile	Specific AI Search profile
AIS Search Fields	Fields AI Search looks at for determining similarity
AIS Return Fields	Fields returned by AI Search to the agentic workflow to base decisions on
GAF Config	Group Action Framework grouping configuration record, which is a collection of groups of records to make searching easier.
Assigned to field	The field for the user who works on the record. By default, the agentic workflow uses the *assigned_to* field.

Order by	JSON object array containing the ordering information for how work records are prioritized.
	
	Default is as follows. Any direction other than “DESC” is considered ascending in order.
	
	`[`
	`{ column: 'priority', direction: ''},`
	`{ column: 'due_date', direction: ''},`

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Incident table config type configuration (continued)

Config field	Description
	`{ column: 'escalation', direction: 'DESC' }, { column: 'sys_created', direction: 'DESC' } ]`

By default, the Generate my work plan agentic workflow relies on the User [sys_user] record's Schedule field. If there is no schedule defined on the User record, the workflow consults the Schedule [chm_schedule] table for the user. If neither are present, the assumed schedule is a weekday schedule from 8:00 a.m. to 5:00 p.m.

Change what tables and fields to look for schedule information with the *`User schedule`* config type.

Generate my work plan User schedule configuration

Config field	Description
Table	Table where user schedule information is stored
Conditions	(Optional) Conditions to determine what user schedule to associate with the user.
Schedule column	Field where specific schedule information is stored

Accessing the Generate my work plan agentic workflow

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Generate my work plan**.

The first step of the guided setup includes a complete list of included AI agents. Selecting the name of an AI agent opens it in AI Agent Studio, where you can see the full description, role, list of steps, and tools. Tools are displayed in the second step of the AI agent guided setup, Add tools and information.

In-product agentic AI and UI actions

Access agentic workflows in the Core UI and in workspaces in the AI Activity panel. From there, track their progress, provide or review input, and see the results of the work performed. For more information, see In-product agentic AI for more details about the AI Activity panel.

To enable users to access agentic workflows with UI actions, open the agentic workflow in AI Agent Studio and navigate to the **Select channels and access** step. Select a UI action as a possible way to access the workflow.

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If you don't see your UI actions after configuring it in AI Agent Studio, verify that the property *com.glide.agentic_processes_view.enabled* is set to `true`. See Enable the in-product experience for agentic workflows.

Testing the Generate my work plan agentic workflow

Manually test an agentic workflow execution or access on the Testing page of AI Agent Studio if you have the sn.aia_admin role and all other roles configured in the security controls. Start a manual test, select a test type and the name of the workflow, and use utterances in the Task field like the following samples. See Test an agentic workflow execution.

To evaluate the agentic workflow over many different execution logs, run an automated evaluation.

Sample utterance

After the workflow is activated in AI Agent Studio, enter `What should I work on today?` or similar phrases in the ServiceNow Otto panel to trigger the workflow. You must have the sn.now_assist_panel_user role to run the workflow. Also run this workflow on the Testing page of AI Agent Studio with the same utterance in the Task field if you have the sn.aia_admin role.

Users must have the sn_uxc_gen_ai.platform_ai_work_planner role to execute the agentic workflow.

AI agents used in the Generate my work plan agentic workflow

The following table lists the agents used in the Generate my work plan agentic workflow.

Important: In the Select channels and status step of each AI agent's guided setup, verify that the Status toggle is enabled to activate the AI agent.

AI agents names and descriptions in the Generate my work plan agentic workflow

AI agent name	AI agent description	Role required
Prioritize work AI Agent	Dynamically orders tasks based on parameters like urgency, priority, SLAs, sentiment, and impact.	sn_uxc_gen_ai.platform_ai_work_planner

Other Platform agentic workflows

For more information on other agentic workflows associated with the Platform workflow, see Platform agentic workflows.

Platform Generate resolution plan agentic workflow

Use the Platform Generate resolution plan agentic workflow to fetch task record details, generate resolution summary steps, and update comments or work notes.

Generate resolution plan overview

The Generate resolution plan agentic workflow can help resolve tasks by collecting record details and generating resolution summaries that can be added to comments or work notes. Due to the dynamic nature of AI agents, this agentic workflow can be used for tasks that require complex logic even when provided with minimal details.

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The agents, tools, and triggers that are associated with the Generate resolution plan agentic workflow are provided by AI applications. You can activate the agentic workflow template by making triggers active and setting the display settings to include the ServiceNow Otto panel. If you want to change this agentic workflow's instructions, you must duplicate it, adjust the settings to suit your specific needs, and activate the duplicated version of the agentic workflow instead.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Prerequisites and setup

To access this workflow, you must have ServiceNow Otto for Platform installed on your instance, which you can get if you install any other AI application.

For this agentic workflow to behave as expected, you must also configure Group Action Framework (GAF). See Set up AI Search for Group Action Framework and Configure Group Action Framework for more information on getting started with GAF.

Role filtering

Required role: sn_uxc_gen_ai.platform_ai_grp_workflow.

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with your applications have specific roles that come included with the application. If you select *`Users with specific roles`* for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

In the data access settings, you must also add the necessary roles to enable reading of the tables for the records you want to access for potential resolution plans. For example, you can add the itil role to the agentic workflow's list of approved roles so that it can access Incident records.

Additional configuration

You can change different settings related to the agentic workflow by changing values for the Now Assist Skill Config Var Set. To access the variable set and make changes, do the following while in the Platform AI Agents and Skills scope:

- Go to the Now Assist Skill Config [sn_nowassist_skill_config] table.
- Open the record named *`Generate Resolution Plans Skill Config`*.
- In the Now Assist Skill Config Var Set related list, select the configuration variable set you want to edit.
- Set the variables for the configuration type.
- Save the Var Set.

The Generate resolution plan configuration variable set includes the following variables. You can configure either the AIS fields or the GAF field for determining how the agentic workflow gathers what work the user has. If you configure both, GAF takes priority when running the agentic workflow. For more information about GAF, see Group Action Framework.

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Review button params configuration

Config field	Description	Default value
Show button	Display a UI action for reviewing a generated resolution plan	Enabled
Button label	Label for the UI action button to review a generated resolution plan	Review

Next Best Action Recommender configuration

Config field	Description
Search Mode	Options include Keyword, Semantic, or Hybrid. Keyword-based searches look at individual phrases, while semantic-based searches rely on the phrasing of utterances as well. Hybrid utilizes both strategies. Default: Keyword
Include Decomposition Agent in the workflow	Determines whether the Decomposition Agent, one of the agents in the workflow, is used. If this is unselected, the Next best action recommendation AI agent still runs.
use_websearch	Enables the agentic workflow to use web searches to help collect relevant information for generating the resolution plan
AIS Semantic Indexed Names	???A
script_to_run	Optional script to run when the Next best action recommendation AI agent executes
save_activity	Determines whether a tool creates an activity record on the sys_aia_agent_execution_activity table when saving resolution notes
AIS Search Profile	Profile for AI search, such as ServiceNow Otto for Virtual Agent.
Return Fields	Field values returned from identified relevant records
GAF Config	Group Action Framework grouping configuration record, which is a collection of groups of records to make searching easier

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Next Best Action Recommender configuration (continued)

Config field	Description
AIS Search Fields	Fields used by AI Search to determine what work a user has
AI Search Matching Threshold	Threshold value for whether AI Search considers a record to be related and relevant
Table	Table which has the records you want to generate resolution plans for
Related List Tables	Tables which contain related records that you want the AI agent to explore before generating resolution plans

Decomposition Agent configuration

Config field	Description
agent	Name of the AI agent to use for generating resolution actions
tablesinfo	Table information for providing context for generated action steps

Accessing the Generate resolution plan agentic workflow

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Generate Resolution Plan**.

The first step of the guided setup includes a complete list of included AI agents. Selecting the name of an AI agent opens it in a new browser tab, where you can see the full description, role, list of steps, and tools. Tools are displayed in the second step of the AI agent guided setup, Add tools and information.

In-product agentic AI and UI actions

Agentic workflows can be accessed in the Core UI and in workspaces in the AI Activity panel. From there, you can track their progress, provide or review input, and see the results of the work performed. For more information, see In-product agentic AI for more details about the AI Activity panel.

To enable users to access agentic workflows with UI actions, you can open the agentic workflow in AI Agent Studio and navigate to the **Select channels and access** step. You can select a UI action as a possible way to access the workflow

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If you don't see your UI actions after configuring it in AI Agent Studio, ensure that the property *com.glide.agentic_processes_view.enabled* is set to `true`. See Enable the in-product experience for agentic workflows.

Testing the Generate Resolution Plan agentic workflow

You can manually test an agentic workflow execution or access on the Testing page of AI Agent Studio if you have the sn.aia_admin role and all other roles configured in the security controls. Start a manual test, select a test type and the name of the workflow, and use utterances in the Task field like the following samples. See Test an agentic workflow execution.

If you want to evaluate the agentic workflow over many different execution logs, run an automated evaluation.

Sample utterance

After the workflow has been activated in AI Agent Studio, enter these or similar phrases in the ServiceNow Otto panel to trigger the workflow. You must have the sn.now_assist_panel_user role to run the workflow. You can also run this workflow on the Testing page of AI Agent Studio with the same utterance in the Task field if you have the sn.aia_admin role.

- Generate resolution plan for INC0001
- Create detailed resolution steps for INC0001
- Resolve INC0001

UI action

After upgrading to the latest version of the Generate resolution plan agentic workflow, previous UI actions associated with the workflow may need to be recreated.

1. Find the UI action in the UI Action [sys_ui_action] table by searching for "Generate Resolution Plan".
2. Deactivate the existing UI action.
3. Repair the sn-ai-engagement-experience plugin.
4. Ensure that the *com.glide.agentic_processes_view.enabled* system property is enabled.
5. Open the agentic workflow in AI Agent Studio, scroll down to the **Channels** section, and add a new UI action.

AI agents used in the Generate resolution plan agentic workflow

The following table lists the agents that are used in the Generate resolution plan agentic workflow.

Important: In the Select channels and status step of each AI agent's guided setup, make sure that the Status toggle is enabled to activate the AI agent.

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AI agents names and descriptions in the Generate resolution plan agentic workflow

AI agent name	AI agent description	Role required
Next best action recommendation AI agent	Identifies the steps for resolving tasks by referencing the similar task details and reviewing knowledge articles.	sn_uxc_gen_ai.platform_ai_next_best_action
Decomposition Agent	Analyzes and breaks down each previous resolution step into smaller, actionable substeps, then creates records	sn_uxc_gen_ai.platform_ai_resolution_action_ai_agent

Other Platform agentic workflows

For more information on other agentic workflows associated with the Platform workflow, see Platform agentic workflows.

Platform Help optimize team productivity agentic workflow

Use the Platform Help optimize team productivity agentic workflow to gather relevant information about tasks automatically and make decisions about priorities and assignments.

Help optimize team productivity overview

The Help optimize team productivity agentic workflow offers multiple capabilities that can enhance your team's performance. Improving assignments based on previous work and balancing workloads, the agentic workflow can address problems that traditional work assignment rules may have.

The agentic workflow performs the following tasks:

- Analyzes historical performance of team members
- Calculates workloads relative to each team member's typical capacity
- Enables proactive team management with data-driven insights

The agents, tools, and triggers that are associated with the Help optimize team productivity agentic workflow are provided by AI applications. You can activate the agentic workflow template by making triggers active and setting the display settings to include the ServiceNow Otto panel. If you want to change this agentic workflow's instructions, you must duplicate it, adjust the settings to suit your specific needs, and activate the duplicated version of the agentic workflow instead.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Prerequisites and setup

To access this workflow, you must have ServiceNow Otto for Platform installed on your instance, which you can get if you install any other AI application.

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Role filtering

Required role: sn_uxc_gen_ai.platform_ai_help_allocate_work.

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with your applications have specific roles that come included with the application. If you select *Users with specific roles* for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

In the data access settings, you must also add the necessary roles to enable reading of the tables for records assigned to team members. For example, you can add the itil role to the agentic workflow's list of approved roles so that it can access Incident records.

Additional configuration

You can change different settings related to the agentic workflow by changing values for the Now Assist Skill Config Var Set. To access the variable set and make changes, do the following while in the Platform AI Agents and Skills scope:

- Go to the Now Assist Skill Config [sn_nowassist_skill_config] table.
- Open the record named *Optimal Ticket Assignment*.
- In the Now Assist Skill Config Var Set related list, select *Work Allocator*.
- Edit the variable values.
- Save or update the record.

The Help optimize team productivity configuration variable sets include the following variables.

Help optimize team productivity Work Allocator configuration

Config field	Description
Tickets per batch	The number of tickets processed by the agentic workflow for evaluation. Default: 25
Metrics Calculation Window	How many days back to include in metric calculations. Default: 600
Assignment Group	The assignment group whose tickets are used for evaluation, analysis, and recommendations.
Table for Query	The table used to gather information about the work assigned to team members.
Backlog Ticket Query	Filter conditions for determining what counts as "backlog" work for team members to complete.

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Help optimize team productivity Work Allocator configuration (continued)

Config field	Description
Similarity Score Table	The table used for gathering information about other work that has been previously assigned to team members.
Similarity Score Fields	Fields to consider for calculating which tasks are similar to the one that needs assigning. For example, selecting category and subcategory as similarity score fields includes those fields in calculating whether a team member has worked on similar assignments within the metric calculation window.

Help optimize team productivity Trigger frequency configuration

Config field	Description
Enable scheduled job	Enable the agentic workflow to run on its own using a scheduled job.
Assignment Group	The assignment group whose tickets are used for evaluation, analysis, and recommendations.
Scheduled job	The name of the scheduled job that runs to trigger the agentic workflow.
Scheduler frequency	How often the scheduled job runs and triggers the agentic workflow.

Accessing the Help optimize team productivity agentic workflow

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Help optimize team productivity**.

The first step of the guided setup includes a complete list of included AI agents. Selecting the name of an AI agent opens it in a new browser tab, where you can see the full description, role, list of steps, and tools. Tools are displayed in the second step of the AI agent guided setup, Add tools and information.

Testing the Help optimize team productivity agentic workflow

You can manually test an agentic workflow execution or access on the Testing page of AI Agent Studio if you have the sn.aia_admin role and all other roles configured in the security controls. Start a manual test, select a test type and the name of the workflow, and use utterances in the Task field like the following samples. See Test an agentic workflow execution.

If you want to evaluate the agentic workflow over many different execution logs, run an automated evaluation.

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Sample utterance

After the workflow has been activated in AI Agent Studio, enter "Give me optimized assignment evaluations for the Software assignment group" or similar phrases in the ServiceNow Otto panel to trigger the workflow. You must name the specific assignment group you're allocating work for.

You must have the sn.now_assist_panel_user role to run the workflow. You can also run this workflow on the Testing page of AI Agent Studio with the same utterance in the Task field if you have the sn.aia_admin role.

AI agents used in the Help optimize team productivity agentic workflow

The following table lists the agents that are used in the Help optimize team productivity agentic workflow.

Important: In the Define availability step of each AI agent's guided setup, make sure that the Status toggle is enabled to activate the AI agent.

AI agents names and descriptions in the Help optimize team productivity agentic workflow

AI agent name	AI agent description	Role required
Work Allocator AI Agent	Streamlines ticket management by automatically fetching backlog tickets, evaluating agent workloads and performance metrics, and assigning tickets to agents in a way that optimizes distribution and operational efficiency.	sn_uxc_gen_ai.platform_ai_help_allocate_work

Other Platform agentic workflows

For more information on other agentic workflows that are associated with the Platform workflow, see Platform agentic workflows.

Platform Identify ways to improve service agentic workflow

Use the Platform Identify ways to improve service agentic workflow to analyze feedback, performance metrics, and historical trends that identify areas for service improvement.

Identify ways to improve service overview

The Identify ways to improve service agentic workflow optimizes service delivery and customer satisfaction by analyzing feedback, metrics, and trends to provide actionable process improvement recommendations. After the analysis is generated, you can continue the conversation to ask follow-up questions or download the analysis as a PDF or Word document.

AI applications provide the agents, tools, and triggers for the Identify ways to improve service agentic workflow. You can activate the agentic workflow template by making triggers active and setting the display settings to include the ServiceNow Otto panel. To change this agentic workflow's instructions, duplicate it, adjust the settings to suit your specific needs, and activate the duplicated version instead.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

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Prerequisites and setup

To access this workflow, you must have ServiceNow Otto for Platform installed on your instance. You can get this by installing any other AI application.

Because this agentic workflow relies on survey data, you must have Assessment records associated with task tables to analyze.

Role filtering

Required role: sn_uxc_gen_ai.platform_ai_improve_services.

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with your applications have specific roles that come included with the application. If you select *`Users with specific roles`* for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

In the data access settings, add the necessary roles to enable reading of the Assessment table and other required tables. For example, add the itil role to the agentic workflow's list of approved roles so it can access Incident records.

Additional configuration

You can change agentic workflow settings by changing values for the Now Assist Skill Config Var Set. To access the variable set and make changes, do the following while in the Platform AI Agents and Skills scope:

- Go to the Now Assist Skill Config [sn_nowassist_skill_config] table.
- Open the record named *`Identify ways to improve service`*.
- In the Now Assist Skill Config Var Set related list, select *`Survey analysis input config`*.
- Edit the variable values.
- Save or update the record.

Survey analysis input configuration

Config field	Description	Default value
Maximum number of records	Maximum number of records included in analysis	500
Analysis Time Frame	Time range, in months, for the survey analyzer to examine records to identify trends. Users can specify smaller ranges when running the agentic workflow, but this value defines the maximum limit.	3

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Survey analysis input configuration (continued)

Config field	Description	Default value
Post Analysis Actions	List of possible follow-up actions a user can take before the agentic workflow completes.	• Download analysis • Get more info

Survey Filter configuration

Config field	Description	Default value
Table name	Table that the filter applies to	Assessment Instance [asmt_assessment_instance]
Fields	Fields that the user can add when invoking the agentic workflow	Metric type.Name

Task Filter configuration

The following is the default configuration for the Task table. You can make additional Skill Config Var Sets for other tables, such as Incident or Case.

Config field	Description	Default value
Table name	Table that the filter applies to	Task [task]
Fields	Fields that the user can add when invoking the agentic workflow	• Assignment group.Name • Service.Name • Configuration item.Name

Accessing the Identify ways to improve service agentic workflow

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Identify ways to improve service**.

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The first step of the guided setup includes a complete list of included AI agents. Selecting an AI agent name opens it in a new browser tab, where you can see the full description, role, list of steps, and tools. Tools are displayed in the second step of the AI agent guided setup, Add tools and information.

In-product agentic AI and UI actions

You can access agentic workflows in the Core UI and in workspaces in the AI Activity panel. From there, you can track their progress, provide or review input, and see the results of the work performed. For more information, see In-product agentic AI for more details about the AI Activity panel.

To enable users to access agentic workflows with UI actions, open the agentic workflow in AI Agent Studio and navigate to the **Select channels and access** step. You can select a UI action as a possible way to access the workflow

If you don't see your UI actions after configuring it in AI Agent Studio, verify that the property *com.glide.agentic_processes_view.enabled* is set to `true`. See Enable the in-product experience for agentic workflows.

Testing the Identify ways to improve service agentic workflow

You can manually test an agentic workflow execution or access on the Testing page of AI Agent Studio if you have the sn.aia_admin role and all other roles configured in the security controls. Start a manual test, select a test type and the workflow name, and use utterances in the Task field like the following samples. See Test an agentic workflow execution.

To evaluate the agentic workflow over many different execution logs, run an automated evaluation.

Sample utterance

After the workflow is activated in AI Agent Studio, enter similar phrases to the following in the ServiceNow Otto panel to trigger the workflow. You can also run this workflow on the Testing page of AI Agent Studio with the same utterance in the Task field if you have the sn.aia_admin role.

When invoking the agentic workflow, if you want to use additional filters, such as metric name or category, use the name of the field in the utterance. For example, "Identify ways to improve services for the Hardware category" is more likely to analyze the correct records than "Identify ways to improve Hardware."

- Make suggestions for continuous service improvement based on surveys within the last 3 months
- Summarize surveys to improve Hardware services based on survey results within the last 2 years
- Give ideas for improving case resolution based on Post-Case metric type survey results over the last month

AI agents used in the Identify ways to improve service agentic workflow

The following table lists the agents used in the Identify ways to improve service agentic workflow.

Important: In the Select channels and access of each AI agent's guided setup, verify that the Status toggle is enabled to activate the AI agent.

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AI agents names and descriptions in the Identify ways to improve service agentic workflow

AI agent name	AI agent description	Role required
Survey Analysis AI agent	Acquires survey data within the specified time range and analyzes it for ways to improve services	sn_uxc_gen_ai.platform_ai_improve_services

Other Platform agentic workflows

For more information on other agentic workflows associated with the Platform workflow, see Platform agentic workflows.

Platform Investigate problems agentic workflow

Use the Platform Investigate problems agentic workflow to perform root cause and risk assessments so that you can create an actionable resolution plan for a problem.

Investigate problems overview

The Investigate problems agentic workflow can help to assist agents and subject matter experts (SMEs) in investigating problems in their IT landscape. A problem can be associated with many incidents, and any investigator must be aware of a large number of details when looking at a problem. The agentic workflow can help provide insights from the incident and problem details and suggest plans or possible solutions.

The agents, tools, and triggers that are associated with the investigate problems agentic workflow are provided by AI applications. You can activate the agentic workflow template by making triggers active and setting the display settings to include the ServiceNow Otto panel. If you want to change this agentic workflow's instructions, you must duplicate it, adjust the settings to suit your specific needs, and activate the duplicated version of the agentic workflow instead.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Prerequisites and setup

To access this workflow, you must have ServiceNow Otto for Platform installed on your instance, which you can get if you install any other AI application.

Because this agentic workflow analyzes problems and incidents related to those problems, you must have records on the Problem and Incident table.

Role filtering

Required role: sn_uxc_gen_ai.platform_ai_problem_investigator.

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with your applications have specific roles that come included with the application. If you select *`Users with specific roles`* for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

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In the data access settings, you must also add the necessary roles to enable reading of the tables for Problems and related records. For example, you can add the itil role to the agentic workflow's list of approved roles so that it can access Incident records.

Accessing the Investigate problems agentic workflow

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Investigate problems**.

The first step of the guided setup includes a complete list of included AI agents. Selecting the name of an AI agent opens it in a new browser tab, where you can see the full description, role, list of steps, and tools. Tools are displayed in the second step of the AI agent guided setup, Add tools and information.

In-product agentic AI and UI actions

Agentic workflows can be accessed in the Core UI and in workspaces in the AI Activity panel. From there, you can track their progress, provide or review input, and see the results of the work performed. For more information, see In-product agentic AI for more details about the AI Activity panel.

To enable users to access agentic workflows with UI actions, you can open the agentic workflow in AI Agent Studio and navigate to the **Select channels and access** step. You can select a UI action as a possible way to access the workflow

If you don't see your UI actions after configuring it in AI Agent Studio, ensure that the property *com.glide.agentic_processes_view.enabled* is set to `true`. See Enable the in-product experience for agentic workflows.

Testing the Investigate problems agentic workflow

You can manually test an agentic workflow execution or access on the Testing page of AI Agent Studio if you have the sn.aia_admin role and all other roles configured in the security controls. Start a manual test, select a test type and the name of the workflow, and use utterances in the Task field like the following samples. See Test an agentic workflow execution.

If you want to evaluate the agentic workflow over many different execution logs, run an automated evaluation.

Sample utterance

After the workflow has been activated in AI Agent Studio, enter `investigate the problem PRB001` or similar phrases in the ServiceNow Otto panel to trigger the workflow. You can also run this workflow on the Testing page of AI Agent Studio with the same utterance in the Task field if you have the sn.aia_admin role.

Troubleshooting

If a Problem has a large number of related incidents, you may run into an error that states "This model's maximum context length is 128000 tokens. However, your messages resulted in [X] tokens. Please reduce the length of the messages." This maximum token count is in place for all generative AI skills, so there is currently no way to work around this error. You can try the agentic workflow again using a different Problem.

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AI agents used in the Investigate problems agentic workflow

The following table lists the agents that are used in the Investigate problems agentic workflow.

Important: In the Define availability step of each AI agent's guided setup, make sure that the Status toggle is enabled to activate the AI agent.

AI agents names and descriptions in the Investigate problems agentic workflow

AI agent name	AI agent description
Problem investigation AI agent	Identifies the root causes, performs an impact assessment, and plans resolutions.

Other Platform agentic workflows

For more information on other agentic workflows associated with the Platform workflow, see Platform agentic workflows.

Platform Process images for new tasks agentic workflow

Use the Platform Process images for new tasks agentic workflow to convert images to actionable tasks.

Process images for new tasks overview

The process images for new tasks agentic workflow can help decrease manual data entry and improve task organization by automatically converting images into task records. First, the agentic workflow extracts information from the image, such as error messages, and presents the analysis to the user. Then, the user is presented with the details of the task, such as short description, category, and priority, before it is submitted so that they can make any changes. Once the information is confirmed, the agentic workflow creates an incident record and attaches the image.

The agents, tools, and triggers that are associated with the process images for new tasks agentic workflow are provided by AI applications. You can activate the agentic workflow template and set the display settings to include the ServiceNow Otto panel. If you want to change this agentic workflow's instructions, you must duplicate it to create a custom agentic workflow, adjust the settings to suit your specific needs, and activate the duplicated version of the agentic workflow instead.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Prerequisites and setup

To access this workflow, you must have ServiceNow Otto for Platform installed on your instance, which you can get if you install any other AI application.

Users must have the `sn_uxc_gen_ai.platform_ai_image_processor` role to invoke the agentic workflow.

If you want the ability for users to create tasks from images using ServiceNow Otto for Virtual Agent, you must activate the Image Processor Agent, Record management AI agent, and Document and visual insights AI agent and set the display to include Virtual Agent. This agentic workflow cannot be discovered in Virtual Agent, so you must enable the individual AI agents that comprise it.

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Role filtering

Required role: sn_uxc_gen_ai.platform_ai_image_processor.

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with your applications have specific roles that come included with the application. If you select *Users with specific roles* for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

In the data access settings, you must also add the necessary roles to enable reading of the tables for the records you want to be able to make tasks on. For example, you can add the itil role to the agentic workflow's list of approved roles so that it can access Incident records.

Additional configuration

You can change different settings related to the agentic workflow by changing values for the Now Assist Skill Config Var Set. To access the variable set and make changes, do the following while in the Platform AI Agents and Skills scope:

- Go to the Now Assist Skill Config [sn_nowassist_skill_config] table.
- Open the record named *Image to task config*.
- In the Now Assist Skill Config Var Set related list, select the *Tables Mapping* configuration variable set.
- Set the variables for the configuration type.
- Save the Var Set.

Tables Mapping configuration

Config field	Description
role_and_table_map	When a user triggers this agentic workflow, it checks the role of the invoking user and uses the map to determine what tables a user can make a record on. For example, if you map itil to Incident table, then users with the itil role can make Incident records with images.
get_location_details	Determines whether information about the image's location is included in metadata extraction.
tableslist	List of tables where you can make tasks from images

Accessing the Process images for new tasks agentic workflow

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Process images for new tasks**.

The first step of the guided setup includes a complete list of included AI agents. Selecting the name of an AI agent opens it in a new browser tab, where you can see the full description, role,

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list of steps, and tools. Tools are displayed in the second step of the AI agent guided setup, Add tools and information.

In-product agentic AI and UI actions

Agentic workflows can be accessed in the Core UI and in workspaces in the AI Activity panel. From there, you can track their progress, provide or review input, and see the results of the work performed. For more information, see In-product agentic AI for more details about the AI Activity panel.

To enable users to access agentic workflows with UI actions, you can open the agentic workflow in AI Agent Studio and navigate to the **Select channels and access** step. You can select a UI action as a possible way to access the workflow

If you don't see your UI actions after configuring it in AI Agent Studio, ensure that the property *com.glide.agentic_processes_view.enabled* is set to `true`. See Enable the in-product experience for agentic workflows.

Sample utterance

After the workflow has been activated in AI Agent Studio, enter `Convert image to new task` or similar phrases in the ServiceNow Otto panel to trigger the workflow. You can also run this workflow on the Testing page of AI Agent Studio with the same utterance in the Task field if you have the sn.aia_admin and sn_uxc_gen_ai.platform_ai_image_processor roles.

AI agents used in the Process images for new tasks agentic workflow

The following table lists the agents that are used in the Process images for new tasks agentic workflow.

Important: In the Define availability step of each AI agent's guided setup, make sure that the Status toggle is enabled to activate the AI agent.

AI agents names and descriptions in the Process images for new tasks agentic workflow

AI agent name	AI agent description	Role required
Document and visual insights AI agent	Extracts information from images.	platform_ml_di.creation_agent

Other Platform agentic workflows

For more information on other agentic workflows associated with the Platform workflow, see Platform agentic workflows.

Platform Propose survey responses agentic workflow

Use the Platform Propose survey responses agentic workflow to assist requesters in completing surveys.

Propose survey responses overview

The Propose survey responses agentic workflow can help simplify and increase survey responses. Many callers end up not filling out surveys after requests have been fulfilled, and this agentic workflow helps them to make informed decisions to answer survey questions quickly.

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When this agentic workflow and trigger are activated, the assignee receives an email with AI-suggested answers to their survey based on the associated Incident or Request. They then have the option to accept the AI-generated answers with a link at the bottom of the email. They can also choose to fill out the survey manually.

The agents, tools, and triggers that are associated with the Propose survey responses agentic workflow are provided by AI applications. You can activate the agentic workflow template by making the trigger active. If you want to change this agentic workflow's instructions, you must duplicate it, adjust the settings to suit your needs, and activate the duplicated version of the agentic workflow instead.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Prerequisites and setup

To access this workflow, you must have ServiceNow Otto for Platform installed on your instance, which you can get if you install any other AI application.

You can use this workflow for any survey triggered on the Incident or Request table. For example, this agentic workflow can be used by the Short Customer Satisfaction Survey with Smiley Face when an Incident is closed. You can change existing surveys, and the agentic workflow can still propose answers. The agentic workflow can also be used for custom surveys triggered by the Incident or Request table as long as there's a trigger associated with the survey. See Configure a trigger condition for a survey for instructions on adding a trigger to a survey.

Propose survey responses isn't available for ServiceNow Otto panel.

Role filtering

Required role: sn_uxc_gen_ai.platform_ai_survey_response.

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with your applications have specific roles that come included with the application. If you select *Users with specific roles* for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

In the data access settings, you must also add the necessary roles to enable reading of survey tables and other related tables.

Accessing the Propose survey responses agentic workflow

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Propose survey responses**.

The first step of the guided setup includes a complete list of included AI agents. Selecting the name of an AI agent opens it in a new browser tab, where you can see the full description, role, list of steps, and tools. Tools are displayed in the second step of the AI agent guided setup, Add tools and information.

In-product agentic AI and UI actions

Agentic workflows can be accessed in the Core UI and in workspaces in the AI Activity panel. From there, you can track their progress, provide or review input, and see the results of the work

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performed. For more information, see In-product agentic AI for more details about the AI Activity panel.

To enable users to access agentic workflows with UI actions, you can open the agentic workflow in AI Agent Studio and navigate to the **Select channels and access** step. You can select a UI action as a possible way to access the workflow

If you don't see your UI actions after configuring it in AI Agent Studio, ensure that the property *com.glide.agentic_processes_view.enabled* is set to `true`. See Enable the in-product experience for agentic workflows.

Sample utterance

After the workflow has been activated in AI Agent Studio, you need to set a trigger for the workflow to run. This workflow cannot be triggered from the ServiceNow Otto panel.

If you want to test the agentic workflow in AI Agent Studio and you have the sn.aia_admin role, enter the following phrase in the Testing page in the Task field: `Help me with survey AINST00XXXX. List of fields to extract inc/case/req details: number, short_description, description, calendar_stc, escalation, reopen_count, close_code, close_notes, state, priority, caller_id`. You must include the list of fields to extract.

AI agents used in the Propose survey responses agentic workflow

The following table lists the agents that are used in the Propose survey responses agentic workflow.

Important: In the Define availability step of each AI agent's guided setup, make sure that the Status toggle is enabled to activate the AI agent.

AI agents names and descriptions in the Propose survey responses agentic workflow

AI agent name	AI agent description	Role required
Survey response suggestion AI agent	Suggests answers to questions based on record details.	sn_uxc_gen_ai.platform_ai_survey_response
Survey filling data collection AI agent	Collects the data related to the record and the survey questions to gather feedback.	sn_uxc_gen_ai.platform_ai_survey_response

Other Platform agentic workflows

For more information on other agentic workflows that are associated with the Platform workflow, see Platform agentic workflows.

AI specialists

AI specialists are autonomous AI units within the ServiceNow Autonomous Workforce. Each AI specialist is purpose-built to perform a specific job function and deliver complete workflow outcomes, working within your organization's existing governance, identity, and access controls.

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Key characteristics

Unlike task-based AI agents, AI specialists plan, execute, and complete multi-step work autonomously.

- Outcome-oriented execution: AI specialists own end-to-end workflows rather than individual tasks. They can investigate, take action, and resolve work autonomously.
- Built-in governance and identity: Each AI specialist operates as a user record and inherits least-privilege access automatically, helping make actions auditable and policy-conforming.
- Role-aligned design: AI specialists are aligned with familiar job roles (for example, Service Desk or IT Operations), so you can assign and manage them alongside human teams.
- Continuous monitoring and feedback: You can view an AI specialist's activity, execution history, and performance, and provide direct feedback to improve outcomes over time.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Available AI specialists

The following table lists examples of AI specialists available as part of the Autonomous Workforce. Availability may vary by product, release, or licensing.

Product	Available AI specialists
Sourcing and Procurement Operations (SPO)	AI L1 SPO Service Desk Specialist
IT Service Management	L1 IT Service Desk AI Specialist
Finance and Supply Chain	AI L1 APO Service Desk Specialist

Related topics

Autonomous Workforce

AI Desktop Actions

ServiceNow® AI Desktop Actions enables you to design, configure, and manage desktop actions that automate repetitive tasks in your desktop and web environment. AI agents can autonomously and semi-autonomously process instructions, generate execution plans, and run desktop actions across legacy systems, thick client applications, and web applications without APIs.

- Automating multi-step desktop or web tasks that involve conditional logic, so agents can focus on work that needs a human touch.
- Adapting to changes in application state and UI in real-time, reducing the need to maintain rigid scripts.
- Helping detect and recover from errors by evaluating context and trying alternative approaches when something doesn't go as expected.

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Types of desktop actions

There are two types of desktop actions: defined path and adaptive path. Both enable AI agents to automate tasks on behalf of users, but they differ in how steps are designed and executed.

Defined desktop actions for desktop and web-based tasks (deterministic)

With defined path desktop actions, you record with AI or capture a fixed sequence of steps in the AI Desktop Actions Windows application. The AI agent executes these predefined steps in order without deviation.

Best for: Repeatable tasks with consistent steps and predictable UI interactions.

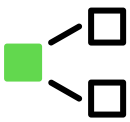
Adaptive desktop actions for web-based tasks (probabilistic)

With adaptive path desktop actions, you describe what task you want to accomplish at a high level for desktop and web-based tasks. The desktop tasks include cross-application processes. The web-based tasks include performing tasks on web applications or websites. The AI agent processes the request, generates an execution plan, and dynamically determines the specific steps needed to complete the task.

Best for: Tasks that require flexibility, decision-making, or adaptation to changing UI elements.

For more information, see When to use adaptive vs. defined path desktop actions.

Get started

Explore Learn about AI Desktop Actions concepts and features	Configure Set up AI Desktop Actions to automate desktop tasks	Design  Design automations for legacy applications that do not have APIs
Create an AI agent Create your own custom AI agents with advanced multi-agent reasoning frameworks	**Use** Use the AI Desktop Actions application to execute automations using AI agents.	Reference Get details about the AI Desktop Actions properties and components

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Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

Helpful resources

- Workflow Automation product on the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. In addition, this application will collect information about scripts (and associated script records) in which ServiceNow Otto for code generation is called. Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

Exploring AI Desktop Actions

Create desktop actions with AI Desktop Actions to automate repetitive tasks on your desktop and web environment using AI agents and agentic workflows.

AI Desktop Actions overview

AI Desktop Actions is a no-code solution that helps you automate repetitive tasks in legacy desktop and web-based applications lacking APIs or backend integrations. AI Desktop Actions leverages AI agents created in the ServiceNow AI Platform to interact with desktop and web applications, perform UI-based tasks, and automate end-to-end workflows.

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Desktop actions are tools used by AI agents—they are not AI agents themselves. Think of it this way:

- **AI Agent**: The orchestrator that receives user requests and coordinates task execution
- **Desktop Action Tool**: The capability the AI agent uses to interact with desktop or web applications

Defined desktop actions

You can use AI Desktop Actions to execute predefined automation sequences on your desktop. Defined path actions provide consistent, repeatable workflows for common desktop tasks. AI Desktop Actions is a client application that is installed on the Windows operating system. The app offers two workspaces, the Design workspace, where you create and configure desktop automations, and the Execution workspace, where those automations run. The Design workspace enables you to automate multi-step processes by recording with AI or manually capturing a fixed sequence of steps. Execution workspace enables AI agents to execute desktop actions in an isolated desktop session.

The Design workspace lets you build multi-step desktop actions by recording or manually capturing steps. The Execution workspace runs desktop actions in an isolated desktop session and is launched automatically when you test a desktop action or trigger an automation from the ServiceNow Otto panel. You don't open the Execution workspace manually. For more information, see Defined path desktop actions for desktop and web-based tasks.

Adaptive desktop actions

Desktop application for macOS

You can automate desktop and web-based tasks that involve adaptive steps using desktop actions. You describe the task in the chat interface of AI Desktop Actions for macOS. Screenshots of each step appear in the preview window of the execution workspace so you can monitor progress.

Browser extension for macOS and Windows

You can automate web-based tasks that involve adaptive steps using desktop actions. You configure desktop actions in AI Agent Studio as part of a AI agent tool configuration. When a user describes a task in the ServiceNow Otto panel, the AI agent uses the desktop action tool to open a separate browser tab and performs the task. Screenshots of each step appear in the **Web view** tab of the ServiceNow Otto panel enhanced chat so you can monitor progress.

For example, opening the application, selecting fields, and completing a workflow. The AI agent checks the state of the page and adjusts the sequence based on the user's goal. Because the steps are adjusted dynamically, results may vary. Review the output for accuracy before accepting it. For more information, see Adaptive path desktop actions for web-based tasks.

How it fits into ServiceNow workflows

AI Desktop Actions integrates with AI Agent Studio, enabling you to publish, manage, and incorporate desktop actions into your broader ServiceNow workflows. This integration lets you automate both cloud and desktop applications, giving your AI agents broader capabilities within ServiceNow.

Creating desktop actions from Task Mining

Build desktop automations by transforming task mining observations into production-ready desktop actions and AI agents.

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- Workstation users capture desktop processes using the Task Mining agent.
- Business analysts review captured tasks and submit automation requests in Task Mining.
- Technical users generate automation blocks (on-screen and background tasks) and create desktop actions and associated AI agent in Automation Center.
- Authorized users execute the completed automations (desktop actions) in AI Desktop Actions using the deployed AI agent.

To learn more about desktop action creation journey from Task Mining, see Building desktop automations from Task Mining data.

Impersonating users

You can trigger AI agents from the ServiceNow Otto panel while impersonating another user, provided the impersonated user has the required roles. The sn_aia.admin role is required to use AI Agent Studio, and the now_assist_panel_user role is required to trigger AI agents that execute desktop actions in the Execution workspace. For more information, see Impersonating users.

What to explore next

To learn more about configuring and using AI Desktop Actions, see:

- Configure AI Desktop Actions
- Defined desktop actions in AI Desktop Actions
- Creating AI agents and adding desktop action tool
- Examples of creating desktop actions
- Examples of executing desktop actions using AI agents
- Components installed with AI Desktop Actions
- System requirements and limitations in AI Desktop Actions

Adaptive desktop actions for web-based tasks

Adaptive desktop actions enables AI agents to automate repetitive tasks across web applications through a browser extension. The agent interacts directly with the browser by clicking, typing, and scrolling, without preconfigured APIs, scripts, or back-end logic.

Adaptive desktop actions overview

Desktop actions are tools that AI agents use to interact with web applications through a browser extension.

When you configure an AI agent and select Desktop action as a tool, you choose how it operates:

Desktop action operating modes

Mode	How it works	Use when
Defined path	Follows fixed steps preconfigured in AI Desktop Actions.	The workflow is stable and steps are known in advance.
Adaptive path	Works from a high-level goal. Dynamically plans and executes steps based on your instructions.	The workflow varies or steps cannot be fully defined in advance.

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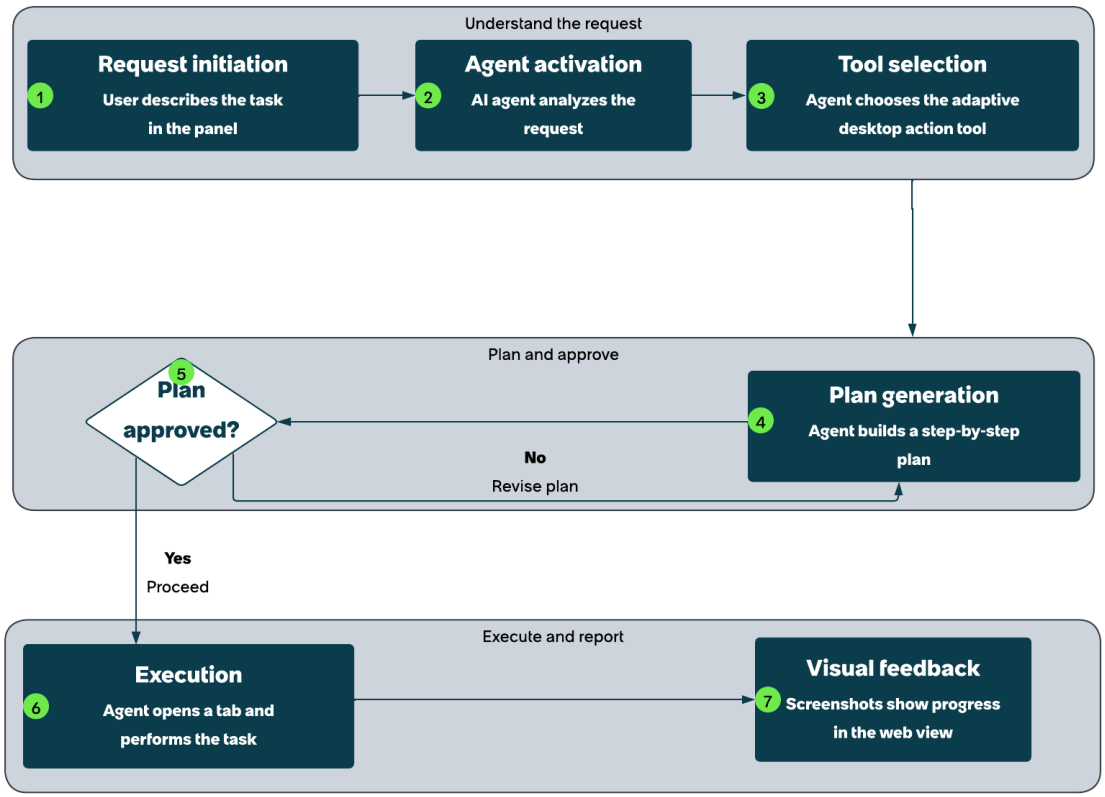
Specify a high-level goal — such as updating user roles or scheduling maintenance — and the agent plans and executes the steps to complete it. You can take manual control at any point.

How adaptive desktop actions work



LLM provider

Adaptive desktop actions use AWS Anthropic Sonnet model provider.

Users

Adaptive desktop actions are available to all users who perform tasks across enterprise applications and automate repetitive work.

Users and descriptions

Users	Description
Administrators	Manage permissions, roles, and agentic workflows
Developers	Build and configure AI agents with desktop action tools
Fulfillers	Automate routine fulfillment tasks across multiple systems
Requestors	Manage browser extensions and submit requests that trigger AI agents to automate web workflows

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Operating desktop actions

You access desktop actions through the ServiceNow Otto panel that has enhanced chat enabled. The AI agent provides updates on its progress in the chat interface. As the agent works, you receive:

- Real-time status updates in the chat
- Periodic screenshots of the web pages the agent navigates
- Notifications when external websites require login credentials

When you close the chat, you have the option to delete the chat log, including all screenshots containing sensitive information. For more information, see Delete an AI agent chat log.

To run multiple tasks at once in adaptive desktop actions, open each task in a separate Chrome browser window, each with a different user profile,logging in with different ServiceNow users. This lets the tasks run in parallel instead of one at a time.

Third-party website access

When you use ServiceNow desktop actions to visit, access, log in to, or otherwise interact with (collectively, “Access”) websites, applications, or other digital properties owned or operated by a third party (“Third Party Services”), that Access is a direct interaction between you and the Third Party Services. You're responsible for adhering to any applicable terms and conditions, including all policies or statements governing the use of personal data, of the third party.

Important:

ServiceNow AI Desktop Actions rely on “computer use,” a beta technology provided by Anthropic. As a result, AI Desktop Actions users are subject to unique risks, including as described in Anthropic's documentation. Notwithstanding anything to the contrary in any customer agreement, or any other agreement governing a customer's use of ServiceNow offerings, ServiceNow AI Desktop Actions are provided “as is” and without representations or warranties of any kind, including any warranty that AI Desktop Actions will be uninterrupted, error free, or free of harmful components, or that any data, including customer data, will be secure or not otherwise lost or damaged.

Related topics

- Configure AI Desktop Actions
- Creating AI agents and adding desktop action tool
- Examples of executing desktop actions using AI agents

Adaptive desktop actions for desktop and web-based tasks

Let an AI agent perform automated actions directly on your desktop across browsers, desktop applications, and files using AI Desktop Actions. You maintain control and can pause the automation at any time to review or adjust steps.

Adaptive desktop actions overview

AI Desktop Actions extends the ServiceNow AI Platform and executes adaptive tasks on your desktop and applications without manual intervention. AI Desktop Actions is a client application that is installed on the macOS machine. AI Desktop Actions can autonomously process instructions, generate execution plans, and run desktop actions across legacy applications, thick client applications, and web applications. The application can do the following:

- Open and interact with web browsers
- Operate desktop applications
- Manage files and documents
- Perform multi-step workflows across different applications

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The application presents its execution plan for your review and approval before taking any action on your desktop.

AI Desktop Actions benefits

AI Desktop Actions delivers the following benefits:

Reduced manual effort

Automation handles repetitive, multi-step tasks across applications without user intervention.

User control and transparency

You review the AI agent's execution plan before it runs and can pause execution to make manual adjustments at any time.

Optimized performance

The AI agent batches consecutive actions into single execution calls where possible, minimizing round trips and reducing overall execution time.

Governance and consent

Explicit user consent is required before the AI agent can access desktop, third-party services, and files. Administrator-configured security policies may restrict AI agent resource access based on your organization's requirements.

Execution visibility

Real-time status tracking shows whether the AI agent is initiating, running, or paused. Non-UI tasks that are processed in the background are tagged in AI steps to clarify execution context.

How it works

User request

You describe the task you want automated in natural language. For example: "Copy last month's invoices from PDFs in the Example folder into a new spreadsheet and save the spreadsheet with name "Nov 2026 invoices" on Desktop."

AI planning

The AI Desktop Actions analyzes your request and creates a detailed execution plan with numbered steps.

Plan review

The AI Desktop Actions presents the execution plan and Legal Disclaimer for your review. You can accept the plan or request modifications before proceeding.

Execution

On your approval, AI agent executes the planned steps on your desktop. The execution workspace shows real-time status, such as Initiated, Running, Input needed, or Stopped.

Control takeover

You can take manual control of the execution in the following scenarios:

- When AI agents require input, more information, or additional context, it pauses execution and status changes to **Input needed**. You can either provide the details in the chat interface or select **Take control** to perform the step manually.
- When you observe that AI agent does not execute the steps according to your expectations, you can select **Take control**. The AI agent pauses the execution and waits for you to make manual changes. You can then return control to the AI agent.

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After you're done, give control back to the AI agent. You can provide notes describing any manual changes you made, ensuring the AI agent resumes with correct context.

Requirements and scope

The following requirements apply before using AI Desktop Actions:

- Supported environments: The feature works with web browsers, installed desktop applications, and local file systems on the M-series macOS. Performance and compatibility depend on your target application behavior and configurations.
- System permissions: On the macOS machine, you must grant the application two system permissions before use:
  - **Screen Recording**: Enables the agent to see what is on your screen
  - **Accessibility**: Enables the agent to control your keyboard and mouse

  You're prompted to grant these permissions when you first launch the application. The application requires a restart after permissions are granted.

Third-party website access

When you use ServiceNow desktop actions to visit, access, log in to, or otherwise interact with (collectively, “Access”) websites, applications, or other digital properties owned or operated by a third party (“Third Party Services”), that Access is a direct interaction between you and the Third Party Services. You're responsible for adhering to any applicable terms and conditions, including all policies or statements governing the use of personal data, of the third party.

Important:

ServiceNow AI Desktop Actions rely on “computer use,” a beta technology provided by Anthropic. As a result, AI Desktop Actions users are subject to unique risks, including as described in Anthropic's documentation. Notwithstanding anything to the contrary in any customer agreement, or any other agreement governing a customer's use of ServiceNow offerings, ServiceNow AI Desktop Actions are provided “as is” and without representations or warranties of any kind, including any warranty that AI Desktop Actions will be uninterrupted, error free, or free of harmful components, or that any data, including customer data, will be secure or not otherwise lost or damaged.

Related topics

- AI Desktop Actions user interface
- Download AI Desktop Actions installer for adaptive desktop actions
- Controlling what AI Desktop Actions can access
- Execute adaptive desktop actions for desktop and web

AI Desktop Actions user interface

The AI Desktop Actions application includes a task input field, an execution workspace, and status indicators that show the current state of AI agent task execution.

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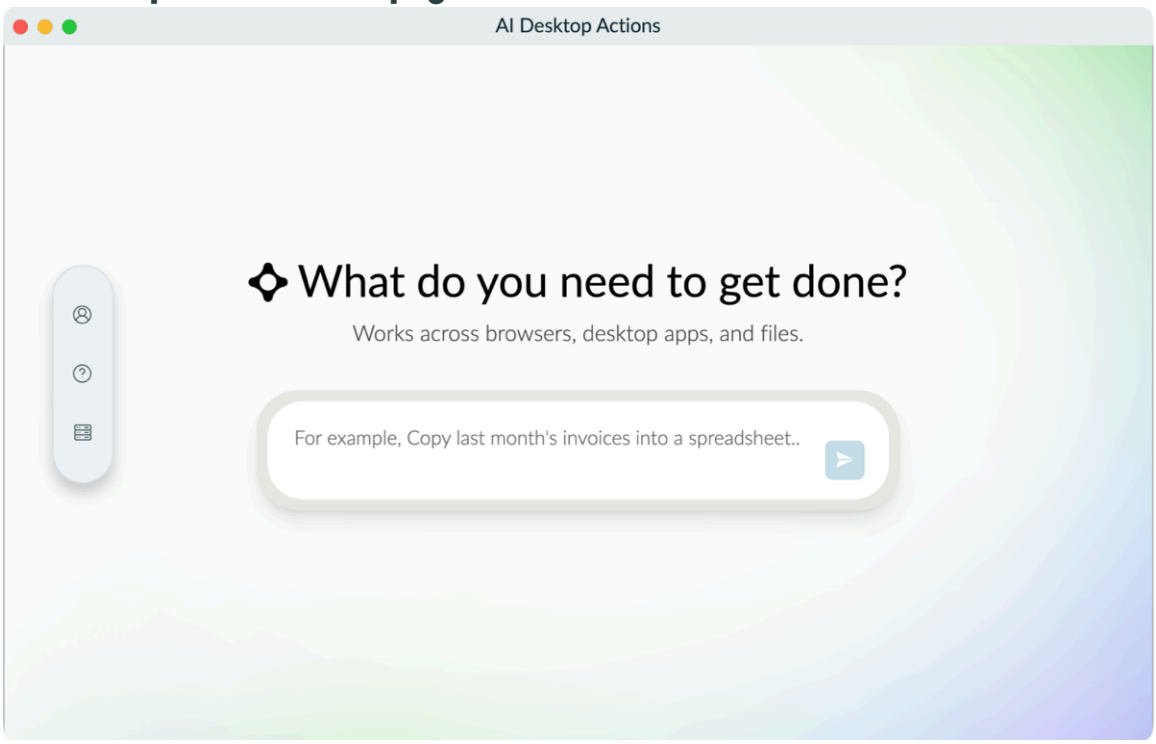
AI Desktop Actions home page



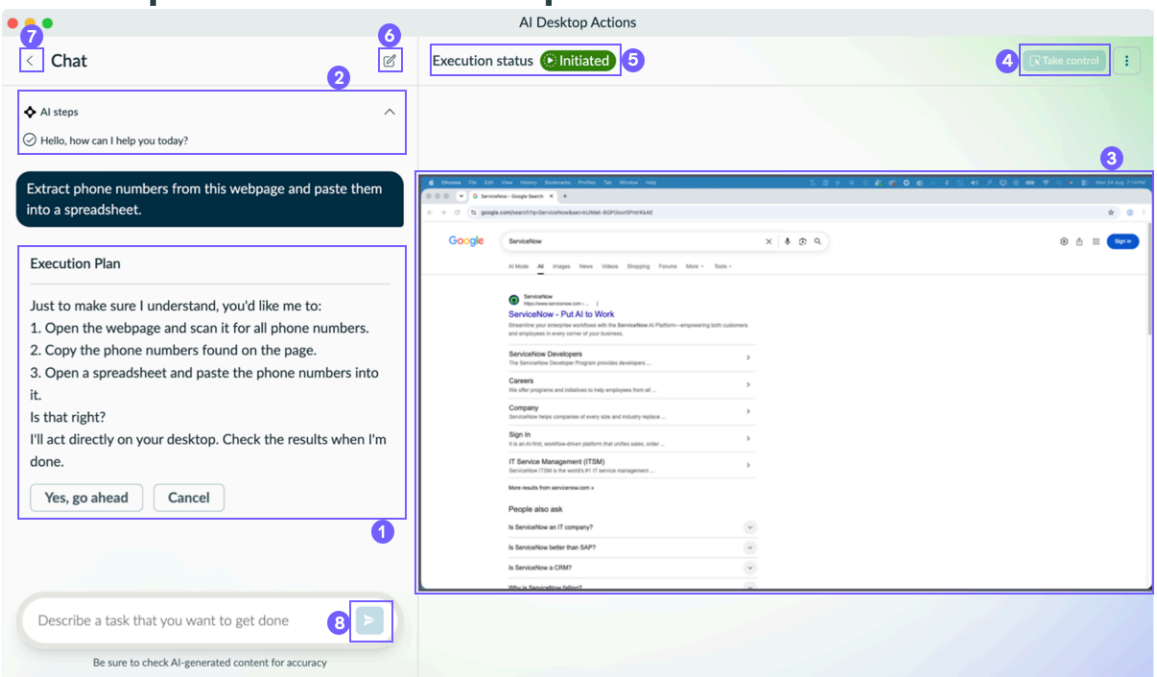
Task input field

The input field is where you describe the task to accomplish in natural language. The field accepts text describing the task to perform across browsers, desktop apps, and files. The description must be specific and include complete context. The field includes a placeholder example to guide you on the type of input expected and the **Send Message** button that triggers the action.

Access to profile and documentation

A dedicated section enables you to view your profile information, access product documentation, and check the product version.

AI Desktop Actions execution workspace



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1. Execution plan

The AI-generated plan that appears before execution begins. AI Desktop Actions restates your request in plain language, breaks it into numbered steps, and asks for approval. This prevents unintended steps and gives you a chance to correct any misunderstandings.

2. AI steps

A real-time breakdown of the AI agent's processing steps and observations as it executes your task. AI steps may differ from the execution plan presented. Each step shows what the AI agent observes on screen, identifies potential issues, and explains its decision for the next step. This transparency lets you follow the AI agent's decision-making and understand the reason for each step.

3. Preview window

The virtual desktop displaying only the files, folders, or applications that AI agent opens as part of automation execution. This window lets you monitor what the AI agent is doing in real time. The preview updates as steps are performed. You can only interact with this virtual desktop through the preview window.

4. Control buttons

- **Take control**: Pauses execution and gives manual control to you. Use this to intervene if the task is not proceeding as expected or requires human input.
- **Return control**: Return control back to AI agent. After you return control, a confirmation dialog appears prompting you to enter handoff notes for the AI agent. These notes help the AI agent interpret the changes you made.

5. Execution status

The current state of the task, such as Initiated, Running, Completed, Failed, or Stopped. The status badge updates as the AI progresses through steps. For more information about the statuses, see Execution status.

6. New chat

Option to begin a fresh conversation. Clears the current task and resets the chat interface to accept a new request.

> **Note:** The preview window continues to show the applications it opened for the previous task.

7. Back button

Option available in the chat interface to return to the home screen.

8. Start/Stop agent

Option to start or stop execution immediately. Use the Stop button to cancel an in-progress task.

Execution status

The execution status indicates the current state of the AI agent's task execution.

Status	Description	What you can do
Ready	The AI Desktop Actions application is open and waiting for you to describe a task. No execution has started yet. This is the initial state after launching the application or after completing a previous execution.	Enter your task description in the text field and select the **Send Message**

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Status	Description	What you can do
		button to send your request to AI agent.
Initiated	AI Desktop Actions has initiated your request. The AI agent creates an execution plan and waits for your approval before performing actions on your desktop.	Review the execution plan. Select **Yes, go ahead** to proceed, or **Cancel** to modify your request.
Running	The AI agent is actively performing the planned steps on your desktop.	Monitor progress. Select **Take control** to pause execution and make manual changes.
Input needed	The AI agent has paused execution because it needs additional information or input from you to continue. This might be credentials, a decision, clarification about how to proceed, or confirmation for a background operation. The AI agent may also pause if it needs confirmation on the resource access.	• Provide the requested information through the chat interface. • Select **Take control** to make manual changes in the preview screen.
You have control	Execution is paused and the desktop is under your control. The AI agent has paused performing actions and is waiting for you to take actions.	Make manual changes to your desktop or applications. After you're done, you can return the control, provide handoff notes, and let AI agent resume.
Success	The AI agent has successfully completed all planned steps. The task is finished and the agent displays results or summary information.	Review the completed task results. You can start a new task or close the application.
Failed	The AI Desktop Actions encountered an error or was unable to complete the task. An error message describes the cause of the failure.	Review the error message. You can start a new task with modified request.
Stopped	You stopped the execution before the AI agent could complete the task. The task is halted and no further actions are taken.	You can start a new task.

Reusable skills in adaptive desktop actions

Reusable skills save steps from completed adaptive desktop actions, allowing future requests with similar intent to run those steps with new data. This accelerates repeated tasks and reduces AI token consumption.

Important:

This feature is in beta. It may change as the feature evolves. Report issues through ServiceNow Support.

Generative AI may produce inaccurate or incomplete information. Always validate AI-generated content.

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Reusable skills overview

Note: This feature is managed by the sn_desktop_core.enable_reusable_assets system property. This is set to `false` by default. You must set the value to `true` to use this feature. For more information, see Components installed with AI Desktop Actions.

When the AI agent runs an adaptive desktop action, it plans each step at run time. Planning every step on every run takes time, even when you repeat a task that the AI agent completed before.

When the sn_desktop_core.enable_reusable_assets system property is set to `true`, the application records the steps of each run and saves the recording to your instance. The instance divides the recording into skills, one for each sub-task. For example, a single run might produce one skill for logging in to an application and another skill for filling in a form.

The next time you submit a request with the same intent but different data, the AI agent searches for a matching skill. If it finds one, it runs the saved steps with the data from your new request instead of planning each step again. The AI agent uses the defined desktop action approach and reduces AI token consumption.

Key benefits

Reusable skills provide the following benefits:

- Shorter run time for repeated tasks, because a matching skill runs saved steps instead of planning each step.
- Saves AI token consumption.
- No change to how you work, because you describe tasks the same way and the AI agent searches for matching skills automatically.

Supported applications and actions

Reusable skills work with the following types of applications:

- Native macOS applications, such as TextEdit and Notes
- Installed applications that provide macOS accessibility information
- Web applications in Google Chrome

UI actions are saved as skills because they run on the UI. These include selecting an element, entering text in a field, or choosing an item from a list.

Non-UI actions, such as working with Microsoft Excel, Microsoft Word, or the file system, aren't saved as skills because they run in the background. The AI agent plans those actions each time the task runs.

Taking control while a skill runs

If you take control during a skill's execution and then return it to the AI agent, the AI agent replans them. The agent does not use the saved steps. This applies only to the current skill. Subsequent skills in your request run their saved steps as usual (unless you take control again).

For example, your request uses two skills with five steps each. You take control during step two of the first skill, then return control. The AI agent replans the remaining steps of the first skill (using adaptive desktop action approach). The agent runs the second skill using the saved steps (using defined desktop actions approach).

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Note: For information on the Take control feature, see Take control of AI Desktop Actions execution.

Considerations

Consider the following when you use reusable skills:

- The AI agent might not find a matching skill even when one exists for the same intent. When this happens, the AI agent plans and runs the steps as usual and records the run.
- Saved steps rely on the accessibility information that a desktop application provides, such as field labels or a unique ID for each field. If a desktop application doesn't provide this information, saved steps might enter data in the wrong field. For example, a phone number might be entered in an email address field. This consideration doesn't apply to web applications in Google Chrome.

Related topics

Adaptive desktop actions for desktop and web-based tasks

Execute adaptive desktop actions for desktop and web

Defined desktop actions for desktop and web-based tasks

Automate desktop and web-based tasks that involve fixed steps using AI Desktop Actions.

AI Desktop Actions is a client application that is installed on the Windows operating system. The app offers two workspaces, the Design workspace, where you create and configure desktop automations, and the Execution workspace, where those automations run. Design workspace enables you to automate multi-step processes by recording with AI or manually capturing steps. Execution workspace enables AI agents to execute desktop actions in an isolated desktop session.

Defined desktop actions are categorized into two categories.

- **On-screen tasks**: These desktop actions help you simulate humans interacting with UI elements on your thick client applications, legacy systems, or SaaS applications without APIs. These actions include clicking buttons, typing into text boxes, selecting from dropdown menus, and more.
- **Background tasks**: These desktop actions include prebuilt connectors that enable your AI agents to interact with various applications and system components in the background.

Key interfaces related to AI Desktop Actions

Design workspace

Create, manage, and test desktop actions that define how automations interact with desktop and web applications. You can create desktop actions by recording with AI or manually capturing steps.

Execution workspace

Automatically runs desktop actions in an isolated desktop session during testing or execution. You don't open this workspace directly.

AI Agent Studio overview

Create, manage, and test AI agents that run desktop actions.

ServiceNow Otto panel

Trigger desktop actions from within ServiceNow.

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These components work together to separate design, execution, and monitoring, ensuring secure and reliable desktop automation.

AI Desktop Actions users

User	Description
Administrators	Set up and deploy the AI Desktop Actions application.
Developers	Design, manage, and deploy automation solutions within their organization.
Business users	Automate repetitive desktop tasks without extensive technical knowledge.
Process owners	Optimize business processes by automating manual desktop interactions.

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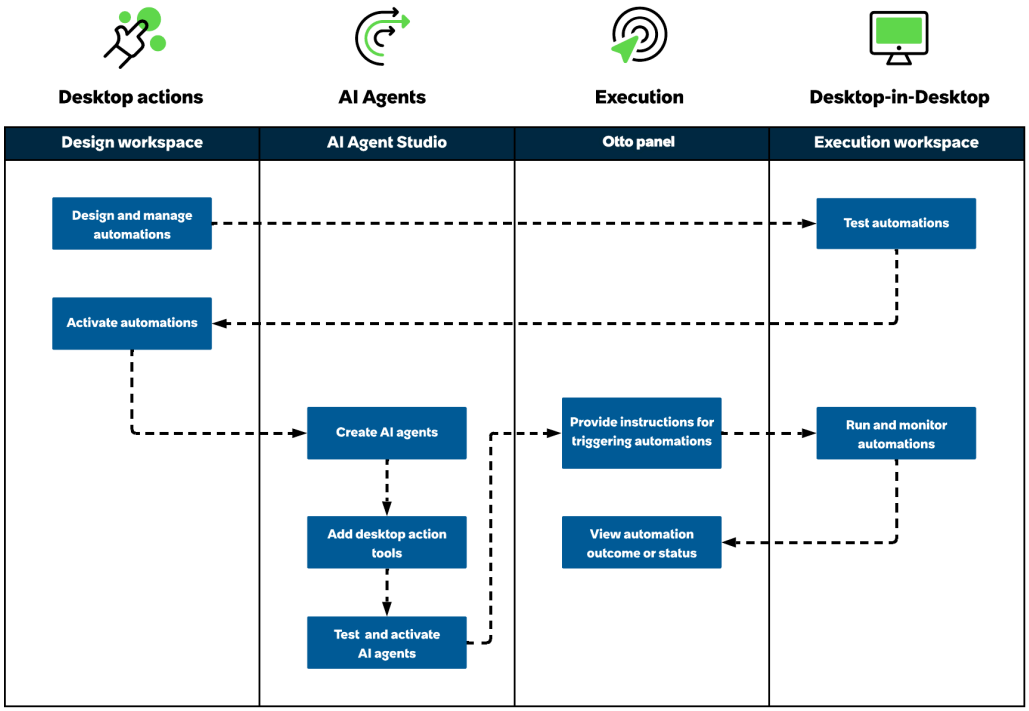
How AI Desktop Actions works end-to-end

Workflow for automating fixed steps using desktop actions



This workflow shows how AI Desktop Actions works end to end from designing desktop actions to running them during execution. As you move through the workflow, note which steps you perform manually and which steps are handled automatically by the system.

Important: Access to the Design workspace and Execution workspace depends on the user's role.

- When users with the AI Agent Admin (sn_aia.admin) role sign in from their desktop, they can access the Home page and Design workspace to create desktop actions. When they test a desktop action, the Execution workspace launches automatically.
- When users with the ServiceNow Otto panel user (now_assist_panel_user) role trigger an automation from the ServiceNow Otto panel, the Execution workspace launches automatically to run the desktop action.

You don't open the Execution workspace directly. It launches automatically when you test or run a desktop action.

- With the AI Agent Admin role, use the no-code Design workspace to create reusable desktop actions that AI agents can execute. You can visually create and simulate application interactions, such as clicks, text entry, and extraction that mimic human behavior using screen and UI element recognition.
- When you test a desktop action, the system automatically launches the Execution workspace in an isolated desktop session. You do not open or manage the Execution workspace directly.
- Activate your desktop actions from the Design workspace so that AI agents can use them as tools in AI Agent Studio.
- Create AI agents by providing simple text instructions in AI Agent Studio.
- Add your designed desktop actions as tools to your AI agents.
- Verify your AI agents function correctly with their integrated tools.

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For more information, see Defined desktop actions in AI Desktop Actions and Creating AI agents and adding desktop action tool.

AI Desktop Actions capabilities

Design desktop actions

- Create, configure, and manage reusable desktop actions with application metadata.
- With the Recorder feature, automatically record and capture user interactions and contextual information while you perform actions on desktop applications. You can record with AI for accurate anchor insertion and generating screen context.
- Additionally, manually capture screens, define UI interactions, and structure steps in a no-code Design workspace.

Run in the background

Enable silent and non-intrusive execution of agent tasks, supporting uninterrupted user workflows.

Support for diverse applications on Windows

Automate tasks across a wide variety of environments and UI types, including legacy systems, thick client applications, and web applications on Windows operating system.

Core desktop capabilities

Support common desktop actions such as form filling, application clicks, and OS file handling.

Performance

Supports automations with native integration to AI Agent Studio.

Seamless integration

Publish configured desktop actions directly to AI Agent Studio for easy access and deployment.

Related topics

Configure AI Desktop Actions

Examples of creating desktop actions

Examples of executing desktop actions using AI agents

AI Desktop Actions reference

AI Desktop Actions Design workspace

The Design workspace is an interactive environment within AI Desktop Actions that enables you to create desktop actions by recording and configuring user interactions with desktop applications. The workspace provides a visual canvas where you can design multi-screen automation workflows that capture business processes across different applications.

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Important: Access to the Design workspace and Execution workspace depends on the user's role.

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- When users with the ServiceNow Otto panel user (now_assist_panel_user) role trigger an automation from the ServiceNow Otto panel, the Execution workspace launches automatically to run the desktop action.

You don't open the Execution workspace directly. It launches automatically when you test or run a desktop action.

AI Desktop Actions home page

The home page provides an intuitive interface to help you quickly create, track, and manage your desktop actions. You can easily find and manage your existing desktop actions and monitor their status.

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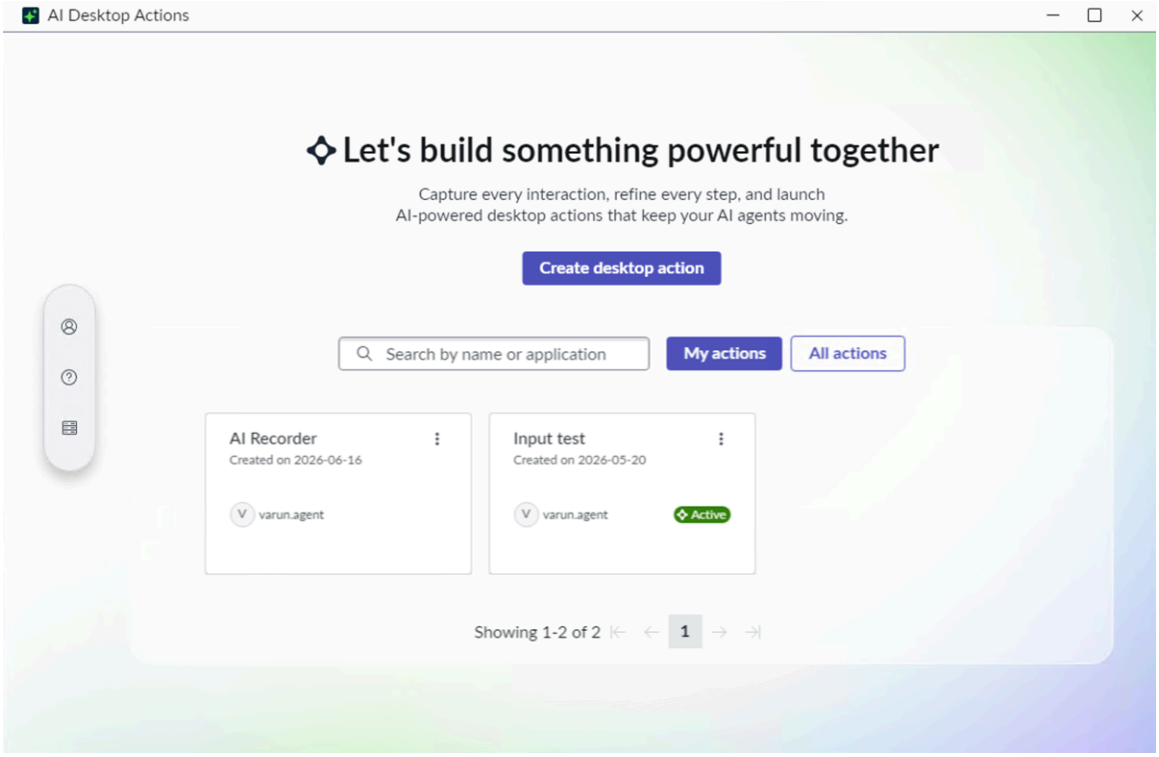
AI Desktop Actions home page



When you log in to AI Desktop Actions, the home page is the first screen you see. The home page lets you interact with various functionalities.

Create desktop action

You can create desktop actions by manually capturing steps or auto-capture steps through recording.

Search and manage actions

You can search for specific actions and manage them directly from the home page.

My Actions and All Actions

My Actions tab shows only the actions published by the logged in user. **All Actions** tab shows list of all actions available on the instance the logged in user is connected to.

Desktop action cards

Configured desktop actions with details, such as created date, user who created, applications added, and activation status.

Edit desktop actions

You can modify a desktop action by selecting the **Edit** option for each card. Any changes you make are saved and reflected on the home page.

First-time user onboarding

When you open AI Desktop Actions for the first time, an onboarding wizard guides you through steps to create and activate a desktop action.

Select **Skip intro** to bypass the onboarding wizard and go to the home page. Select the **Don't show this again** option to prevent the wizard from appearing the next time you open the app. After completing the onboarding wizard, select **Get started** to start creating desktop actions.

Access to profile and documentation

A dedicated section enables you to view your profile information,

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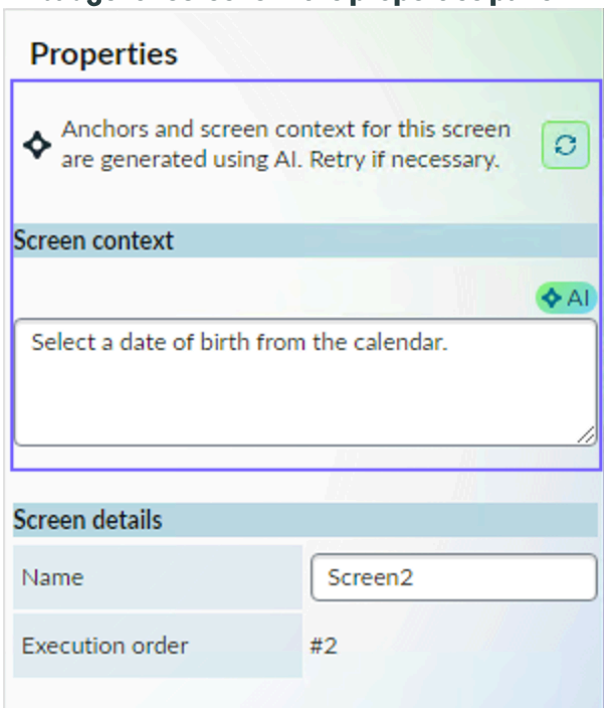
What AI generates after recording

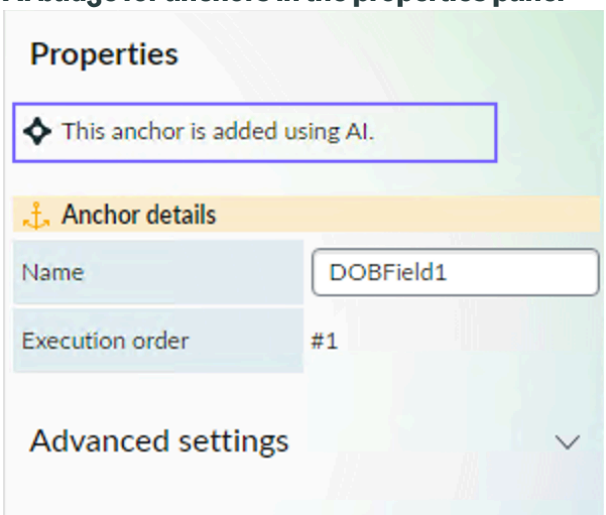
When you use record with AI option, AI badge, AI analysis retry option, and screen context are shown in the properties panel for each screen. If you aren't satisfied with the results, you can regenerate anchors and screen context by selecting **Retry** .

AI badge for screens in the properties panel



An AI badge appears for each anchor generated using AI.

AI badge for anchors in the properties panel



AI Desktop Actions Design tab

The Design workspace provides a no-code environment for creating, managing, and testing your desktop actions. You can either auto-capture or manually record a series of steps you perform on your computer, such as clicking buttons, entering text, selecting from drop-down, or interacting with different applications. You can then save this sequence as a reusable desktop action.

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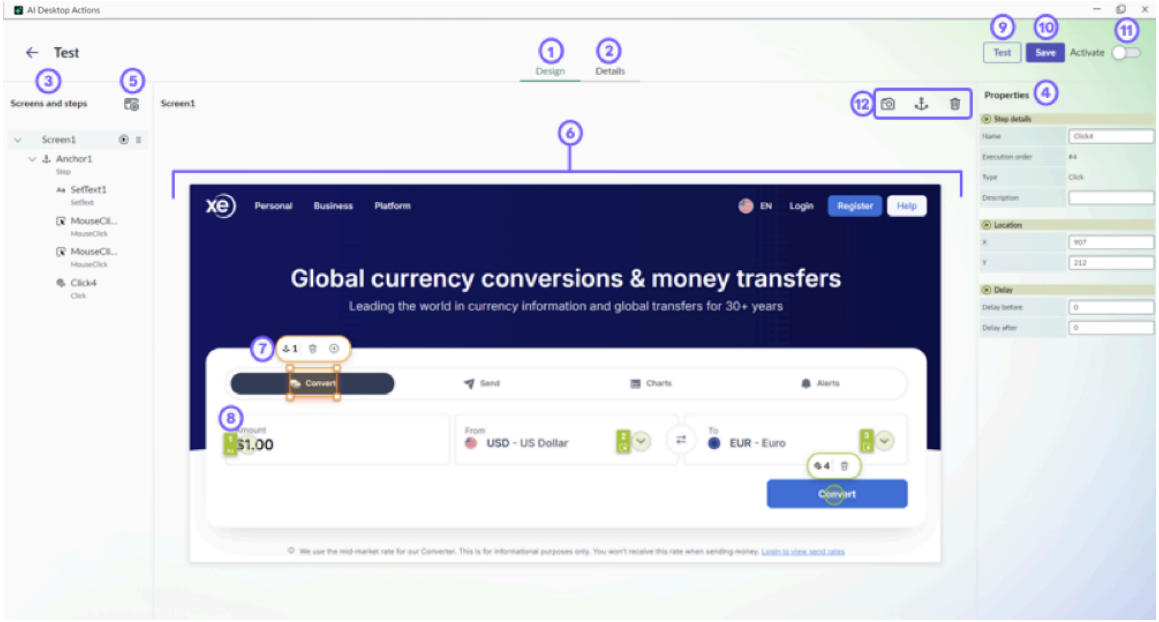
Design tab



No.	Element	Description
1	**Design** tab	Enables you to design your desktop actions by adding screens, anchors, and steps.
2	**Details** tab	Enables you to add details to your desktop actions, such as name, description, and applications that this desktop action interacts with. You can also review the inputs and outputs of this desktop action.
3	**Screens and Steps** panel	Shows all the captured screens and added anchors and steps in a sequence the desktop action must perform them. You can drag and move these items to change the order. You can also run a screen-level test by selecting the Run screen test icon .
4	**Properties** panel	Enables you to configure the properties for screens, anchors, and steps.
5	**Capture options**	Provides two options for capturing interactions with applications that you want to automate. • **Auto-capture steps**: Automatically records the steps that you perform for the task that you want to automate. • **Manual capture screens**: Enables you to capture the screens manually, insert anchors, and add steps that you want to automate.
6	Captured screen	The application screen that you captured. You can delete any screen by selecting the **Delete** icon from the Screens and steps panel.
7	**Anchor**	An anchor is a reference point on the screen that helps the automation identify and interact

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Related topics

- Defined desktop actions in AI Desktop Actions
- Automate repetitive tasks by auto-capturing steps in AI Desktop Actions
- Extend a desktop action by manually capturing steps in AI Desktop Actions
- Example: Automate badge request management using AI Desktop Actions
- Example: Automate shipping management tasks using AI Desktop Actions
- Screen, anchor, and step properties in AI Desktop Actions

Action recorder in AI Desktop Actions

With Action recorder, you can capture steps to automate repetitive tasks in AI Desktop Actions. You can save the steps that you perform on application elements as a reusable desktop action.

Action recorder helps you record your interactions with desktop applications to create automated workflows. By recording steps, you can automate tasks that replicate your interactions. The recorded actions are displayed as screenshots in the Design workspace with anchors and steps automatically added.

The recorder captures the following items:

- Visual snapshots of your screen at key interaction points.
- Steps in the form of the buttons, fields, and other interface components you interact with.

Record with AI

Record with AI is the recommended way to create desktop actions. Record with AI generates more accurate anchor positions automatically, reducing the time you spend on manual anchor adjustments.

When you record with AI, after you finish recording, AI analyzes the recording, validates anchor positions, and corrects inaccuracies before you save or activate the action. AI also generates a screen context for each captured screen and description for the desktop action. Screen context is a description of what the screen does and what it contains, which helps reviewers and AI agents understand the screen's intent.

After AI processing completes, a confirmation banner appears: `AI analysis complete. Verify AI generated anchors and screen contexts before continuing.` Review and refine the AI-generated anchors and screen contexts before activating the action.

> **Important:** Record with AI feature requires the ServiceNow AI Lens skill to be active on your instance and you must have the sn_desktop_core.desktop_action_user role. If these conditions aren't met, the **Record with AI** option is unavailable. Contact your ServiceNow administrator for help.

Capture modes

You can select a capture mode from the **Capture options** menu in the **Screens and Steps** panel.

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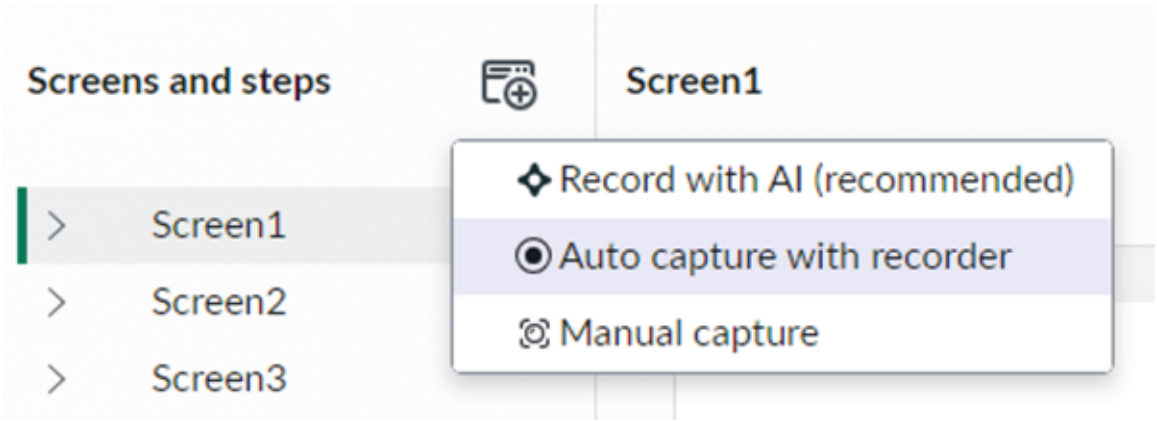


Record with AI (recommended)

Records your interactions by capturing screens and adding steps and uses AI to automatically validate anchor positions and generate screen contexts at design time, reducing the risk of automation failures at runtime.

Auto capture with recorder

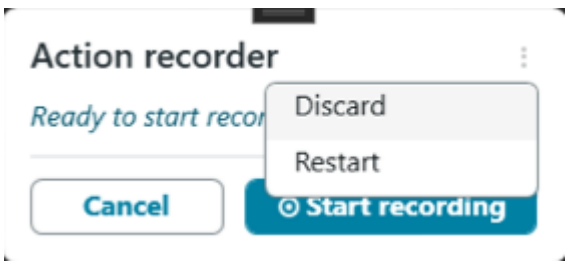
Records your interactions automatically and adds anchors and steps without AI processing.

Manual capture

Captures screens without automated recording, giving you full control over what is captured.

Recorder controls

You can select any of the following options from the **More options** menu on the Action recorder panel:



- **Start recording**: Start recording the steps
- **Pause**: Skip recording steps
- **Restart**: Restart recording the steps
- **Discard**: Discard the recording if it doesn't meet your needs
- **Stop recording**: Stop recording steps

Each step that you perform is captured sequentially and the type of UI action is displayed for each step. For example, Capturing Mouse Left Click event.

Limitations

Scrolls performed using a laptop touchpad aren't captured.

Tips for accurate recording

Follow these tips to improve the accuracy of your recordings.

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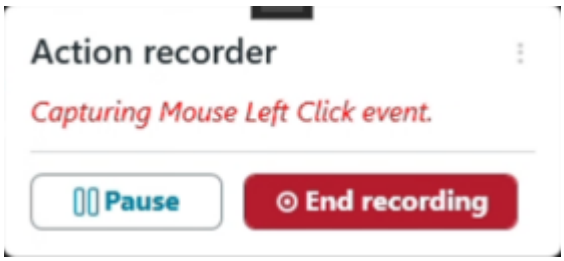
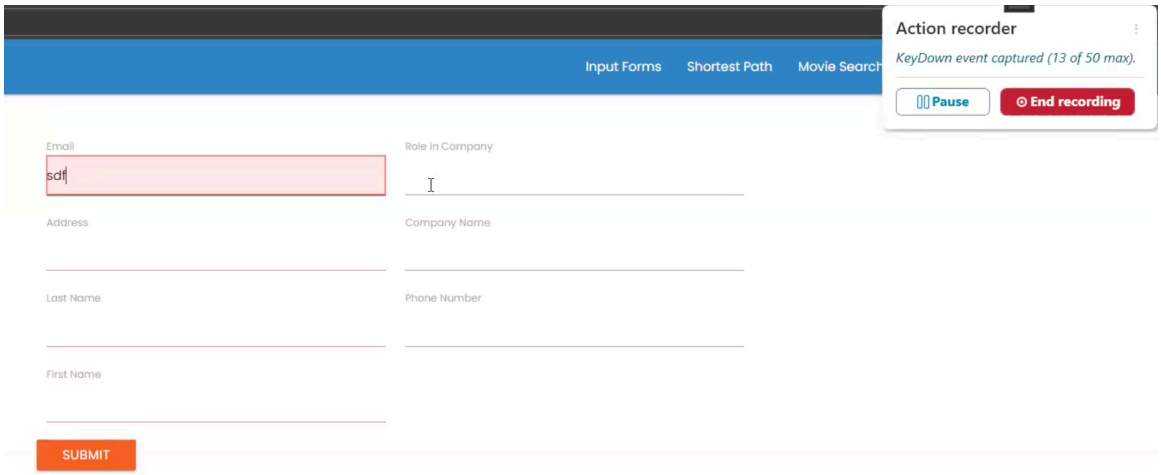
- Before performing any action, ensure the highlighter is visible on the target control. Recording too quickly may prevent the recorder from capturing the action sequence correctly.
- Avoid performing steps too quickly. When the message in the Action recorder panel appears in red, wait for the recorder to finish processing the current step before continuing.



Proceed with the next step when the red highlight box appears around the element you interact with and the message in the Action recorder panel changes to blue.



- Temporarily hovering components, such as drop-downs, multi-select fields, reference fields, and date pickers may not always be captured during recording, or may generate inaccurate anchors. Review the recording after completion and recapture any affected steps as needed.
- When selecting check boxes or radio buttons, click as close to the center of the control as possible to avoid activating areas outside the intended element.
- Scrolling the page or hovering over a field may result in inaccurate anchors. Avoid both while recording.
- Perform scrolls in small increments, one scroll at a time, so the recorder captures each scroll action accurately.
- On the desktop home screen, the system may select the Windows icon instead of the Chrome icon as the anchor due to differences in the desktop layout between the main and inset user sessions. Verify that the correct icon is selected after recording.
- In rare instances, latency between capturing a screenshot and retrieving control details may cause an anchor to reflect an element from a subsequent screen rather than the intended one. If this occurs, recapture the affected screen.

How screens are captured

During recording, the steps that you perform are captured as screens. Related steps are captured in the same screen, for example, the steps related to filling in the text fields in the same window. A new screen is captured in the following conditions:

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1. Window is changed
2. Button is clicked or option is selected that might change the layout
3. Page is scrolled
4. Special keyboard keys are used, such as Enter or Tab

This helps maintain the correct screen context and reliable automation replay.

You can capture a maximum of 50 steps using the recorder in a recording session. While auto-capturing steps, a counter displays the remaining number of steps you can capture (for example, "35 of 50 max"). Recording stops automatically after you capture 50 steps. If you need to capture additional steps, start a new recording session. The new recording adds screens and steps to those captured in the previous recording.

Related topics

- AI Desktop Actions Design workspace
- Automate repetitive tasks by recording steps with AI in AI Desktop Actions
- Automate repetitive tasks by auto-capturing steps in AI Desktop Actions
- Create badge desktop action in AI Desktop Actions

AI Desktop Actions Execution workspace

Execution workspace enables you to test, run, and monitor your desktop actions. It enables you to observe how your automations interact with desktop applications, including handling situations where human input is needed.

Important: Access to the Design workspace and Execution workspace depends on the user's role.

- When users with the AI Agent Admin (sn_aia.admin) role sign in from their desktop, they can access the Home page and Design workspace to create desktop actions. When they test a desktop action, the Execution workspace launches automatically.
- When users with the ServiceNow Otto panel user (now_assist_panel_user) role trigger an automation from the ServiceNow Otto panel, the Execution workspace launches automatically to run the desktop action.

You don't open the Execution workspace directly. It launches automatically when you test or run a desktop action.

This session acts as a virtual environment where the automations run in isolation. While desktop actions run in the Execution workspace, you can continue working on other desktop tasks.

Note:

To avoid conflicts, don't run the AI Desktop Actions Execution workspace and RPA Attended Desktop mode at the same time.

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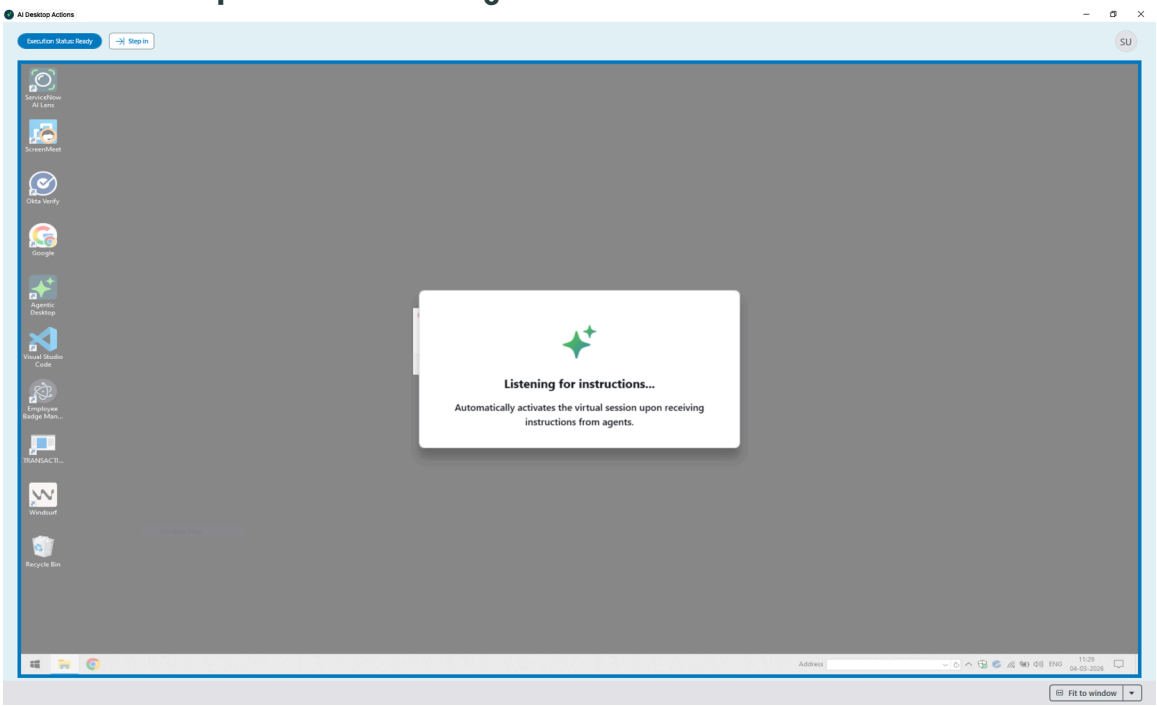
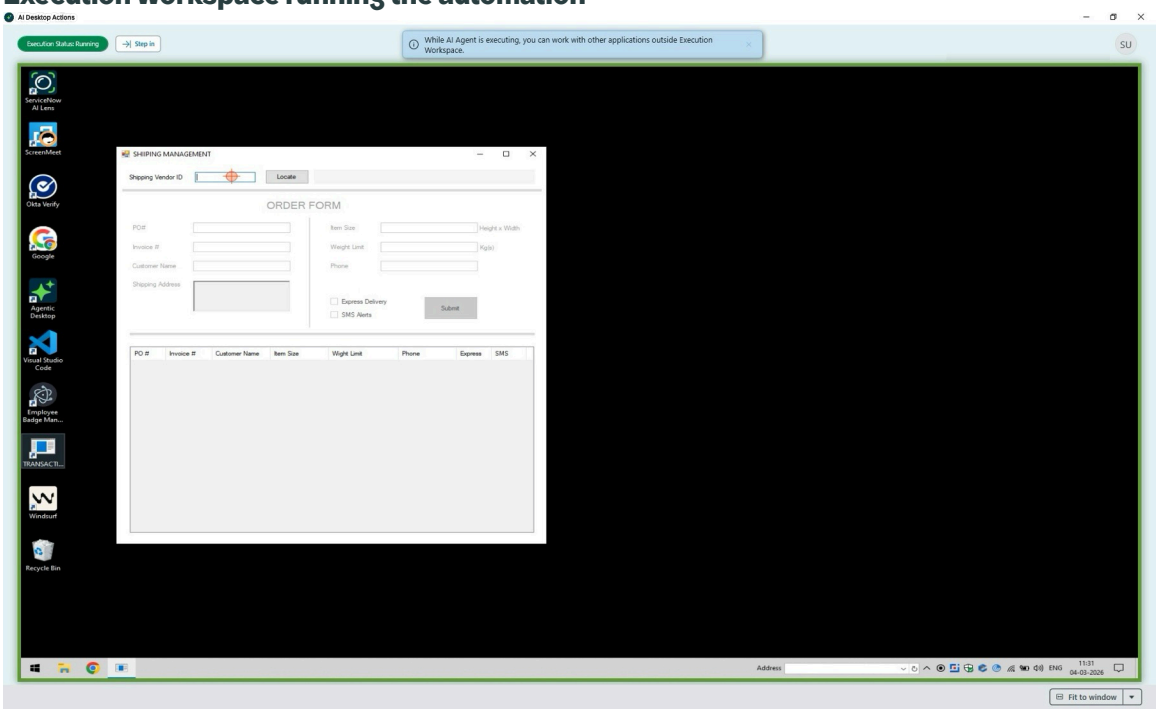
Execution workspace before executing automation



Execution workspace running the automation



Execution workspace features

Execution workspace offers the following features:

Desktop-in-Desktop (DiD) mode

A virtual environment where your automation executes. You can monitor the execution of your desktop actions and how they interact with desktop applications.

Step in/Step out

You can manually take control to provide an input by selecting **Step in**. Once done, you can leave the control by selecting **Step out**.

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> **Note:** If your automation requires manual inputs, such as entering an OTP or CAPTCHA, you must provide instructions the AI Agent to wait for user input during execution. Otherwise, the automation cannot proceed.

Single execution

The system supports one automation execution at a time within the workspace.

Smart sizing

Smart Sizing enables your desktop sessions automatically adapt to your display. This ensures each captured desktop session is fully visible, readable, and usable, regardless of the device resolution and scaling.

Fit to window: Automatically scales the desktop session to fit within the Execution workspace while keeping it fully visible and readable.

Original resolution: Displays the desktop session at its original resolution. Scroll bars appear if the desktop session is larger than the Execution workspace.

Execution statuses

Execution workspace shows the following statuses throughout the execution process.

Execution status	Description
Ready	Automation execution is ready to be initiated. The workspace is waiting for instructions from AI Agent Studio.
Initiated	Automation execution is initiated. The workspace has received the execution plan from AI Agent Studio. **Note:** When you launch Execution workspace for the first time, it takes longer to move to the Running state because it is setting things up for you.
Running	Automation execution is running. The workspace executes the steps defined in the desktop actions.
Success	Automation execution is completed successfully. The workspace executed the steps defined in the desktop actions and the outcome is shown on the ServiceNow Otto panel, such as the automation execution completed successfully and incident created successfully.
Failed	Automation execution is failed. The workspace couldn't execute the automation due to an error.
Canceled	Automation execution is canceled. The user canceled the execution manually.

Related topics

Example: Use AI agents to process badge-related requests automatically

Example: Use AI agents to automatically enter data into the shipping management app

When to use adaptive vs. defined path desktop actions

Use this guide to determine which type of desktop action best fits your automation scenario before you begin configuration.

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There are two types of desktop actions: defined path and adaptive path. Both enable AI agents to automate tasks on behalf of users, but they differ in how steps are executed, what applications they support, and how they handle variation in the user interface.

Key differences

Area	Defined path	Adaptive path
How steps are determined	You record a fixed sequence of steps in the AI Desktop Actions Windows application	The AI agent generates and adjusts steps dynamically based on a high-level goal you describe
Supported applications	Desktop applications, thick client applications, and web-based applications	Web-based applications and websites only
Environment	Runs on the Windows desktop	Requires Google Chrome and the ServiceNow Web Automation browser extension
Handles UI changes	Steps may fail if the application UI changes	Adjusts to changes in UI state at runtime
Handles conditional logic	Requires a separate desktop action for each conditional path	Evaluates conditions at runtime and determines the appropriate path
Result consistency	Consistent and repeatable — steps execute in the same order every time	Results may vary between runs due to the non-deterministic nature of AI
Configuration location	AI Desktop Actions Windows application and AI Agent Studio **Note:** Background task desktop actions can't be configured in AI Desktop Actions, but you can add them in AI Agent Studio as tools.	AI Agent Studio

Choose defined path when

Use defined path desktop actions for scenarios where the steps are known, fixed, and don't change between executions:

- The task involves a legacy desktop application or thick client that does not have an API or web interface. For example, automatically processing badge-related requests in a facilities management desktop application.
- The task follows the same sequence of steps every time, regardless of the data involved. For example, entering shipping data into a shipping management application using a fixed form structure.

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- Your organization requires predictable, auditable automation where every execution follows an identical sequence.
- The application runs on Windows and does not require a browser.

Choose adaptive path when

Use adaptive path desktop actions for scenarios where the steps can't be fully predicted in advance, or where the application UI may change between executions:

- The task is web-based and involves conditional logic. For example, the next steps depend on the outcome of a previous action, such as reviewing an incident record and routing it differently based on its current state.
- The web application updates its UI frequently.
- You want the AI agent to determine the most efficient path to complete a goal, rather than following a prescribed sequence.
- The task requires navigating multiple web pages or making decisions based on page content. For example, finding the latest invoice from a vendor portal and returning a summary.

When you aren't sure which to use

If your task is web-based and you're uncertain whether the steps always be the same, start with adaptive path. Adaptive path actions require less upfront design work and can handle variation that would cause a defined path action to fail. If you find that results are inconsistent and the task is always performed the same way, consider switching to defined path.

If your task involves a non-browser desktop application, defined path is your only option. Adaptive path requires Google Chrome and can't interact with applications outside the browser.

Note:

Defined path desktop actions can automate both desktop applications and web-based tasks. Adaptive path desktop actions support web-based tasks only and require Google Chrome with the ServiceNow Web Automation browser extension installed.

Supporting information for AI Desktop Actions

Get a quick overview of the important information that is related to the AI Desktop Actions application.

Supported versions

Support for adaptive desktop actions is added from Australia Patch 2.

Supported user interfaces

To design and run AI-powered desktop actions using ServiceNow AI agents, install the AI Desktop Actions application. For more information, see Configure AI Desktop Actions.

Licensing requirements

The AI Desktop Actions application requires a ServiceNow Pro Plus or Enterprise Plus license.

Application information

This app has the following dependencies:

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- AI Desktop Actions Core (sn_desktop_core)
- ServiceNow Otto AI web agents (sn_naa)
- ServiceNow AI agents

Configure AI Desktop Actions

You can enable the AI Desktop Actions application if you have the admin role.

Before you begin

To get started with AI Desktop Actions, you must have:

- A ServiceNow Pro Plus or Enterprise Plus license.
- An instance on Australia Patch 2 or later.
- A .NET 9.0 runtime v9.0.10 and .NET 9 Desktop Runtime v9.0.10 is installed.

Role required: administrator

About this task

AI Desktop Actions isn't a standalone store application that you can install directly. To enable AI Desktop Actions on your instance, you must install other generative AI applications, such as ServiceNow Otto for IT Service Management (ITSM) or ServiceNow Otto for Customer Service Management (CSM).

- Review the AI Desktop Actions application listing in ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- Refer to the document to see the prebuilt skills that exist and are currently available for purchase in AI packages and to review the number of assists consumed.
- Perform these steps in your ServiceNow instance.

For more information about the components installed, see Components installed with AI Desktop Actions.

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for and select a generative AI application, such as ServiceNow Otto for IT Service Management (ITSM) or ServiceNow Otto for Platform.
3. Select **Install**.

What to do next

Defined desktop action

Download and install the AI Desktop Actions installer on your system to automate repetitive tasks that involve fixed steps in your desktop and web environment. For more information, see Download AI Desktop Actions installer for defined desktop actions.

Adaptive desktop action

Install the Chrome browser extension and configure allowed websites to automate repetitive tasks that involve adaptive steps for web applications. For more information, see Install the Google Chrome extension for adaptive desktop actions and Configure allowed websites for adaptive desktop actions.

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Configuration for adaptive path desktop actions

Adaptive path desktop actions automatically adjust their behavior based on user context and system conditions. Configure these settings to optimize desktop action performance and user experience across different scenarios.

Install the Google Chrome extension for adaptive desktop actions

Install the ServiceNow Web Automation Chrome extension to the Google Chrome browser. The browser extension enables AI agents to interact with web applications during task execution.

Before you begin

- At least one AI agent that uses one or more adaptive desktop actions must exist in the ServiceNow® instance you plan to connect to.
- You must be logged in to your ServiceNow® instance.
- You must have permissions to install browser extensions in Chrome.

Role required: none

About this task

Follow the procedure to download and install the extension from the Google Chrome webstore. Install the Google Chrome browser extension on each device where you want to invoke an AI agent to automate tasks.

Using the ServiceNow Web Automation browser extension, an AI agent opens a browser tab to navigate to web applications.

When you log out of the ServiceNow instance, the message `Disconnected` appears in the browser extension. This message also appears when any browser window to your instance is inactive. The extension must be connected for AI agents to interact with the web applications.

Note: Verify that you open only one tab with active ServiceNow® instance.

Procedure

1. Download the Google Chrome browser extension from the Google Chrome webstore by navigating to:
   https://chromewebstore.google.com/detail/servicenow-rpa-chrome-ext/bnaofpgjajbimmicdiipemhmheafhgkb
2. Select **Add to Chrome**.
3. In the Add ServiceNow Web Automation dialog, select **Add extension**.
4. In your Google Chrome browser address bar, enter `chrome://extensions/`.
5. Select **Details** on the *ServiceNow* **Web Automation** card, and then select the **Pin to toolbar** option.
   The extension icon appears in the Chrome toolbar.
6. Select the *ServiceNow* **Web Automation** extension icon in the browser toolbar.
7. In the **Enter your instance URL** field, enter the ServiceNow instance you want to connect to, in the format `https://<instance-name>.service-now.com/`.
   The confirmation message appears in the browser extension: `Connected`.

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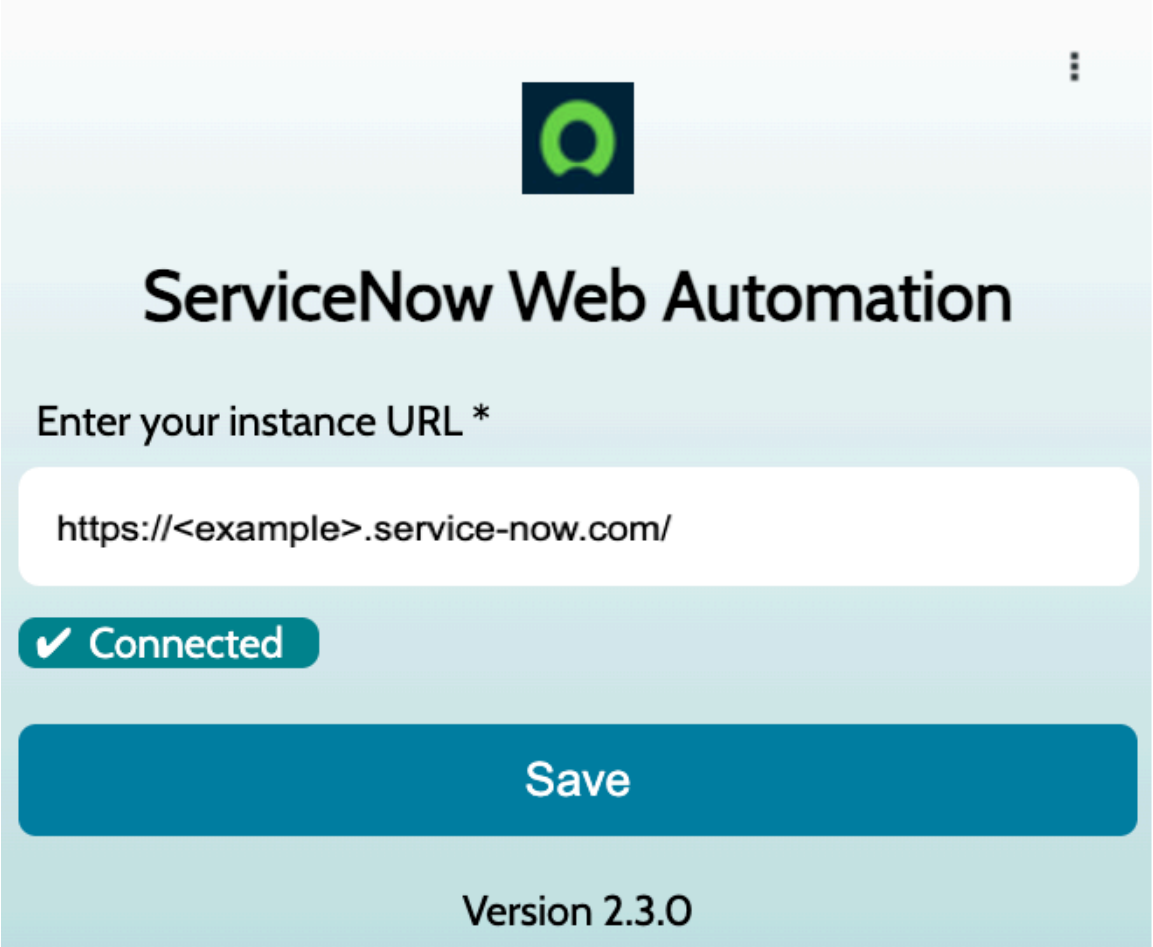

Trouble?

Verify that you're connected to the ServiceNow® instance that has at least one AI agent that uses one or more adaptive desktop actions.

Note: If any browser windows were already open with the instance, you must reload the windows to connect successfully to the browser extension.

8. In the browser extension panel, select **Save**.

What to do next

After installing the browser extension, configure websites that AI agents can access for automating web tasks. For detailed instructions, see Configure allowed websites for adaptive desktop actions.

Configure allowed websites for adaptive desktop actions

Specify a list of websites that AI agents configured with adaptive desktop actions are permitted to open and perform tasks.

Before you begin

Set your application scope to ServiceNow Otto AI web agent.

Role required: admin

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About this task

AI agents configured with adaptive desktop actions perform tasks on web applications or websites. You can control the websites that AI agents access by updating a system property, *sn_naa.allowed_websites*. This system property allows access to all websites, with a single asterisk (*) as the default value. When you enter a list of allowed sites, the AI agents are restricted to only the sites in the list.

Note: AI agents operate through the browser extension, which means they can only access content within the browser and are unable to interact with desktop applications or other local files, except for downloading files. The AI agents can't access the downloaded files as well from the desktop. Use defined desktop actions for uploading data from the local system.

When configuring an allow list, include your organization's websites. Work with your stakeholders to determine which websites to include. If an AI agent tries to access a website not on the allow list, the system stops the request and displays an error message. An AI agent can open websites defined in tool actions that aren't on the allow list. However, the AI agent can't perform any actions on those websites.

Note: The AI agent checks its access to the internet by first opening the Google website. If the AI agent isn't allowed to open the Google website, it can't proceed with its task. Be sure to include `google.com` or `*.google.com` in the allowed list.

Procedure

1. Navigate to **All**.
2. In the filter navigator, enter `sys_properties.list`.
3. In the System Properties table, search and select the *sn_naa.allowed_websites* property.
   The System Property form opens.
4. In the **Value** field, delete the single asterisk (*) and enter the websites that you want to allow for AI agents to access.
   The following guidance apply:
   - Separate the websites using commas (comma-separated list).
   - Enter websites as hostnames without protocols, such as `example.com`.
   - Allow all subdomains on a website by using an asterisk. The format `*.example.com` allows abc.example.com, xyz.example.com, and so forth.
   - Be sure to include access to Google website by entering `google.com` or `*.google.com`.

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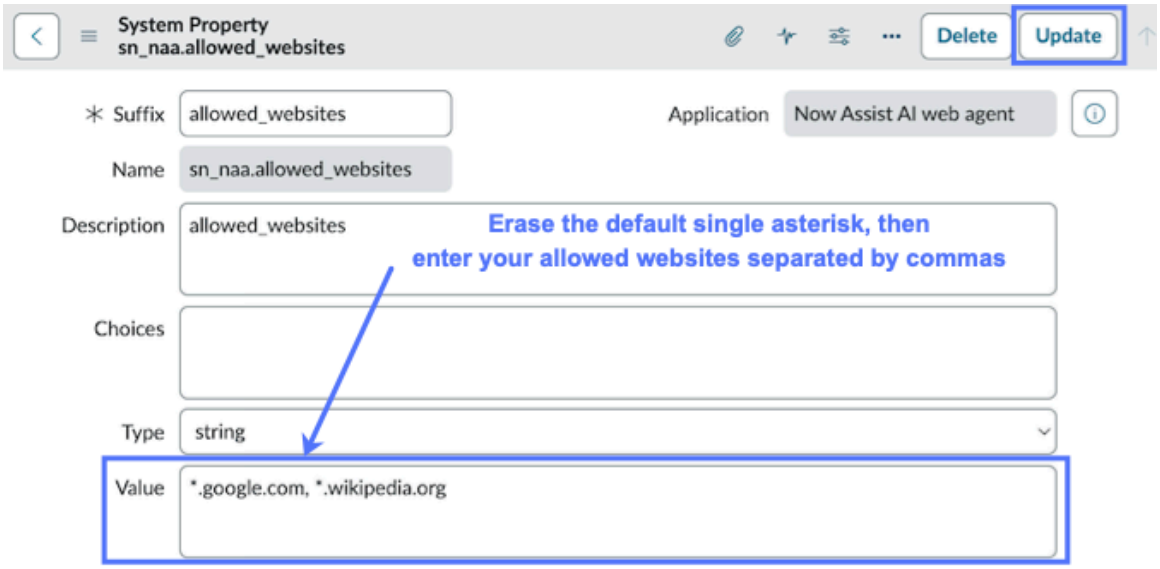

5. Select **Update** to save your changes.

What to do next

- Create an AI agent
-
-

File upload and download in adaptive desktop actions

Upload files to web forms and track file downloads during automated browser tasks. The agent validates file safety, confirms the target field with the reasoning model, and escalates to the user when it can't proceed safely.

Important:

Generative AI may produce inaccurate or incomplete information. Always validate AI-generated content.

Overview of the feature

Previously, a file could not be downloaded from or uploaded to a browser when using adaptive desktop actions. The tasks that required attaching a document or had a downloadable output were impacted. Now, these issues are resolved.

Key benefits

This functionality provides the following benefits:

- Completes tasks that require attaching a document, such as uploading a file to a form or a ticket.
- Completes tasks that produce downloadable output, such as exporting a report.
- Confirms upload success or failure with an actionable reason, instead of assuming the result.
- Reuses a file downloaded earlier in the same task as the input to a later upload step.
- Hands off to a the user when the agent can't proceed safely, rather than guessing or retrying indefinitely.

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Considerations

- A downloaded file's path carries forward automatically only within the same task session. If the upload happens in a different session, the agent asks the user for the file path instead of guessing.
- Blocked file types and download status values are listed in the file transfer reference.
- Automated downloads require Chrome configuration. For more information, see Configure Chrome to download files automatically.

Related topics

Configure Chrome to download files automatically

Considerations for file upload and download

Configure Chrome to download files automatically

Configure Chrome so that the files can automatically complete downloads without manual intervention, and each download's status and path can be tracked automatically.

Before you begin

Role required: none

About this task

The agent needs to detect when a download completes and capture the resulting file name and path. Chrome's default behavior is to prompt the user to choose a save location for every download. This blocks the detection. Turning off the default behavior enables the agent to save the downloaded file automatically and track it.

Procedure

1. Enter `chrome://settings/downloads` in the Chrome address bar, and press **Enter**.
2. Turn off the **Ask where to save each file before downloading** option.

Result

The files get downloaded automatically without any prompt. The Web agent extension can now detect each download's completion and report its status and file path to the reasoning layer.

Related topics

File upload and download in adaptive desktop actions

Considerations for file upload and download

Credential and dynamic parameter management

Logs in automatically when a goal references stored credentials configured for a website, without exposing sensitive values in chat or asking you to provide the input.

Key benefits

This functionality provides the following benefits:

- Skips manual login steps for websites that already have stored credentials configured.
- Keeps sensitive values, such as passwords, out of the chat and out of the agent's plan.
- Falls back to manual login when credentials aren't configured, so the task can continue.

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How it works

If your goal doesn't reference stored credentials, or references credentials that aren't defined for the website, the agent asks you to log in manually:

1. The agent prompts you to log in.
2. Switch to the website's browser window and log in.
3. Confirm in chat so the agent can continue.

If your goal references stored credentials, the agent logs in automatically with dynamic parameters already configured for that website:

1. The agent retrieves the corresponding values from the stored credentials.
2. The agent enters the values on the website's login page. You don't need to provide anything in chat.

Sensitive value handling

- Values marked as sensitive in the stored credentials are never displayed, in chat or elsewhere.
- Non-sensitive values, such as a username, might appear as part of the agent's plan.

Considerations

- To use stored credentials, an administrator must first define them as desktop action parameters. For more information, see Enable AI agents to securely access parameters in AI Desktop Actions.
- To trigger automatic login, phrase your goal in such a way that it explicitly references the stored parameter names, as shown in the following examples.
  - Go to https://www.example.com/ and authenticate using parameter 'user_name' and parameter 'password'.
  - Open https://www.example.org/ and log in with stored 'user_name' and stored 'password', then select Transactions.
  - Open https://www.example.net/ and log in using username from reference 'user_name' and password from reference 'password'. Then navigate to 'Task List', remove any filters, choose Pending status, and select Save.

Related topics

Enable AI agents to securely access parameters in AI Desktop Actions

Configuring AI Desktop Actions for adaptive desktop actions for desktop and web

Adaptive desktop actions adjust their execution based on user context and system conditions. Configure these settings to optimize desktop action performance and user experience across different scenarios for desktop and web-based tasks.

Download AI Desktop Actions installer for adaptive desktop actions

Download and install the AI Desktop Actions installer on your macOS machine for running adaptive desktop actions.

Before you begin

- This task must be completed in the ServiceNow instance.
- Administrator privileges are required to install the AI Desktop Actions installer on the macOS system.

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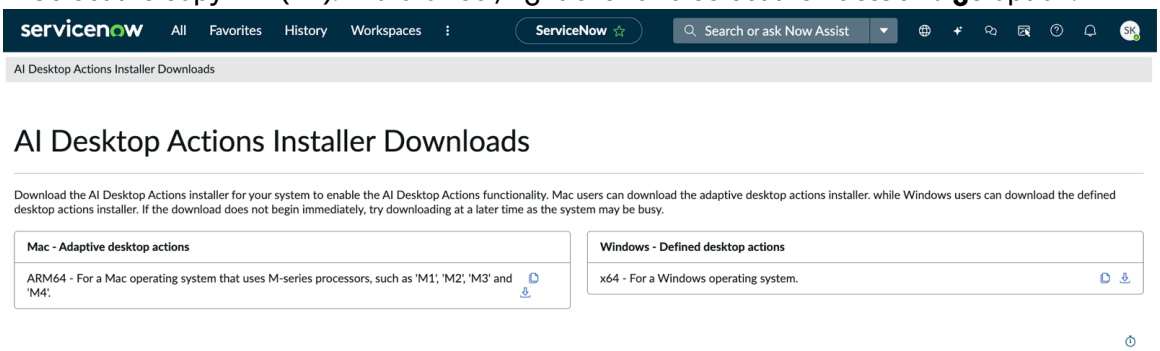
Role required: sn_aia.admin or now_assist_panel_user

Procedure

1. Navigate to **All** > **AI Desktop Actions** > **Downloads**.
2. On the AI Desktop Actions Downloads page, do any of the following actions to download the required application for macOS:
   - Select the download icon ( ).
   - Select the copy link ( ). In a browser, right-click and select the **Paste and go** option.



   The system might prompt you to save or open the file.
3. Run the application installation file (.pkg file).
4. Follow the onscreen instructions to complete the installation.

   AI Desktop Actions is installed for all users by default, but you can choose to install it for your account only or specify a disk location during setup.

What to do next

- Configure policies and rules to control access to various resources. For more information, see Controlling what AI Desktop Actions can access.
- Use AI Desktop Actions to run adaptive desktop actions for desktop and web. For more information, see Execute adaptive desktop actions for desktop and web.

Controlling what AI Desktop Actions can access

Control which desktop resources, such as files, folders, websites, and applications, AI Desktop Actions can access within your organization.

Create policies for defined user criteria and resource access rules to enforce consistent resource restrictions across your organization.

Key concepts

Policy

Collection of resource access rules that applies to a specific user group or set of users based on defined user criteria. Only active policies are enforced. For example, a "Finance Team Policy" restricts AI agents from accessing payroll documents.

Resource access rule

A specific rule that controls access to one type of resource, such as a file, folder, website, or application. Each rule specifies the resource type, match pattern, access level (allow or deny), and permissions. Rules can be reused across multiple policies.

Policy-rule mappings

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Mappings that connect policies to the resource access rules they enforce. One policy can link to multiple rules, and one rule can be linked to multiple policies. When you update a rule, the change applies everywhere it is linked.

User criteria

The condition that determines which users are subject to a policy. User criteria typically reference group membership, department, role, company, or other user attributes. For example, "members of the Finance group" or "users assigned to the Accounting role."

Resource type

The category of resource being controlled: File, Folder, Website, or Application. Each resource type has specific field options, match types, and value formats.

Resource types and details

Resource type	Details
File	• **Match type**: Exact, Wildcard • **Value**: File path using forward slashes (for example, `username/documents/report.pdf`) • **Permissions**: Read, Create, Update, and Delete • Wildcard examples: ○ `**/*.pdf` — All PDF files anywhere ○ `**/*.log` — All log files anywhere ○ `/documents/**/*.xlsx` — All Excel files in the documents folder and subfolders ○ `/tmp/**` — All files in the tmp folder and subfolders
Folder	• **Match type**: Exact, Wildcard • **Value**: Folder path using forward slashes (for example, `/payroll`) • **Permissions**: Read, Create, Update, and Delete • Wildcard examples: `/private/**` — Private folders and all contents
Website	• **Match type**: Exact, Wildcard • **Value**: Domain name (for example, `github.com`, `*.internal.company.com`) • **Permissions**: Not applicable • Wildcard examples: ○ `*.servicenow.com` — All ServiceNow subdomains ○ `github.com` — Exact domain match

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Resource types and details (continued)

Resource type	Details
Application	• **Match type**: Not applicable • **Value**: Application name as seen in the Application folder (for example, `chrome`, `python`, `Microsoft Excel`) • **Permissions**: Not applicable

How it works

When a user begins a task, the system checks which active policies apply to that user based on user criteria, such as group membership. The system then uses the combined active resource access rules from all applicable policies to determine which resources the AI agent can access.

1. When user logs in, the system identifies the user and their applicable policies based on user criteria.
2. When the user provides a task, all active resource access rules from the user's applicable policies are retrieved.
3. Before accessing any resource: file, folder, URL, application, the system checks whether the resource is permitted by the resource access rules.
4. If a resource is restricted by any policy, the AI agent stops execution.
5. If a resource is permitted by any policy, the AI agent automatically executes the task.

Default policy and rules

The following policy and rules are available by default with installation of the AI Desktop Actions application.

Default policy and rules

Name	Type	Description
Default Desktop Actions Policy	Policy	Default desktop actions policy with standard resource access rules
Allow ServiceNow	Rule	Allow access to ServiceNow websites
Allow Calculator	Rule	Allow access to Calculator application
Allow Text Files	Rule	Allow access to text files
Allow Downloads	Rule	Allow access to Downloads folder
Deny Terminal	Rule	Deny access to Terminal application
Deny Run Shell Script	Rule	Deny access to Run Shell Script application
Deny Automator	Rule	Deny access to Automator application
Deny Script Editor	Rule	Deny access to Script Editor application

If you need AI Desktop Actions to access one of these apps for a specific task, you can update the resource access rules to allow these applications.

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Warning: Restricted applications can execute system-level commands and scripts that aren't available through the graphical interface. If the AI agent proposes an alternate plan that involves restricted applications, review the plan carefully before granting access. After the task completes, revert access to Deny.

Policy evaluation order

When AI Desktop Actions needs to access a resource, policies are evaluated in this order.

The system collects all active policies where the current user matches the user criteria, then gathers all active resource access rules linked to those policies. If any rule explicitly denies access to the resource, access is refused — Deny takes precedence. If any rule explicitly allows access, access is granted. If no rule matches, the user is prompted during execution to allow or deny access to the resource for that task. For security-sensitive resources, create explicit rules rather than relying on runtime prompts.

Common use cases

Protect sensitive files

Create a "Restricted Files" policy that denies AI agent access to payroll folders, HR documents, or financial records. Apply the policy to the Finance group.

Limit external website access

Create a policy that allows access only to company-internal websites. Apply it to the IT Operations group.

Control application access

Create a policy that restricts access to applications outside an approved developer toolset to avoid accidental launches of unknown or untrusted applications.

Role-based automation

Create separate policies for different roles, such as HR, Finance, Operations, with resource restrictions appropriate to each role's responsibilities.

Temporary restrictions

Temporarily deactivate a policy during maintenance, then reactivate it when complete. Deactivated policies aren't enforced.

Known policy behaviors and limitations

Multiple permission prompts for same resource

If a resource is not explicitly declared in a rule, the AI agent may ask for permission multiple times for the same resource during a single goal. This is expected behavior when no rule matches a resource.

The system checks each resource access independently. For operations such as Read, Write, Update, and Delete on the same resource, each operation may trigger a prompt if no rule covers that specific operation.

Create explicit Allow or Deny rules for resources your organization uses frequently. Use wildcard patterns to cover resource categories efficiently. For example, instead of creating separate rules for each URL, use a wildcard pattern like `*.internal.company.com` to allow all internal company subdomains in one rule.

Denied applications take precedence

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If any policy rule explicitly denies access to a resource, that Deny decision takes precedence over any Allow rules. The AI agent can't access the resource, regardless of other permissions.

Verify that your Allow and Deny rules are carefully balanced. A broad Deny rule overrides more specific Allow rules.

Default allow behavior when no rule matches

If no policy rule matches a resource, the AI agent prompts you for access during execution. This provides flexibility but may leave sensitive resources unprotected if not explicitly restricted.

Use a default-deny approach: create explicit Allow rules for resources you want AI agents to access, rather than relying on implicit allow for unspecified resources.

Related topics

Create a desktop action policy

Create a desktop action access rule

Known issues and limitations of adaptive desktop actions

Create a desktop action policy

Desktop action policies control which users are subject to resource access rules. Configure a policy to define the user criteria and link the rules that govern automated resource access.

Before you begin

This task must be performed in the ServiceNow instance.

Role required: sn_aia.admin

About this task

The Desktop action policy form includes the following fields and the Resource Access Rules related list.

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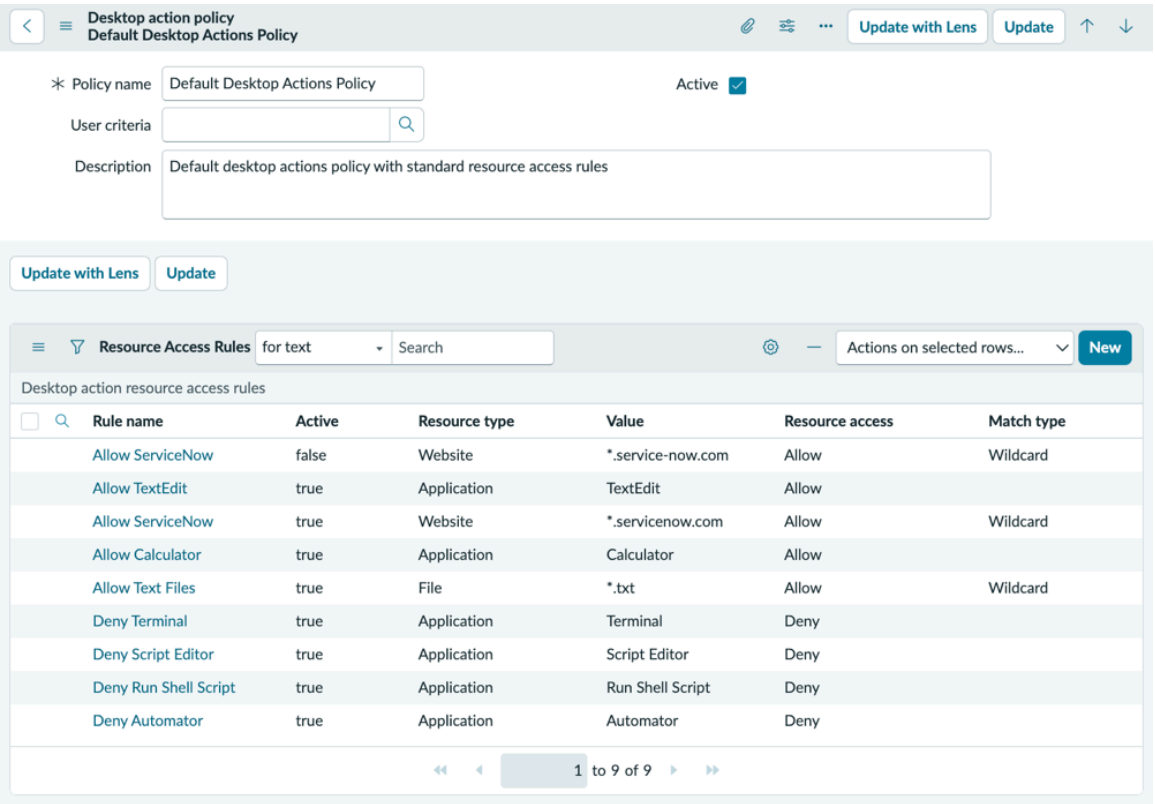

Procedure

1. Navigate to **All** > **AI Desktop Actions** > **Desktop Action Policies**.
2. Select **New**.
3. On the Desktop action policy form, fill in the fields.

Field	Description
Policy name	A descriptive name for the policy. Use concise, role-specific or function-specific names so administrators can identify the policy's purpose. Example: Finance Team Policy, IT Operations Policy, Sales Read-Only
Active	Option to enforce the policy. Only active policies are applied to the users. Deactivated policies are stored but not enforced. **Note:** You must add at least one resource access rule to the policy before activating it. To use an existing rule: Save your policy first, then navigate to the Resource Access Rule record and link this policy from its Policies related list. This saves you from recreating the same rule. Once linked, return to the policy and activate it.
User criteria	Defines users who are subject to this policy. Supports Users, Groups, Roles, Departments, Locations, Companies, and Match All. When left blank, no restriction is applied.

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Field	Description
	Example: "members of Finance group" or "users assigned to Accounting role" or "users in Marketing department"
Description	Description of the policy explaining the policy's purpose, affected resources, and rationale. Example: "Restricts automated access to payroll, HR records, and financial reports for non-Finance users. Finance team members can manually access these resources when needed."

4. From the form header, select **Save**.
5. Add rules to the policy.
   You can either create rules for this policy or link existing rules. Rules can be linked to multiple policies, so you can reuse rules across different policies.
   - From the Resource Access Rules related list, select **New** to create a resource access rule. For more information, see Create a desktop action access rule.
   - To link an existing resource access rule, navigate to the Resource Access Rule record. On the Policy related list, select **Edit** to add the policies to link to this rule. For more information, see the step for linking policy.
6. On the Desktop action policy form, select **Active**.
7. Select **Submit**.

Create a desktop action access rule

Configure rules to enforce security boundaries for AI agents in your organization. Resource access rules define which files, folders, websites, and applications AI Desktop Actions can access.

Before you begin

This task must be performed in the ServiceNow instance.

Role required: sn_aia.admin

About this task

The Desktop action resource access rule form includes fields for configuring the rule and a Policy related list for linking the rule to policies.

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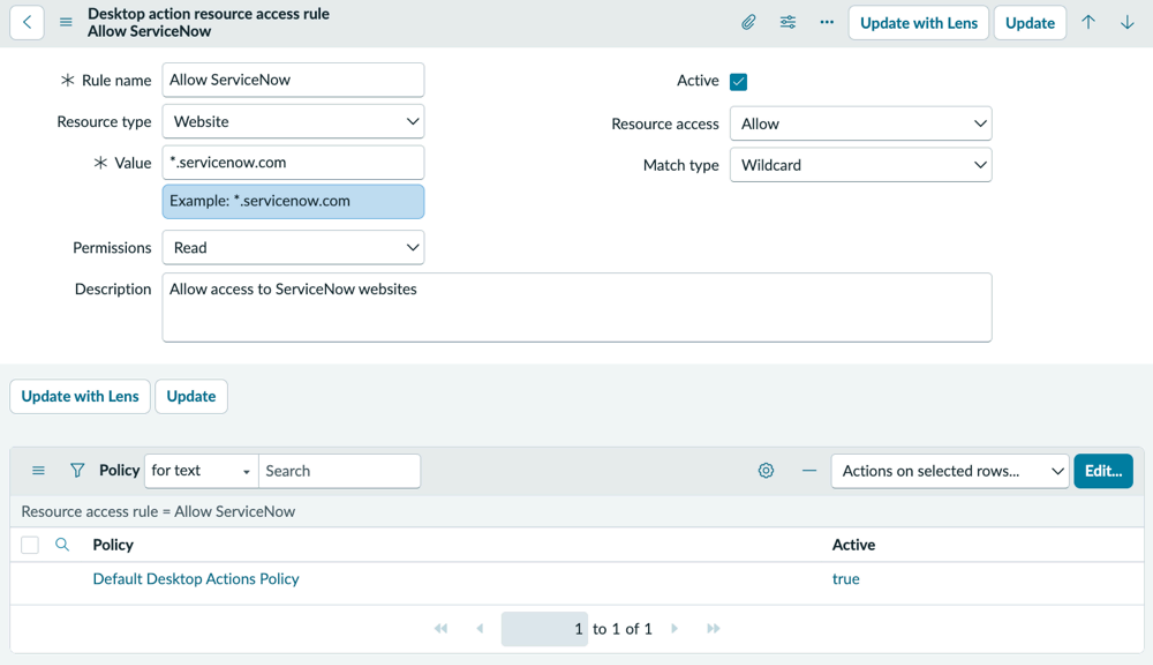

For more information about the default resource access rules available with the installation of the application, see Default policy and rules.

Procedure

1. Navigate to **All** > **AI Desktop Actions** > **Desktop Action Access Rules**.
   Access rules can also be created from the related list of a policy record, which links the rule to that policy.
2. Select **New**.
3. On the Desktop action resource access rule form, fill in the fields.

Field	Description
Rule name	A descriptive name for the rule. Keep names specific to the resource or restriction so rules are easy to identify when linked to multiple policies. Example: Restrict Payroll Folder, Allow GitHub, Block Excel Files
Active	Option to enable or disable the rule. Only active rules are evaluated during policy checks.
Resource type	The type of resource this rule applies to: ○ File ○ Folder ○ Website ○ Application This determines which match type and permission options are available.
Resource access	Whether the rule permits or blocks access: ○ **Allow**: AI agent can access the resource. ○ **Deny**: AI agent can't access the resource.

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Field	Description
	Deny rules take precedence over Allow rules. If any rule explicitly denies access to a resource, the agent can't access it, regardless of any other Allow rules. If no rule matches a resource (neither Allow nor Deny), the AI agent prompts the user for the access during execution. To enforce strict security, create explicit Allow rules for only the resources AI agents should access. Example: If you have an Allow rule for `*.xlsx` (allow Excel files) and a Deny rule for `/payroll/**` (deny payroll folder), the AI agent can access `/documents/report.xlsx` but can't access `/payroll/report.xlsx`.
Value	The resource identifier (path, URL, or app name) to match against. The format depends on match type and resource type. Example: /payroll/*, *.github.com, chrome, */Documents/*.pdf
Match type	Match types determine how the Value field is compared against actual resources on the user's system: ○ **Exact**: The value must match exactly (case-sensitive). Use for precise, single-item restrictions. Example: Value: `/payroll/salaries.xlsx` matches only that exact file, not `/payroll/salaries.pdf` or `/payroll`. Value: `github.com` matches only that exact domain. ○ **Wildcard**: The value must match with patterns using wildcards. Use `*` to match any characters at the current level (single directory or domain part). Use `**` to match any characters recursively across multiple directory levels. Works for file paths, folders, application names, and website domains. Example: Value: `**/*.log` matches `/tmp/app.log`, `/var/logs/app.log`, and any .log file anywhere. Value: `*.github.com` matches `api.github.com`, `user.github.com`, but not `github.io`. **Note:** This field does not apply to the Application resource type.
Permissions	The specific operations allowed: ○ **Read**: The AI agent has read-only access to the resource. ○ **Create**: The AI agent can read and create the resource. ○ **Update**: The AI agent can read, create, and update the resource. ○ **Delete**: The AI agent can read, create, update and delete the resource. **Note:** This field does not apply to the Application and Website resource type.
Description	Description explaining what the rule controls, why it's necessary, and what resources are affected.

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Field	Description
	Example: Denies automated access to payroll folder (/payroll/*). Agents can't read, write, or execute files in this location. Finance team must manually handle payroll documents.

4. From the form header, select **Save**.
5. Link the rule to the policies.
   a. In the Policy related list, select **Edit**.
   b. From the Collection column, select the policies to add, then move them to the Policy List column.
   c. Select **Save**.
6. Select **Submit**.

What to do next

Execute adaptive desktop actions on your desktop. For more information, see Execute adaptive desktop actions for desktop and web.

Take manual control of automation during execution. For more information, see Take control of AI Desktop Actions execution.

Configuring AI Desktop Actions for defined path desktop actions

Configure AI Desktop Actions to execute predefined automation sequences on your desktop. Defined path actions provide consistent, repeatable workflows for common desktop tasks.

Download AI Desktop Actions installer for defined desktop actions

Download the AI Desktop Actions installer so that you can install AI Desktop Actions on your Windows machine for designing and running defined desktop actions.

Before you begin

- Perform this task in the ServiceNow instance.
- A .NET 9.0 runtime v9.0.10 and .NET 9 Desktop Runtime v9.0.10 is installed.
- Confirm that you install the AI Desktop Actions installer using Windows administrator privileges.
- Confirm that the Desktop-in-Desktop settings are configured correctly.
- Add the end users who interact with the Execution workspace of AI Desktop Actions to the Remote Desktop Users group on the target machine and provide Remote Desktop access permissions for seamless automation execution.

  If your organization uses Group Policy, add the end users to a Microsoft Active Directory group that is permitted to use Remote Desktop through Group Policy on each target machine where desktop actions run.

  - Local changes to the Remote Desktop Users group are temporary unless they align with Microsoft Active Directory entitlements.
  - If the user is not entitled, Group Policy refresh automatically removes them from the group.

Role required: Windows administrator

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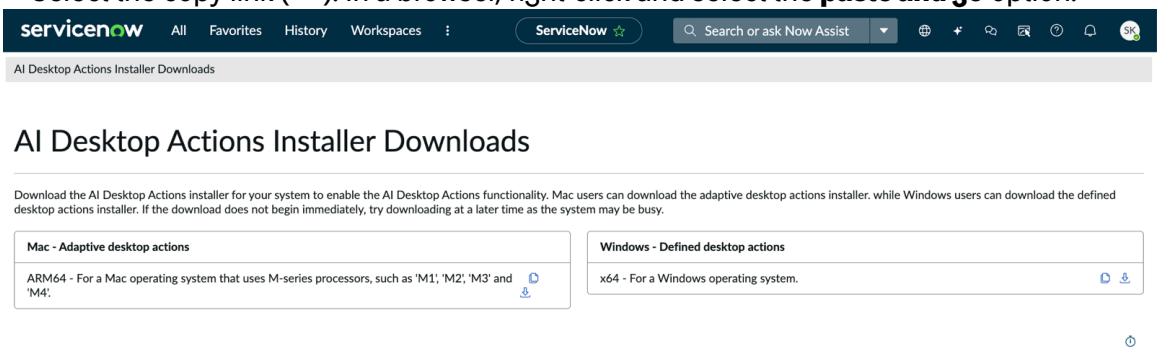
Procedure

1. Navigate to **All** > **AI Desktop Actions** > **Downloads**.
2. In the AI Desktop Actions Downloads page, do any of the following actions to download the required application for Windows:
   - Select the download icon ( ).
   - Select the copy link ( ). In a browser, right-click and select the **paste and go** option.



   The system might prompt you to save or open the file.

   Note: Depending on your browser setting, the browser might automatically save the file to your Downloads folder.

3. Execute the application installation file (.msi file).
4. Follow the on-screen instructions to install the application.

   AI Desktop Actions is installed in a per-machine folder by default, making it available to all users. You can change the folder location during setup.

5. Keep the option **Enable Remote Desktop access for the logged-in user** selected to automatically add the logged-in user to the Remote Desktop Users group.

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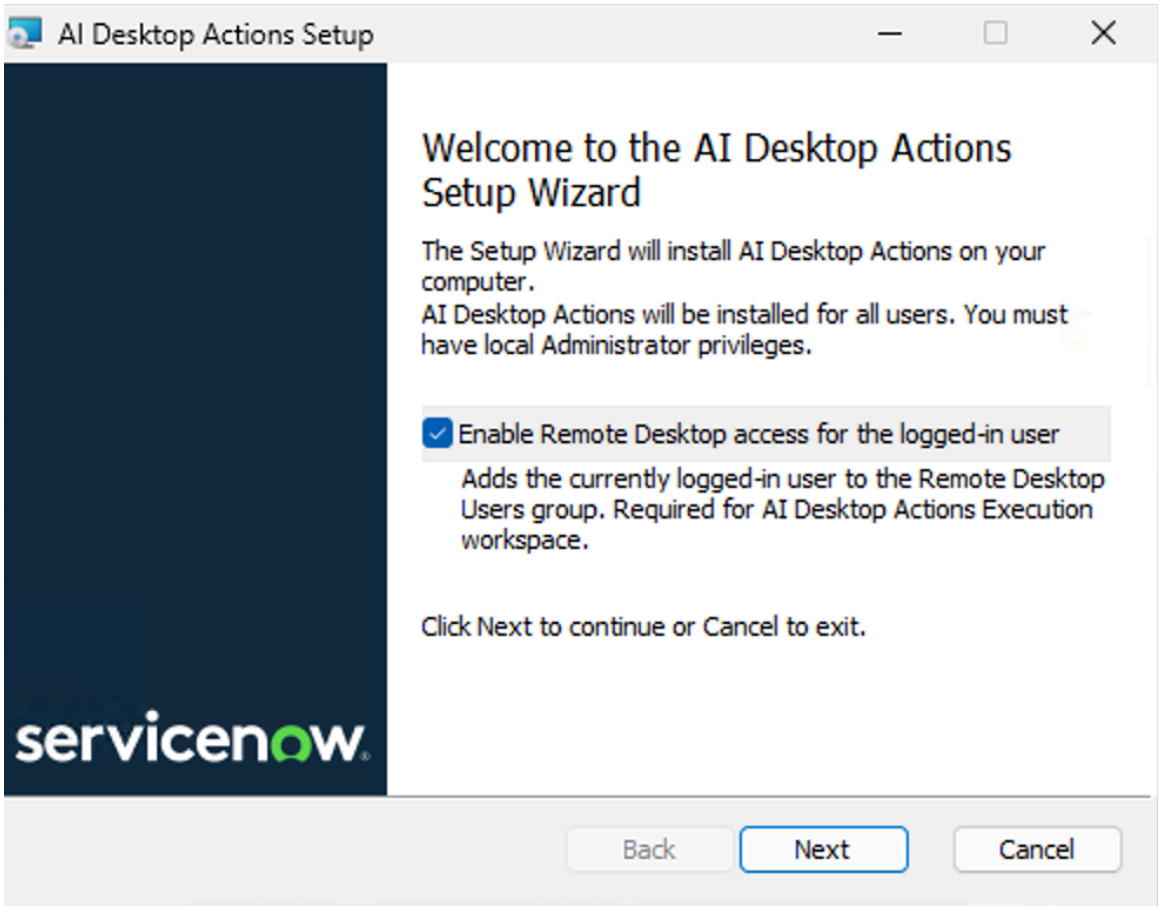

6. If not already installed, download and install the .Net Desktop Runtime framework.

   The installer validates if required .NET Desktop Runtime is installed or not on the user machine. If not installed, the installer provides a link to instructions for downloading and installing the

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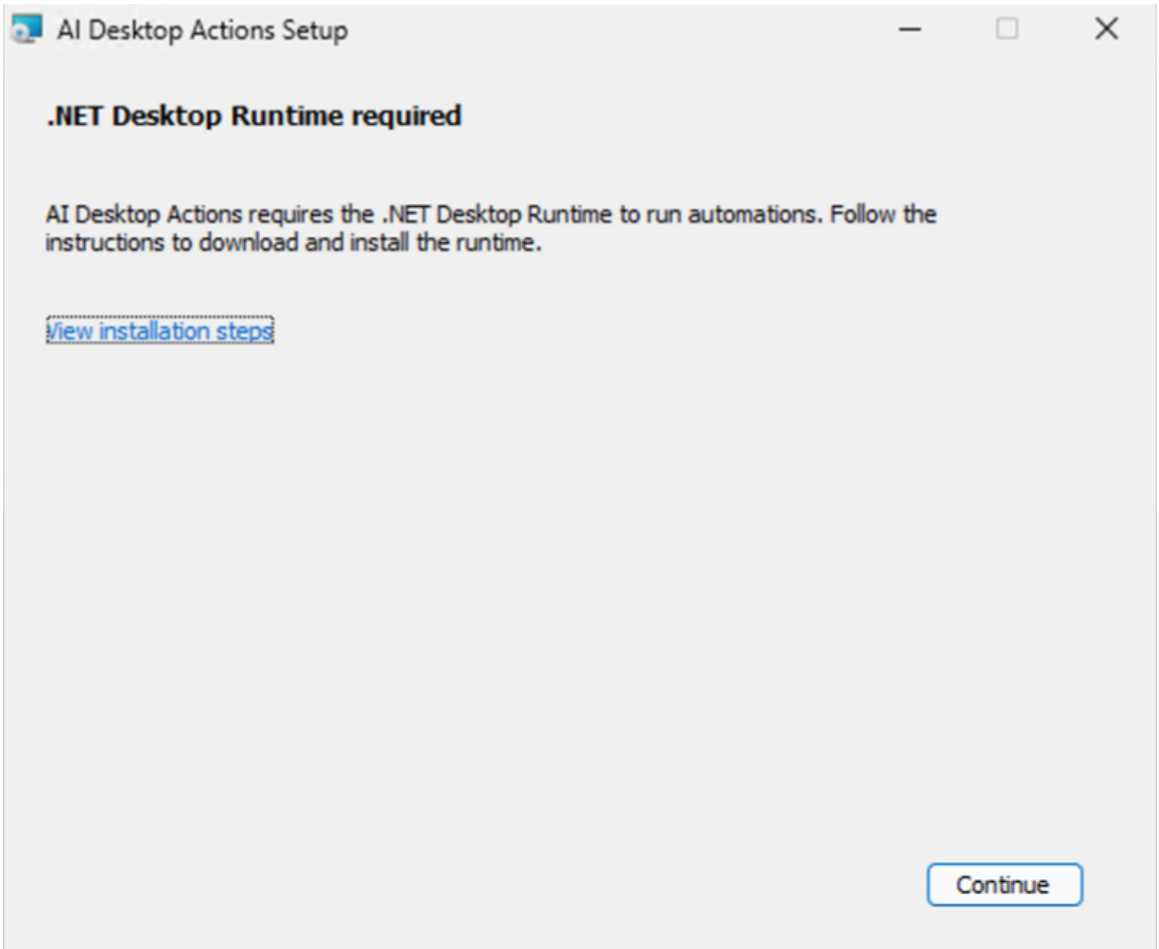
same. For more information, see Download and install .Net Desktop Runtime for AI Desktop Actions.



Trouble?

If AI Desktop Actions is not installed using Windows administrator privileges, you may encounter issues with the desktop session in the Execution workspace. To fix the issue, perform the following steps.

1. Navigate to the **SessionRegistry** folder of the AI Desktop Actions installation directory.
2. Right-click **SN.AGENTICDESKTOP.SESSION.REGISTER.exe** and select **Run as administrator**.
3. Restart your system.

What to do next

Use AI Desktop Actions to design defined desktop actions. For more information, see Defined desktop actions in AI Desktop Actions.

Download and install .Net Desktop Runtime for AI Desktop Actions

Reduce setup time and prevent installation errors by downloading and installing .Net Desktop Runtime following the instructions.

Before you begin

Ensure that you have installed the AI Desktop Actions MSI. For more information, see Download AI Desktop Actions installer for defined desktop actions.

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Role required: admin

About this task

The AI Desktop Actions installer guides you through installation of .NET Desktop Runtime during the setup.

Procedure

1. Copy the following script to your clipboard.

```
Write-Host "--- Initializing Agentic Environment Setup ---"
 -ForegroundColor Cyan
$ErrorActionPreference = "Stop"

$downloadUrl = "https://dot.net/v1/dotnet-install.ps1"
$workingDir = $PSScriptRoot
$scriptPath = Join-Path $workingDir "dotnet-install.ps1"

try {
    Write-Host "[1/3] Downloading official Microsoft
 installer..." -ForegroundColor Yellow
    Invoke-WebRequest -Uri $downloadUrl -OutFile $scriptPath

    Write-Host "[2/3] Installing .NET 9.0.10..."
 -ForegroundColor Yellow
    Set-Location $workingDir

    & .\dotnet-install.ps1 `
        -Architecture x64 `
        -InstallDir "C:\Program Files\dotnet\" `
        -Runtime windowsdesktop `
        -Version 9.0.10

    & .\dotnet-install.ps1 `
        -Architecture x64 `
        -InstallDir "C:\Program Files\dotnet\" `
        -Runtime dotnet `
        -Version 9.0.10

    Write-Host ""
    Write-Host "--- SUCCESS: System is ready for Agentic
 Desktop ---" -ForegroundColor Green
}
catch {
    Write-Host ""
    Write-Host "--- ERROR: Installation failed ---"
 -ForegroundColor Red
    Write-Host $_.Exception.Message -ForegroundColor Red
}

Write-Host ""
Write-Host "Press any key to exit..."
$null = $Host.UI.RawUI.ReadKey("NoEcho,IncludeKeyDown")
```

2. Paste the script in any text editor.

3. Save the file with a `.ps1` extension.

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a. Select **File** > **Save As**.

b. In the **File name** field, enter a name and save the file with a `.ps1` extension.
Example: `myscript.ps1`

c. Set **Save as type** to **All Files (.)**.

d. Choose a location such as Documents or Desktop.

e. Select **Save**.

4. Run the script in Windows PowerShell.

a. Select **Start**.

b. Search for **Windows PowerShell**.

c. Select **Run as administrator**.

d. Use the `cd` command to move to the folder where you saved the script.
Example:

```
cd C:\Users\YourName\Documents
```

e. Run the script by entering the following command.
Example:

```
.\myscript.ps1
```

Result
.NET Desktop Runtime is downloaded and installed on your system.

What to do next
Use AI Desktop Actions to design desktop actions. For more information, see Defined desktop actions in AI Desktop Actions.

Enable AI agents to securely access parameters in AI Desktop Actions

Enable AI agents to securely access stored values, such as credentials and other input data, through Desktop Action Parameter records. Parameters protect sensitive values and provide dynamic inputs to desktop actions during agent execution.

Only users with the sn_aia.admin role can create Parameter records. Parameter records store the names of values that an AI agent accesses during desktop action execution. A separate Parameter record is required for each distinct value.

Parameter record settings

Each Parameter record includes two fields that control how parameter values are stored and retrieved at execution time.

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Setting	Description
Shared - selected	Makes the parameter available to all users. When selected, only one Parameter Value record can be created under the parameter, and only a user with the sn_aia.admin role can create it. During execution, the agent always uses the single Parameter Value record regardless of which user triggered the agent. For example, use this setting for a service account or shared API key that all agents use to connect to the same system.
Shared - not selected	Enables multiple users with the sn_aia.admin or now_assist_panel_user role to create Parameter Value records under the Parameter record to store values. Only one Parameter Value record can be created per user for each Parameter record. If multiple users must trigger the same AI agent, each user must create a Parameter Value record for their own credentials or inputs. During execution, the agent retrieves the Parameter Value record that belongs to the user who triggered the agent. For example, use this setting when each user connects with their own credentials, such as individual usernames and passwords for an internal application.
Mark As Sensitive	Encrypts values of all associated Parameter Value records. The agent decrypts the value at execution time. When not selected, values are passed to the agent as plain text. For example, enable this setting for passwords, API keys, or any value that should not be visible in plain text in the instance.

Important:

The **Shared** and **Mark As Sensitive** fields can only be edited when there are no associated Parameter Value records.

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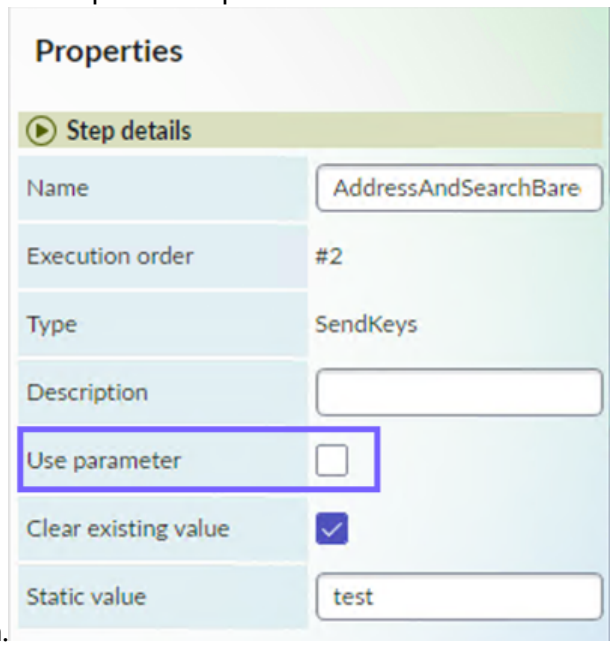
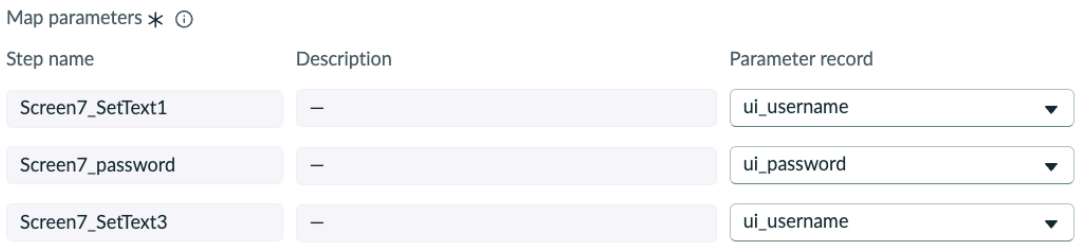
Map parameters to inputs of on-screen task desktop action

In the Design workspace of the AI Desktop Actions application, you can select the **Use parameter** check box for desktop action inputs that must retrieve values from the parameter records during execution.



In AI Agent Studio, when you add a desktop action tool that contains inputs configured for parameters, the **Map parameters** section appears in the modal. Each input configured for a parameter is listed by step name and description, with a **Parameter record** drop-down.



The following rules apply to parameter mapping:

- All inputs configured for parameters must be mapped to a Parameter record before the desktop action can be saved.
- The same Parameter record can be mapped to multiple inputs.
- Each input can only be mapped to one Parameter record.

Note: If you specify values for inputs configured for parameters in the agent instructions or in the ServiceNow Otto panel, the mapped parameter values override them.

Important:

If you update a desktop action in AI Desktop Actions client application after mapping its inputs in AI Agent Studio, the agent continues to use the previous mapping until you reopen the tool configuration and save it again.

If you rename an input in the desktop action, the agent treats it as a new input and the existing mapping for that input is removed. You must remap the renamed input before the desktop action can be saved.

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SSH parameter example

Note:

The following example applies to SSH connector, background task desktop actions. For on-screen task desktop actions, parameter values are supplied through the **Map parameters** section in AI Agent Studio and aren't referenced in agent instructions.

Only users with the sn_aia.admin role can create Parameter records for SSH desktop actions. To store both a username and a password, the AIA admin must create two separate Parameter records, one for the username (for example, `un_username_group`) and one for the password (for example, `un_password_group`).

Users with the sn_aia.admin or now_assist_panel_user role can then create Parameter Value records under each Parameter record to store the values. Only one Parameter Value record can be created per user for each Parameter record.

Example: AI Agent instructions during execution

The following example shows how an AI agent instruction can reference stored parameter names:

`Connect to SSH server and retrieve my session info. Here are my details:`

- `IP address: 172.27.50.123`
- `Port: 22`
- `Retrieve the user name stored in "un_username_group" and the password stored in "un_password_group" parameter records.`

Note: When triggering an AI agent, explicitly specify in your instructions whether the credentials are provided directly or stored in Parameter records. If Parameter records are used, clarify that the record names are for reference only and that the agent must retrieve the username and password from those records.

Verify that you use the exact names of the Parameter records. Parameter record names are case sensitive. For example, "UserName" and "username" are treated as different values.

Related topics

Create a Desktop action parameter record

Create a parameter value record

Create a Desktop action parameter record

Create a Desktop action parameter record to store a name that an AI agent references when accessing credentials or other values during desktop action execution.

Before you begin

Perform this task in the ServiceNow instance.

For SSH connector desktop actions, verify that you have an active SSH server.

Role required: sn_aia.admin

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About this task

Parameter records are supported for on-screen tasks and SSH background tasks. Use them to replace fixed values with configured ones for on-screen tasks and username and password for SSH.

Procedure

1. Navigate to **All** > **AI Desktop Actions** > **Desktop Action Parameters**.
2. Select **New**.
3. Fill in the following fields.

Desktop action parameter fields

Field	Description
Name	Enter a unique name for the parameter. The AI agent references this name when retrieving the stored value. For example, `un_username_group` or `un_password_group`.
Description	Enter a description of what value this parameter stores.
Shared	Option to make this parameter available to all users. When selected, only one Desktop action parameter value record can be created under this parameter, and only a user with the sn_aia.admin role can create it. During execution, the AI agent uses this single value regardless of which user triggered the agent.
Mark As Sensitive	Option to encrypt all associated Desktop action parameter value records. The agent decrypts the value at execution time.

Important:

Shared and **Mark As Sensitive** can only be edited when there are no associated parameter value records.

4. Select **Submit**.

Result

The Desktop action parameter record is created and appears in the Desktop Action Parameters list. You can now create Desktop action parameter value records under this parameter. For more information, see Create a parameter value record.

Create a parameter value record

Create a Desktop action parameter value record to store the value that an AI agent retrieves during desktop action execution.

Before you begin

Perform this task in the ServiceNow instance.

At least one Desktop action parameter record must exist.

Role required: sn_aia.admin or now_assist_panel_user

Note:

For shared parameters, only users with the sn_aia.admin role can create Desktop action parameter value records.

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Procedure

1. Navigate to **All** > **AI Desktop Actions** > **Desktop Action Parameters**.
2. Select the Parameter record for which you want to store a value.
3. In the Desktop action parameter values related list, select **New**.
4. Fill in the following fields.

Desktop action parameter value fields

Field	Description
Name	Read-only. Inherited from the parent Desktop action parameter record.
User	The user this value record belongs to. Defaults to the user creating the record. Users with the sn_aia.admin role can change this field to assign the value record to a different user. **Note:** This field is not shown for shared parameters.
Value	Enter the value the agent retrieves at execution time, such as a username, password, or other credential. **Note:** The **Value** field displays as plain text or encrypted text depending on the **Mark As Sensitive** setting on the parent parameter record.

5. Select **Submit**.

Result

The Desktop action parameter value record is created and appears in the Desktop action parameter values related list on the Parameter record.

Defined desktop actions in AI Desktop Actions

Desktop actions enable you to automate repetitive tasks on your desktop and web applications. This capability helps you streamline repetitive tasks, improve efficiency, and integrate desktop application workflows into your ServiceNow processes.

Desktop actions are tools that AI agents use to interact with web and desktop applications. When you configure an AI agent and select desktop action as a tool, you define whether the AI agent follows a defined path (fixed steps designed in AI Desktop Actions) or an adaptive path (high-level goal described in the tool configuration). Unlike adaptive path desktop actions that dynamically plan execution, defined path desktop actions enable AI agents to execute preconfigured workflows through a fixed sequence of steps.

Types of defined desktop actions

AI agents use these desktop actions to interact with desktop applications, perform UI-based tasks, and automate end-to-end workflows. There are two types of desktop actions that can be added as tools to AI agents:

On-screen task

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These desktop actions help you simulate humans interacting with UI elements on your thick client applications, legacy systems, or SaaS applications without APIs. These actions include clicking buttons, typing into text boxes, selecting from dropdown menus, and more. These desktop actions make it easier to automate repetitive tasks. They encapsulate repeatable UI interactions, such as screens, anchors, and steps. You can create, manage, and test your desktop actions using the no-code Design workspace.

Example: Filling in fields on a payroll application, updating inventory in a point-of-sale system, or submitting a request through a desktop insurance claims app.

You can access and view the existing desktop actions in the ServiceNow instance by navigating to **All** > **AI Desktop Actions** > **Desktop Actions**. You can see the details of related desktop action applications, AI agents, and desktop action execution records for on-screen task, and AI agents and desktop action execution records for background desktop actions.

Background task

These desktop actions include prebuilt connectors that enable your AI agents to interact with various applications and system components in the background. These connectors streamline automation by offering actions for common tasks, reducing the need for complex scripting. Each connector focuses on a specific application or system area, providing a collection of related methods. You can't create background task desktop actions.

Example: Reading data from Microsoft Excel, extracting emails from Microsoft Outlook, generating a PDF, compressing files into a ZIP, fetching records from a database, or sending a system notification.

Background task desktop actions are supported for the following applications:

Note: For the AI agents to perform Background task automations, the following applications must already be installed on the end-user's system.

Application	Description
Microsoft Excel	Enables AI agents to perform standard actions on the Microsoft Excel documents. For example, data manipulation, content modification, and information retrieval from spreadsheets. The following methods are supported: • ReadData • WriteData • FindAndReplace **Note:** CSV and password-protected files aren't supported.
Microsoft Outlook	Enables AI agents to perform standard actions on the Microsoft Outlook application. For example, you can automate sending or replying to emails. The following methods are supported:

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Application	Description
	• DeleteMail • ForwardMail • GetMailsFromFolder • MoveMail • Reply • SaveAllAttachments • SendMail • GetMail • MarkAsRead • MarkAsUnread **Note:** Only the classic view is supported. Shared inboxes aren't supported.
Microsoft Word	Enables AI agents to perform standard actions on the Microsoft Word documents. For example, you can replace text in a document. The following methods are supported: • GetText • InsertText • ReplaceText **Note:** Password-protected files aren't supported.
PDF	Enables AI agents to perform standard actions on the PDF documents. For example, extracting text, converting to Excel or Images, and merging and spiting files. The following methods are supported: • GetText • ConvertToExcel • ConvertToImages • Merge • Split **Note:** Password-protected files aren't supported. You can't manipulate e-signed PDFs such as performing merge and split. This action corrupts the PDF files.
PowerShell	Enables AI agents to execute PowerShell commands and scripts and returns the results. The following methods are supported:

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Application	Description
	• InvokeCommand • InvokeScript **Note:** Each PowerShell step runs in a new session. Output from one step isn't carried over to the next step.
SQL	Enables AI agents to execute custom SQL queries against supported databases (MSSQL, ORACLE, MYSQL, OLEDB, ODBC) and returns results as JSON. The following method is supported: ExecuteQuery
Secure Shell (SSH)	Enables AI agents to securely connect to remote servers to run SSH commands and scripts; and returns the execution results. This connector supports non-interactive commands. The following method is supported: RunCommand **Note:** Each SSH step runs in a new session. Output from one step isn't carried over to the next step.
System Actions	Enables AI agents to perform standard Windows system operations. For example, starting an app, creating a ZIP file, or deleting any file or folder. The following methods are supported: • StartApp • Terminate • DateTimeNow • SetEnvironmentVariable • GetEnvironmentVariable • CopyFileOrFolder • DeleteFileOrFolder • WriteToFile • ReadFromFile • GetFilesFromFolder • ExtractFile • CreateZip

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Ways to create desktop actions

Note: If your automation requires manual inputs, such as entering an OTP or CAPTCHA, you must provide instructions to the AI Agent to wait for user input during execution. Otherwise, the automation can't proceed.

You can create on-screen desktop actions in the following ways:

Auto-capture screens and steps

With Action recorder, you can record your interactions with desktop applications to create automated workflows. It records every step you take, including clicks, keystrokes, and data entry, along with visual and contextual information. By recording steps, you can automate tasks that replicate your interactions. You can save the recorded screens and steps as a reusable desktop action. For more information, see Action recorder in AI Desktop Actions.

Manually capture screens and steps

You can manually take a screen capture, add anchors and steps to automate a series of steps you perform on your computer, such as clicking buttons, typing text, or interacting with different applications, and then save this sequence as a reusable desktop action.

Benefits of desktop actions

- Eliminate manual effort by automating repetitive tasks for frequent desktop activities.
- Execute complex sequences of steps quickly and consistently.
- Connect desktop application processes with your broader ServiceNow automations.
- Standardize task execution to minimize human error.
- You can record steps directly on your desktop applications.
- Automate tasks that span across multiple desktop applications.
- Save recorded sequences as desktop actions to use them in various automations.
- Review, rearrange, edit, or delete individual steps within a recorded action.

How the Design workspace works

Record steps

Capture your interactions with desktop applications, including clicks, text input, and screen navigation.

Define steps

Specify individual steps like Click, Set Text, or Get Text to interact with elements on your screen.

Application details

Select and store the desktop applications involved in your automations in the **Details** tab.

Organize screens

Structure your recorded steps by application screens, making it easy to review and edit.

Save and publish

Store your desktop actions in your ServiceNow instance for reuse and deployment.

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What you can automate

Desktop actions support a wide range of desktop application interactions, including:

- Entering data into forms.
- Extracting information from applications.
- Navigating through application menus and screens.
- Performing steps like saving files or generating reports.
- Transferring data between different desktop applications.

Related topics

AI Desktop Actions Design workspace

Action recorder in AI Desktop Actions

Automate repetitive tasks by auto-capturing steps in AI Desktop Actions

Extend a desktop action by manually capturing steps in AI Desktop Actions

Add details to desktop actions in AI Desktop Actions

Test and activate a desktop action in AI Desktop Actions

Automate repetitive tasks by recording steps with AI in AI Desktop Actions

Create desktop actions by recording steps with AI to automate repetitive tasks in AI Desktop Actions. AI validates anchor positions and generates screen contexts automatically after recording, reducing the risk of automation failures at runtime.

Before you begin

Familiarize yourself with the Design workspace and Action recorder. For more information, see AI Desktop Actions Design workspace and Action recorder in AI Desktop Actions.

To access the AI Desktop Actions functionality, perform the following steps:

- Enable AI Desktop Actions on your ServiceNow instance. For more information, see Configure AI Desktop Actions.
- Download the AI Desktop Actions installer to automate repetitive tasks across applications and systems. For more information, see Download AI Desktop Actions installer for defined desktop actions.

Confirm that the following system requirements are met:

- Windows 11 operating system is used.
- A .NET 9.0 runtime v9.0.10 and .NET 9 Desktop Runtime v9.0.10 is installed.
- No extended monitors are connected.
- Theme must match between the systems used for recording and execution.
- The ServiceNow AI Lens skill must be active on your instance. Contact your ServiceNow administrator if you're unsure whether this condition is met.

Role required: sn_desktop_core.desktop_action_user

About this task

Record with AI generates more accurate anchor positions automatically, reducing the time you spend on manual anchor adjustments.

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When you record with AI, after you finish recording, AI analyzes the recording, validates anchor positions, and corrects inaccuracies before you save or activate the desktop action. AI also generates a screen context for each captured screen and description for the desktop action. Screen context is a description of what the screen does and what it contains, which helps reviewers and AI agents understand the screen's intent.

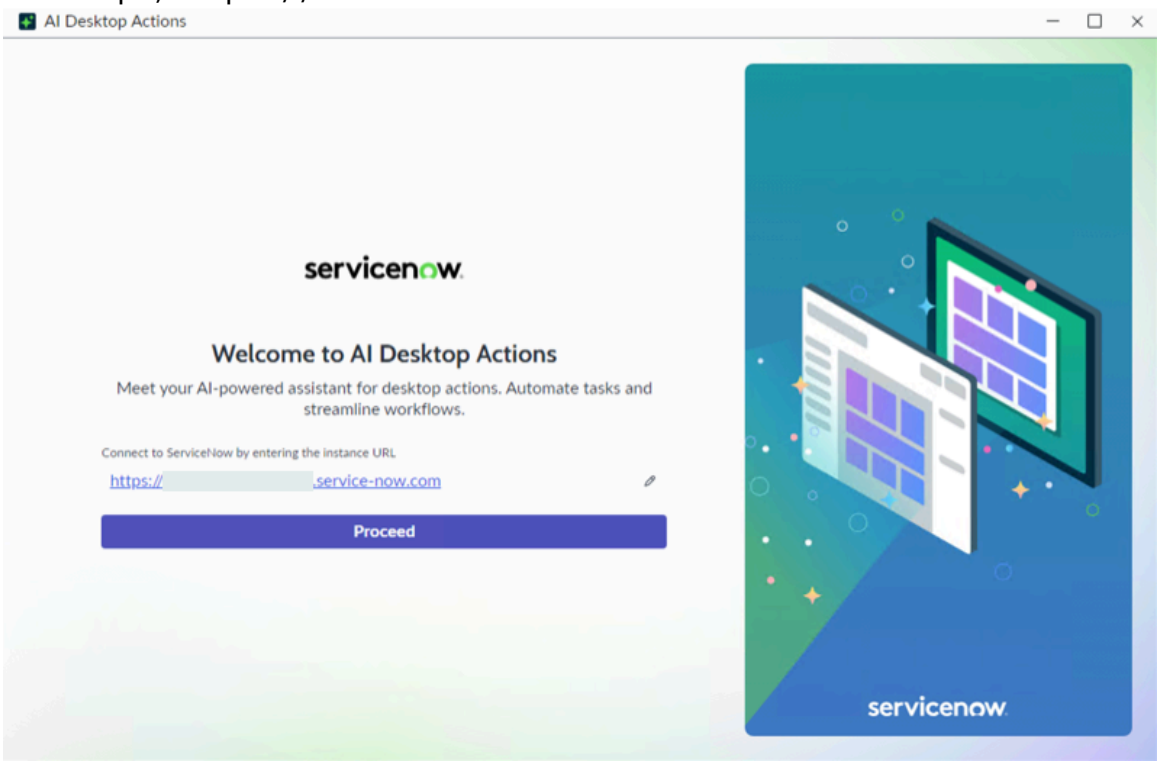
Note: If your automation requires manual inputs, such as entering an OTP or CAPTCHA, you must provide instructions to the AI Agent to wait for the user input during execution. Otherwise, the automation can't proceed.

The *sn_desktop_core.record_with_ai* property is enabled by default, making **Record with AI** the default recording option. Turn off this property to set the manual recorder as the default recording option.

Procedure

1. From your Windows system, launch the AI Desktop Actions application.
2. On the login page, in the **Add ServiceNow URL** field, enter the ServiceNow instance URL.

   Example
   For example, `https://<instance name>.service-now.com`.



3. Select **Proceed**.
4. Log in to your ServiceNow account by entering your user name and password.
   Your must have the sn_aia.admin role.

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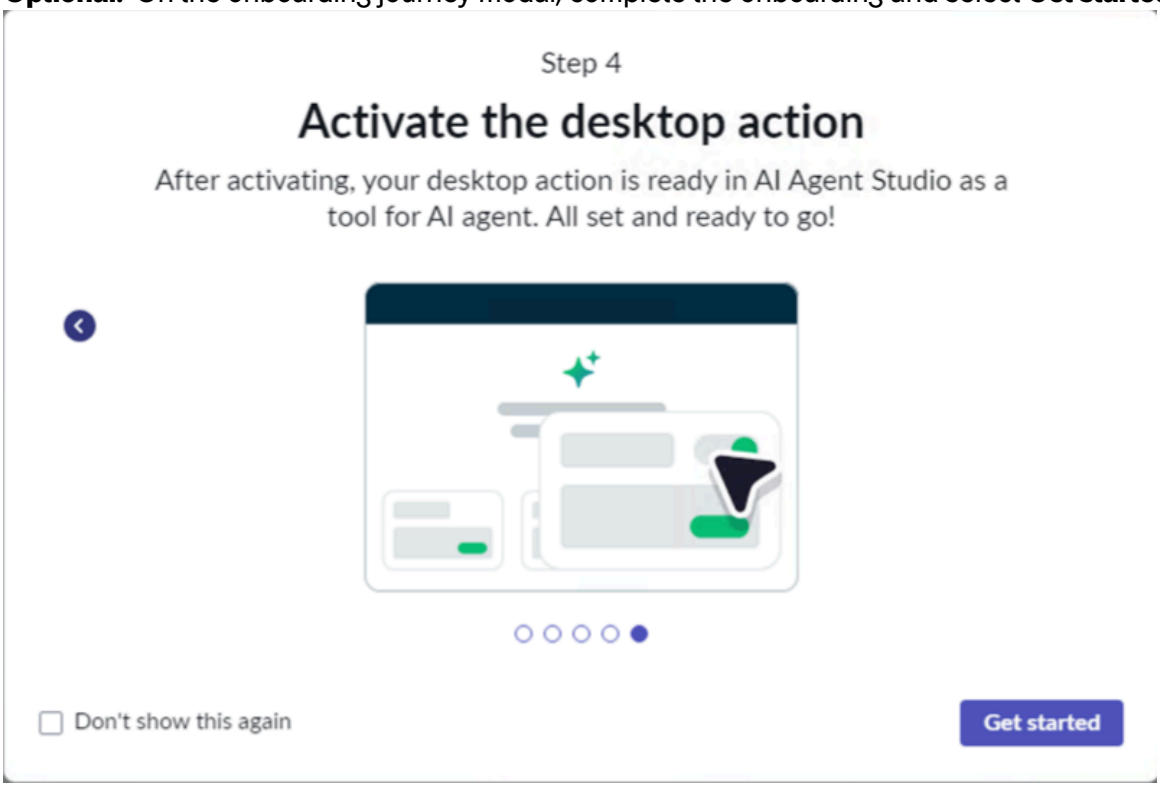
5. **Optional:** On the onboarding journey modal, complete the onboarding and select **Get started**.



If you launch the AI Desktop Actions for the first time, the onboarding journey widget appears. You can select **Don't show me again** to hide the widget the next time you launch AI Desktop Actions or **Skip intro** to skip the onboarding.

6. On the AI Desktop Actions home page, select **Create desktop action**.

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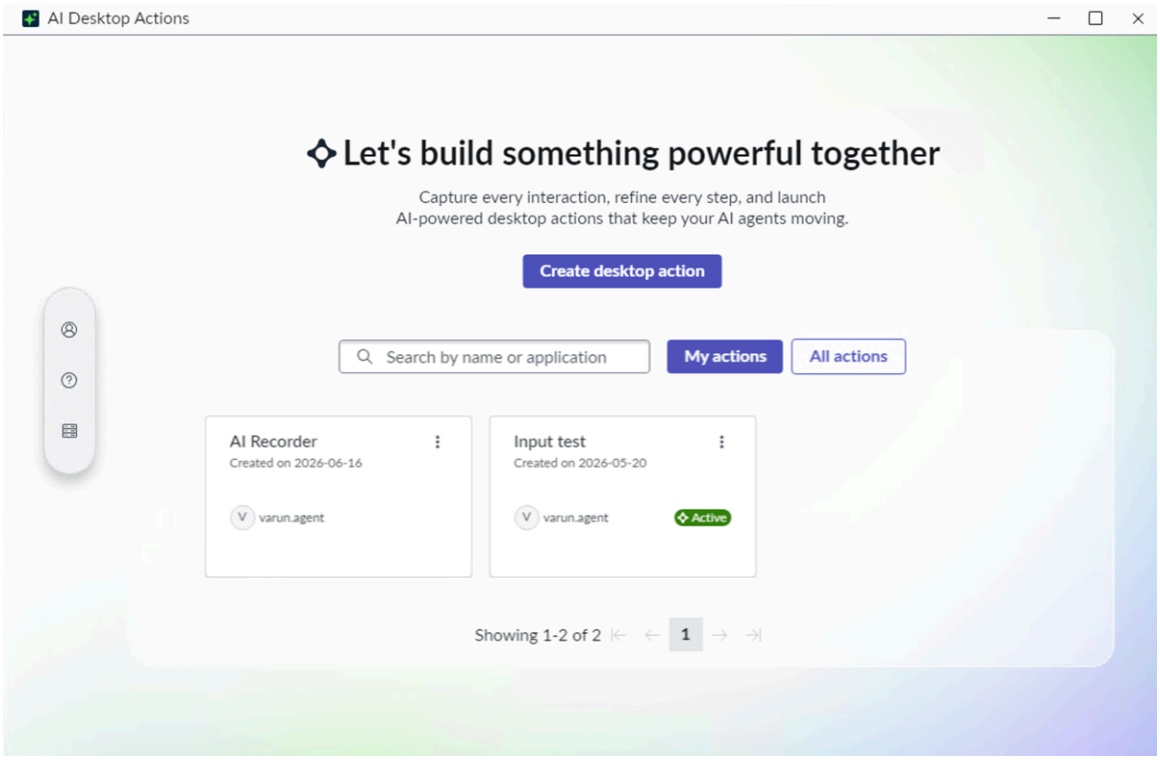
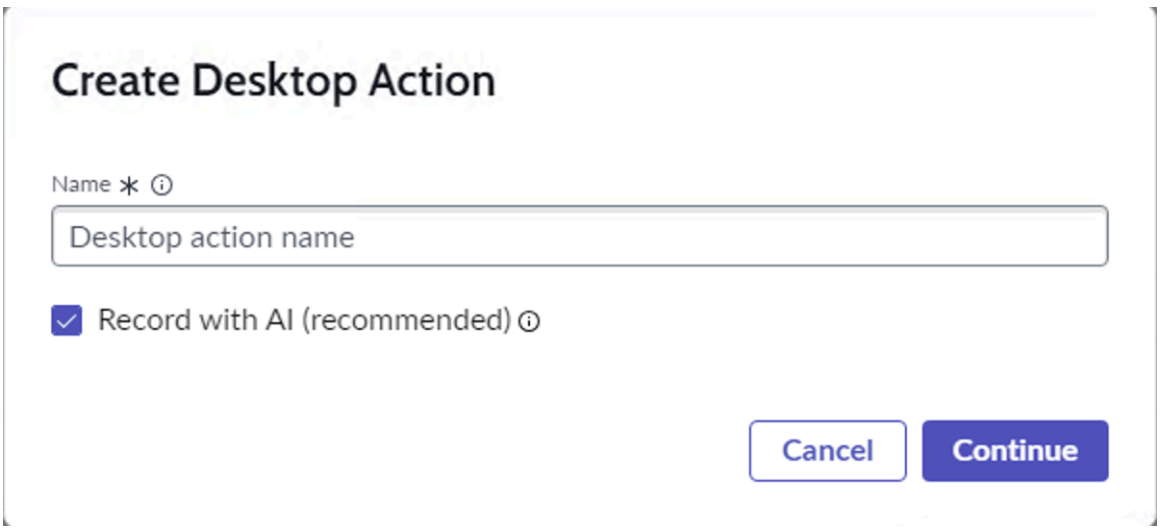


7. In the Create Desktop Action dialog, keep the **Record with AI (recommended)** check box selected.



Important: If the **Record with AI (recommended)** check box is unavailable, the ServiceNow AI Lens is inactive on your instance. Contact your ServiceNow administrator to enable it. You can still create desktop actions using auto-capture mode.

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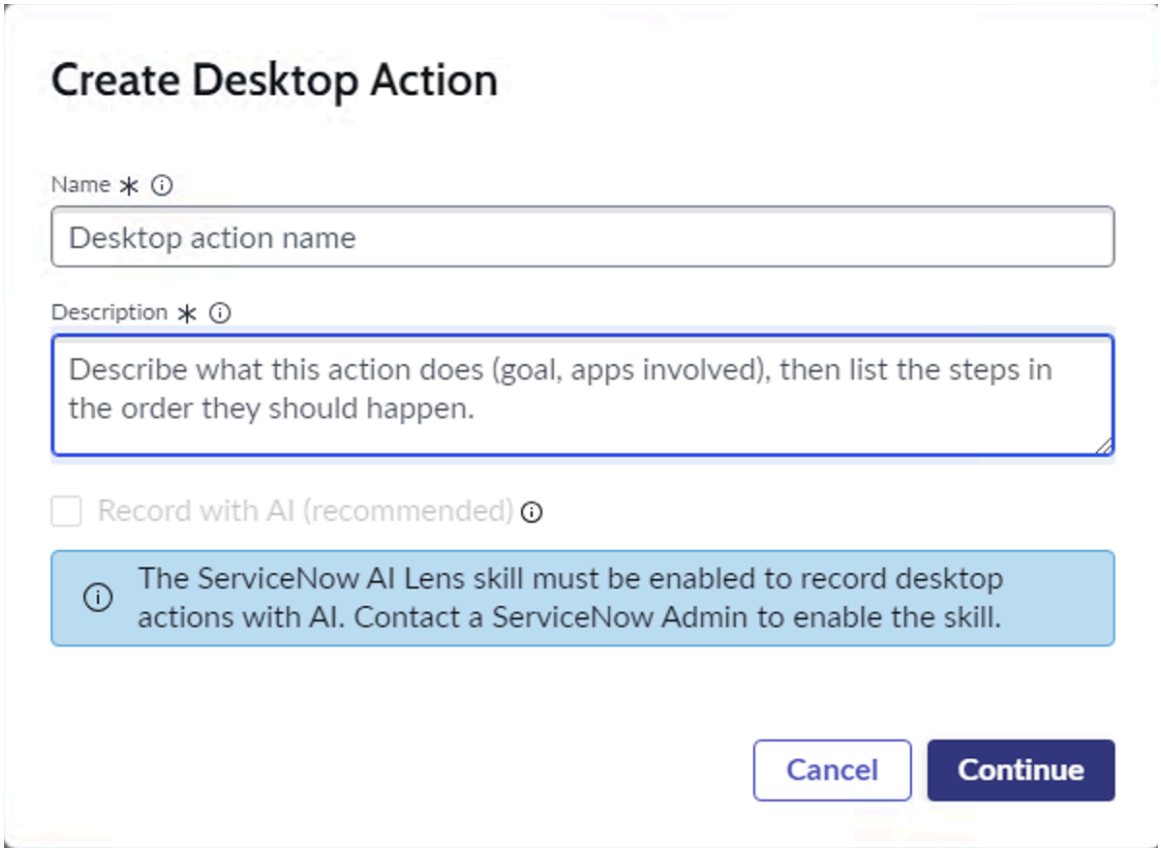
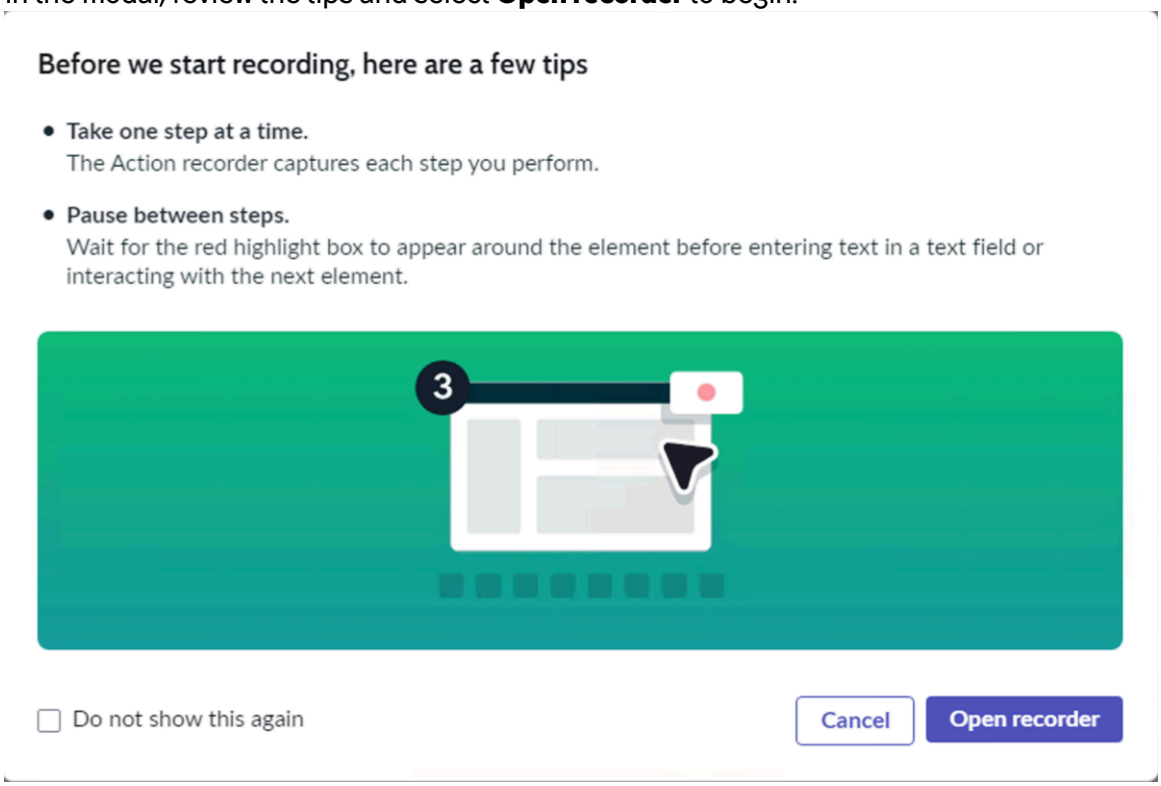


8. Enter a name for the desktop action.
9. Select **Continue**.
10. In the modal, review the tips and select **Open recorder** to begin.



The AI Desktop Actions window is minimized and the Action recorder panel is launched. You can freely drag and reposition the Action recorder panel anywhere on your desktop screen.

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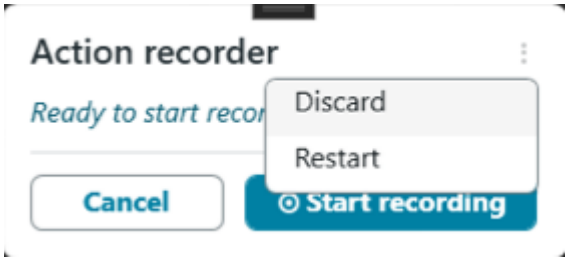

11. Open the applications that you want to record steps for.
12. From the Action recorder panel, select **Start recording**.

    Important: Before you start recording, review the tips for accurate capturing of anchors and steps. For more information, see Tips for accurate recording.

    You will see a "Recording started" message on the Action recorder panel. You can select any of the following options when needed from the **More options** menu:

    - **Pause**: Skip recording steps
    - **Restart**: Restart recording the steps

      You will lose the recorded screens and steps.

    - **Discard**: Discard the recording if it doesn't meet your needs
13. Perform the steps that you want to automate.

    Each step that you perform is captured sequentially and the type of UI action is displayed for each step. For example, Capturing Mouse Left Click event.

    You can capture maximum of 50 steps using the recorder in a recording session. While auto-capturing steps, a counter displays the remaining number of steps you can capture using the recorder (for example, "35 of 50 max"). Recording stops automatically after you capture 50 steps. If you must capture additional steps, start a new recording session. The new recording adds screens and steps to those captured in the previous recording.

14. After you're done with all the steps, select **End recording** on the Action recorder panel.

    You will see the "Draft workflow saved" message on the Action recorder panel.

    AI processes the recording in three stages:

    a. Analyzing your recording with AI

    b. Inserting anchors

    c. Generating screen contexts
    You must not close the application during processing.

    The recorded steps are displayed as screenshots in the Design workspace with anchors and steps automatically added.

15. When the `AI analysis complete` banner appears, review the AI-generated anchors and screen contexts.

    Note: If two applications in the frame have similar logos or visual elements, verify that the anchor position is unique to the target application to avoid incorrect element identification during automation.

    Anchors and screen context generated by AI are marked with an AI badge in the properties panel. For each screen, review the screen context and edit it if needed.

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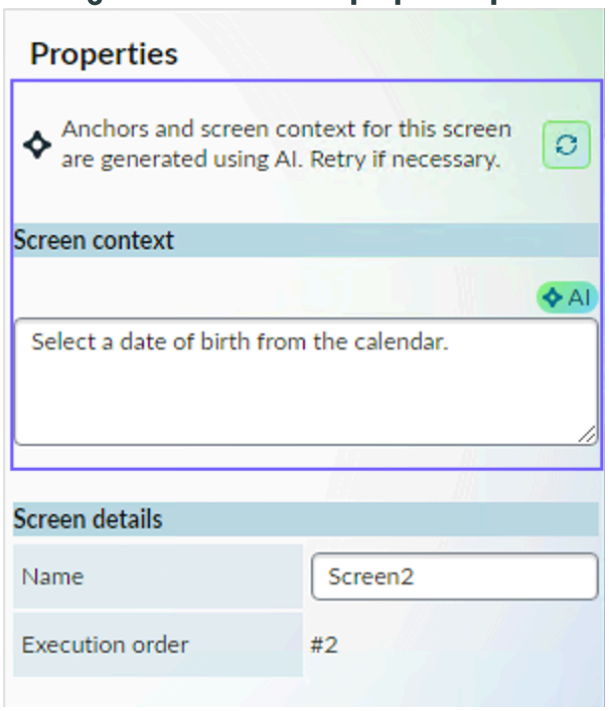
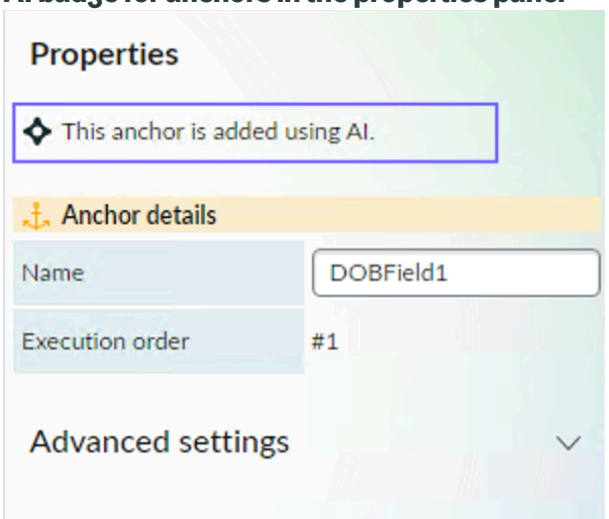
AI badge for screens in the properties panel



AI badge for anchors in the properties panel



Note: The accuracy of AI-generated anchors depends on the application's accessibility, performance, and UI complexity. Always review before activating.

16. **Optional:** To regenerate the screen context and anchor position for a specific screen, select **Retry** in the screen properties panel.
17. Review the sequence of captured screens and adjust if necessary.
    You can adjust the sequence by dragging the screens in the Screens and steps panel.
18. Review and adjust steps.
    You can modify the sequence by adding, removing, or dragging steps.

    a. From the Anchor control menu, select the **Add step** icon ⊕.

    b. Select the type of step to perform for this step from the contextual menu.

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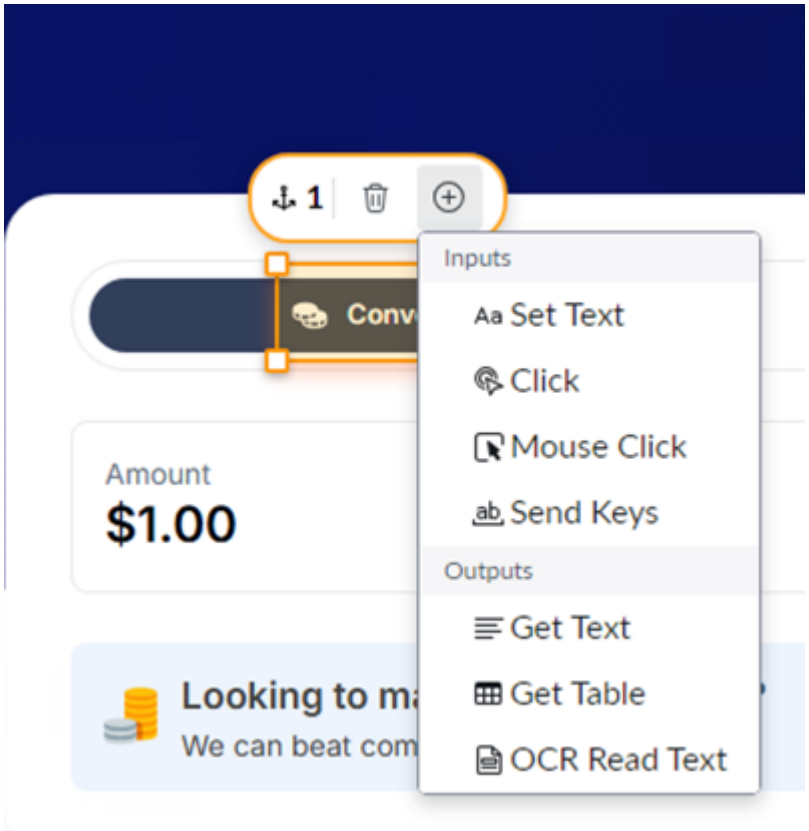

Description of the actions

Goal	Step	Type	Example
Enter text in a field	Set Text	Input	Enter any text data such as a user name, an address, a survey response, or in any situation where text entry is accepted. **Note:** If you set a static value for this field, the automation uses it during execution and doesn't prompt you for input from the ServiceNow Otto panel.
Simulate a mouse click	Click	Input	Click a button, open a menu, or perform any step typically performed by a mouse click.

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Goal	Step	Type	Example
Simulate an alternative mouse action (for example, right-click, drag, scroll, or paste)	Mouse Click	Input	Perform various mouse device actions, such as right-click and select an object or scroll on a web page.
Simulate a key press or a key function	Send Keys	Input	Perform keyboard shortcuts, such as copying text by entering `Ctrl + C` on fields and elements. **Note:** If you set a static value for this field, the automation uses it during execution and doesn't prompt you for input from the ServiceNow Otto panel.
Capture text from a window or web page	Get Text	Output	Receive text from the source area.
Capture a table	Get Table	Output	Receive table from the source area when the text is in the table format. **Note:** For the step to capture table data successfully, the data must already be in the table form. The step can't convert ordinary text to table data.
Read text from an image	OCR Read Text	Output	Recognize text from images and return it in the standard text format.

You can add multiple steps representing your automation steps.

19. Configure the properties for added screens, anchors, and steps in the Properties panel.

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For more information, see Screen, anchor, and step properties in AI Desktop Actions.

20. **Optional:** Modify the auto-generated names for all added screens, anchors, and steps.

    (Optional) You can modify the auto-generated names following these naming guidelines.

    - Name fields must not be empty.
    - Name fields must contain only alphanumeric characters. Spaces and special characters are not permitted.
    - Each name must be unique at its respective parent level.
        - Each screen must have a unique name at the desktop-action level.
        - Each anchor must have a unique name at the screen level.
        - Each step must have a unique name at the anchor level.

What to do next

1. Configure the details of your desktop action. For more information, see Add details to desktop actions in AI Desktop Actions.
2. Test and activate the desktop action so that it can be added as a tool to AI agents. For more information, see Test and activate a desktop action in AI Desktop Actions.
3. Add the desktop action as a tool to AI agents in AI Agent Studio. For more information, see Add a defined desktop action tool to an AI agent for desktop and web-based task.

Related topics

AI Desktop Actions Design workspace

Action recorder in AI Desktop Actions

Screen, anchor, and step properties in AI Desktop Actions

Automate repetitive tasks by auto-capturing steps in AI Desktop Actions

Extend a desktop action by manually capturing steps in AI Desktop Actions

Examples of creating desktop actions

Examples of executing desktop actions using AI agents

Automate repetitive tasks by auto-capturing steps in AI Desktop Actions

Create desktop actions by auto-capturing steps to automate repetitive tasks in AI Desktop Actions. You can save the steps that you perform on the application elements as a reusable desktop action of type on-screen task.

Before you begin

To access the AI Desktop Actions functionality, perform the following steps:

- Enable AI Desktop Actions on your ServiceNow instance. For more information, see Configure AI Desktop Actions.
- Download the AI Desktop Actions installer to automate repetitive tasks across applications and systems. For more information, see Download AI Desktop Actions installer for defined desktop actions.

Confirm that the following system requirements are met:

- Windows 11 operating system is used.
- A .NET 9.0 runtime v9.0.10 and .NET 9 Desktop Runtime v9.0.10 is installed.

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- No extended monitors are connected.
- Theme must match between the systems used for recording and execution.

Familiarize yourself with the Design workspace and Action recorder. For more information, see AI Desktop Actions Design workspace and Action recorder in AI Desktop Actions.

Role required: sn_aia.admin

About this task

Note: To create desktop actions with AI-assisted anchor validation and automatic screen context generation, use Record with AI instead.

You can record steps that you want to automate for desktop and web applications and save them as desktop actions of type on-screen task that AI agents can simulate while executing automations.

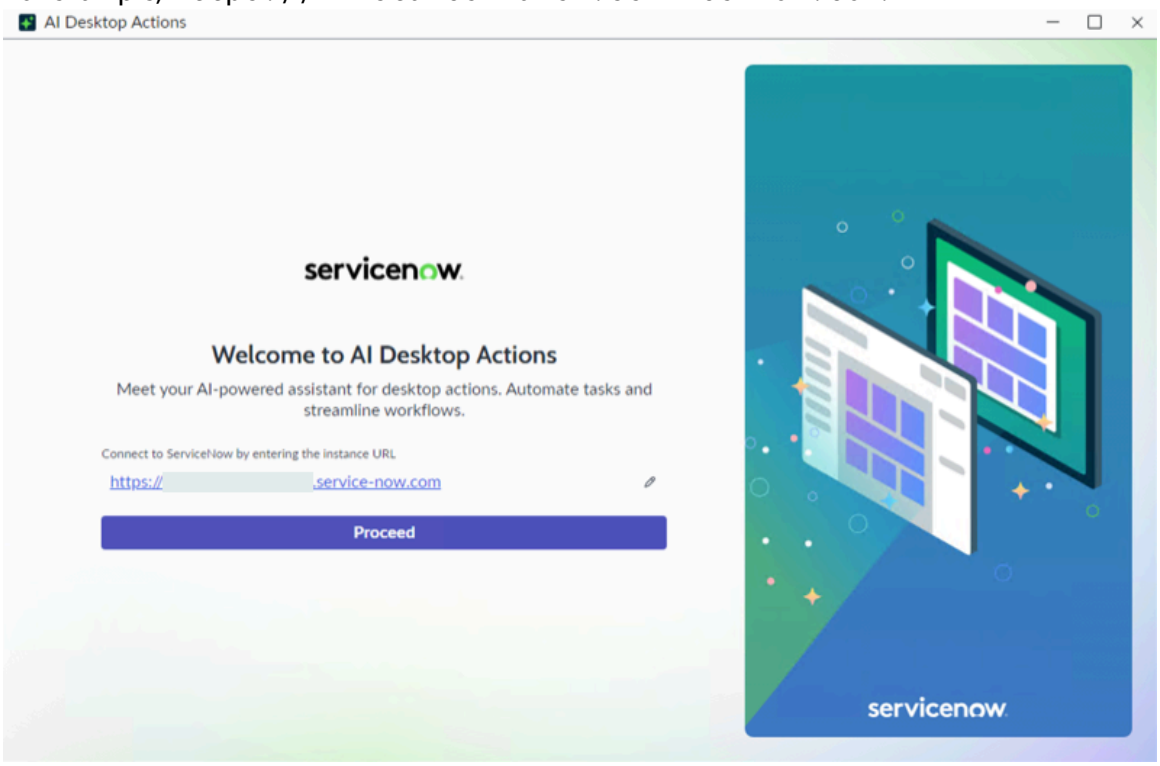
With Action recorder, you can record every step you perform on desktop applications, including clicks, keystrokes, and data entry, along with visual and contextual information. This detailed recording of steps allows automated tasks to reliably replicate your interactions.

Note: If your automation requires manual inputs, such as entering an OTP or CAPTCHA, you must provide instructions to the AI Agent to wait for the user input during execution. Otherwise, the automation can't proceed.

Procedure

1. From your Windows system, launch the AI Desktop Actions application.
2. On the login page, in the **Add ServiceNow URL** field, enter the ServiceNow instance URL.

   Example
   For example, `https://<instance name>.service-now.com`.



3. Select **Proceed**.

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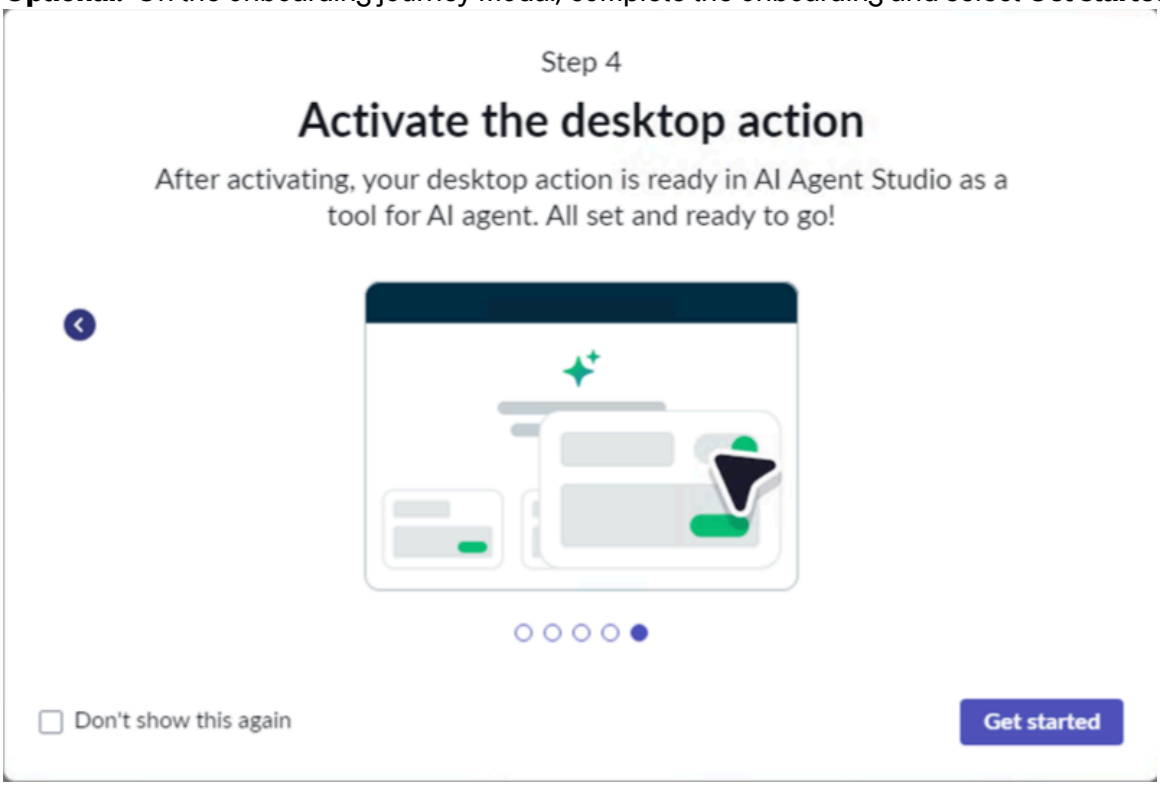
4. Log in to your ServiceNow account by entering your user name and password. Your must have the sn_aia.admin role.

5. **Optional:** On the onboarding journey modal, complete the onboarding and select **Get started**.



If you launch the AI Desktop Actions for the first time, the onboarding journey widget appears. You can select **Don't show me again** to hide the widget the next time you launch AI Desktop Actions or **Skip intro** to skip the onboarding.

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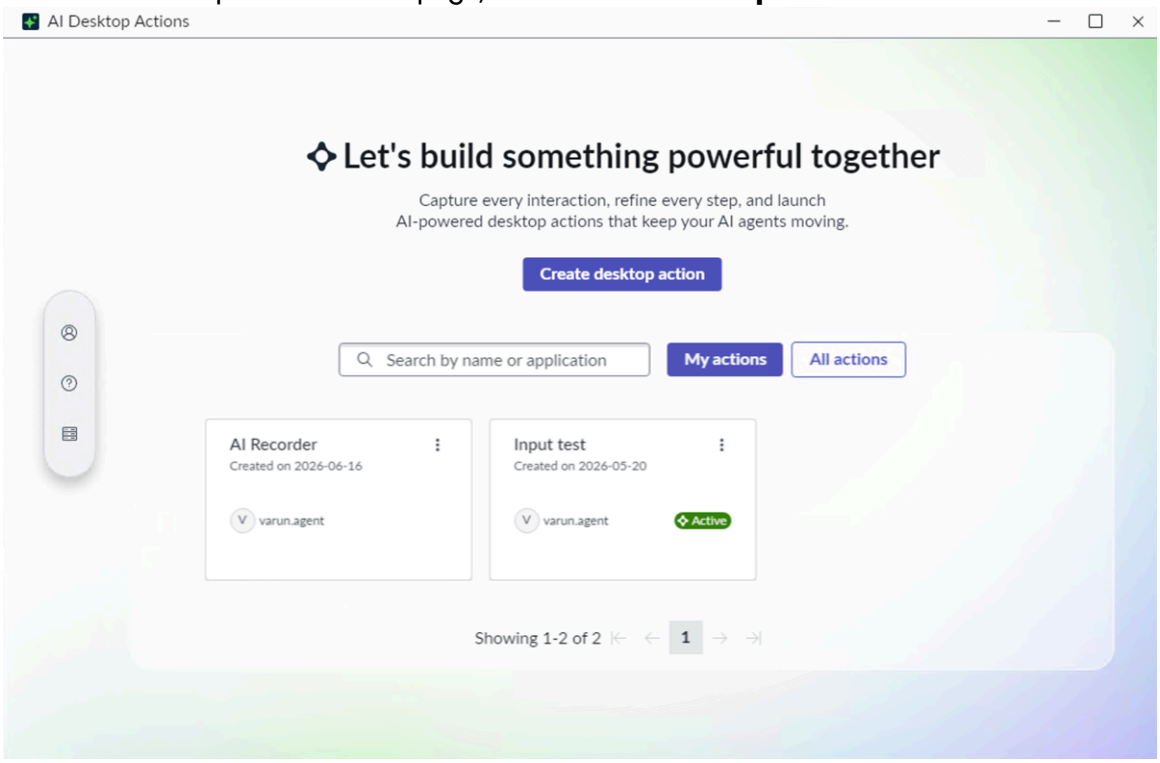
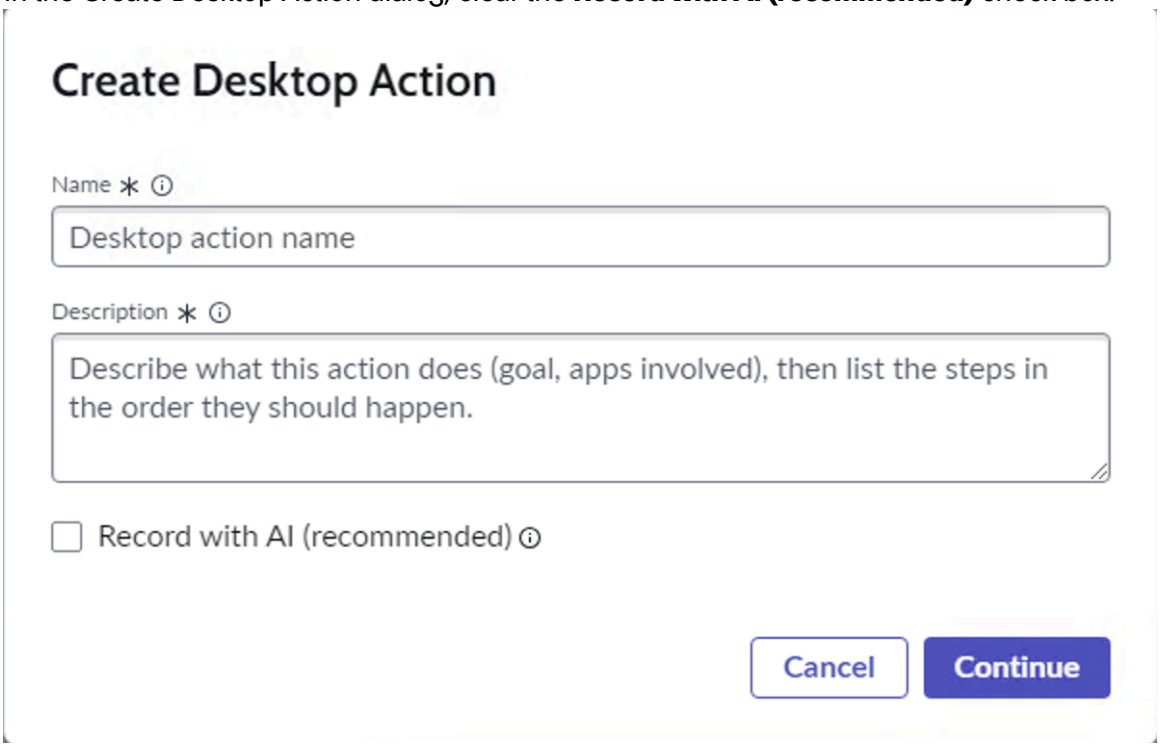
6. On the AI Desktop Actions home page, select **Create desktop action**.



7. In the Create Desktop Action dialog, clear the **Record with AI (recommended)** check box.



8. Enter a name and description for the desktop action.
9. Select **Continue**.
10. In the modal, review the tips and select **Open recorder** to begin.

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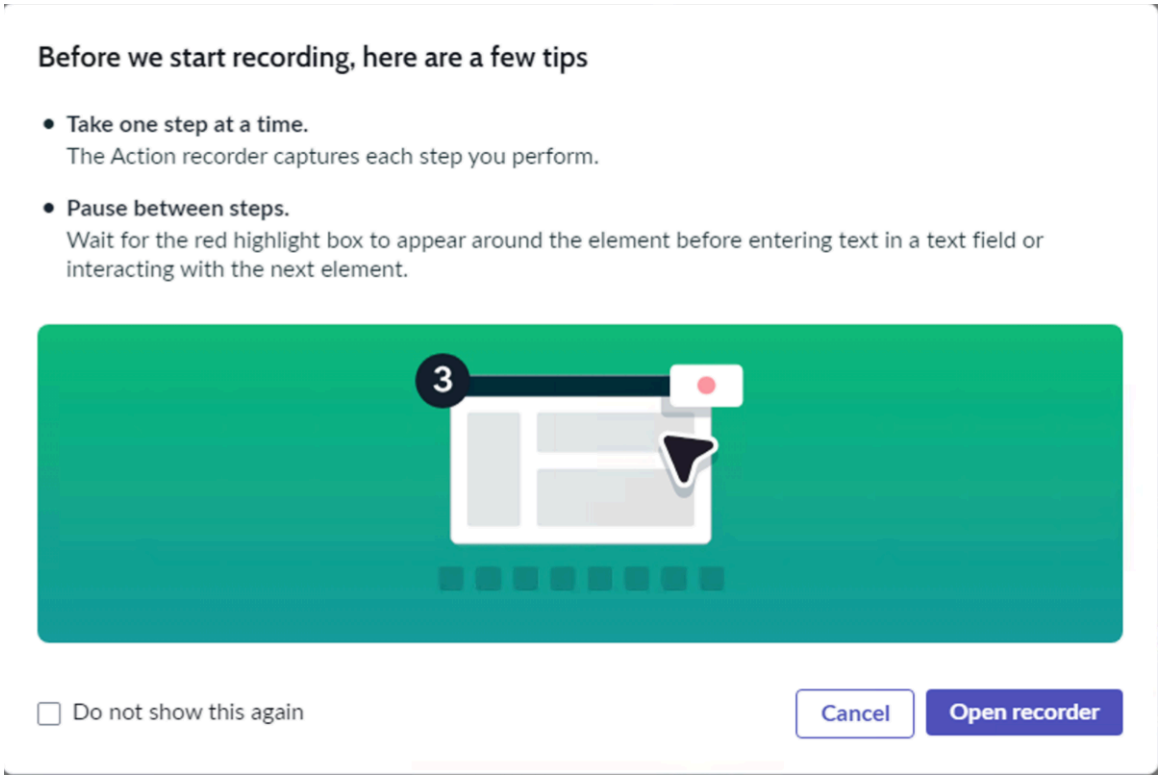
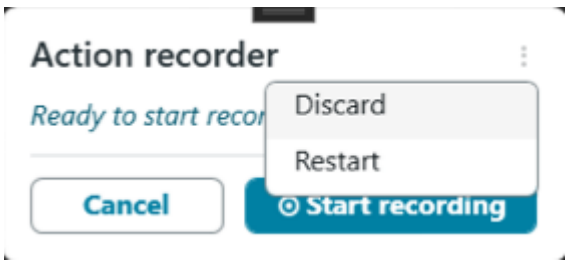


The AI Desktop Actions window is minimized and the Action recorder panel is launched. You can freely drag and reposition the Action recorder panel anywhere on your desktop screen.



11. Open the applications that you want to record steps for.
12. From the Action recorder panel, select **Start recording**.

> **Important:** Before you start recording, review the tips for accurate capturing of anchors and steps. For more information, see Tips for accurate recording.

You will see a "Recording started" message on the Action recorder panel. You can select any of the following options when needed from the **More options** menu:

- **Pause**: Skip recording steps
- **Restart**: Restart recording the steps

  You will lose the recorded screens and steps.

- **Discard**: Discard the recording if it doesn't meet your needs

13. Perform the steps that you want to automate.

    Each step that you perform is captured sequentially and the type of UI action is displayed for each step. For example, Capturing Mouse Left Click event.

    You can capture maximum of 50 steps using the recorder in a recording session. While auto-capturing steps, a counter displays the remaining number of steps you can capture using the

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recorder (for example, "35 of 50 max"). Recording stops automatically after you capture 50 steps. If you must capture additional steps, start a new recording session. The new recording adds screens and steps to those captured in the previous recording.

14. After you're done with all the steps, select **End recording** on the Action recorder panel.

    You will see the "Draft workflow saved" message on the Action recorder panel.

    The recorded steps are displayed as screenshots in the Design workspace with anchors and steps automatically added.

15. Review the sequence of captured screens and adjust if necessary.
    You can adjust the sequence by dragging the screens in the Screens and steps panel.
16. Review the location of anchors and adjust as necessary.

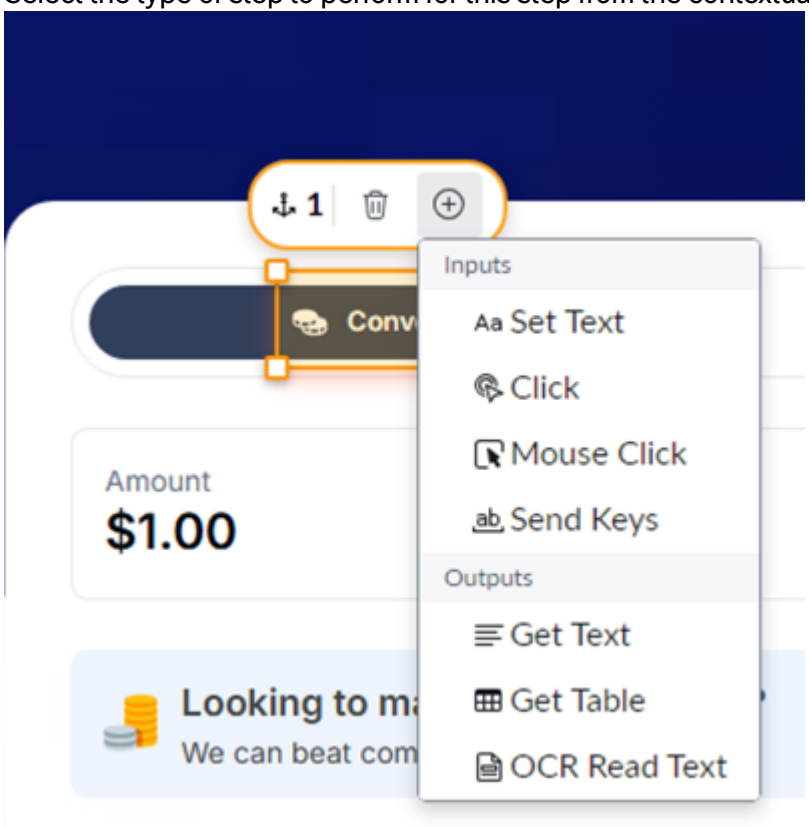
    Note: If two applications in the frame have similar logos or visual elements, verify that the anchor position is unique to the target application to avoid incorrect element identification during automation.

    The auto-anchoring accuracy depends on the application's accessibility, performance, and UI complexity.

17. Review and adjust steps.
    You can modify the sequence by adding, removing, or dragging steps.

    a. From the Anchor control menu, select the **Add step** icon ⊕.

    b. Select the type of step to perform for this step from the contextual menu.



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Description of the actions

Goal	Step	Type	Example
Enter text in a field	Set Text	Input	Enter any text data such as a user name, an address, a survey response, or in any situation where text entry is accepted. **Note:** If you set a static value for this field, the automation uses it during execution and doesn't prompt you for input from the ServiceNow Otto panel.
Simulate a mouse click	Click	Input	Click a button, open a menu, or perform any step typically performed by a mouse click.
Simulate an alternative mouse action (for example, right-click, drag, scroll, or paste)	Mouse Click	Input	Perform various mouse device actions, such as right-click and select an object or scroll on a web page.
Simulate a key press or a key function	Send Keys	Input	Perform keyboard shortcuts, such as copying text by entering `Ctrl + C` on fields and elements. **Note:** If you set a static value for this field, the automation uses it during execution and doesn't prompt you for input from the ServiceNow Otto panel.

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Goal	Step	Type	Example
Capture text from a window or web page	Get Text	Output	Receive text from the source area.
Capture a table	Get Table	Output	Receive table from the source area when the text is in the table format. **Note:** For the step to capture table data successfully, the data must already be in the table form. The step can't convert ordinary text to table data.
Read text from an image	OCR Read Text	Output	Recognize text from images and return it in the standard text format.

You can add multiple steps representing your automation steps.

18. Configure the properties for added screens, anchors, and steps in the Properties panel. For more information, see Screen, anchor, and step properties in AI Desktop Actions.
19. **Optional:** Modify the auto-generated names for all added screens, anchors, and steps.

    (Optional) You can modify the auto-generated names following these naming guidelines.

    - Name fields must not be empty.
    - Name fields must contain only alphanumeric characters. Spaces and special characters are not permitted.
    - Each name must be unique at its respective parent level.
        - Each screen must have a unique name at the desktop-action level.
        - Each anchor must have a unique name at the screen level.
        - Each step must have a unique name at the anchor level.

What to do next

1. Configure the details of your desktop action. For more information, see Add details to desktop actions in AI Desktop Actions.
2. Test and activate the desktop action so that it can be added as a tool to AI agents. For more information, see Test and activate a desktop action in AI Desktop Actions.
3. Add the desktop action as a tool to AI agents in AI Agent Studio. For more information, see Add a defined desktop action tool to an AI agent for desktop and web-based task.

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Related topics

- AI Desktop Actions Design workspace
- Action recorder in AI Desktop Actions
- Automate repetitive tasks by recording steps with AI in AI Desktop Actions
- Screen, anchor, and step properties in AI Desktop Actions
- Extend a desktop action by manually capturing steps in AI Desktop Actions
- Examples of creating desktop actions
- Examples of executing desktop actions using AI agents

Extend a desktop action by manually capturing steps in AI Desktop Actions

Extend the automation logic in a desktop action by manually capturing steps in AI Desktop Actions.

Before you begin

To access the AI Desktop Actions functionality, perform the following steps:

- Enable AI Desktop Actions on your ServiceNow instance. For more information, see Configure AI Desktop Actions.
- Download the AI Desktop Actions installer to automate repetitive tasks across applications and systems. For more information, see Download AI Desktop Actions installer for defined desktop actions.

Confirm that the following system requirements are met:

- Windows 11 operating system is used.
- A .NET 9.0 runtime v9.0.10 and .NET 9 Desktop Runtime v9.0.10 is installed.
- No extended monitors are connected.
- Theme must match between the systems used for recording and execution.
- Remote Desktop must be enabled on your machine and your account must be granted Remote Desktop access permissions before you start using the AI Desktop Actions Execution workspace.

Familiarize yourself with the Design workspace and Action recorder. For more information, see AI Desktop Actions Design workspace and Action recorder in AI Desktop Actions.

Role required: sn_aia.admin

About this task

Note: To create desktop actions with AI-assisted anchor validation and automatic screen context generation, use Record with AI instead.

You can simulate a user interaction in an automation by manually capturing screens and defining steps.

Using the controls in the window, you can capture an area of an application window. You can then set one or more anchors, and define steps that represent the user interactions in that window.

- **Anchor**: Anchors help specify the target area for the interaction by defining a static area from which steps can be defined at a relative distance.
- **Step**: Steps are your sequential interactions of type click, select, type, scroll, and more.

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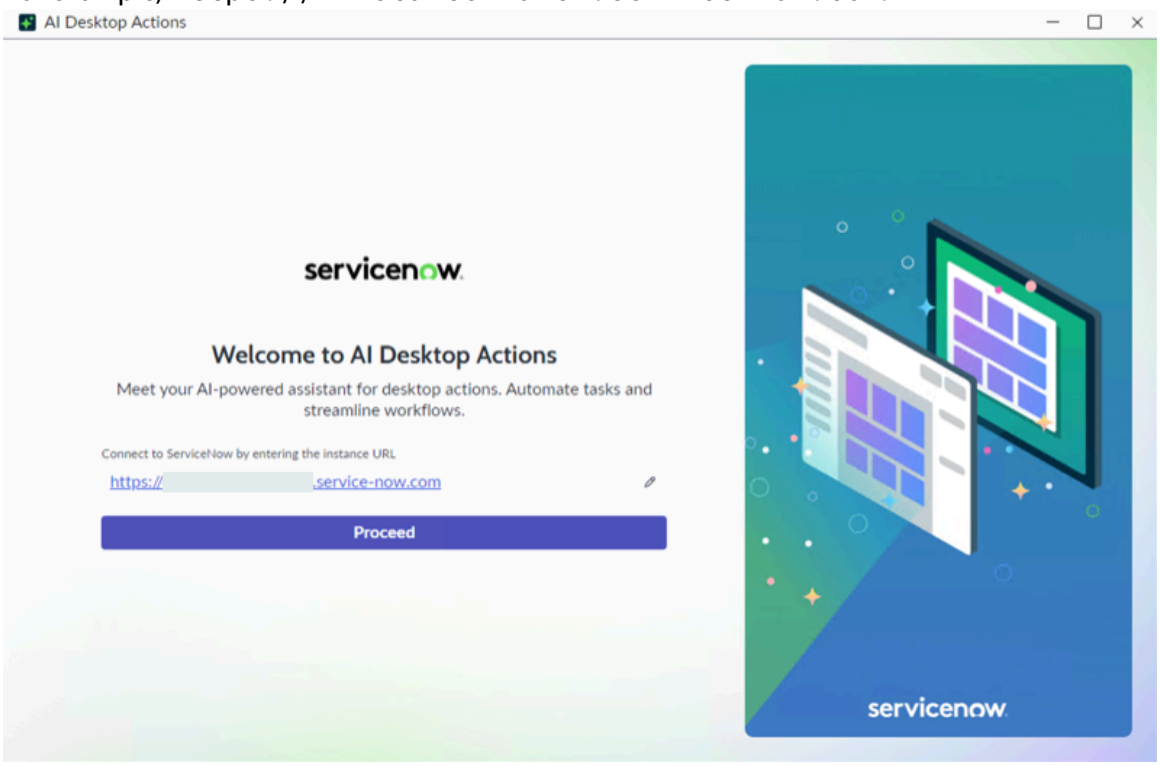
Note: If your automation requires manual inputs, such as entering an OTP or CAPTCHA, you must provide instructions to the AI Agent to wait for the user input during execution. Otherwise, the automation can't proceed.

Procedure

1. From your Windows system, launch the AI Desktop Actions application.
2. On the login page, in the **Add ServiceNow URL** field, enter the ServiceNow instance URL.

   Example
   For example, `https://<instance name>.service-now.com`.



3. Select **Proceed**.
4. Log in to your ServiceNow account by entering your user name and password. Your must have the sn_aia.admin role.

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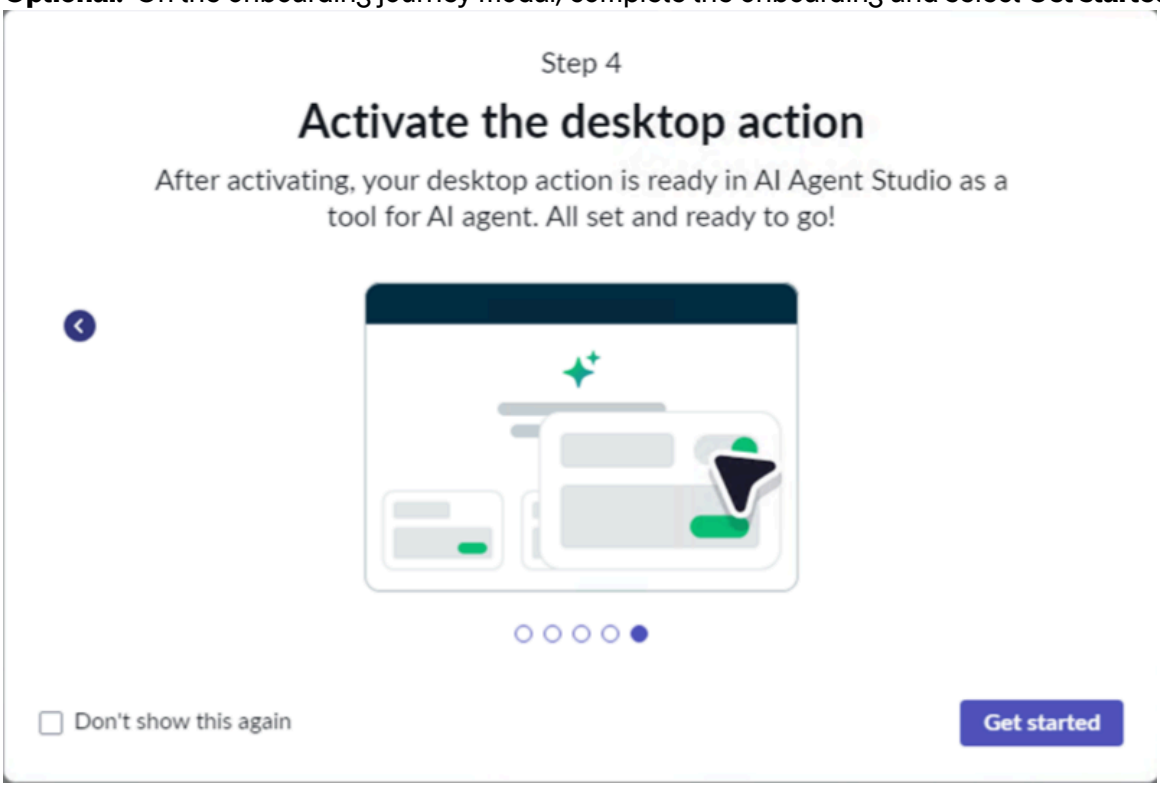
5. **Optional:** On the onboarding journey modal, complete the onboarding and select **Get started**.



If you launch the AI Desktop Actions for the first time, the onboarding journey widget appears. You can select **Don't show me again** to hide the widget the next time you launch AI Desktop Actions or **Skip intro** to skip the onboarding.

6. On the AI Desktop Actions home page, select an existing desktop action.

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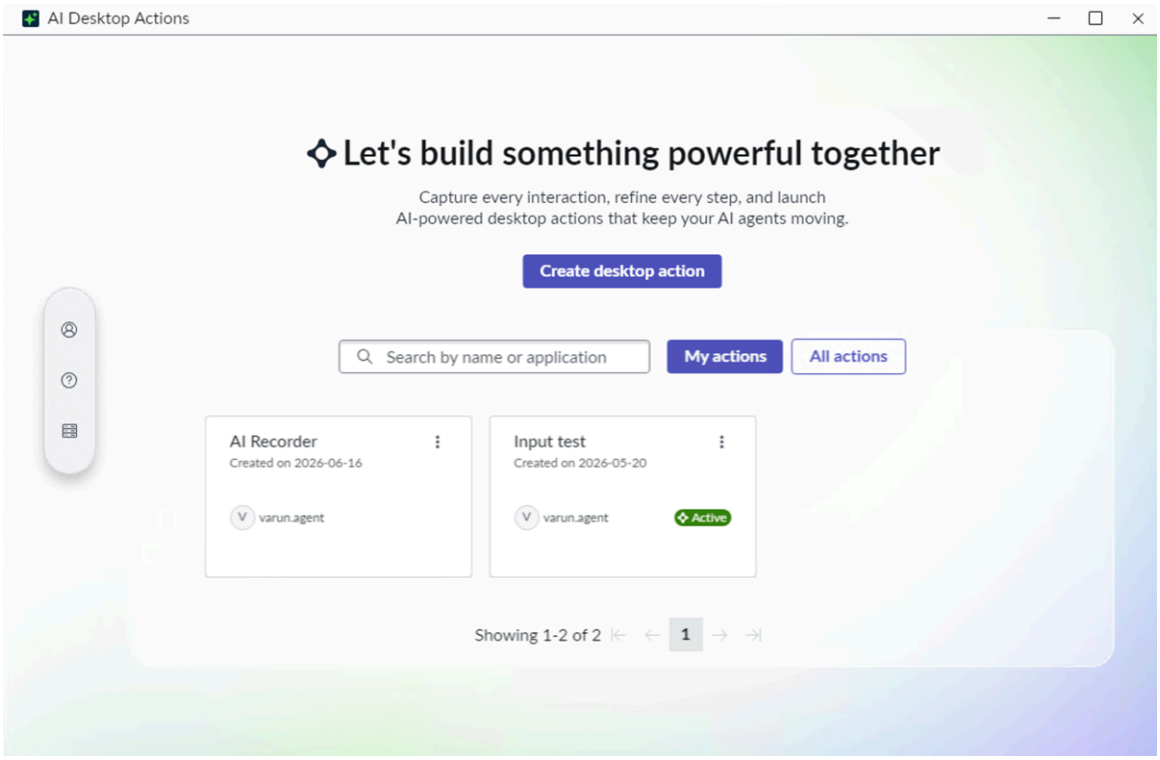
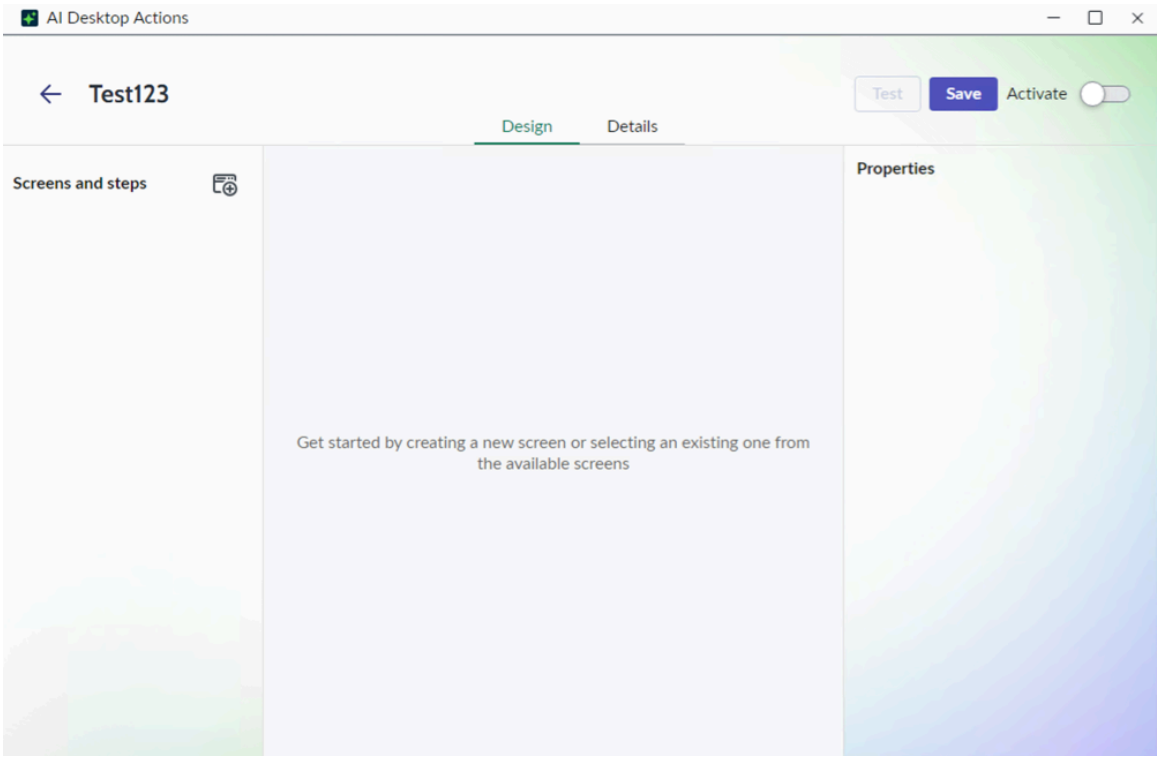


The Design workspace is displayed.



7. Capture screens.

   a. In the Design tab, select the **Capture Options** icon .

   b. Select **Manual capture**.

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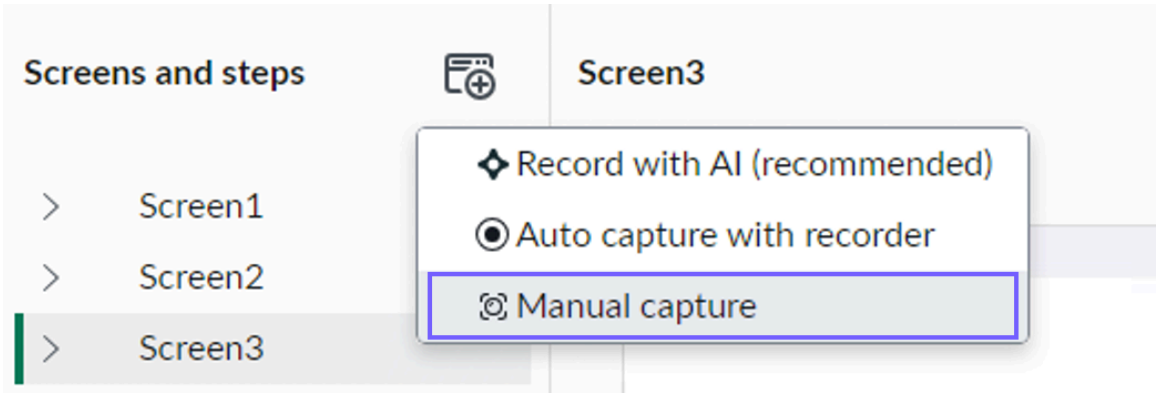
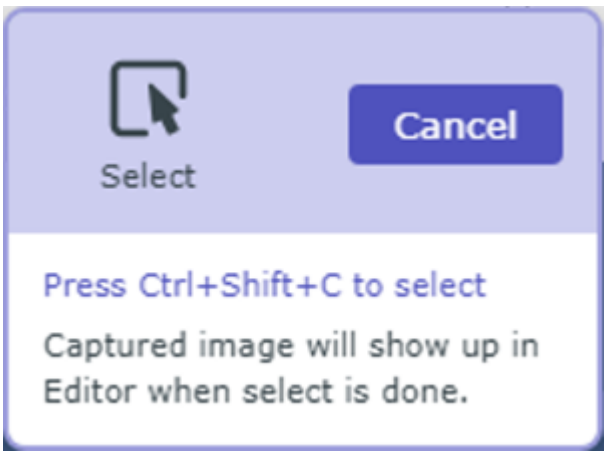


You can also extend the desktop action logic using the **Record with AI (Recommended)** or **Auto capture with recorder** options. For more information, see Automate repetitive tasks by recording steps with AI in AI Desktop Actions and Automate repetitive tasks by auto-capturing steps in AI Desktop Actions.

The AI Desktop Actions window is minimized and the Capture panel is launched.



c. Open the applications that you want to automate steps for.

d. Capture the area of the external application's window by selecting the **Select** icon on the Capture panel or pressing the `Ctrl + Shift + C` on the keyboard.

> **Note:** If the `Ctrl + Shift + C` shortcut conflicts with another application on the your machine, such as Zoom, then you must use the **Select** button to initiate manual screen capture.

For example, you can capture the area surrounding a button or a text field in a web browser.

The cursor icon changes to the + icon.

e. Drag the + icon and select the required screen area.

When you leave the + icon, the selected area is captured as a screenshot in the Design workspace.

If you aren't satisfied with the captured screen, you can recapture the screen area by selecting the **Capture image** icon .

8. Insert anchors.

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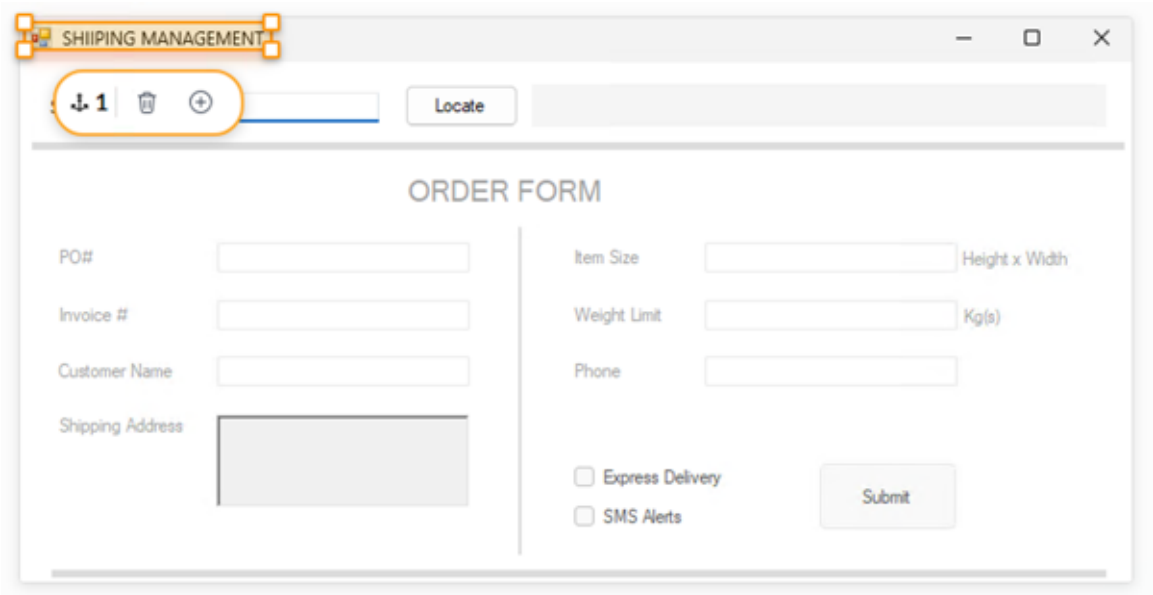
a. Insert an anchor on the captured screen by selecting the **Add anchor** icon .



Note: If two applications in the frame have similar logos or visual elements, verify that the anchor position is unique to the target application to avoid incorrect element identification during automation.

An anchor is a reference point on the screen that helps the automation identify and interact with a nearby UI elements. During execution, the system uses computer vision to locate the anchor and then identifies the UI elements at a related distance from the anchor. Anchors improve the stability and accuracy of steps when the target element's location may shift or when the UI layout varies across sessions.

Note: Don't use dynamically changing UI elements as anchors. If an element changes its color, text, or state after an action (for example, after a click), select a different anchor that remains static on the screen.

b. Move the anchor to a part of the captured image that won't change.
For example, move the anchor to a title or field label.

If the area under the anchor doesn't exactly match the corresponding area of the captured image, the anchor isn't recognized, and the steps aren't performed as intended. Choose a static area of the image for setting your anchor.

You can add multiple anchors on each screen. Multiple anchors let you define the geographical relationship between anchor and target with greater accuracy when targeting different locations in the image.

9. Configure the steps.

a. From the Anchor control menu, select the **Add step** icon ⊕.

b. Select the type of step to perform for this step from the contextual menu.

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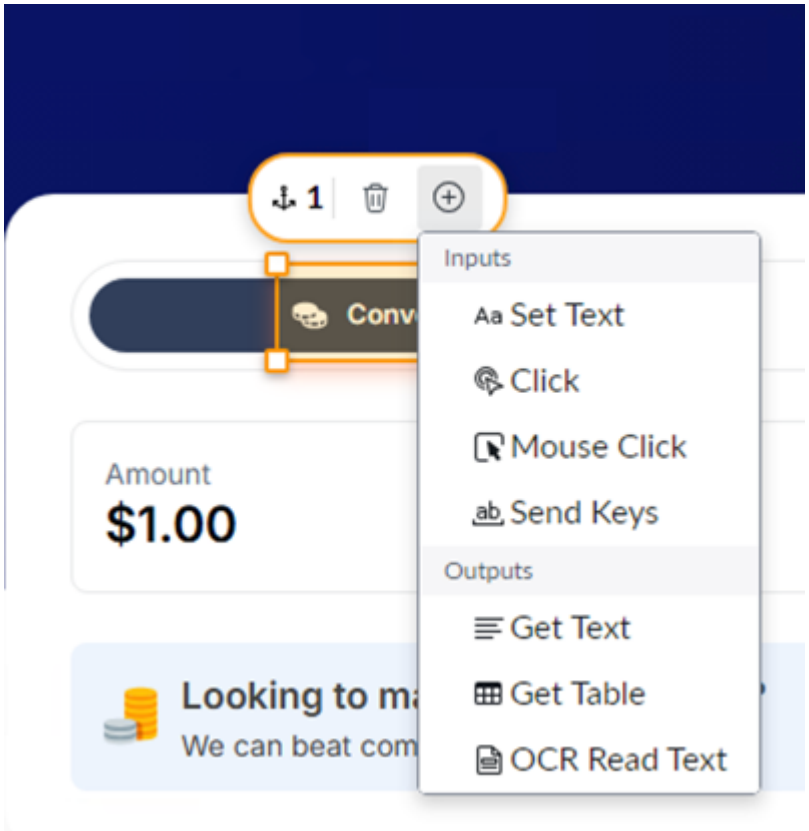

Description of the actions

Goal	Step	Type	Example
Enter text in a field	Set Text	Input	Enter any text data such as a user name, an address, a survey response, or in any situation where text entry is accepted. **Note:** If you set a static value for this field, the automation uses it during execution and doesn't prompt you for input from the ServiceNow Otto panel.
Simulate a mouse click	Click	Input	Click a button, open a menu, or perform any step typically performed by a mouse click.

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Goal	Step	Type	Example
Simulate an alternative mouse action (for example, right-click, drag, scroll, or paste)	Mouse Click	Input	Perform various mouse device actions, such as right-click and select an object or scroll on a web page.
Simulate a key press or a key function	Send Keys	Input	Perform keyboard shortcuts, such as copying text by entering `Ctrl + C` on fields and elements. **Note:** If you set a static value for this field, the automation uses it during execution and doesn't prompt you for input from the ServiceNow Otto panel.
Capture text from a window or web page	Get Text	Output	Receive text from the source area.
Capture a table	Get Table	Output	Receive table from the source area when the text is in the table format. **Note:** For the step to capture table data successfully, the data must already be in the table form. The step can't convert ordinary text to table data.
Read text from an image	OCR Read Text	Output	Recognize text from images and return it in the standard text format.

You can add multiple steps representing your automation steps.

10. Configure the properties for added screens, anchors, and steps in the Properties panel.

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For more information, see Screen, anchor, and step properties in AI Desktop Actions.

11. **Optional:** Modify the auto-generated names for all added screens, anchors, and steps.

    (Optional) You can modify the auto-generated names following these naming guidelines.

    - Name fields must not be empty.
    - Name fields must contain only alphanumeric characters. Spaces and special characters are not permitted.
    - Each name must be unique at its respective parent level.
        - Each screen must have a unique name at the desktop-action level.
        - Each anchor must have a unique name at the screen level.
        - Each step must have a unique name at the anchor level.

What to do next

1. Configure the details of your desktop action. For more information, see Add details to desktop actions in AI Desktop Actions.
2. Test and activate the desktop action so that it can be added as a tool to AI agents. For more information, see Test and activate a desktop action in AI Desktop Actions.
3. Add the desktop action as a tool to AI agents in AI Agent Studio. For more information, see Add a defined desktop action tool to an AI agent for desktop and web-based task.

Related topics

AI Desktop Actions Design workspace

Screen, anchor, and step properties in AI Desktop Actions

Automate repetitive tasks by auto-capturing steps in AI Desktop Actions

Add a defined desktop action tool to an AI agent for desktop and web-based task

Examples of creating desktop actions

Examples of executing desktop actions using AI agents

Add details to desktop actions in AI Desktop Actions

Add desktop action details, such as name, description, and associated applications, and review inputs and outputs.

Before you begin

- Capture your automation steps. For more information, see Automate repetitive tasks by auto-capturing steps in AI Desktop Actions or Extend a desktop action by manually capturing steps in AI Desktop Actions.
- Configure the properties for screens, anchors, and steps. For more information, see Screen, anchor, and step properties in AI Desktop Actions.

Role required: sn_aia.admin

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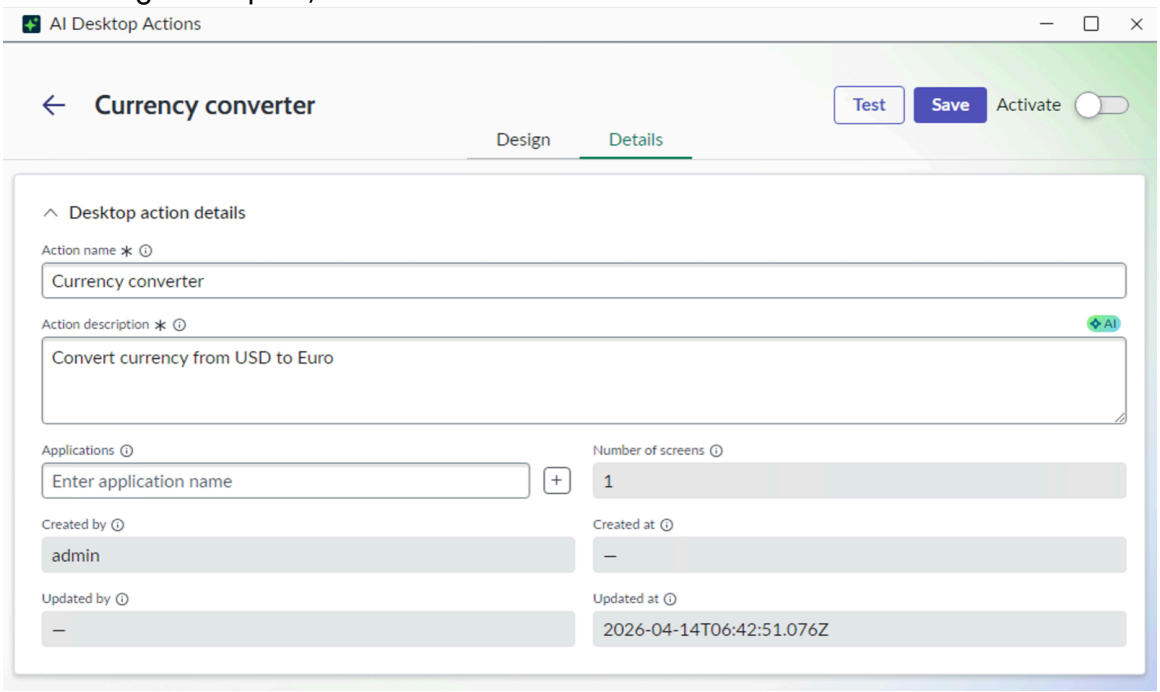
Procedure

1. In the Design workspace, select the Details tab.



2. **Optional:** In the Desktop action details section, edit the name of the desktop action.
   The description in the **Action description** field is auto-filled when you select the **Record with AI** option and an AI badge appears.
3. **Optional:** In the **Application** list, select the applications you want to automate.
   The list displays the applications available on the ServiceNow instance. If an application isn't listed, you can add it by selecting the **Add** icon [+].
4. In the Input and output parameters section, review the parameters related to steps for each screen.
5. Select **Save**.

   You can save the desktop action after all the required fields are configured.

What to do next

Test and activate the desktop action so that it's available as a tool in the AI Agent Studio. You can add this tool to the AI agents that execute desktop actions in your desktop environment. For more information, see Test and activate a desktop action in AI Desktop Actions.

Test and activate a desktop action in AI Desktop Actions

Test the desktop action and then activate it so that it's available as a tool in the AI Agent Studio. You can add this tool to the AI agents that execute desktop actions in your desktop environment.

Before you begin

- Capture your automation steps. For more information, see Automate repetitive tasks by recording steps with AI in AI Desktop Actions, Automate repetitive tasks by auto-capturing steps in AI Desktop Actions, or Extend a desktop action by manually capturing steps in AI Desktop Actions.

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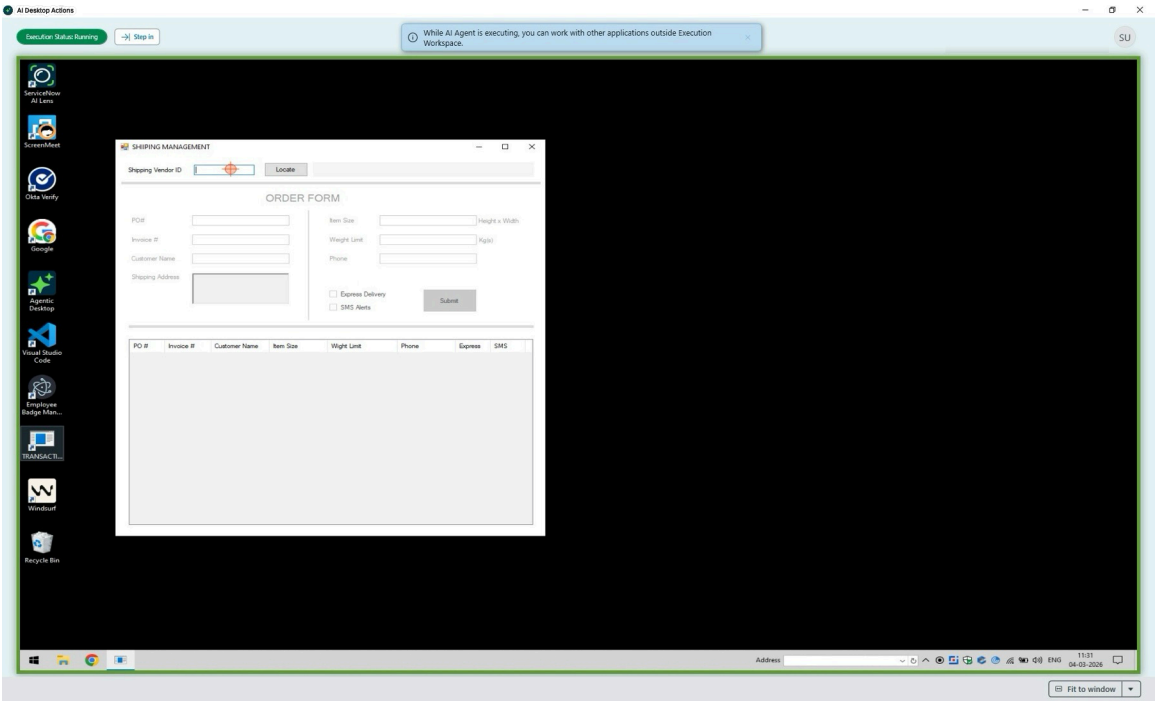
- Configure the properties for screens, anchors, and steps. For more information, see Screen, anchor, and step properties in AI Desktop Actions.
- Add desktop action details, such as name, description, and associated applications, and review inputs and outputs. For more information, see Add details to desktop actions in AI Desktop Actions.

Role required: sn_aia.admin

About this task

You can test the desktop action before you activate it. You can also test individual screens to quickly identify and troubleshoot issues.

Execution workspace is launched to run and test the selected screen or the desktop action.



After you run the test by entering the required inputs manually, test results are shown either for a screen or for entire desktop action in the Execution workspace. While running tests, if you do not see the Execution workspace coming forth, switch to the Execution workspace manually.

While working on a desktop action, the test values you enter are retained across test runs until you close the desktop action or reset the test values.

Procedure

1. From the desktop action header, select **Test**.
2. Option 1: Run the screen-level test.

   a. In the Test modal, enter required inputs for the screen that you want to test.

   b. Select **Test screen**.
   The Execution workspace is launched.

   c. Enter the Windows Security credentials.
   Observe the test run in the Execution workspace.

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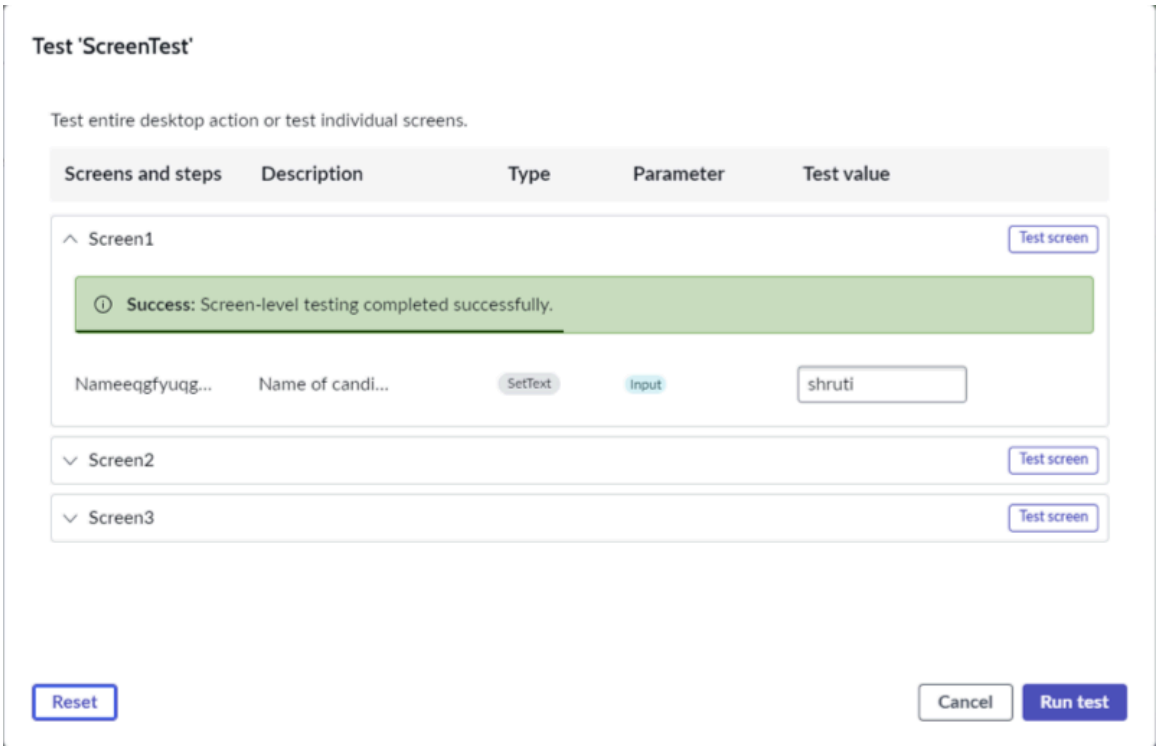
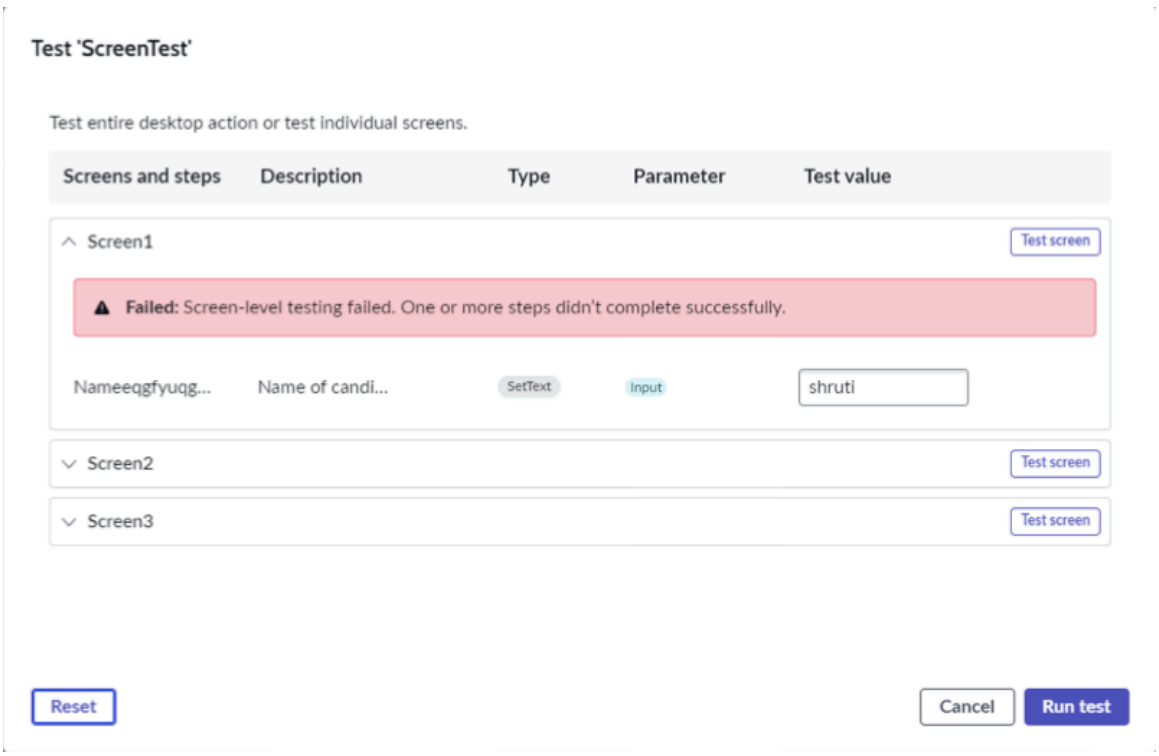
Note: If any pop up is blocking the automation from running, step in to clear the pop up so that you can see the test run in the Execution workspace.

d. After the test run is complete, check the status in the Test modal.

- If test is successful, proceed with testing the next screen.



- If test isn't successful, fix the issue highlighted in the error message and run the screen-level test again.



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e. **Optional:** Reset test data by selecting **Reset**.

f. **Optional:** Cancel running test by selecting **Cancel**.

3. Option 2: Run the Desktop action-level test.

a. In the Test modal, enter the required input values in the desktop action.

- **Show inputs** - Shows all the required input fields.
- **Show all** - Shows all fields.

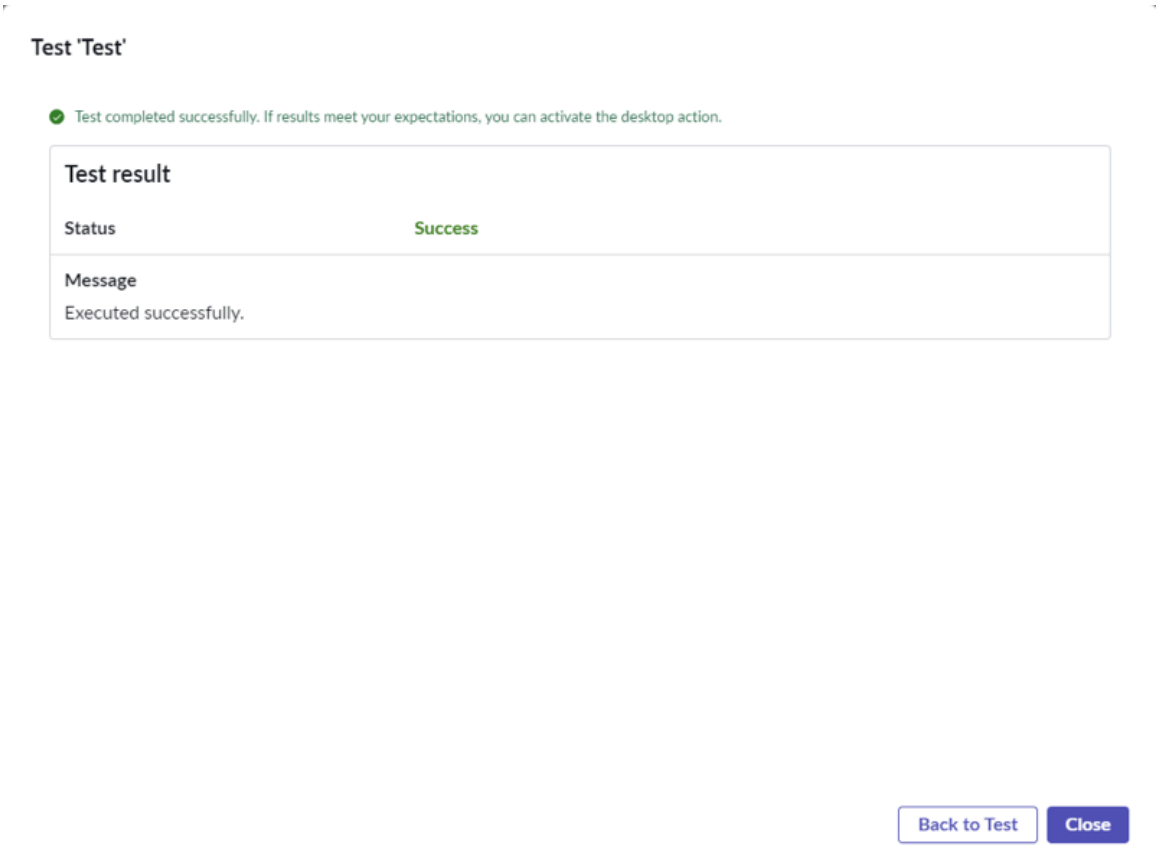
b. Select **Run test**.
The Execution workspace is launched.

c. Enter the Windows Security credentials.
Observe the test run in the Execution workspace.

> **Note:** If any pop up is blocking the automation from running, step in to clear the pop up so that you can see the test run in the Execution workspace.

d. After the test run is complete, check the status in the Test modal.

- If test is successful, proceed with activating the desktop action.



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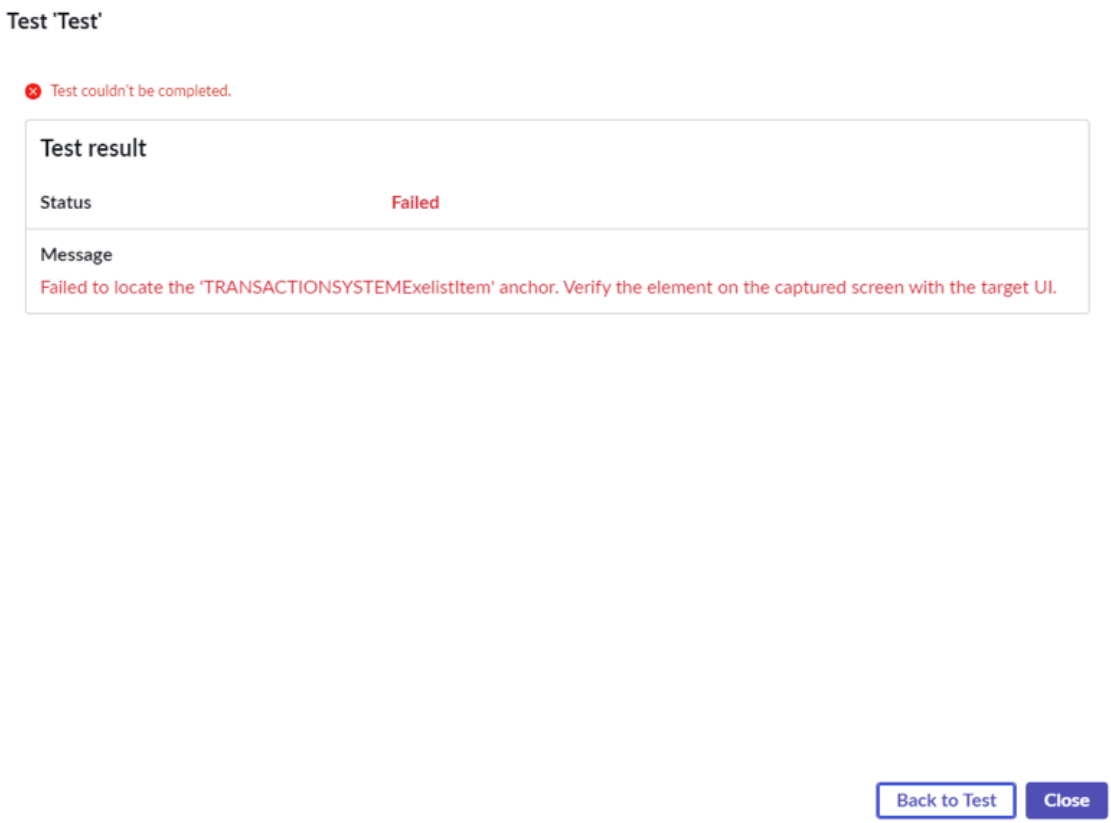
- If test isn't successful, select **Back to Test** to check the configuration and run the test again.



4. **Optional:** Cancel running test by selecting **Cancel**.
5. After a successful completion of the desktop action test and when you're satisfied with the result, select **Activate** to publish the desktop action in AI Agent Studio.

   Important: If you recorded the desktop action using Record with AI, an alert appears if any screens have failed anchors. Resolve the issues before activating to verify reliable automation at runtime.

   The **Activate** button sets the desktop action as active or inactive. Only the activated on-screen desktop actions can be selected from the drop-down in AI Agent Studio.

   Note: After activation, save the desktop action to make it available as a tool in AI Agent Studio.

Trouble?
If you get en error that the file size is beyond 10 MB, you can increase the file size in a payload by creating system properties in the ServiceNow instance. For more information, see Increase payload limit through system properties.

What to do next
Create an AI agent. For more information, see Creating AI agents and adding desktop action tool.

Enable AI agents to perform desktop actions by adding desktop actions as tools. For more information, see .

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Screen, anchor, and step properties in AI Desktop Actions

Learn about the properties of screens, anchors, and steps. There are multiple types of steps and each step type has distinct properties. You can update the properties to modify the behavior of the steps.

Screen

Screen properties

Property	Description
Name	Unique name for the captured screen. The updated name reflects in the Screens and steps panel.
Execution order	Order in which the screen is executed when multiple screens are captured. You can drag the screen at the desired order in the Screens and steps panel.

Anchor

Anchor properties

Property	Description
Name	Unique name of the added anchor. The updated name reflects in the Screens and steps panel.
Execution order	Order in which the anchor is executed when multiple anchors are added.
X	Location of the top-left corner of the anchor on the screen along the X-axis.
Y	Location of the top-left corner of the anchor on the screen along the Y-axis.
Width	Width of the area highlighted as anchor.
Height	Height of the area highlighted as anchor.
Convert to grayscale	Option to convert the captured screen as a grayscale image. The default value is False.
Search in Scale	Option to specify whether the component scales the target image before trying to match the source image. The scaling is done in an increment of 10% each between 100% and 150%. The default value is False.
Confidence threshold	Specifies the accuracy in matching the image captured before the component performs a step. The value of 1 defines a 100% match while 0.5 defines 50% match. The default value is 0.95 or 95% match.
Retry with scroll	Option to scroll the target image before trying to match the source image.

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Anchor properties (continued)

Property	Description
Wait for image	Option to specify if the automation must wait for the image to appear on the screen. The default value is True.
Max wait time	Number of seconds to wait for the image or application to appear on the screen.
Delay before	Delay in number of seconds before the anchor is executed. The automation waits until the specified time elapses before executing the anchor.
Delay after	Delay in number of seconds after the anchor is executed. The automation will wait until the specified time elapses before executing the next anchor.

Step

Common properties for steps

The following properties apply to all steps - Set Text, Click, Mouse Click, Send Keys, Get Text, Get Table, and OCR Read Text.

Common properties

Property	Description
Name	Unique name of the step. The updated name reflects in the Screens and steps panel.
Execution order	Order in which this step is executed when multiple steps are set up. This order is assigned when you add a step from the anchor. You can drag the step under its anchor at the desired order in the Screens and Steps panel.
Type	Type of the step, such as Set Text, Get Text, Mouse Click.
Description	Helpful description of this step.
X	Location of the green plus icon along the X-axis relative to the anchor.
Y	Location of the green plus icon along the Y-axis relative to the anchor.
Delay before	Delay in seconds before the action is executed.
Delay after	Delay in seconds after the action is executed.

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Set Text

Set Text properties

Property	Description
Use parameter	Option to supply the value from a Desktop action parameter record mapped in AI Agent Studio. When selected, the Static value field is not used.
Static value	The text to enter in the field when Use parameter is not selected.

Mouse Click

Mouse Click properties

Property	Description
Mouse click type	Type of mouse click action to set for this step: • Left click • Left double click • Middle click • Right click • Right double click • Move • Drag • Drop • Scroll down • Scroll up • Paste

Send Keys

Send Keys properties

Property	Description
Clear existing value	Option to specify if the step clears the existing value on a field before setting the text.
Use parameter	Option to supply the value from a Desktop action parameter record mapped in AI Agent Studio. When selected, the Static value field is not used.

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Send Keys properties (continued)

Property	Description
Static value	The text to enter in the field when Use parameter is not selected.
Focus with mouse click	Option to use the mouse click to focus on the area in the application where the mouse inputs are passed.

OCR Read Text

OCR Read Text properties

Property	Description
Width	Width of the area in image to recognize and get the text.
Height	Height of the area in image to recognize and get the text.

Increase payload limit through system properties in AI Desktop Actions

By default, maximum 10 MB of file size is allowed in a scripted REST API request payload. Increase the payload limit to 15 MB by creating system properties in the global scope.

Before you begin

You must do this procedure in the ServiceNow instance.

Role required: system admin

About this task

If you already have these properties configured for your instance, you can update the value to 15 MB to increase the limit.

Procedure

1. Navigate to **All**.
2. In the filter navigator, enter `sys_properties.list`.
3. In the System Properties table, select **New** to add the *`glide.rest.max_content_length`* property.

   a. On the form, fill in the fields.

Field	Description	Value
Name	Name of this system property	glide.rest.max_content_length
Description	Explanation for this property	For example: `Revised payload for a scripted REST request body.`

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Field	Description	Value
Type	Data type of this system property	integer
Value	The maximum size, in megabytes, for a scripted REST request body. The default value is 10 MB.	15

b. Select **Submit**.

4. In the System Properties table, select **New** to add the *glide.rest.scripted.max_inbound_content_length_mb* property.

a. On the form, fill in the fields.

Field	Description	Value
Name	Name of this system property	glide.rest.scripted.max_inbound_content_leng
Description	Explanation for this property	For example: `Revised payload for a scripted REST request body.`
Type	Data type of this system property	integer
Value	The maximum size, in megabytes, for a scripted REST request body. The default value is 10 MB. **Note:** Even if glide.rest.scripted.max_inbound_content_length_mb is set, the request body is limited to the value of glide.rest.max_content_length.	15

b. Select **Submit**.

Creating AI agents and adding desktop action tool

Create an AI agent and add desktop action tool in AI Agent Studio to mimic human-like intelligence while executing desktop actions for repetitive tasks in web and desktop environment.

AI agent and agentic workflow for AI Desktop Actions

In the ServiceNow agentic ecosystem, an AI agent is a set of large language model (LLM) instructions and tools that can perform specific tasks. The AI agents can perform specific tasks and functions, often using natural language instead of traditional code. For more information creating AI agents, see Create an AI agent.

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AI agents process instructions, generate execution plans, and run desktop actions autonomously and semi-autonomously across legacy systems, thick client applications, and web applications lacking APIs or backend integrations. AI agents can interpret your goal and map them to one or more desktop actions via metadata (capabilities, inputs, and outputs).

Use AI agents to do the following tasks for your organization:

- Generate a dynamic execution plan for desktop or web-based tasks
- Coordinate with other AI agents to complete subtasks
- Process human input during task execution when required
- Collaborate with users to resolve issues that require human judgment

Trigger conditions aren't supported for AI agents that execute desktop actions. You must manually trigger these agents from the system where the AI Desktop Actions application is installed.

For adaptive desktop actions, an AI agent named **Web Automation Agent** and agentic workflow named **Web Automation** are provided by default when you install AI Desktop Actions. You can create a different agentic workflow referencing this AI agent or AI agent that you created. For more information about creating agentic workflows, see Create an agentic workflow.

Desktop action tool for an AI agent

Desktop actions are tools that AI agents use to interact with web and desktop applications. An AI agent uses a desktop action to automate tasks in desktop-based or web-based applications on the end user's system. You can create a desktop action or add an existing one as a tool to your AI agent. For more information about adding desktop action tools, see Add a desktop action tool to an AI agent.

There are two types of desktop actions.

Defined desktop action

Created in the AI Desktop Actions client application on the Windows machine, then added as a tool to an AI agent.

Adaptive desktop action

Configured in AI Agent Studio during AI agent tool configuration. There are two ways the adaptive desktop actions run:

- **Desktop applications**: AI agents run these desktop actions in the AI Desktop Actions client application on the macOS machine. For more information, see Adaptive desktop actions for desktop and web-based tasks.

  ⚠ **Warning:** This is a beta feature in this release. Functionality, behavior, and execution logic may change in subsequent releases. Test these desktop actions thoroughly in a test environment before deploying to production. Report issues or feedback through your support channels.

- **Web based applications**: AI agents run these desktop actions in the Google Chrome browser through a browser extension. For more information, see Adaptive desktop actions for web-based tasks.

Testing an AI agent or agentic workflow

Test an AI agent or agentic workflow that uses adaptive desktop actions in AI Agent Studio to evaluate its performance. For more information, see Manually test an agentic AI asset.

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Related topics

- Defined desktop actions for desktop and web-based tasks
- Adaptive desktop actions for web-based tasks
- Defined desktop actions in AI Desktop Actions
- Examples of executing desktop actions using AI agents

Examples of creating desktop actions

Learn the key concepts and workflow for creating end-to-end desktop actions and building automations for your desktop environments.

The tasks that you can automate are done manually on desktop-native applications and repetitive in nature. Here are examples:

Badge management automation

Shows how an HR team automates the end-to-end workflow for issuing, replacing, and disabling badges for their employees.

Shipping order processing

Demonstrates how to extract order data from Excel, interact with a shipping management tool, and complete the data processing life cycle.

Example: Automate badge request management using AI Desktop Actions

Automate various tasks related to badge requests through desktop actions using AI Desktop Actions and AI agents.

Your HR representatives manage repetitive badge-related tasks. For example, issuing new badges, distributing temporary badges, replacing lost badges, and disabling badges during offboarding. To streamline and automate this work, you can create a desktop action for each task and assign these actions to an AI Agent in AI Agent Studio.

When new requests come in, HR representatives can trigger the AI agent from the ServiceNow Otto panel. The AI Agent automatically selects and runs the appropriate desktop action. This automation reduces manual effort and enables them to focus on higher-value work.

Create badge desktop action in AI Desktop Actions

Automate various badge-related tasks through desktop actions in AI Desktop Actions.

Before you begin

To access the AI Desktop Actions functionality, perform the following steps:

- Enable AI Desktop Actions on your ServiceNow instance. For more information, see Configure AI Desktop Actions.
- Download the AI Desktop Actions installer to automate repetitive tasks across applications and systems. For more information, see Download AI Desktop Actions installer for defined desktop actions.

Confirm that the following system requirements are met:

- Windows 11 operating system is used.
- A .NET 9.0 runtime v9.0.10 and .NET 9 Desktop Runtime v9.0.10 is installed.
- No extended monitors are connected.

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- Theme must match between the systems used for recording and execution.
- For record with AI, the ServiceNow AI Lens skill must be active on your instance. Contact your ServiceNow administrator if you're unsure whether this condition is met.

Familiarize yourself with the Design workspace and Action recorder. For more information, see AI Desktop Actions Design workspace and Action recorder in AI Desktop Actions.

Role required: sn_desktop_core.desktop_action_user

About this task

Record with AI generates more accurate anchor positions automatically, reducing the time you spend on manual anchor adjustments.

When you record with AI, after you finish recording, AI analyzes the recording, validates anchor positions, and corrects inaccuracies before you save or activate the desktop action. AI also generates a screen context for each captured screen and description for the desktop action. Screen context is a description of what the screen does and what it contains, which helps reviewers and AI agents understand the screen's intent.

Note: If your automation requires manual inputs, such as entering an OTP or CAPTCHA, you must provide instructions to the AI Agent to wait for the user input during execution. Otherwise, the automation can't proceed.

The *sn_desktop_core.record_with_ai* property is enabled by default, making **Record with AI** the default recording option. Turn off this property to set the manual recorder as the default recording option.

Procedure

1. From your Windows system, launch the AI Desktop Actions application.
2. On the login page, in the **Add ServiceNow URL** field, enter the ServiceNow instance URL.

   Example
   For example, `https://<instance name>.service-now.com`.

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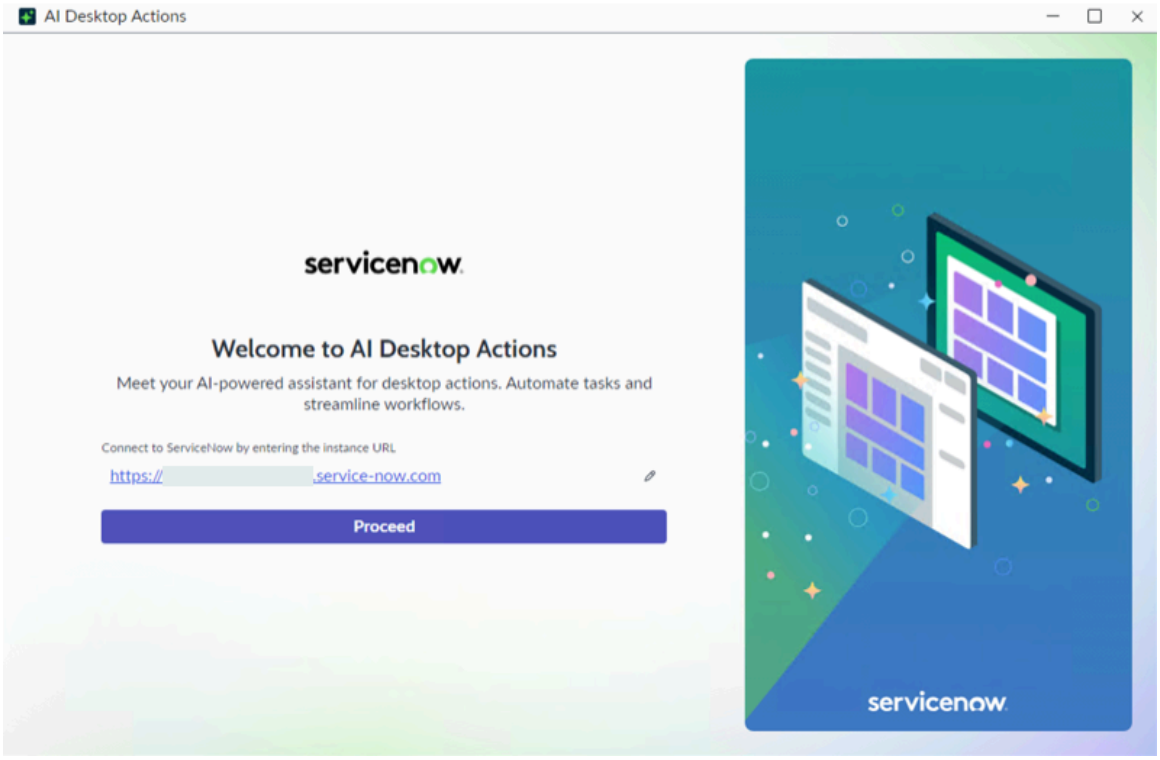

3. Select **Proceed**.
4. Log in to your ServiceNow account by entering your user name and password. Your must have the sn_aia.admin role.

5. **Optional:** On the onboarding journey modal, complete the onboarding and select **Get started**.

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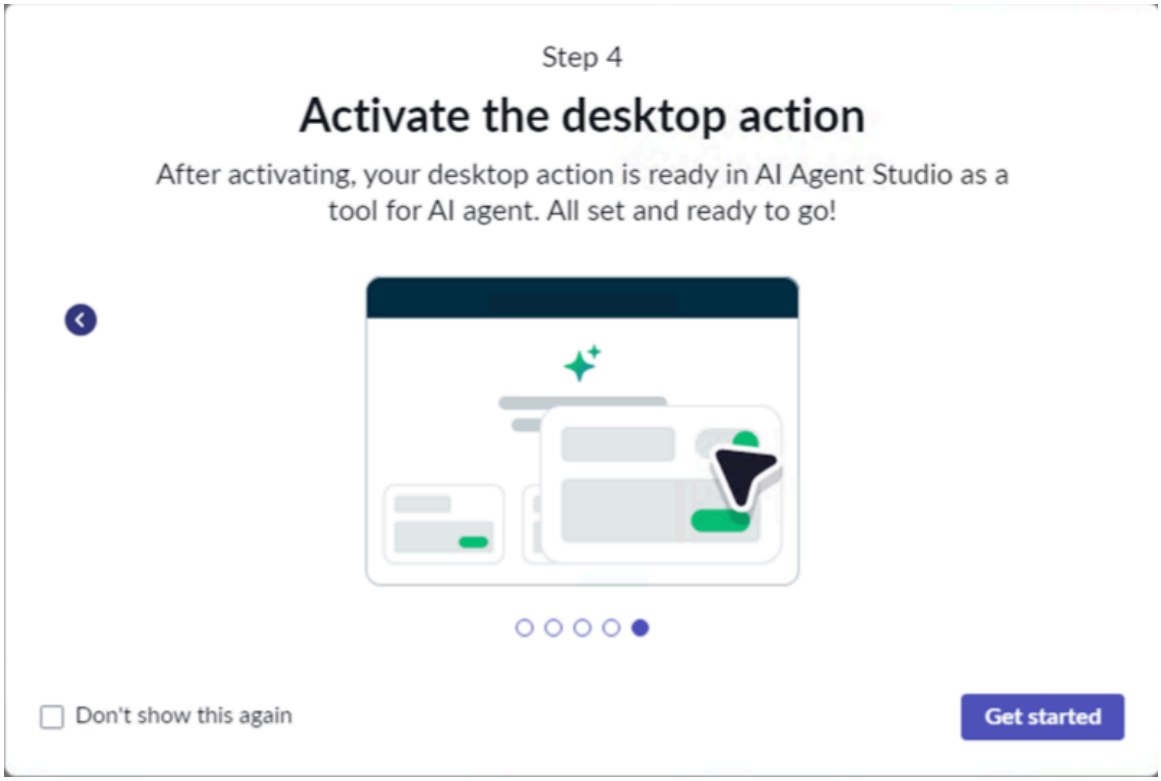
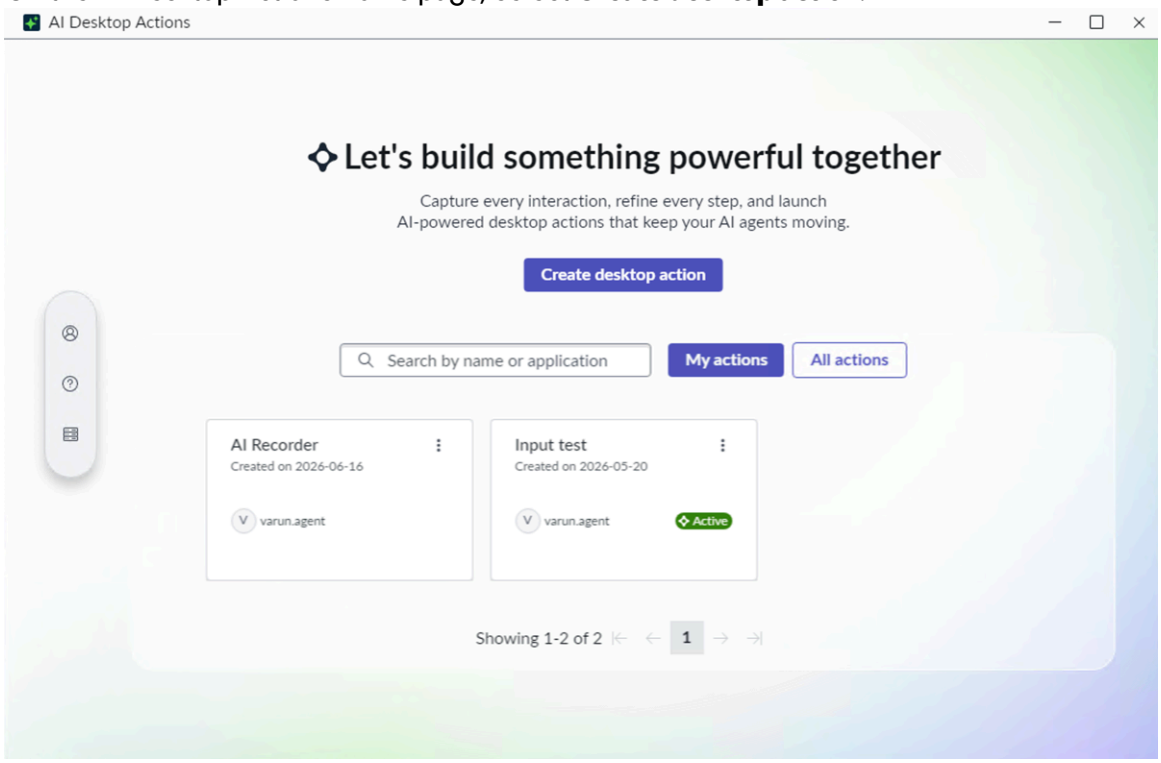


If you launch the AI Desktop Actions for the first time, the onboarding journey widget appears. You can select **Don't show me again** to hide the widget the next time you launch AI Desktop Actions or **Skip intro** to skip the onboarding.

6. On the AI Desktop Actions home page, select **Create desktop action**.



7. In the Create Desktop Action dialog, do one of the following.

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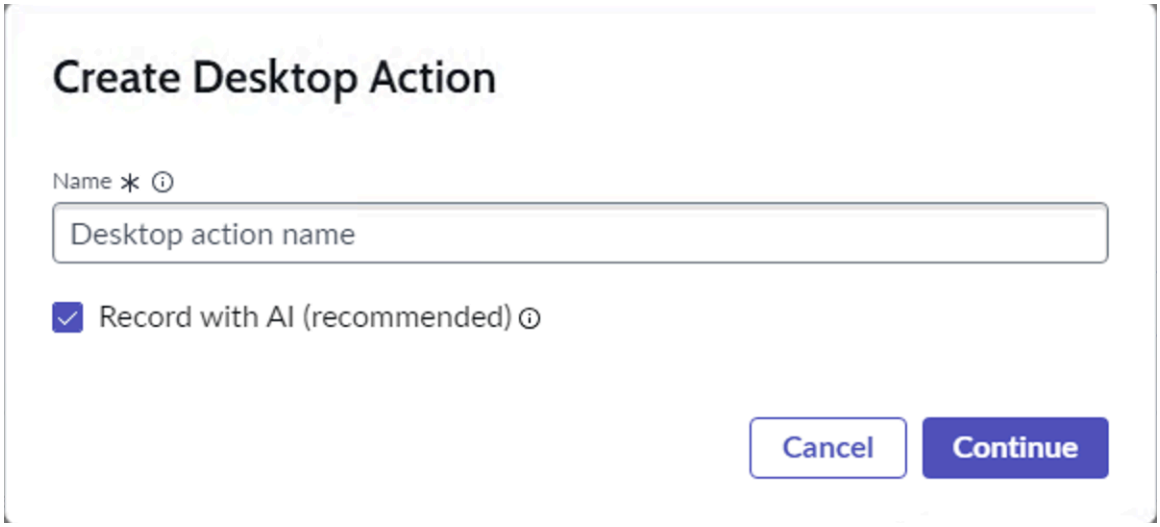
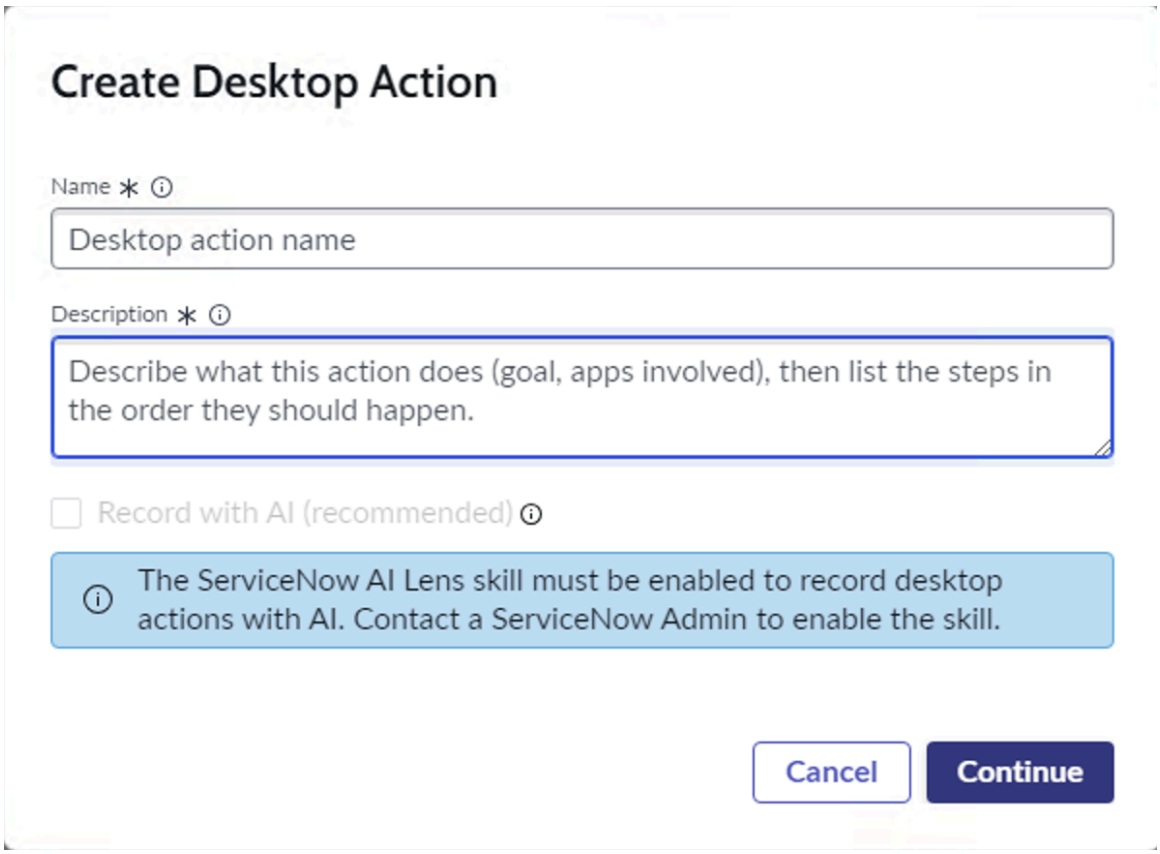
- If you want to record with AI, keep the **Record with AI (recommended)** check box selected.



Important: If the **Record with AI (recommended)** check box is unavailable, the ServiceNow AI Lens is inactive on your instance. Contact your ServiceNow administrator to enable it. You can still create desktop actions using auto-capture mode.

- If you want to use manual recorder, clear the **Record with AI (recommended)** check box.



8. In the **Name** field, enter `Create new badge`.
9. In the **Description** field, enter `Desktop action for issuing a badge to a new employee.`
   This field only appears when you clear the **Record with AI (recommended)** check box.

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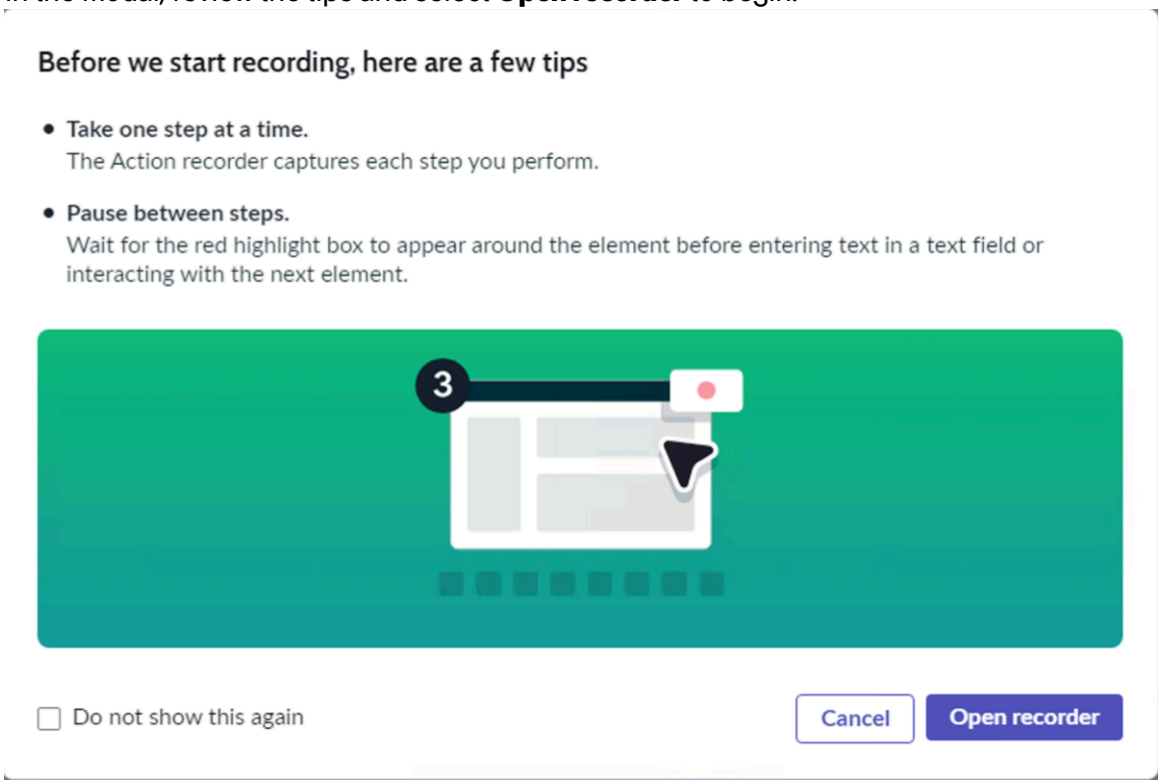
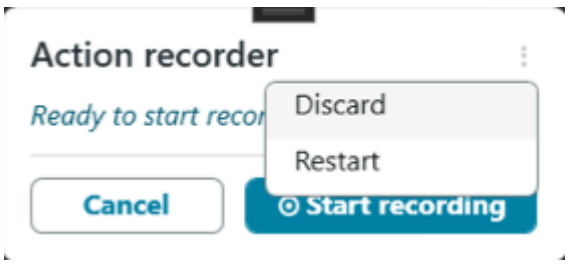
10. Select **Continue**.
11. In the modal, review the tips and select **Open recorder** to begin.



The AI Desktop Actions window is minimized and the Action recorder panel is launched. You can freely drag and reposition the Action recorder panel anywhere on your desktop screen.



12. Open the **Employee Badge Management** application on your desktop.
13. From the Action recorder panel, select **Start recording**.

> **Important:** Before you start recording, review the tips for accurate capturing of anchors and steps. For more information, see Tips for accurate recording.

You will see a "Recording started" message on the Action recorder panel. You can select any of the following options when needed from the **More options** menu:

- **Pause**: Skip recording steps
- **Restart**: Restart recording the steps

  You will lose the recorded screens and steps.

- **Discard**: Discard the recording if it doesn't meet your needs

14. On the **Employee Badge Management** application, perform the following steps for creating a badge.

The recorder feature records the steps that you perform for creating a badge.

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a. Select **CREATE BADGE** on the **New Badge** tile.

b. In the New Badge Creation page, search for the employee using the employee ID.

c. After the employee record is found, select **CREATE BADGE** for creating badge.

You see the success message that the new badge is created.

15. After you're done with all the steps, select **End recording** on the Action recorder panel.
You see a "Draft workflow saved" message on the Action recorder panel.

For Record with AI option, AI processes the recording in three stages:

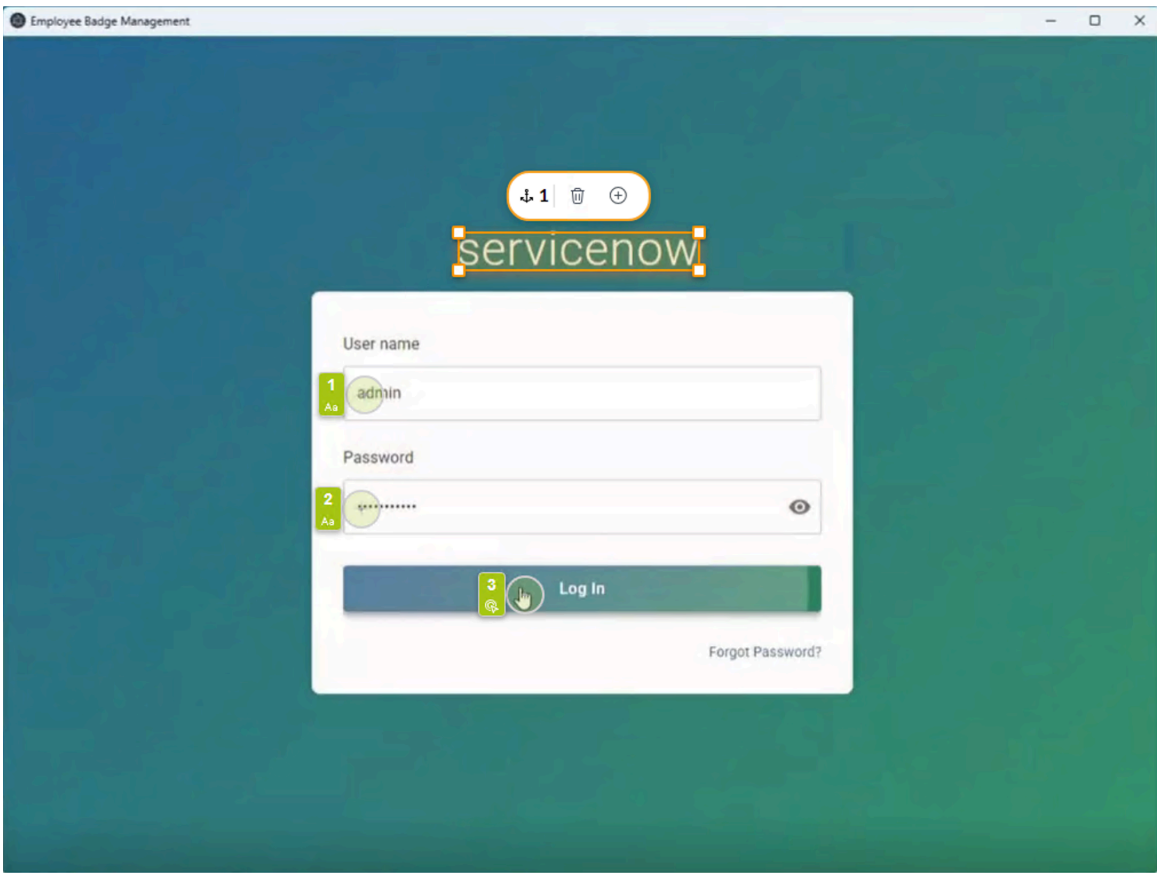
a. Analyzing your recording with AI

b. Inserting anchors

c. Generating screen contexts
You must not close the application during processing.

The recorded steps are displayed as screenshots in the Design workspace with anchors and steps automatically assigned.

Screen1



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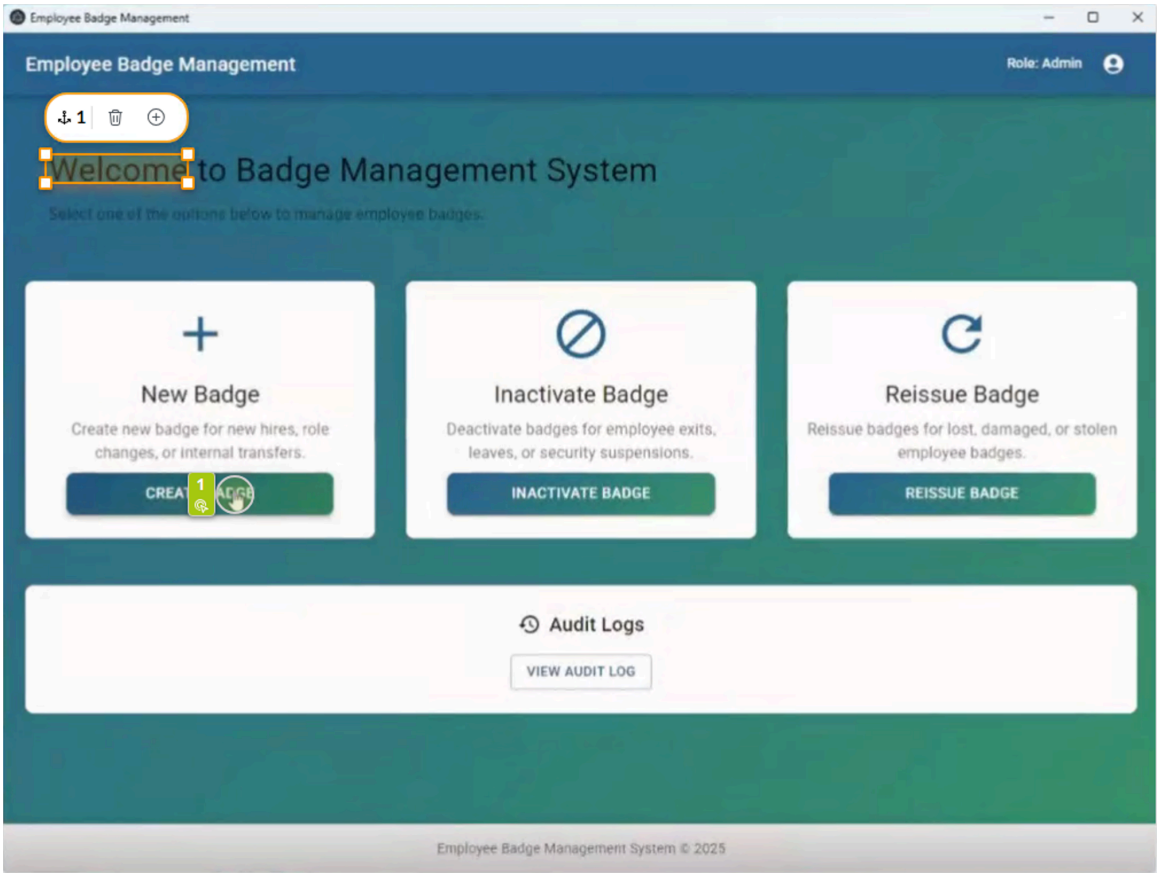
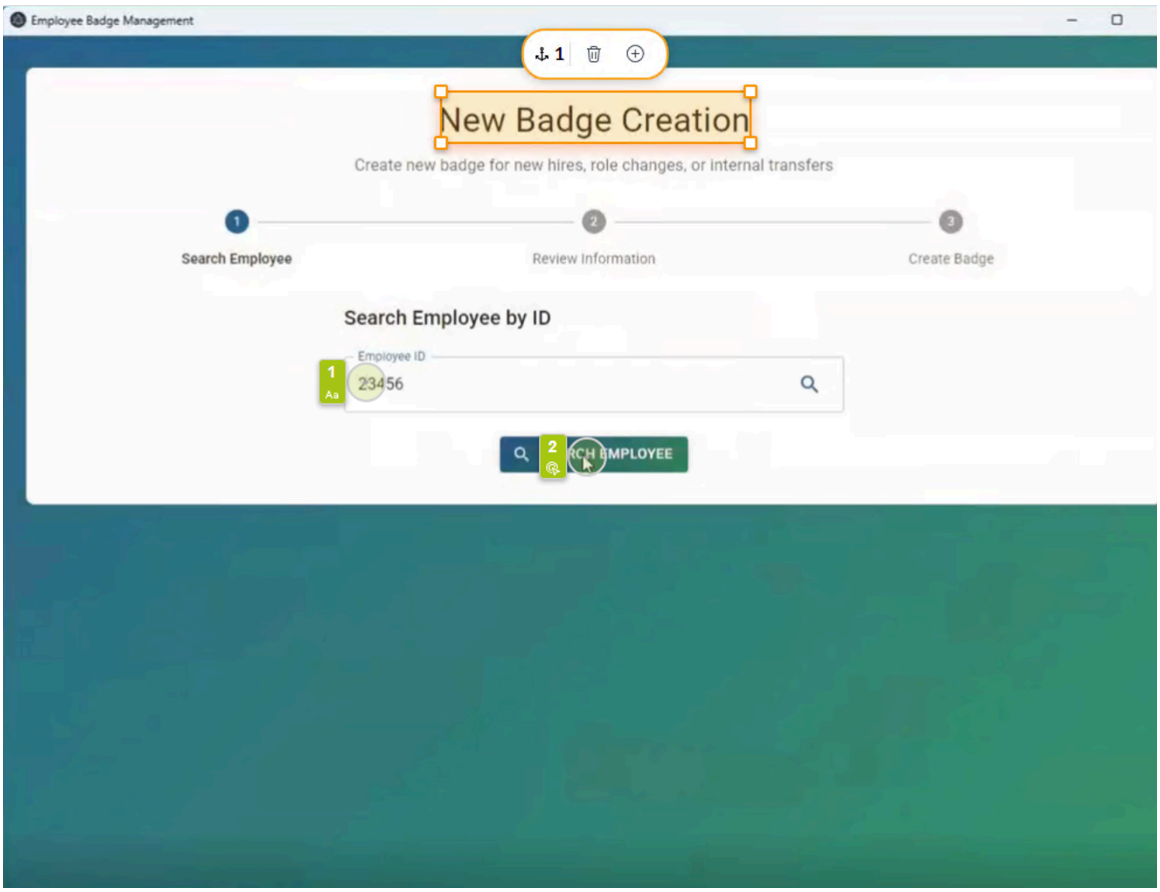
Screen2



Screen3



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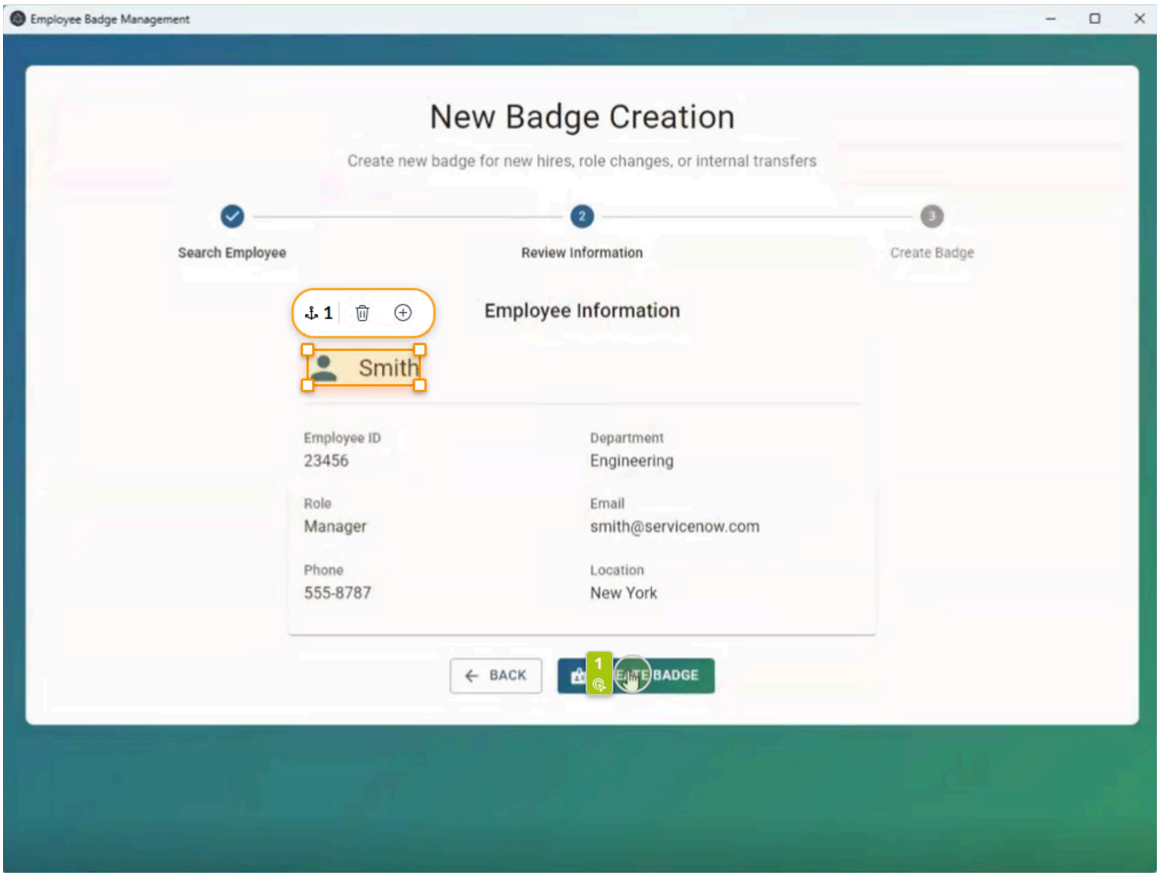
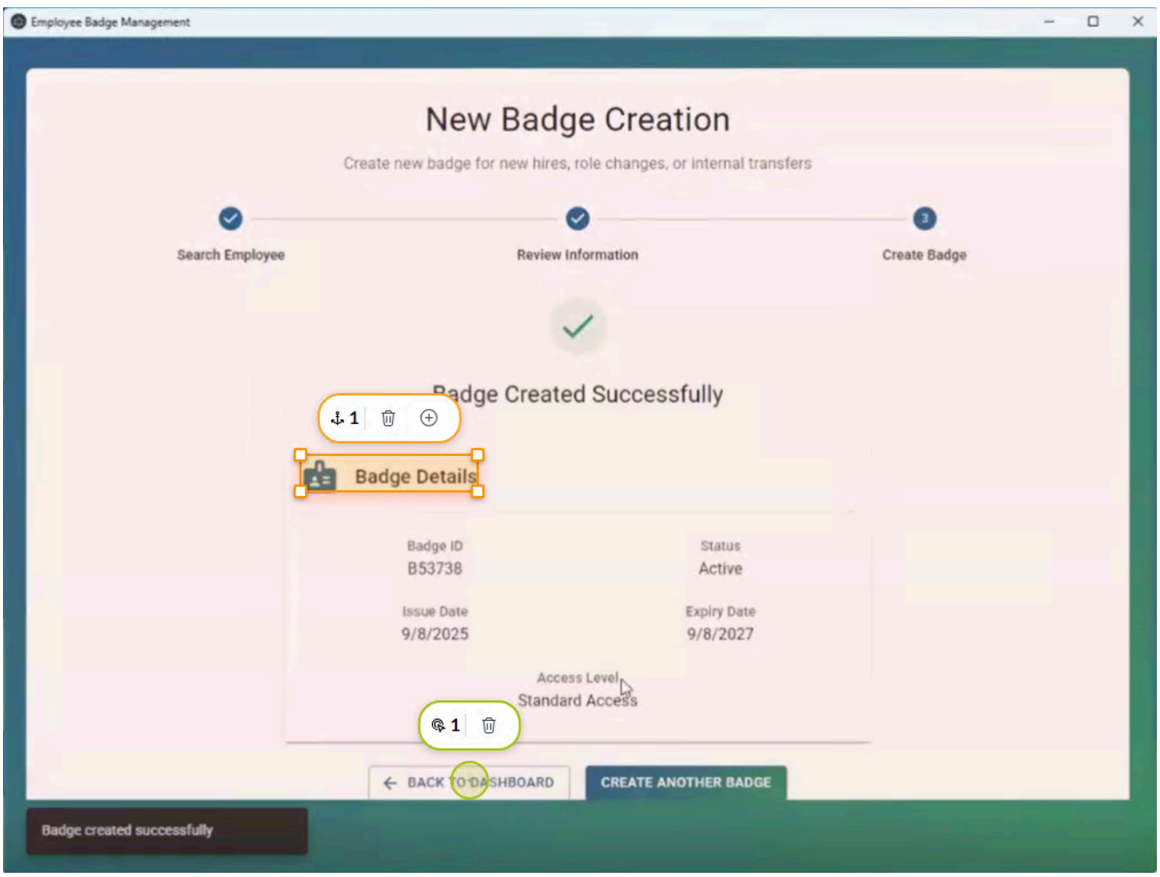
Screen4



Screen5



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16. Configure the following properties for the captured steps.

Screen > Step	Property	Value
Screen1 > SetText1	Value	admin
Screen1 > SetText2	Value	Enter your password
Screen1 > Click1	Delay after	5
Screen2 > Click2	Delay after	5
Screen3 > Click2	Delay after	10

For more information, see Screen, anchor, and step properties in AI Desktop Actions.

17. **Optional:** Modify the auto-generated names for all added screens, anchors, and steps.

(Optional) You can modify the auto-generated names following these naming guidelines.

- Name fields must not be empty.
- Name fields must contain only alphanumeric characters. Spaces and special characters are not permitted.
- Each name must be unique at its respective parent level.
  - Each screen must have a unique name at the desktop-action level.
  - Each anchor must have a unique name at the screen level.
  - Each step must have a unique name at the anchor level.

18. Select the Details tab.
19. In the Applications list, add Badge Management Application.
20. Select **Save**.
21. Test and activate the desktop action.
For more information, see Test and activate a desktop action in AI Desktop Actions.
22. Similarly, create and activate the following desktop actions.
    - Badge application login
    - Badge application logout
    - Reissue badge
    - Deactivate badge
    - Issue a temporary badge
    - Read Request details

Create AI agents and add tools for badge management

Create an AI agent in AI Agent Studio and add desktop action tools for automating badge-related requests.

Before you begin

Role required: sn_aia.admin

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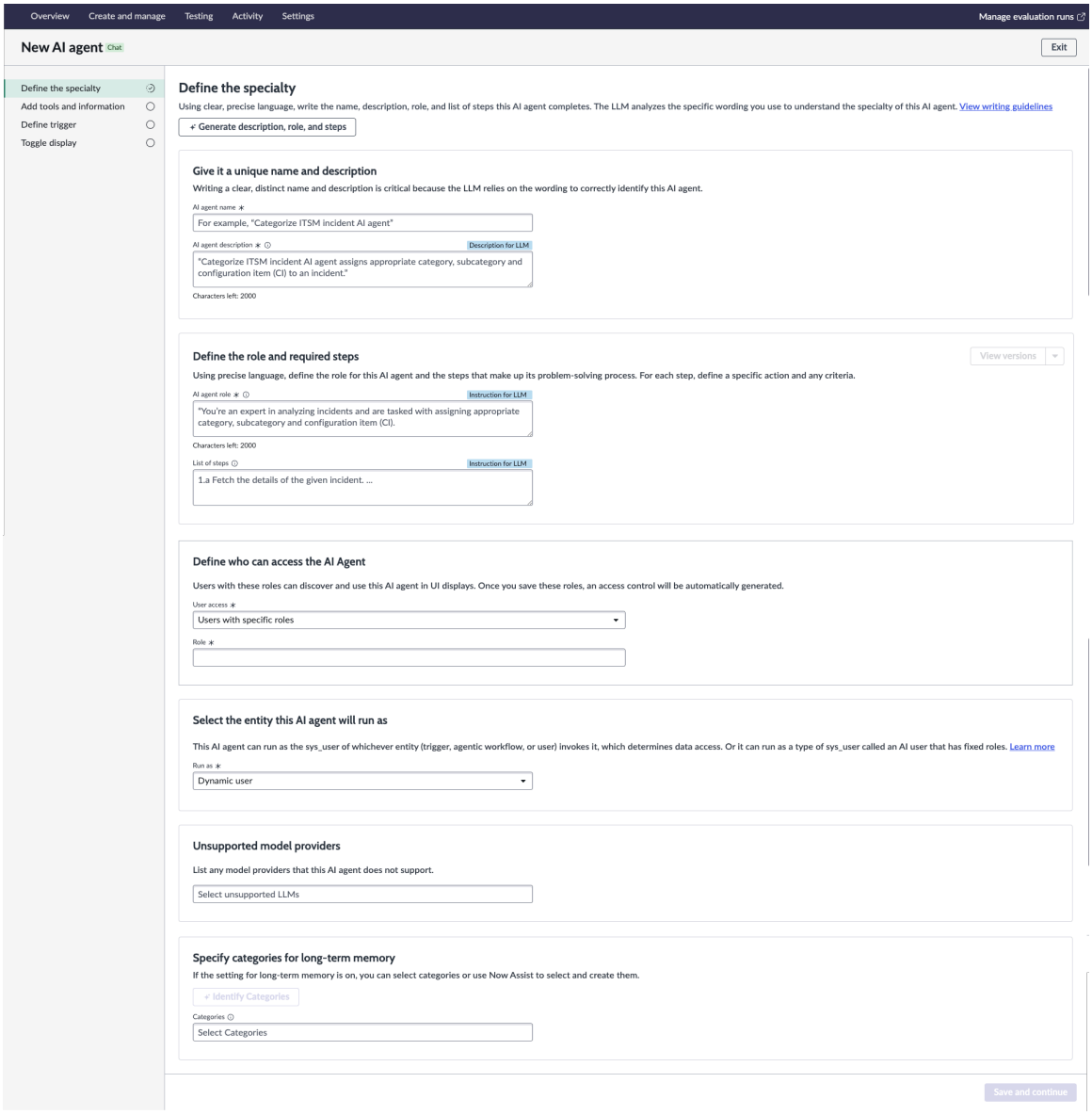
Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **AI agents**.
2. From the **Add** drop-down, select **Chat**.
3. On the New AI Agent page, in the Define the specialty step, define your AI agent and provide the specialties that this agent contains so that the LLM can analyze the wording you use to understand the purpose of the AI agent.



Note: The more details that you provide, the more accurately your AI agent can perform.

a. Describe your AI Agent by giving it a unique name and description.

Give it a unique name and description

Field	Description
AI agent name	Badge Management Agent
AI agent Description	This AI agent takes Requests details and launches the Employee Badge Management

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Field	Description
	application and perform various tasks—create badges, deactivate badges, replace lost badges, and Reissue the badges. The agent executes the appropriate desktop actions automatically. This reduces manual effort, ensures process consistency, and speeds up the overall employee lifecycle experience.

b. Define the role and necessary steps so that the AI agent can carry out its tasks.

Note: The AI agent uses this information as guidance to tailor its responses and actions.

Define the role and required steps

Field	Description
AI agent role	Automates the intake of badge-related requests and performs accurate, end-to-end execution of badge actions—such as issuance, replacement, temporary provisioning, and deactivation—across the HR and security systems.
List of steps	**Note:** If your automation requires manual inputs, such as entering an OTP or CAPTCHA, you must provide instructions to the AI Agent to wait for the user input during execution. Otherwise, the automation can't proceed. Read the comma-separated Request numbers from the input by invoking the **Read Request details** desktop action. Launch and log in to the Employee Badge Management application by invoking the **Badge application login** desktop action. Based on the details of each Request, perform one of the following actions that is applicable. ▪ Create a badge i. Create a badge in Employee Badge Management application by invoking **Create new badge** desktop action. ii. If badge creation failed, create an incident with the issue details. Otherwise, continue with other steps. ▪ Deactivate a badge

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Field	Description
	i. Deactivate a badge in Employee Badge Management application by invoking **Deactivate badge** desktop action. ii. If badge deactivation failed, create an incident with the issue details. Otherwise, continue with other steps. ▪ Reissue Badge i. Reissue a badge in Employee Badge Management application by invoking **Reissue badge** desktop action. ii. If badge deactivation failed, create an incident with the issue details. Otherwise, continue with other steps. ▪ Issue a temporary badge i. Issue a temporary badge in Employee Badge Management application by invoking **Issue temporary badge** desktop action. ii. If badge reissue failed, create an incident with the issue details. Otherwise, continue with other steps. Log out of the Employee Badge Management application by invoking the **Badge application logout** desktop action.

c. Select **Save and continue**.
You're directed to the Add tools and information page.

4. On the Add tools and information page, add Desktop actions tools for AI agents to automate your desktop tasks.

a. In the Add tool drop-down list, select **Desktop action**.

b. In the **Select a desktop action** drop-down list, select **Create new badge** desktop action.
This desktop action enables AI agents to create a badge in the Employee Badge Management application.

c. Provide a name and tool description for this desktop action configuration.
Tool description of the desktop action helps with what it's going to do to assist your AI agent.

Note: This description is sent to the large language model (LLM).

d. In the **Execution mode** field, select **Autonomous**.

e. Select **Add**.
The desktop action is added in the Desktop actions list on the Add tools and information page.

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f. Similarly, add the following desktop actions related to the badge management to this AI agent.
   - Badge application login
   - Badge application logout
   - Reissue badge
   - Deactivate badge
   - Issue a temporary badge
   - Read Request details

5. Select **Save and continue**.
6. Complete the remaining steps that are necessary.
   For more information, see Create an AI agent.
7. Select **Save and test** to complete the configuration steps or review a previous step by selecting **Back**.

   Selecting Save and test leads you to the AI agent testing page, where you can test the AI agent that you created. For more information, see Manually test the execution of an AI agent.

   To test the AI agent, you must have the sn_aia.admin role and any roles the ACLs configured for the AI agent and its tools require, if applicable.

What to do next

Enable your HR representatives to trigger AI agents from the ServiceNow Otto panel to address badge-related requests.

For more information, see Example: Use AI agents to process badge-related requests automatically.

Example: Automate shipping management tasks using AI Desktop Actions

Automate various tasks related to shipping management through desktop actions using AI Desktop Actions and AI agents.

Your shipping coordinators frequently handle repetitive data-entry tasks. For example, entering PO numbers, invoice details, customer information, shipping addresses, item dimensions, and weights from Excel into the Shipping Management application on their desktops. When there are dozens of rows to process, it becomes time-consuming, error-prone, and significantly slows down their daily workflow.

To streamline this process, you can create a dedicated desktop action that reads each row from the Excel file and automatically inputs the data into the Shipping Management application. You can then assign this action to an AI Agent. When new shipping batches arrive, shipping coordinators simply trigger the AI Agent from the ServiceNow Otto panel. The agent then automatically processes each line item by selecting and running the appropriate desktop action.

Create Process shipping orders desktop action in AI Desktop Actions

Automate various tasks related to shipping management through desktop actions in AI Desktop Actions.

Before you begin

To access the AI Desktop Actions functionality, perform the following steps:

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- Enable AI Desktop Actions on your ServiceNow instance. For more information, see Configure AI Desktop Actions.
- Download the AI Desktop Actions installer to automate repetitive tasks across applications and systems. For more information, see Download AI Desktop Actions installer for defined desktop actions.

Confirm that the following system requirements are met:

- Windows 11 operating system is used.
- A .NET 9.0 runtime v9.0.10 and .NET 9 Desktop Runtime v9.0.10 is installed.
- No extended monitors are connected.
- Theme must match between the systems used for recording and execution.

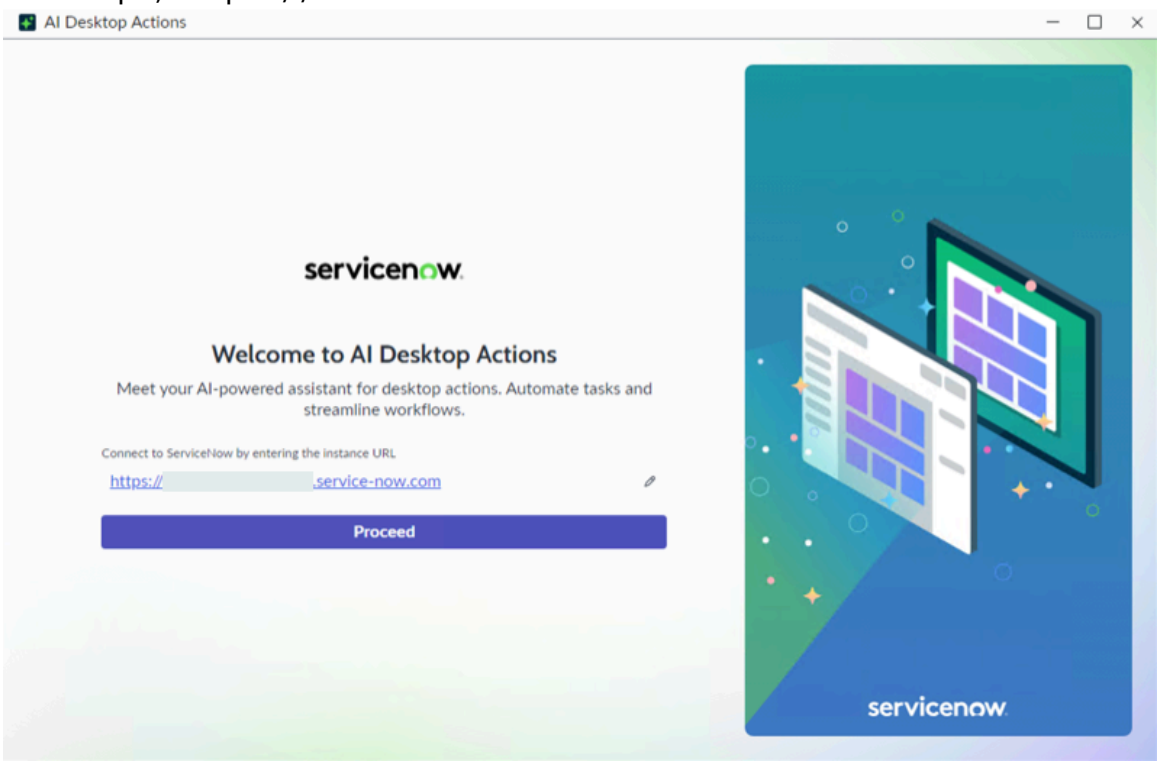
Familiarize yourself with the Design workspace and Action recorder. For more information, see AI Desktop Actions Design workspace and Action recorder in AI Desktop Actions.

Role required: sn_aia.admin

Procedure

1. From your Windows system, launch the AI Desktop Actions application.
2. On the login page, in the **Add ServiceNow URL** field, enter the ServiceNow instance URL.

   Example
   For example, `https://<instance name>.service-now.com`.



3. Select **Proceed**.
4. Log in to your ServiceNow account by entering your user name and password.
   Your must have the sn_aia.admin role.

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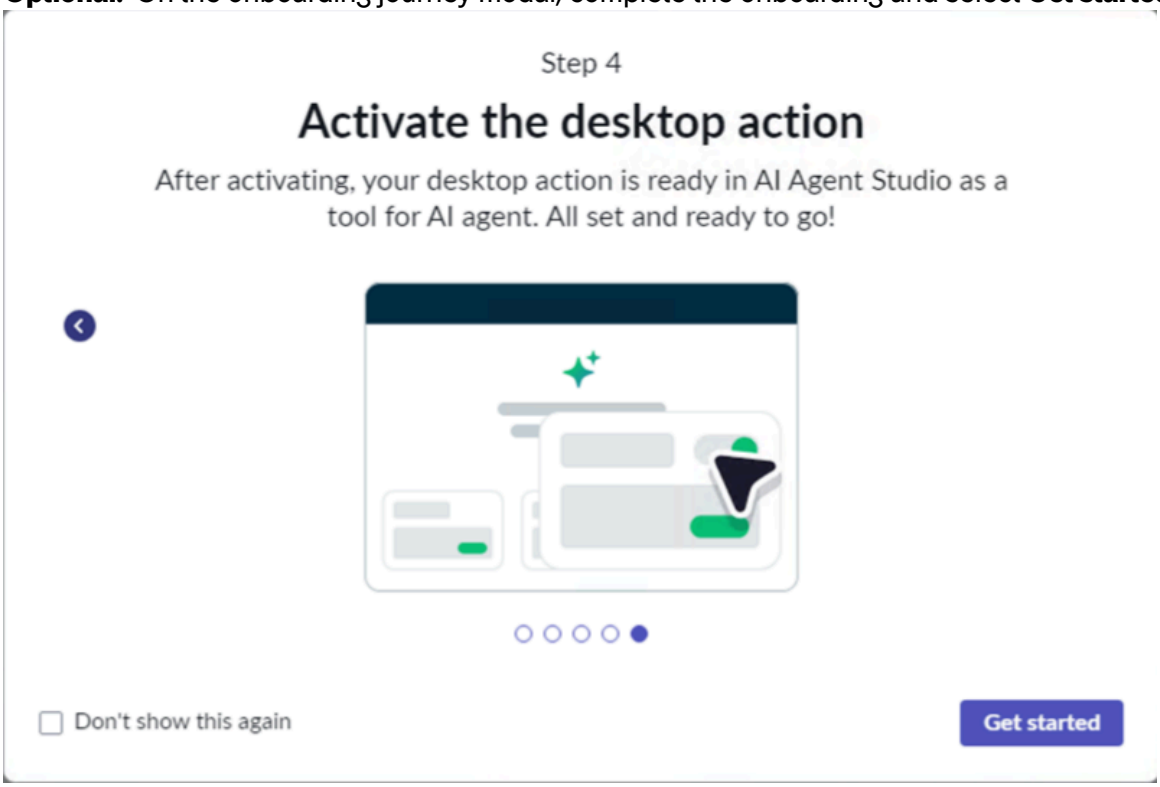
5. **Optional:** On the onboarding journey modal, complete the onboarding and select **Get started**.



If you launch the AI Desktop Actions for the first time, the onboarding journey widget appears. You can select **Don't show me again** to hide the widget the next time you launch AI Desktop Actions or **Skip intro** to skip the onboarding.

6. On the AI Desktop Actions home page, select an existing desktop action.

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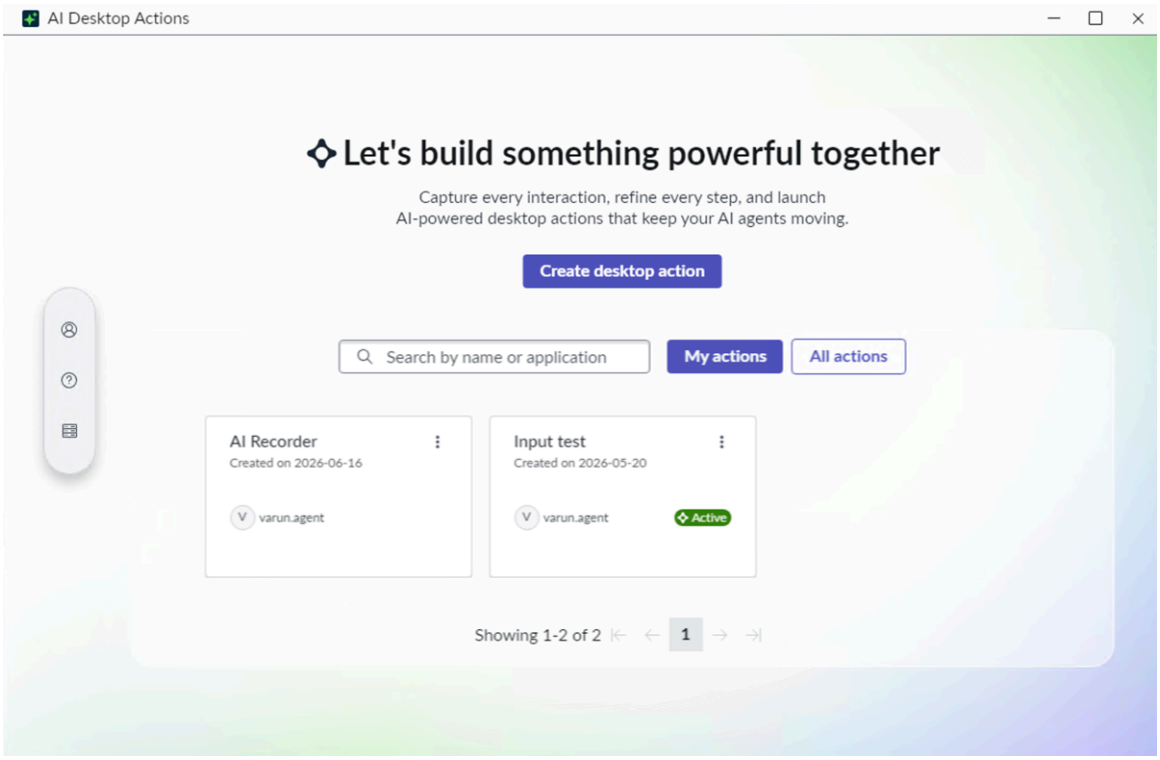
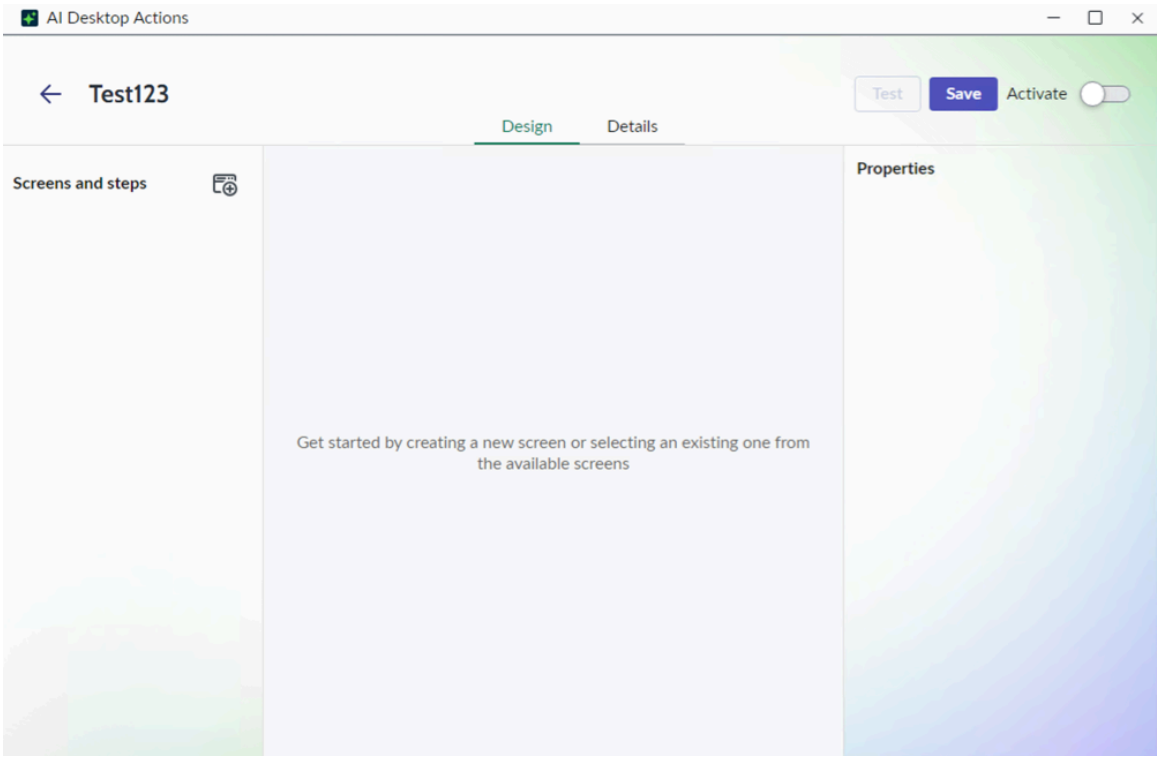


The Design workspace is displayed.



7. Capture screens.

   a. In the Design tab, select the **Capture Options** icon .

   b. Select **Manual capture**.

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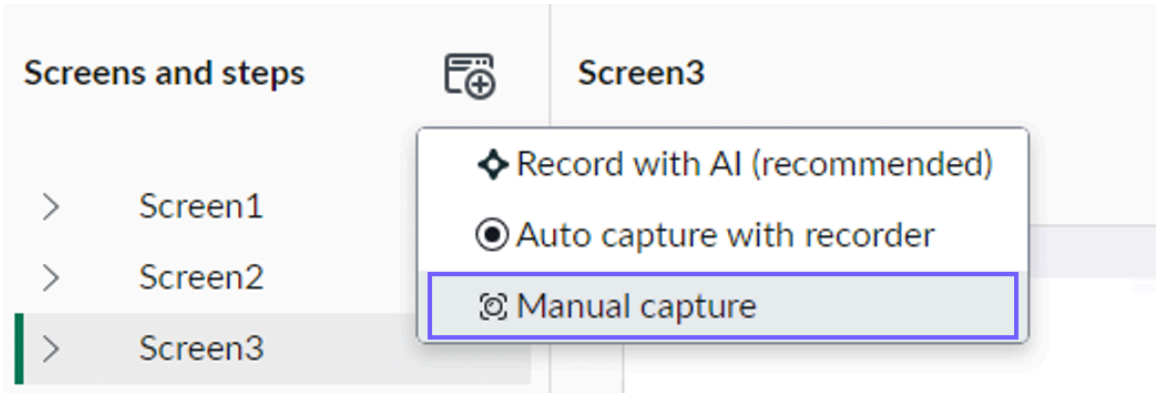
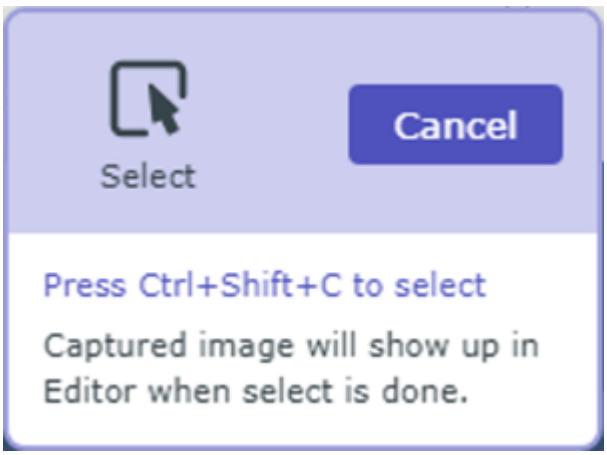


You can also extend the desktop action logic using the **Record with AI (Recommended)** or **Auto capture with recorder** options. For more information, see Automate repetitive tasks by recording steps with AI in AI Desktop Actions and Automate repetitive tasks by auto-capturing steps in AI Desktop Actions.

The AI Desktop Actions window is minimized and the Capture panel is launched.



c. Open the Shipping Management application from your desktop.

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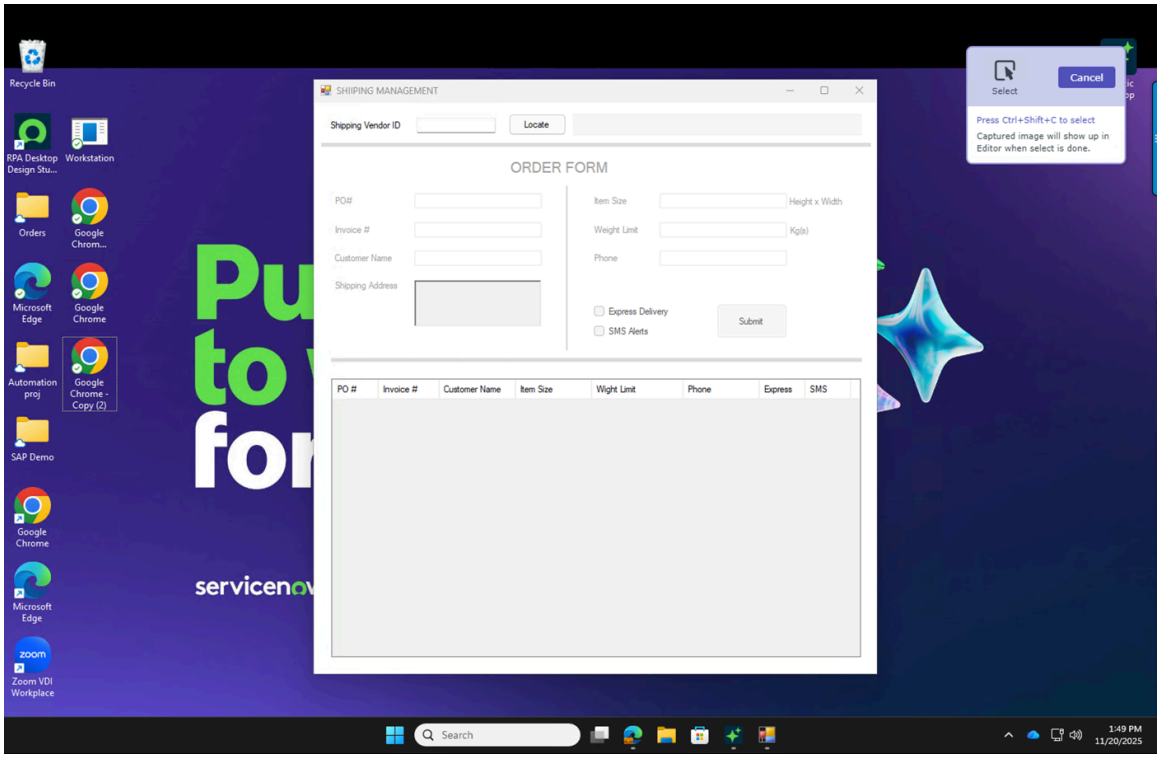

d. Capture the area of the external application's window by selecting the **Select** icon on the Capture panel or pressing the `Ctrl + Shift + C` on the keyboard.

> **Note:** If the `Ctrl + Shift + C` shortcut conflicts with another application on the your machine, such as Zoom, then you must use the **Select** button to initiate manual screen capture.

For example, you can capture the area surrounding a button or a text field in a web browser.

The cursor icon changes to the + icon.

e. Drag the + icon and select the required screen area.

When you leave the + icon, the selected area is captured as a screenshot in the Design workspace.

If you aren't satisfied with the captured screen, you can recapture the screen area by selecting the **Capture image** icon .

8. Insert anchors.

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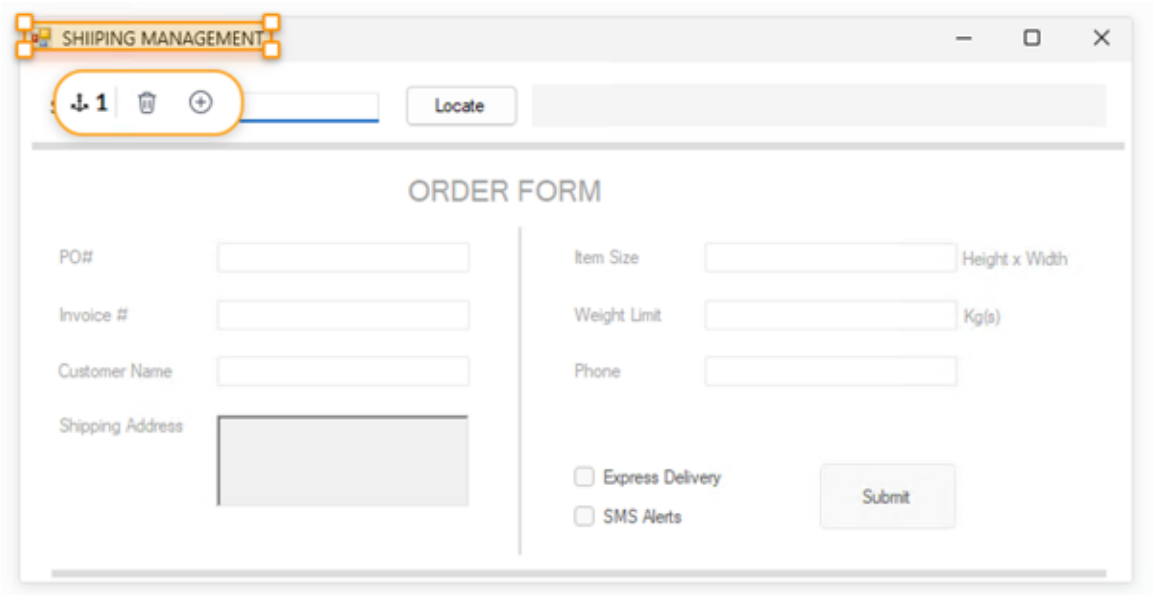
a. Insert an anchor on the captured screen by selecting the **Add anchor** icon .



Note: If two applications in the frame have similar logos or visual elements, verify that the anchor position is unique to the target application to avoid incorrect element identification during automation.

An anchor is a reference point on the screen that helps the automation identify and interact with a nearby UI elements. During execution, the system uses computer vision to locate the anchor and then identifies the UI elements at a related distance from the anchor. Anchors improve the stability and accuracy of steps when the target element's location may shift or when the UI layout varies across sessions.

Note: Don't use dynamically changing UI elements as anchors. If an element changes its color, text, or state after an action (for example, after a click), select a different anchor that remains static on the screen.

b. Move the anchor to a part of the captured image that won't change.
For example, move the anchor to a title or field label.

If the area under the anchor doesn't exactly match the corresponding area of the captured image, the anchor isn't recognized, and the steps aren't performed as intended. Choose a static area of the image for setting your anchor.

You can add multiple anchors on each screen. Multiple anchors let you define the geographical relationship between anchor and target with greater accuracy when targeting different locations in the image.

9. Configure the steps.

a. From the Step control menu, select the **Add step** icon ⊕.

b. Select the type of step for each field on the ORDER FORM from the contextual menu.

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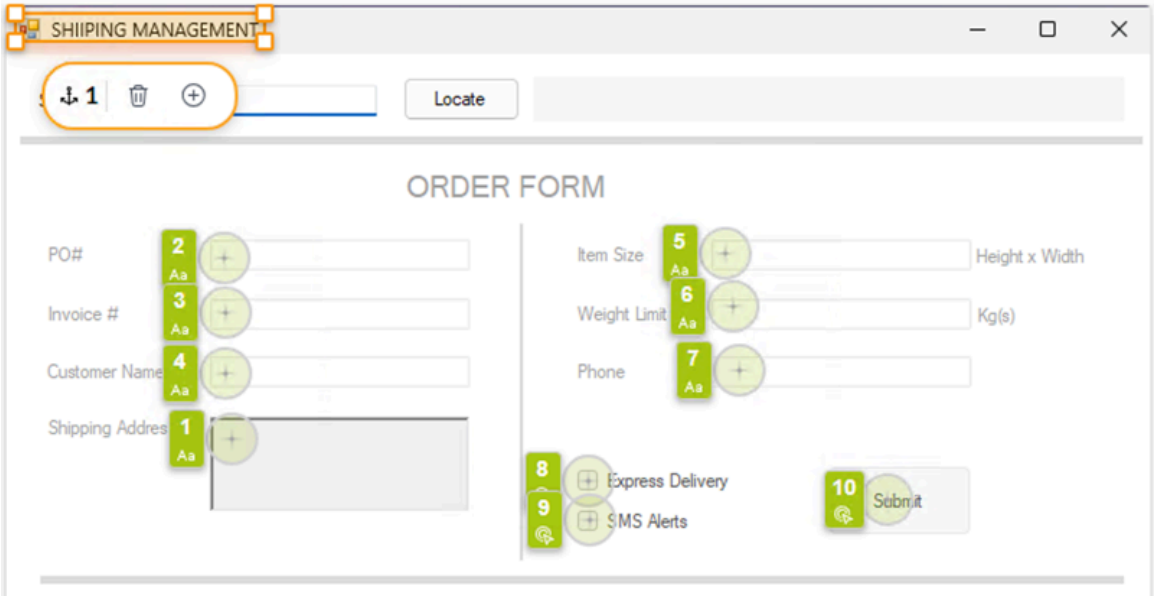

Number	Field	Step
1	PO#	Set Text
2	Invoice#	Set Text
3	Customer Name	Set Text
4	Shipping Address	Set Text
5	Item size	Set Text
6	Weight limit	Set Text
7	Phone	Set Text
8	Express Delivery	Click
9	SMS Alerts	Click
10	Submit	Click

10. Configure the properties for added screens, anchors, and steps in the Properties panel. For more information, see Screen, anchor, and step properties in AI Desktop Actions.
11. **Optional:** Modify the auto-generated names for all added screens, anchors, and steps.

    (Optional) You can modify the auto-generated names following these naming guidelines.

    - Name fields must not be empty.
    - Name fields must contain only alphanumeric characters. Spaces and special characters are not permitted.
    - Each name must be unique at its respective parent level.
        - Each screen must have a unique name at the desktop-action level.
        - Each anchor must have a unique name at the screen level.
        - Each step must have a unique name at the anchor level.
12. Select the Details tab.
13. In the Applications list, add Shipping Management.

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14. Select **Save**.
15. Test and activate the desktop action.
    For more information, see Test and activate a desktop action in AI Desktop Actions.
16. Similarly, create and activate the **Shipping Management login** desktop action.

Create AI agents and add tools for shipping orders

Create an AI agent in AI Agent Studio and add desktop action tools for Shipping Management task automation.

Before you begin

Role required: sn_aia.admin

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **AI agents**.
2. From the **Add** drop-down, select **Chat**.
3. On the New AI Agent page, in the Define the specialty step, define your AI agent and provide the specialties that this agent contains so that the LLM can analyze the wording you use to understand the purpose of the AI agent.

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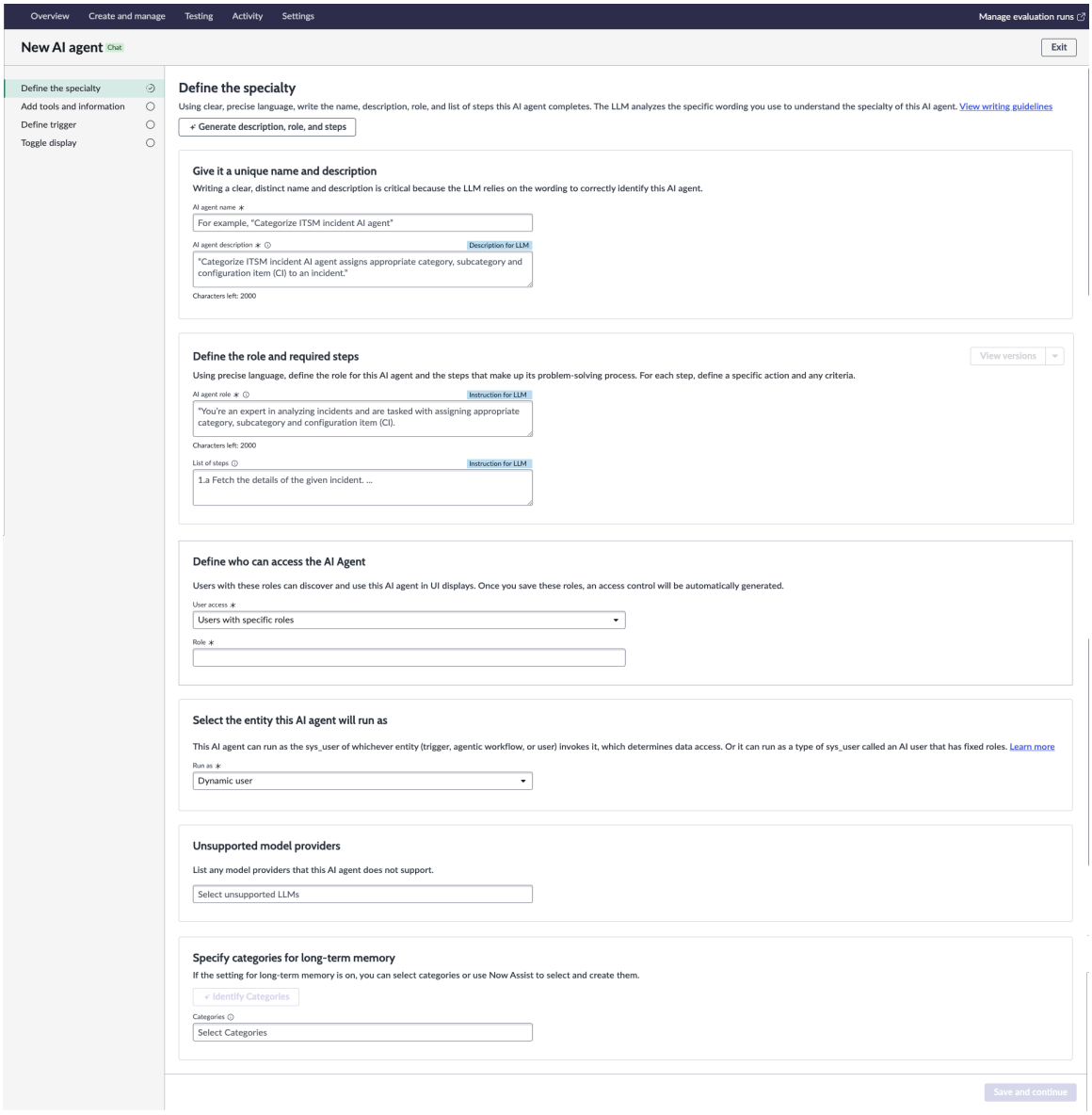

Note: The more details that you provide, the more accurately your AI agent can perform.

a. Describe your AI Agent by giving it a unique name and description.

Give it a unique name and description

Field	Description
AI agent name	Shipping Management Agent
AI agent Description	The Shipping Management Agent automates end-to-end handling of shipping orders across multiple platforms. It retrieves order data from an Excel sheet and seamlessly uploads the information into the shipping management tool. This reduces manual effort, ensures data consistency, and accelerates the overall invoice life cycle.

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b. Define the role and necessary steps so that the AI agent can carry out its tasks.

> **Note:** The AI agent uses this information as guidance to tailor its responses and actions.

Define the role and required steps

Field	Description
AI agent role	Automates the retrieval of shipping orders from Excel and performs seamless data entry into the shipping management application.
List of steps	**Note:** If your automation requires manual inputs, such as entering an OTP or CAPTCHA, you must provide instructions to the AI Agent to wait for the user input during execution. Otherwise, the automation can't proceed. **i.** Launch and log in to the Shipping Management application. **ii.** Open the Excel file from the user-specified folder. **iii.** Navigate to the designated worksheet within the Excel file. **iv.** Read the required columns for each order from the Excel sheet. **v.** Enter the extracted data into the corresponding fields in the shipping management application. **vi.** Select **Submit** to register the order. **vii.** Repeat steps 4–6 until all pending orders in the Excel sheet have been processed.

c. Select **Save and continue**.
You're directed to the Add tools and information page.

4. On the Add tools and information page, add Desktop actions tools for AI agents to automate your desktop tasks.

a. In the Add tool drop-down list, select **Desktop action**.

b. In the **Select a desktop action** field, select **On-screen** desktop action.

c. In the **Select a desktop action** drop-down list, select **Shipping Management login** desktop action.
This desktop action enables AI agents to log in to the Shipping Management application.

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d. Provide a name and tool description for this desktop action configuration.
Tool description of the desktop action helps with what it's going to do to assist your AI agent.

> **Note:** This description is sent to the large language model (LLM).

e. In the **Execution mode** field, select **Autonomous**.

f. Select **Add**.
The desktop action is added in the Desktop actions list on the Add tools and information page.

g. In the Add tool drop-down list, select **Desktop action**.

h. In the **Select a desktop action** drop-down list, select **Process shipping orders** desktop action.
This desktop action enables AI agents to enter data extracted from the spreadsheet into the Shipping Management application.

i. Provide a name and tool description for this desktop action configuration.
Tool description of the desktop action helps with what it's going to do to assist your AI agent.

> **Note:** This description is sent to the large language model (LLM).

j. In the **Execution mode** field, select **Autonomous**.

k. Select **Add**.
The desktop action is added in the Desktop actions list on the Add tools and information page.

l. In the Add tool drop-down list, select **Desktop action**.

m. In the **Select an application** drop-down list, select Microsoft Excel.
The Microsoft Excel tool, background task desktop action, enables AI agents to contextually extract information from the spreadsheet.

n. Provide a name and tool description for this desktop action configuration.
Tool description of the desktop action helps with what it's going to do to assist your AI agent.

> **Note:** This description is sent to the large language model (LLM).

o. In the **Execution mode** field, select **Autonomous**.

p. Select **Add**.
The desktop action is added in the Desktop actions list on the Add tools and information page.

5. Select **Save and continue**.
6. Complete the remaining steps that are necessary.
For more information, see Create an AI agent.
7. Select **Save and test** to complete the configuration steps or review a previous step by selecting **Back**.

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Selecting Save and test leads you to the AI agent testing page, where you can test the AI agent that you created. For more information, see Manually test the execution of an AI agent.

To test the AI agent, you must have the sn_aia.admin role and any roles the ACLs configured for the AI agent and its tools require, if applicable.

What to do next

Enable shipping coordinators to trigger AI agents from the ServiceNow Otto panel to enter data automatically into the Shipping Management application.

For more information, see Example: Use AI agents to automatically enter data into the shipping management app.

Examples of executing desktop actions using AI agents

These examples explain how to trigger AI Agents that execute automations you designed using desktop actions. The following topics walk you through the end-to-end execution flow so you understand how AI-driven execution works in your desktop environment.

Example: Use AI agents to process badge-related requests automatically

As an HR representative, automatically process various badge requests by triggering AI agents that use desktop action tools from the ServiceNow Otto panel.

Before you begin

To access the AI Desktop Actions functionality, perform the following steps:

- Enable AI Desktop Actions on your ServiceNow instance. For more information, see Configure AI Desktop Actions.
- Download the AI Desktop Actions installer to automate repetitive tasks across applications and systems. For more information, see Download AI Desktop Actions installer for defined desktop actions.

Confirm that the following system requirements are met:

- Windows 11 operating system is used.
- A .NET 9.0 runtime v9.0.10 and .NET 9 Desktop Runtime v9.0.10 is installed.
- No extended monitors are connected.
- Remote Desktop must be enabled on your machine and your account must be granted Remote Desktop access permissions before you start using the AI Desktop Actions Execution workspace.
- Theme must match between the systems used for recording and execution.
- Confirm that your firewall allows bidirectional traffic between the AI Desktop Actions application and your ServiceNow instance on the port 80 for HTTP and port 443 for HTTPs.

  If your organization uses non-standard ports for HTTP or HTTPS, confirm the correct ports with your IT administrator before proceeding.

  You must have full permissions to create and use system I/O communication pipes.

- If applicable, confirm that the `snada://` custom URI protocol is registered to launch the AI Desktop Actions application in the browser.

Note: Screen resolution and scaling must be the same between the systems used for recording and execution of desktop actions that are created before AI Desktop Actions v1.0.1.

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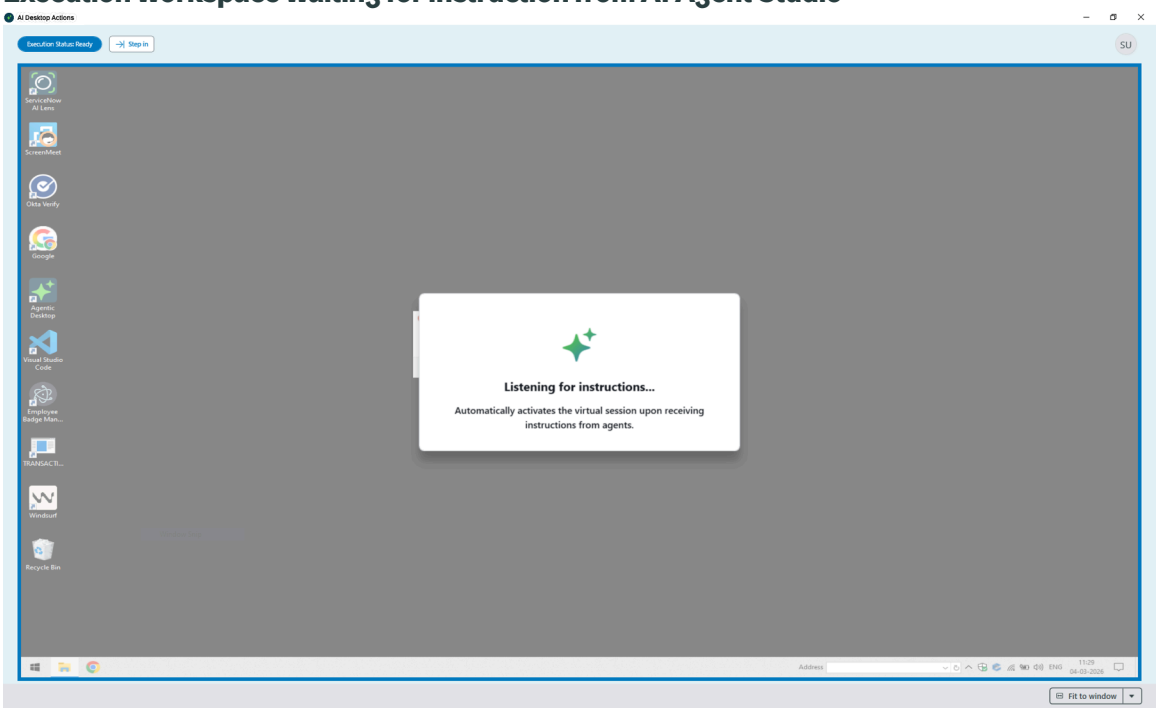
Familiarize yourself with the AI Desktop Actions Execution workspace. For more information, see AI Desktop Actions Execution workspace.

Role required: now_assist_panel_user for the user and sn_naa.web_agent_runtime for the service account the agent runs as

About this task

AI agents use desktop actions that are designed in the AI Desktop Actions Design workspace as tools. When an AI agent is triggered from the ServiceNow Otto panel, it determines which desktop actions it can use to perform the automation. Once triggered, the automation is executed in the desktop-in-desktop mode within the AI Desktop Actions Execution workspace.

Execution workspace waiting for instruction from AI Agent Studio



Note:

To avoid conflicts, don't run the AI Desktop Actions Execution workspace and RPA Attended Desktop mode at the same time.

Procedure

1. Navigate to **All** > **Requests** > **Assigned to you** and select all the pending requests that you would like to resolve.
2. Open the ServiceNow Otto panel by using the ServiceNow Otto icon.
3. On the ServiceNow Otto panel, enter `Use the badge management tool and process the selected requests`.
4. Monitor the automation execution.

Automation execution process on ServiceNow Otto panel and AI Desktop Actions

On ServiceNow Otto panel	On AI Desktop Actions Execution workspace
The AI agent is triggered and starts preparing a plan.	The Execution workspace launches. The AI agent logs in.

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On ServiceNow Otto panel	On AI Desktop Actions Execution workspace
	If this is the first time you launch the Execution workspace using AI agents, enter your Windows Security credentials when prompted.
The agent shows which desktop actions it uses for the execution.	The Execution workspace waits for instructions from AI Agent Studio.
The AI agent shows each step as it executes them.	The AI agent performs the tasks in the Execution workspace that shows the execution status. For more information, see Execution statuses.
The outcome of the execution is shown in the ServiceNow Otto panel.	The Execution workspace returns to the ready state.

Note: If a pop-up window blocks the automation, select **Step in** to clear it, then select **Step out** to return control to the agent.

During execution, the agent uses the values configured for each input. Values can come from two sources: static values set during design time, or mapped parameter records. If you also specify values for inputs configured for parameters in the agent instructions or in the ServiceNow Otto panel, the mapped parameter values override them.

5. **Optional:** Interact with the automation when your inputs are required.
   - **Step in**: take control whenever human inputs are required
   - **Step out**: give the control back to the AI agent.

   Note: If your automation requires manual inputs, such as entering an OTP or CAPTCHA, you must provide instructions to the AI Agent to wait for the user input during execution. Otherwise, the automation can't proceed.

6. **Optional:** Use the smart sizing options to enable your desktop executions automatically adapt to your display.

Option	Description
Fit to window	Scales the execution screen to fit within the display area of the Execution workspace. The entire screen is visible without scrolling. (Optional) Shortcut: `ctrl+shift+w`
Original resolution	Displays the execution screen at its original resolution. Scroll bars appear if the screen is larger than the display area of the Execution workspace. (Optional) Shortcut: `ctrl+shift+d`

Trouble?

If the desktop session isn't sized correctly and mouse actions aren't working as expected after you enter the session, use the following keyboard shortcuts to resize the session:

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`Ctrl + Shift + W`: Resize to window view.

`Ctrl + Shift + D`: Resize to actual desktop view.

Example: Use AI agents to automatically enter data into the shipping management app

As a shipping coordinator, enter shipping details automatically from Excel to the Shipping Management app by triggering AI agents that use desktop action tools from the ServiceNow Otto panel.

Before you begin

To access the AI Desktop Actions functionality, perform the following steps:

- Enable AI Desktop Actions on your ServiceNow instance. For more information, see Configure AI Desktop Actions.
- Download the AI Desktop Actions installer to automate repetitive tasks across applications and systems. For more information, see Download AI Desktop Actions installer for defined desktop actions.

Confirm that the following system requirements are met:

- Windows 11 operating system is used.
- A .NET 9.0 runtime v9.0.10 and .NET 9 Desktop Runtime v9.0.10 is installed.
- No extended monitors are connected.
- Remote Desktop must be enabled on your machine and your account must be granted Remote Desktop access permissions before you start using the AI Desktop Actions Execution workspace.
- Theme must match between the systems used for recording and execution.
- Confirm that your firewall allows bidirectional traffic between the AI Desktop Actions application and your ServiceNow instance on the port 80 for HTTP and port 443 for HTTPs.

  If your organization uses non-standard ports for HTTP or HTTPS, confirm the correct ports with your IT administrator before proceeding.

  You must have full permissions to create and use system I/O communication pipes.
- If applicable, confirm that the `snada://` custom URI protocol is registered to launch the AI Desktop Actions application in the browser.

Note: Screen resolution and scaling must be the same between the systems used for recording and execution of desktop actions that are created prior to AI Desktop Actions v1.0.1.

Familiarize yourself with the AI Desktop Actions Execution workspace. For more information, see AI Desktop Actions Execution workspace.

Role required: now_assist_panel_user for the user and sn_naa.web_agent_runtime for the service account the agent runs as

About this task

AI agents use desktop actions that are designed in the AI Desktop Actions Design workspace as tools. When an AI agent is triggered from the ServiceNow Otto panel, it determines which desktop actions it can use to perform the automation. Once triggered, the automation is executed in the desktop-in-desktop mode within the AI Desktop Actions Execution workspace.

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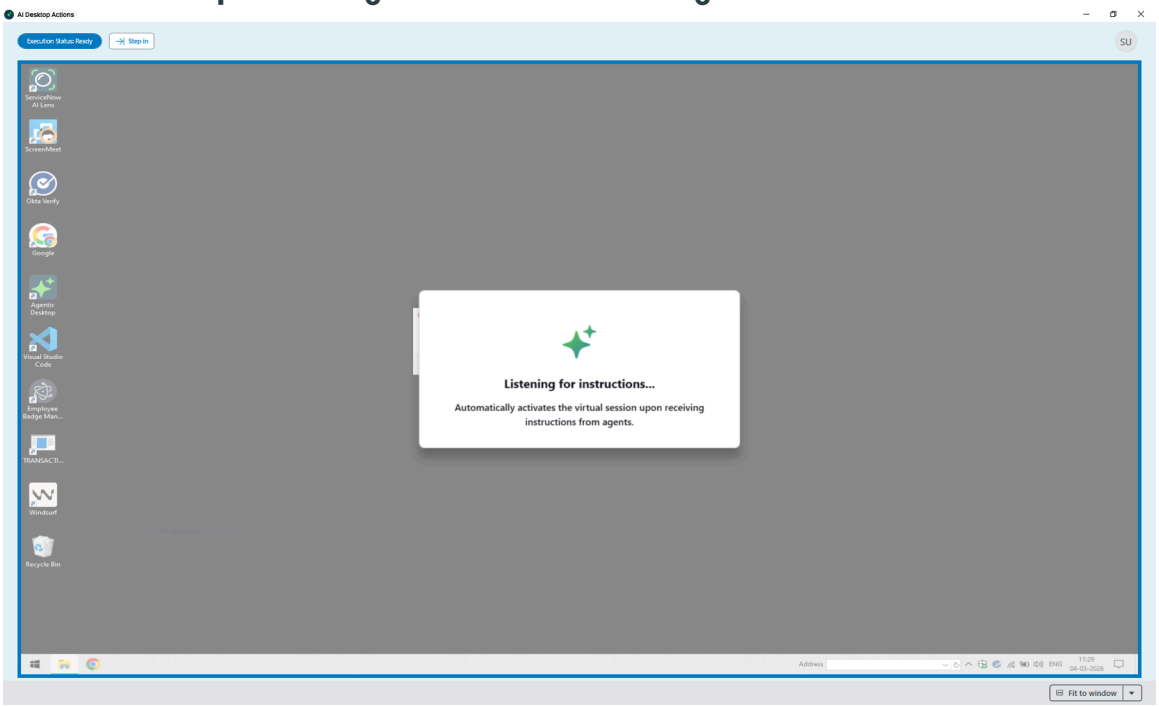
Execution workspace waiting for instruction from AI Agent Studio



Note:

To avoid conflicts, don't run the AI Desktop Actions Execution workspace and RPA Attended Desktop mode at the same time.

Procedure

1. Navigate to **All** > **Incidents** > **Assigned to you** and open an incident that you would like to resolve.
   When you open an incident, ServiceNow Otto checks if a plan is available by using AI agents and displays the `ServiceNow Otto has a plan for solving INCXXXXXXX. Open ServiceNow Otto panel to view the plan.` message in a banner.

   Note: You can select the banner and directly go to the conversation on the ServiceNow Otto panel to complete the task.

2. Open the ServiceNow Otto panel by using the ServiceNow Otto icon.
   ServiceNow Otto provides the resolution steps for the incident.
3. On the ServiceNow Otto panel, enter `Read the shipping order details from the Excel spreadsheet located at: "C:\temp\Shipping orders.xlsx\". First, launch the Shipping Management application and login. Then, iterate through each order row in the spreadsheet and enter the data into the Shipping Management application.` .
4. Monitor the automation execution.

Automation execution process on ServiceNow Otto panel and AI Desktop Actions

On ServiceNow Otto panel	On AI Desktop Actions Execution workspace
The AI agent is triggered and starts preparing a plan.	The Execution workspace launches. The AI agent logs in.

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On ServiceNow Otto panel	On AI Desktop Actions Execution workspace
	If this is the first time you launch the Execution workspace using AI agents, enter your Windows Security credentials when prompted.
The agent shows which desktop actions it uses for the execution.	The Execution workspace waits for instructions from AI Agent Studio.
The AI agent shows each step as it executes them.	The AI agent performs the tasks in the Execution workspace that shows the execution status. For more information, see Execution statuses.
The outcome of the execution is shown in the ServiceNow Otto panel.	The Execution workspace returns to the ready state.

Note: If a pop-up window blocks the automation, select **Step in** to clear it, then select **Step out** to return control to the agent.

During execution, the agent uses the values configured for each input. Values can come from two sources: static values set during design time, or mapped parameter records. If you also specify values for inputs configured for parameters in the agent instructions or in the ServiceNow Otto panel, the mapped parameter values override them.

5. **Optional:** Interact with the automation when your inputs are required.
   - **Step in**: take control whenever human inputs are required
   - **Step out**: give the control back to the AI agent.

   Note: If your automation requires manual inputs, such as entering an OTP or CAPTCHA, you must provide instructions to the AI Agent to wait for the user input during execution. Otherwise, the automation can't proceed.

6. **Optional:** Use the smart sizing options to enable your desktop executions automatically adapt to your display.

Option	Description
Fit to window	Scales the execution screen to fit within the display area of the Execution workspace. The entire screen is visible without scrolling. (Optional) Shortcut: `ctrl+shift+w`
Original resolution	Displays the execution screen at its original resolution. Scroll bars appear if the screen is larger than the display area of the Execution workspace. (Optional) Shortcut: `ctrl+shift+d`

Trouble?

If the desktop session isn't sized correctly and mouse actions aren't working as expected after you enter the session, use the following keyboard shortcuts to resize the session:

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`Ctrl + Shift + W`: Resize to window view.

`Ctrl + Shift + D`: Resize to actual desktop view.

Trigger an AI agent to execute adaptive path desktop actions

Trigger an AI agent that uses adaptive desktop actions from the ServiceNow Otto panel. These desktop actions perform tasks on an external website or web application.

Before you begin

- Confirm that the *ServiceNow* **Web Automation** Google Chrome extension is installed and connected to your ServiceNow® instance. For more information, see Install the Google Chrome extension for adaptive desktop actions.
- Confirm that you're logged in to your ServiceNow instance and it is in the active state in the browser window.
- Verify that enhanced chat is available in ServiceNow Otto panel. The Web view pane is available only when enhanced chat is enabled. For more information see Enhanced chat.
- Adaptive desktop actions can handle a broader range of user interactions beyond custom UI, such as triple-click, double-click, right-click, native prompts, dialogues, and alerts.

Role required: now_assist_panel_user for the user and sn_naa.web_agent_runtime for the service account the agent runs as

About this task

AI agents using adaptive desktop actions perform tasks for you on a website or web application. The AI agent opens the website in a separate browser tab in the background, and reports its actions to you in the ServiceNow Otto panel. During the process, the website might require credentials for a login or acceptance of terms.

How the AI agent handles this depends on whether or not the goal provided by you references stored credentials. For more information, see Credential and dynamic parameter management.

You can preserve the context across long-running sessions by summarizing older step history instead of discarding it. When history exceeds the configured window, older steps are automatically summarized instead of being discarded, preserving context about earlier actions, failed approaches, and application state.

There are three system properties that handle this:

- sn_naa.web_agent.compaction_enabled
- sn_naa.web_agent.compaction_history_limit
- sn_naa.web_agent.summarization_batch_size

For detailed information about the system properties, see Components installed with AI Desktop Actions.

Here are tips for writing successful requests for the LLM:

- Be sure to provide the URL to your target website, using the format `https://www.example.com` or `example.com`.
- Make your request clear and specify your goal.
- List steps to achieve the goal, if possible.

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Procedure

1. On your ServiceNow instance, open the ServiceNow Otto panel by using the ServiceNow Otto icon.
   Use the same instance that the *ServiceNow* **Web Automation** extension is connected to and has at least one AI agent that uses adaptive desktop actions.
2. Type your request.
   ServiceNow Otto panel asks for details about your request.

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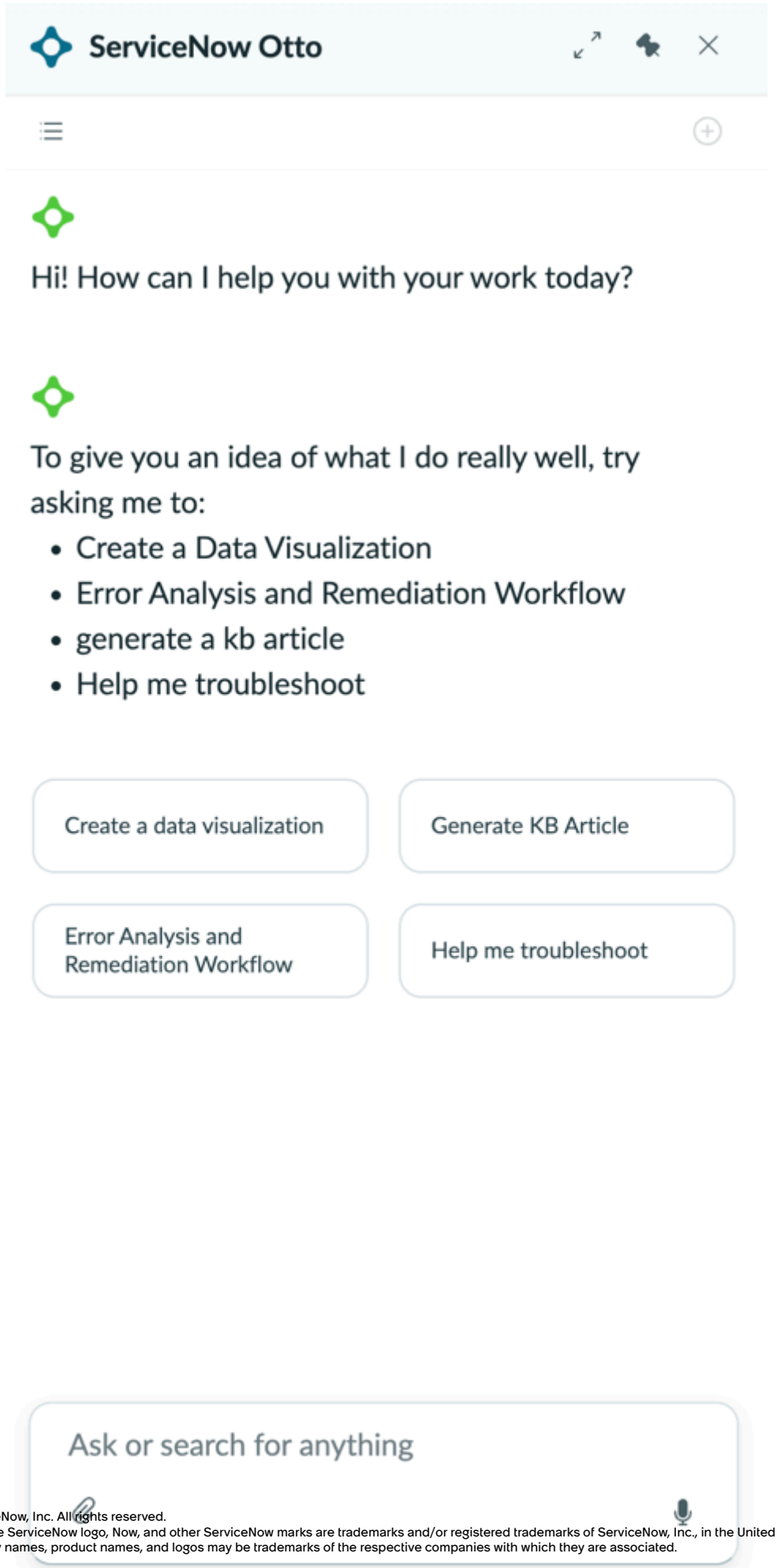

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3. Enter details about the task you want the AI agent to execute for you.

   Example

   Examples of tasks you can request:

   - **Manual log in (Without using stored credentials)**
     - Can you find the best coffeemaker on amazon.com?
     - Can you find the latest invoice from invoiceninja.com?
     - Navigate to https://www.accuweather.com/. In the Search field, enter "zip code 95054" and search. In the search results, open the first page. Find the current temperature in degrees Fahrenheit and tell me the temperature.
     - Navigate to en.wikipedia.org. On the main page of wikipedia.org, in the Search field, search for "Santa Clara, California". In the search results, open the first page listed, and read its contents. Summarize the contents of the page in 2 or 3 sentences.
   - **Automatic log in (Using stored credentials)**
     - Go to https://www.example.com/ and authenticate using parameter 'user_name' and parameter 'password'.
     - Open https://www.example.org/ and log in with stored 'user_name' and stored 'password', then select Transactions.
     - Open https://www.example.net/ and log in using username from reference 'user_name' and password from reference 'password'. Then navigate to 'Task List', remove any filters, choose Pending status, and select Save.

       For more information, see Credential and dynamic parameter management.

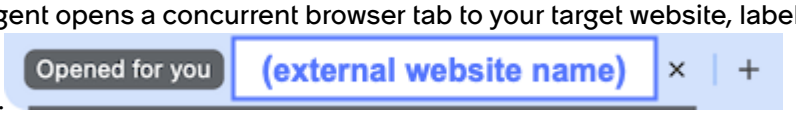
   In your conversations with AI agents, the actual wording of the questions and answers may be different from the given examples. For more information about ServiceNow Otto panel, see ServiceNow Otto panel.

4. Review the execution plan proposed by the AI agent and confirm your approval.
   - If you're satisfied that the AI agent understood your request, then enter `proceed` or `approve`
   - If you're not satisfied with the AI agent's plan, try to rephrase your request.

   After you indicate approval, the AI agent begins to execute its plan. It provides updates on its process in the ServiceNow Otto panel.

   Note: The system may display an error about a setup configuration if the ***ServiceNow* Web Automation** Google Chrome extension is disconnected. Verify that the browser extension displays **Connected** by refreshing the browser windows that has the ServiceNow instance open.

5. Monitor the AI agent's updates in ServiceNow Otto panel.
   You can see the following:
   - AI agent opens a concurrent browser tab to your target website, labeled "Opened for you".

     Note: Each browser session starts on a blank page instead of a search engine homepage, and the same browser tab is reused for every action within a chat session instead of opening a new tab each time. If the previous tab no longer exists, or is no longer part of a tab group, a new tab opens.

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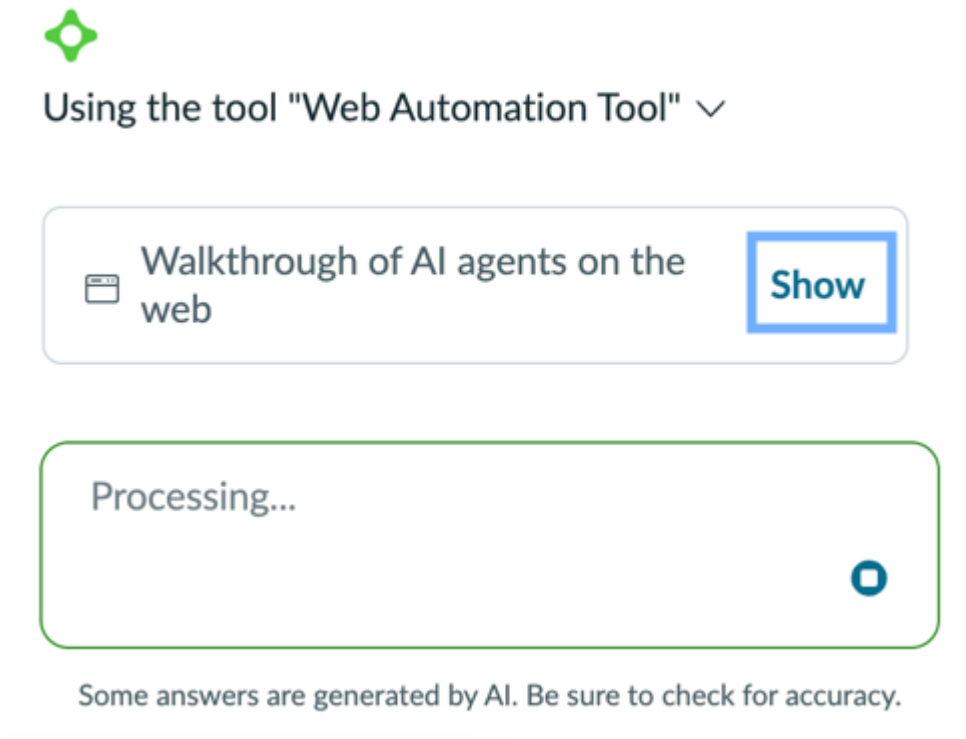
- The **Web view** tab displays periodic screenshots of how AI agent navigates to the website and perform requested steps.

  You can switch to the Web view by selecting the **Web view** tab or by selecting the **Walkthrough of AI agents on the web** card in ServiceNow Otto panel.



Note:

If your goal references stored credentials that aren't defined for the website, or doesn't reference stored credentials at all, the agent prompts you to log in manually. Switch to the website's browser window, log in, and confirm in chat so the agent can continue.

If your goal references stored credentials (dynamic parameters previously configured for that website), the agent retrieves the corresponding values and enters them on the login page automatically. You don't have to provide anything in the chat.

Values marked as sensitive in the stored credentials are never displayed, in the chat or elsewhere. Non-sensitive values, such as a username, might appear as part of the agent's plan.

To use the stored credentials, an administrator must first define them as desktop action parameters. For more information, see Enable AI agents to securely access parameters in AI Desktop Actions.

6. When the AI agent returns satisfactory results in the ServiceNow Otto panel chat, enter a closing such as `Thank you` to signal to the AI agent that the task is finished.

   If the AI agent doesn't take the expected steps, you can take over and complete them manually.

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Result
The browser tabs opened during goal execution in adaptive desktop actions stay open after the goal completes. Use the `keep_tab_open` system property to turn this behavior on or off. The property is turned on by default.

What to do next
You can delete the chat log in ServiceNow Otto panel if any sensitive information was captured. For detailed instructions, see Delete an AI agent chat log.

Delete an AI agent chat log

After you close an AI agent session, you can delete its chat if any sensitive information was captured. Deleting your chat log permanently erases the chat history of that session, including screenshots.

Before you begin
- Close at least one interaction with an AI agent. Active chats can't be deleted.
- Only the user who opened the AI agent session can delete the session's chat.

Role required: now_assist_panel_user

About this task
As you're interacting with an AI agent, the text of your conversation with the AI agent is recorded in a chat log. The screenshots taken during the session are also recorded in the chat.

While interacting with an AI agent in the ServiceNow Otto panel, the **Web view** tab displays the following notice from the title's information icon :

Screenshots are being captured by the system. You can delete the chat log if any sensitive information was captured.

After your chat session is closed, its title is listed in your ServiceNow Otto panel under the **Closed** section.

Review your chat log by selecting its title. Use the following procedure if you decide to permanently delete your chat log from chat history.

Procedure
1. In the ServiceNow Otto panel, select the context menu icon and navigate to **Chats** > **Closed**.
2. Locate the title of your AI agent session, and hover your cursor over it.

   Note: The title of your chat may default to the name of the task used with the AI agent. The chat title was displayed as a banner while the session was running.

3. Select the delete icon that appears when you hover your cursor over the chat title.

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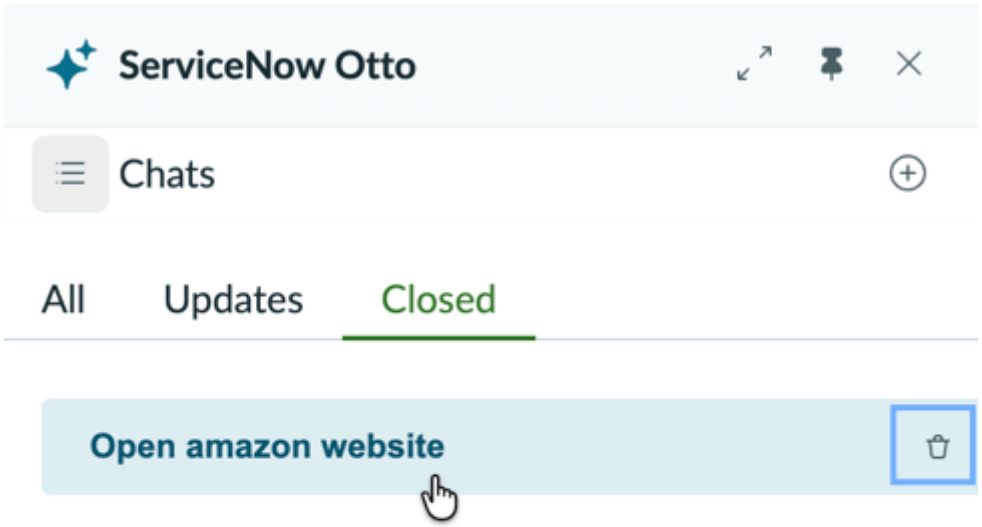
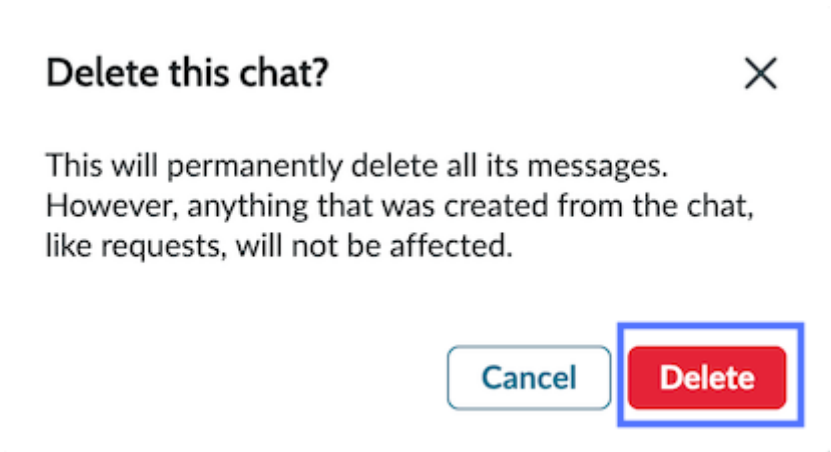


A dialog box appears with the question **Delete this chat?**



4. Select **Delete** to permanently delete the chat.

Result
The chat history and its screenshots are deleted from the system.

Execute adaptive desktop actions for desktop and web

Use AI Desktop Actions to automate desktop or web-based tasks. Describe your task to the AI agent, review and approve the execution plan, and monitor real-time progress.

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Before you begin

- Confirm that AI Desktop Actions is enabled on your ServiceNow instance. For more information, see Configure AI Desktop Actions.
- Confirm that the AI Desktop Actions installer is installed to automate repetitive tasks across applications and desktop. For more information, see Download AI Desktop Actions installer for adaptive desktop actions.
- Confirm that the following system requirements are met:
  - macOS machine is used.
  - The ServiceNow AI Lens skill must be active on your instance. Contact your ServiceNow administrator if you're unsure whether this condition is met.

Role required: sn_aia.admin and lens_user, now_assist_panel_user and lens_user, or desktop_action_user

About this task

Use this procedure when you have a repetitive or complex desktop task that involves multiple applications or steps. Examples include copying data between systems, filling out forms, organizing files, or extracting information from documents. Instead of doing these tasks manually, you can describe what you want done and let AI handle the execution while you review and control the process.

AI Desktop Actions maintains context of the task until it is completed or failed. Each task starts without context from the previous task.

⚠ **Warning:** Don't lock the desktop during automation execution. If the desktop locks, the AI agent loses access and can't continue the automation.

Procedure

1. From your macOS machine, launch the AI Desktop Actions application.
2. Verify that you granted the following system permissions on your macOS system.
   When you first launch the application, you will be prompted to grant two permissions:
   - **Screen Recording**: Enables the AI agent to see your screen
   - **Accessibility**: Enables the AI agent to control your keyboard and cursor

   You can grant system permissions by selecting **Open system settings**. After granting permissions, restart the application.

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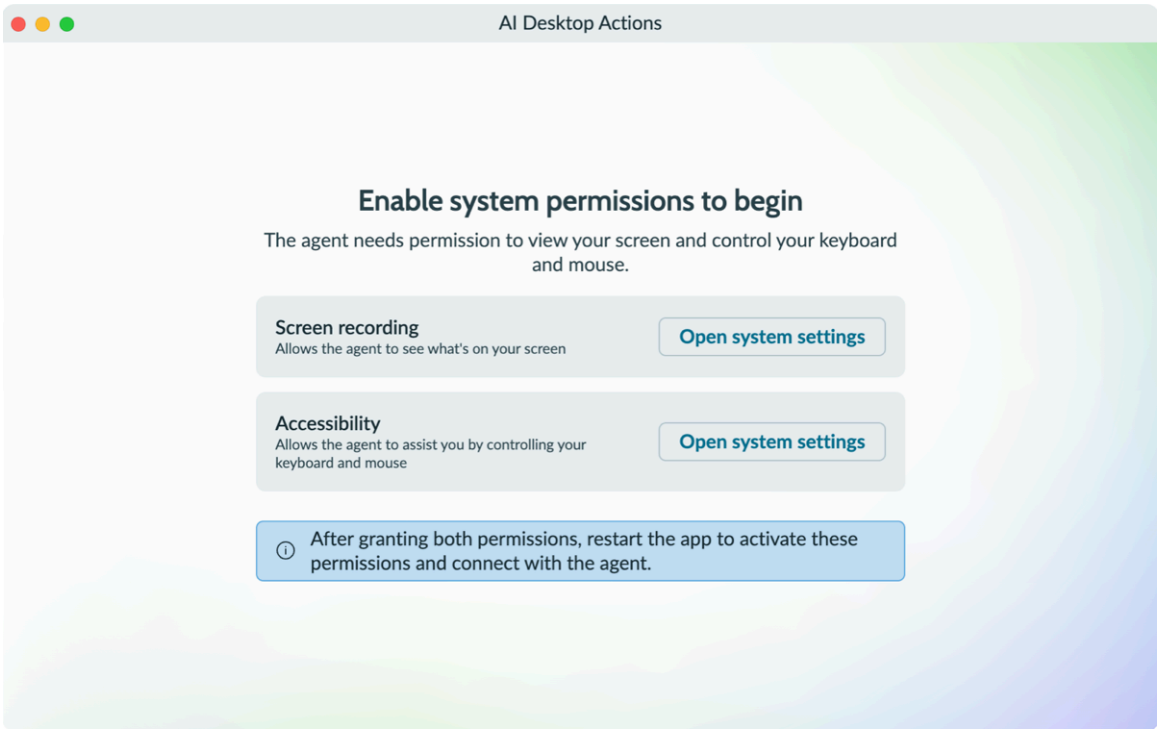
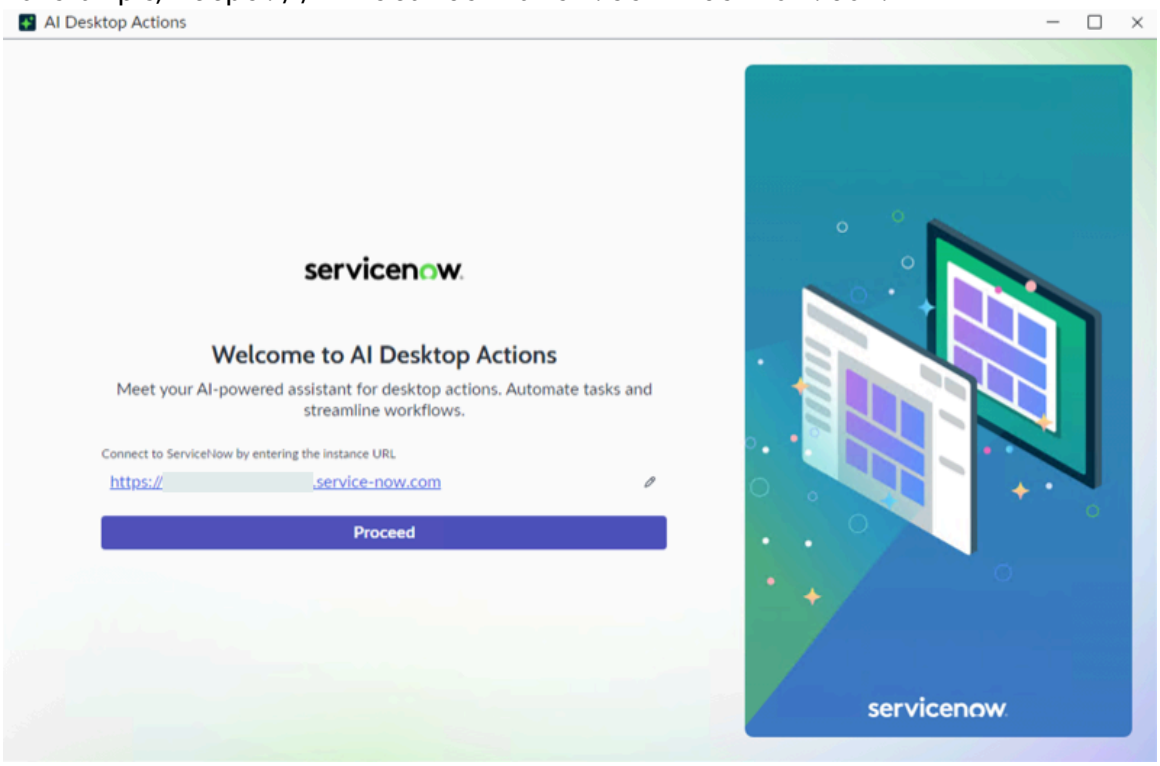


If you have already granted the permissions, the application displays the login page.

Note: If you want to create reusable skills from this task and reuse them for a new task, you must use the reusable skills feature. For more information, see Reusable skills in adaptive desktop actions.

3. On the login page, in the **Add ServiceNow URL** field, enter the ServiceNow instance URL.

Example
For example, `https://<instance name>.service-now.com`.



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4. Select **Proceed**.
5. Log in to your ServiceNow account by entering your user name and password.

6. In the text field, describe the task you want the AI agent to perform in natural language.

   Include specific details such as:

   - Which application to start with
   - What data or documents to use
   - Where the data is located
   - What the result should be
   - Any specific values or settings to use

   Example

   Example: Open /users/sales_data.xlsx. Navigate to sheets "Q1", "Q2", "Q3". In each sheet, identify column C (Revenue) and sum all values. Create a sheet named "Annual_Summary". In this new sheet, create a table with: Row headers (Q1, Q2, Q3), Column A with quarterly totals calculated from each sheet, Column B with monthly averages. Add a row for Annual Total. Format cells with currency format. Save the file.

   Note: Some actions, such as background processing or non-UI operations, displays an "Executing in background" tag in AI steps to indicate that the AI agent is working on a task that is not visible on your screen.

7. Select the **Send Message** button to send your request.
   You're taken to the execution workspace. The AI agent begins analyzing your request and creates an execution plan.

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8. In the execution workspace, review the execution plan that the AI agent created.
   The AI agent displays a numbered list of steps it will perform and applications it will access.
9. Select one of the following options based on the plan proposed.
   - **Yes, go ahead**: Select this option if the plan is correct. The agent displays legal disclaimer and proceeds with execution.

     Before executing the task on your desktop, the system checks for applicable security policies and resource access rules based on user criteria.
   - **Cancel**: Select this option if you want to modify the plan and resubmit with more specific instructions.
10. Depending on the security policy evaluation result, do one of the following.

Resource access	Description and action
Denied	○ File, folder, website: The AI agent can't ac cess the denied resource and stops execu tion. ○ Application: The AI agent tries an alterna tive approach to open the application.
Allowed	The AI agent continues with the task automati cally.
Neither allowed nor denied	No policy rule exists for this resource, so the AI agent prompts you to allow access. Choose: ○ **Allow once**: The AI agent accesses this re source for this task only ○ **Deny**: The AI agent stops and halts execu tion

11. Observe the execution progress in the preview window.
    The AI agent opens applications, navigates windows, and performs the requested actions.
12. Monitor the execution status to track the AI agent's progress.

    For more information about execution statuses, see Execution status.
13. **Optional:** If the AI agent paused execution and needs your inputs or encounters an issue, do one of the following.
    - Provide the requested information or clarify your instructions in the chat. The AI agent resumes automatically.
    - Take control of execution, manually complete the blocked step yourself, and then return control to the AI agent. For more information, see Take control of AI Desktop Actions execution.
14. **Optional:** If the AI agent is not executing steps according to your expectations, select **Take control** and manually perform the step.
    For more information, see Take control of AI Desktop Actions execution.

Result

After the AI agent completes all planned steps, verify that the results match your expectations.

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- If the results are correct, the task is complete. Any data collected, files created, or changes made are available for your review.
- If adjustments are needed, you can start a new task or manually edit any changes the AI agent made.

Related topics

Adaptive desktop actions for desktop and web-based tasks

Take control of AI Desktop Actions execution

Known issues and limitations of adaptive desktop actions

Take control of AI Desktop Actions execution

Take control and pause the execution that AI agent is running. Make manual changes to your desktop, and then resume execution by providing handoff notes to the AI agent.

Before you begin

- AI Desktop Actions must be in the Running state. For more information, see Execute adaptive desktop actions for desktop and web.

Role required: sn_aia.admin and lens_user, now_assist_panel_user and lens_user, or desktop_action_user

About this task

When the AI agent is running, you can take control to pause it, make your changes, and then return control to the AI agent. Use this to correct a data entry error, adjust a workflow, or provide manual input that the agent can't detect. Taking control lets you address issues without restarting the task.

Some actions may run in the background, particularly non-UI operations or processing tasks that don't require screen interaction. When you take control during background execution, AI Desktop Actions pauses all processing and waits for your input. After you provide handoff notes, the AI agent resumes with the updated context.

Procedure

1. Select **Take control** from the execution interface.
   The AI agent pauses immediately and the execution status changes to **You have control**.
2. Review the current state of your desktop and applications.
   The applications the AI agent was working will remain open and in their current state. The AI agent has paused executing any actions.
3. Make any manual changes or corrections you require to your desktop or applications.

   Example

   Examples of manual changes:

   - Dismiss a pop-up or browser security dialog
   - Complete a CAPTCHA or security challenge
   - Correct data that the agent entered incorrectly
   - Navigate to a different location or window
   - Make adjustments to form fields or settings

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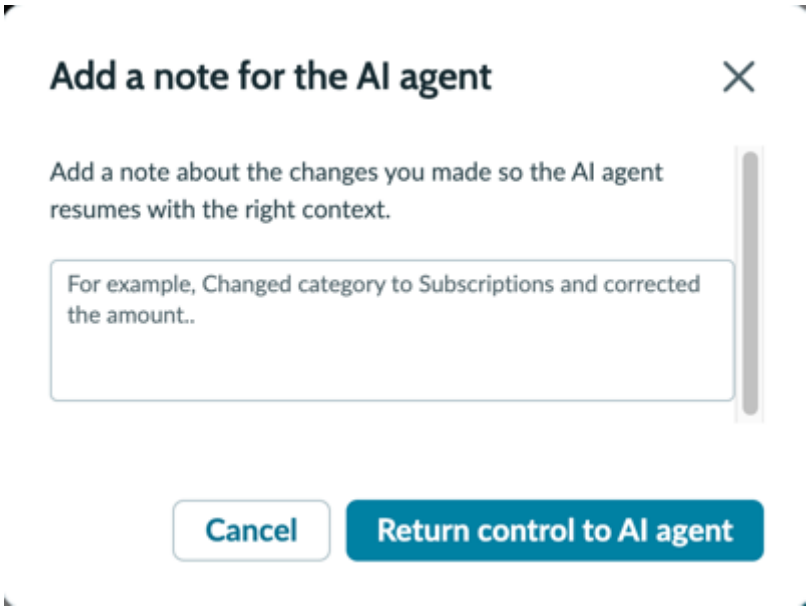
- Organize or reorganize files
- Cancel an action the agent started and redirect it

4. When you're ready to resume execution, select **Return control**.

   A text input area opens for you to leave notes for the AI agent.



5. In the Add a note for the AI agent dialog, describe the manual changes you made and any additional context the AI agent needs to resume correctly.

   Example

   Example handoff note: "Changed category to Subscriptions and corrected the amount to $250. The new total should be $2,100."

   Example handoff note: "Navigated to the Reports tab. Password field now contains the updated credentials."

   Be specific about what you changed and why, so the AI agent can continue with the correct context and avoid repeating unnecessary steps.

6. Select **Return control to AI agent** to resume execution.
   The AI agent reads your handoff notes, updates its context, and continues executing the remaining steps of your original request.
7. Monitor the execution status as the AI agent continues working.
   The execution status returns to Running. The AI Desktop Actions continues from where it paused, incorporating the changes you made and the context you provided in your handoff notes.

What to do next

After the AI agent resumes:

- Monitor the progress to verify the AI agent is executing correctly with your manual changes.
- If additional corrections are needed, you can pause execution again by selecting **Take control**.
- When execution completes, review the final results to verify that all steps were performed correctly.

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Related topics

Adaptive desktop actions for desktop and web-based tasks

Known issues and limitations of adaptive desktop actions

Known issues and limitations of adaptive desktop actions

Reference known issues, limitations, and resolution steps for AI Desktop Actions on macOS.

Known issues and resolution steps

Issue	Resolution steps
The app can't interact with lists, window overlays, popovers, pop-ups, or context menus in non-native applications, such as: • Microsoft Outlook for macOS (web-based) • Microsoft Teams (web-based) • Microsoft PowerPoint (web-based) • Other non-native macOS apps Reason: These applications are built as web-based interfaces inside native windows rather than traditional native apps. The interface elements don't respond to automation the same way native controls do.	The AI agent pauses when it encounters these interface elements and asks you to complete the step manually. You can: • Make the selection or interaction yourself. • Tell the AI agent that the action is complete to continue. The AI agent then resumes automating the remaining steps. **Tip:** When interacting with the app in the virtual desktop, select a text field or select from the list to change the green pointer into the macOS cursor. You can then interact normally and perform actions inside the virtual desktop.
After interacting with an application, the OS cursor may remain inside the virtual desktop instead of returning to your main session.	To bring the cursor back to the main desktop manually, move the cursor diagonally toward the top-left corner inside the virtual desktop. This moves the cursor out of the virtual desktop to your main session.
Unable to run automation tasks involving Microsoft Excel and Microsoft Word.	To use Microsoft Excel and Microsoft Word connectors, create resource access rules for these applications on your instance.
The AI agent is unable to select values in certain ServiceNow form field types, such as: • List field selections • Reference field value selections • Date and time picker controls • Overlay or pop-up selections	When the AI agent encounters these form field types, it pauses and asks you to take control. Do one of the following: • Select the required value in the list or reference field manually. • Pick the date or time from the date and time picker.

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Known issues and resolution steps (continued)

Issue	Resolution steps
	• Confirm the selection is complete. • Return control to the AI agent to continue with the remaining steps. Alternatively, you can defer the action and provide the value in a subsequent task.
If the AI agent launches one instance of an application (for example, Outlook or Chrome), it continues performing actions on that instance even if you open other instances of the same application. The AI agent operates on the window it launched, not on windows you open separately. The AI agent detects and works with the specific application instance it created at the start of the task. It doesn't automatically switch between multiple instances. If you start a new task using the same application, the AI agent may open a new window or instance. You may see multiple icons of the same app in your dock.	• Before starting a task, close other instances of the same application to avoid confusion. • After completing a task, close unused instances of the application to keep your dock clean.
When the AI agent performs actions on non-UI tools like Microsoft Excel, Microsoft Word, and other document-based applications, you may not see any visual indicator of the actions being performed in the preview window. You can only see the **executing in background** tag in AI steps in the chat interface. Reason: The AI agent may interact with these applications through automation APIs rather than the graphical user interface. This is more efficient but means you won't see visual feedback of what's happening.	In some cases, the AI agent may open the target file on your main session before performing operations. When this happens, you can see the file open in your main desktop and observe the changes being made. Otherwise, monitor the AI agent's progress updates in the chat window, which reports the status of file operations.
Some applications are denied by default for security reasons, including: • Terminal • Run Shell Script • Automator • Script Editor The AI agent doesn't interact with these apps without explicit permission.	If you need the AI agent to use one of these apps for a specific task, update the resource access rules to allow these applications. ⚠ **Warning:** These apps have elevated system privileges. Update resource access rules only for trusted tasks.
Sometimes the AI steps shown in the chat window aren't in sync with the actions shown in the preview	Wait a moment for the chat and preview window to sync. The actions

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Known issues and resolution steps (continued)

Issue	Resolution steps
window. The chat may show one step while the AI agent is still working on a previous step in the preview window. The system is still evaluating the success or failure of its operations. Chat updates are provided as the AI agent progresses, but there can be a slight delay before the chat reflects the actual state in the preview window.	being performed in the preview window are the current state; the chat will update shortly.
The system may use alternate approaches to interact with specific files that differ from the default method. In the process, the alternate approach may generate additional OS dialogs (such as "Do you want to save?" prompts). Additionally, when the OS alerts you of pending operations, the OS animation may display in the currently active Dock. For example, the AI agent may use an alternate app to interact with a file. After some time, if you try to quit that app from your main session, you might see an OS save dialog. You then need to go back into the preview window and select **Don't Save** to complete the quit operation. The Dock icon may keep jumping up and down during this time.	• Let the AI agent complete its task before manually interacting with applications in your main session. • If an unexpected dialog appears, handle it in the preview window where the AI agent is working. • After the task is complete, close any alternate applications the AI agent may have opened.

AI Desktop Actions reference

Reference topics provide additional information about the roles and tables that are installed with the AI Desktop Actions application.

Components installed with AI Desktop Actions

Several types of components are installed with activation of the sn_desktop_agents plugin, including user roles and tables.

Roles used

Role title [name]	Description	Contains roles
AI Agent Admin [sn_aia.admin]	Enables you to create, manage, and test desktop actions in AI Desktop Actions and deploy them as tools in AI Agent Studio.	• agent_role_config_admin • sn_skill_builder.admin • connection_admin • flow_designer • sn_aia.viewer • sn_mcp_client.admin • sn_ace.ace_user

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Role title [name]	Description	Contains roles
ServiceNow Otto panel user [now_assist_panel_user]	Enables you to trigger desktop actions from ServiceNow Otto panel and execute desktop actions in the desktop environment using Execution workspace.	sn_nowassist_admin.user
Desktop action user [sn_desktop_core.desktop_action_user]	Enables you to create desktop actions using the **Record with AI** feature in AI Desktop Actions.	• sn_aia.admin • sn_nowassist_admin.user
Web Agent Runtime [sn_naa.web_agent_runtime]	Grants the Web Automation Agent's service account read and write access to data required during execution. Assign this role only to the service account the agent runs as (not to end users). Without this role, the agent can't read or write any data at runtime.	None

Tables installed

Table	Description
Desktop action [sn_desktop_core_action]	Stores details, such as input and output parameters and number of screens for on-screen desktop actions.
Desktop action application [sn_desktop_core_action_application]	Stores the desktop application associated with the desktop action.
Desktop action execution [sn_desktop_core_action_execution]	Stores the execution details of a desktop action, such as request, response, tool execution, and execution plan.
Desktop action parameter [sn_desktop_core_action_parameter]	Stores the desktop action parameter records as parent records.
Desktop action parameter value [sn_desktop_core_action_parameter_value]	Stores the desktop action parameter value records as child records.

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Plugins installed

Plugin	Description
AI Desktop Actions [com.sn_desktop_agents]	Contains configuration of desktop action tool used by AI Agent Studio to discover available desktop actions while creating AI agents and invoke desktop actions via AI agents during execution.
AI Desktop Actions Core [com.sn_desktop_core]	Packages tables, custom functionality specific to AI Desktop Actions application, and AI Desktop Actions download interface within a scoped application.
ServiceNow Otto AI web agents [sn_naa]	Contains system properties, default AI agent and agentic workflow named Web Automation Agent and Web Automation respectively, and functionality to perform adaptive automation on web.

System properties installed

Property	Description
sn_desktop_core.record_with_ai	Makes **Record with AI** the default recording option. Turn off this property to set the manual recorder as the default recording option. • Type: true | false • Default: true
sn_desktop_core.max_action_events	Modifies the limit of maximum number of events processed during a single Desktop action execution in AI Desktop Actions. • Type: Integer • Default: 200
sn_naa.ai_web_agent.enabled	Enables or disables the adaptive desktop actions on the instance. Set to 'true' to enable the web agent, or 'false' to disable it. • Type: true | false • Default: true Roles and permissions admin: Read
sn_naa.allowed_websites	Stores a list of websites that AI agents configured with adaptive desktop actions are permitted to open and perform tasks. Type: String

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Property	Description
	Roles and permissions • admin: Read and Write • sn_naa_admin: Read and Write
sn_naa.context_closing_frequency	Specifies, in hours, how long to wait before closing orphaned, running `sn_naa_context` records in the database. • Type: integer • Default: 24 Roles and permissions • admin: Read and Write • sn_naa_admin: Read and Write
sn_naa.keep_tab_open	Keeps the browser tabs that open during goal execution open after the goal completes. Whenever you update the value, select the *ServiceNow* **Web Automation** extension icon, and save the instance provided in the extension. • Type: true | false • Default: true Roles and permissions • admin: Read and Write • sn_naa_admin: Read and Write
sn_naa.min_web_agent_version	Specifies the minimum adaptive desktop action (browser extension) version required for this instance to function correctly. If the installed version is lower than this value, the system will not run. Type: string Roles and permissions sys_admin: Read
sn_naa.NaaModeratorToolTimeLimit	Specifies the maximum duration, in milliseconds, that the web automation tool is allowed to run before it's considered a failure. • Type: integer • Default: 1800000 Roles and permissions • admin: Read and Write • sn_naa_admin: Read and Write

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Property	Description
sn_naa.reasoning.manual_intervention_prompt	Instructs the system to pause and request explicit input, confirmation, or a decision from the user in scenarios that require manual intervention. Type: string Roles and permissions • admin: Read and Write • sn_naa_admin: Read and Write
sn_naa.step_record_cleanup_frequency	Specifies, in days, how long to wait before permanently deleting `sn_naa_step` records from the database. • Type: Integer • Default: 90 Roles and permissions • admin: Read and Write • sn_naa_admin: Read and Write
sn_naa.web_agent.compaction_enabled	Enables summarization of steps that exceed the history limit, rather than discarding them. When turned off, only the most recent configured number of steps are retained. • Type: true | false • Default: true Roles and permissions • admin: Read and Write • sn_naa_admin: Read and Write
sn_naa.web_agent.compaction_history_limit	Sets the maximum number of unsummarized steps allowed before the oldest batch is summarized. When unsummarized steps exceed this value, compaction is triggered. • Type: Integer • Default: 15 Roles and permissions • admin: Read and Write • sn_naa_admin: Read and Write
sn_naa.web_agent.summarization_batch_size	Sets the number of steps combined into a single summary. Larger batches reduce how often summarization runs, but produce less granular summaries. • Type: Integer • Default: 10

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Property	Description
	Roles and permissions • admin: Read and Write • sn_naa_admin: Read and Write
sn_naa.web_agent_environment_type	Specifies the adaptive desktop action execution type. Set to `cloud`, which runs execution in the cloud. Set it to `local` to run execution through the browser extension. • Type: choice list • Default: cloud Roles and permissions admin: Read
sn_desktop_core.enable_reusable_assets	Allows turning on or off the Reusable Skills feature enables reuse of recorded desktop actions as deterministic assets that execute from user prompts in the AI Desktop Actions application (macOS). • Type: true | false • Default: false Roles and permissions • admin: Read and Write • sn_aia.admin and now_assist_panel_user: Read

System requirements and limitations in AI Desktop Actions

Be aware of system requirements and a few limitations when you're using the AI Desktop Actions application for defined desktop actions.

Note: These system requirements and limitations apply to only defined desktop actions that are created in the AI Desktop Actions Windows application.

Hardware requirements

Hardware requirements for AI Desktop Actions

Resource	Minimum	Recommended
CPU	Intel Processor (Core i5)	Intel Processor (Core i7)
RAM	4-GB RAM	8-GB RAM

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Hardware requirements for AI Desktop Actions (continued)

Resource	Minimum	Recommended
Disk space	Minimum 20-GB free disk space after installing the OS, patches, and base software	Minimum 50-GB free disk space after installing the OS, patches, and base software

Software requirements

- Windows 11 operating system is used.
- A .NET 9.0 runtime v9.0.10 and .NET 9 Desktop Runtime v9.0.10 is installed.
- No extended monitors are connected.
- Add the end users who interact with the Execution workspace of AI Desktop Actions to the Remote Desktop Users group on the target machine and provide Remote Desktop access permissions for seamless automation execution.

  If your organization uses Group Policy, add the end users to a Microsoft Active Directory group that is permitted to use Remote Desktop through Group Policy on each target machine where desktop actions run.

  - Local changes to the Remote Desktop Users group are temporary unless they align with Microsoft Active Directory entitlements.
  - If the user is not entitled, Group Policy refresh automatically removes them from the group.
- Theme must match between the systems used for recording and execution.
- Confirm that your firewall allows bidirectional traffic between the AI Desktop Actions application and your ServiceNow instance on the port 80 for HTTP and port 443 for HTTPs.

  If your organization uses non-standard ports for HTTP or HTTPS, confirm the correct ports with your IT administrator before proceeding.

  You must have full permissions to create and use system I/O communication pipes.
- If applicable, confirm that the `snada://` custom URI protocol is registered to launch the AI Desktop Actions application in the browser.

Note: Screen resolution and scaling must be the same between the systems used for recording and execution of desktop actions that are created before AI Desktop Actions v1.0.1.

Limitations

Limitations with AI Desktop Actions

Limit	Description
RPA Attended robot and AI Desktop Actions parallel execution	To avoid conflicts, don't run the AI Desktop Actions Execution workspace and RPA Attended Desktop mode at the same time.
Pause for human input	If your automation requires manual inputs, such as entering an OTP or CAPTCHA, you must provide instructions to the AI Agent

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Limitations with AI Desktop Actions (continued)

Limit	Description
	to wait for user input during execution. Otherwise, the automation can't proceed.
Single execution	The system supports one automation execution at a time within the Execution workspace.
Screen elements	During recording, auto-assignment accuracy of screen elements depends heavily on the target application's technology and interface characteristics. Applications with strong accessibility support, such as well-defined UI elements and controls, stable rendering performance, and simple, consistent layouts enable anchors to be detected more reliably. In contrast, UI complexity, such as dynamic elements, frequent layout shifts, animations, or poor accessibility metadata can reduce accuracy and may require manual anchor configuration or additional tuning.
Getting table information	The **Get Table** step doesn't convert ordinary text to table data. For the step to capture table data successfully, the data must already be in the table form.
Browsers parallel execution	The Chrome or Edge browser must not be used in parallel in the main session and the desktop session on your system. You must close the session in the main session to execute automations that use the Chrome or Edge browser in the Execution workspace.
Sensitive information	The sensitive information isn't masked during recording. Confirm that you don't record any sensitive information.

Considerations for file upload and download

Lists the details of the supported file types and validation rules.

Upload validation rules

The agent checks the following conditions before and after providing a file for upload.

Upload validation rules

Condition	Result	Error message
The file path is empty, missing, or not text	A human-in-the-Loop step is triggered that prompts the user to provide the required file path to unblock the process.	"File path is empty or invalid"

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Upload validation rules (continued)

Condition	Result	Error message
The file path contains a parent-directory reference (`..`)	Blocked	"Path traversal (..) is not allowed"
The file extension matches a blocked type (see the following table)	Blocked	"Blocked file type: "
The file does not attach after being supplied — the path does not exist, is unreadable, or does not match the input's accepted file types	Blocked	"File was not attached. The path likely does not exist, is unreadable, or does not match the input's accepted file types."

Blocked file types

The agent does not upload files with the following extensions, regardless of the file input's accept attribute.

Blocked file extensions

Category	Blocked extensions
Executables	`.exe`, `.msi`, `.dll`, `.com`, `.scr`, `.pif`
Windows scripts	`.bat`, `.cmd`, `.ps1`, `.vbs`, `.vbe`, `.wsf`, `.wsh`
Unix scripts	`.sh`, `.csh`, `.ksh`, `.bash`
Other script or code files	`.js`, `.jsx`, `.ts`, `.tsx`, `.py`, `.pyc`, `.pyo`, `.rb`, `.pl`, `.php`, `.jar`, `.class`
Shortcut and link files	`.lnk`, `.url`, `.desktop`
Macro-enabled Office files	`.docm`, `.xlsm`, `.pptm`

Download status values

The agent reports every tracked download using one of the following statuses.

Download status values

Status	Meaning
`pending`	The download has started but has not yet finished.
`completed`	The download finished, and the browser reported a final saved-file path.
`interrupted`	The download stopped before finishing. The agent does not retry it automatically.

AI Desktop Actions glossary

Learn about the terms and concepts that are unique to AI Desktop Actions.

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A

Glossary terms are grouped alphabetically.

Action recorder

Recording feature in the Design workspace that auto-captures user interactions with desktop applications to create automated workflows. The recorder captures clicks, keystrokes, data entry, and visual and contextual information as screens and steps.

AI agent

Set of large language model (LLM) instructions and tools in AI Agent Studio that can process natural language inputs, generate execution plans, and run desktop actions autonomously or semi-autonomously.

AI Agent Studio

ServiceNow platform interface for creating, managing, testing, and activating AI agents. Desktop actions are published to AI Agent Studio as tools that AI agents can use during execution.

Anchor

Reference point on a captured screen that helps the automation identify and interact with nearby UI elements. During execution, the system uses computer vision to locate the anchor and then identifies UI elements at a relative distance from it. Anchors improve the stability and accuracy of steps when the target element location may shift or when the UI layout varies across sessions.

Auto-capture

Method of creating desktop actions by recording user interactions with desktop applications using the Action recorder. The recorder captures clicks, keystrokes, and data entry along with visual and contextual information.

C

Glossary terms are grouped alphabetically.

Confidence threshold

Accuracy level required for matching a captured image before the system performs a step. A value of 1 defines a 100% match while 0.5 defines a 50% match. The default value is 0.95 (95% match).

D

Glossary terms are grouped alphabetically.

Design workspace

Interactive no-code environment within Agentic Desktop for creating, configuring, managing, and testing desktop actions. The workspace provides a visual canvas where you can design multi-screen automation workflows that capture business processes across different applications. Accessible to users with the AI Agent Admin (sn_aia.admin) role.

Desktop action application

Record that stores the association between a desktop action and the desktop application it interacts with. Stored in the Desktop action application [sn_desktop_core_action_application] table.

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Desktop action

Reusable automation that defines how AI agents interact with desktop applications. Desktop actions consist of screens, anchors, and steps. There are two types: UI block and non-UI block.

Desktop-in-Desktop (DiD) mode

Virtual environment within the Execution workspace where automations run in isolation from the main desktop session. You can monitor the execution of desktop actions and how they interact with desktop applications while continuing to work on other tasks.

Desktop session

Isolated Windows session within the Execution workspace where desktop actions run. The desktop session launches automatically when you test a desktop action or trigger an automation from the Now Assist panel.

E

Glossary terms are grouped alphabetically.

Execution status

Current state of an automation in the Execution workspace. Statuses include Ready, Initiated, Running, Success, Failed, and Canceled.

Execution workspace

Isolated desktop session where desktop actions run during testing or AI agent execution. This workspace launches automatically when you test a desktop action from the Design workspace or trigger an automation from the Now Assist panel. You do not open the Execution workspace directly.

M

Glossary terms are grouped alphabetically.

Manual capture

Method of creating desktop actions by taking screen captures, inserting anchors, and defining steps individually rather than recording interactions automatically.

N

Glossary terms are grouped alphabetically.

Non-UI block

Type of desktop action that uses pre-built connectors to interact with applications and system components in the background without UI interaction. Supported applications include Microsoft Excel, Microsoft Outlook, Microsoft Word, PDF, PowerShell, SQL, SSH, and System Actions. Non-UI block actions can't be created by users.

Now Assist panel

ServiceNow interface from which users trigger AI agent automations. When you provide instructions through the Now Assist panel, the AI agent selects and runs the appropriate desktop actions in the Execution workspace. Accessible to users with the Now Assist panel user (now_assist_panel_user) role.

P

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Parameter record

Record created by an AI Agent Admin that stores a reference name for credentials such as usernames or passwords. AI agents access these records during desktop action execution to retrieve sensitive values securely. Currently supported only for SSH connector, non-UI block desktop actions.

Parameter Value record

Child record under a Parameter record that stores the actual credential value, such as a username or password, for a specific user. Only one Parameter Value record can be created per user for each Parameter record.

S

Glossary terms are grouped alphabetically.

Screen

Captured image of an application window within a desktop action. Screens represent the application states that the automation moves through during execution. Each screen contains one or more anchors and associated steps.

Smart sizing

Display feature in the Execution workspace that automatically adapts the desktop session to the display. Includes two options:

- **Fit to window**: Scales the session to fit within the Execution workspace.
- **Original resolution**: Displays the session at its native resolution with scroll bars if necessary.

Step

Individual interaction within a desktop action, such as clicking a button, entering text, or extracting data. Steps are positioned relative to an anchor.

- Input step types include Set Text, Click, Mouse Click, and Send Keys.
- Output step types include Get Text, Get Table, and OCR Read Text.

Step in / Step out

Manual control options in the Execution workspace. Step in transfers control to the user for manual input such as entering an OTP or CAPTCHA. Step out returns control to the AI agent to continue the automation.

T

Glossary terms are grouped alphabetically.

Tool

Desktop action that has been activated and added to an AI agent in AI Agent Studio. Tools provide AI agents with the capabilities to complete specific tasks during execution. An AI agent selects a tool based on its name and description.

U

Glossary terms are grouped alphabetically.

UI block

Type of desktop action that simulates human interactions with UI elements on thick client applications, legacy systems, or SaaS applications without APIs. Interactions include

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clicking buttons, entering text, and selecting from menus. UI block actions are created and managed in the Design workspace.

Creating AI user experiences

Deliver AI capabilities to your users with the ServiceNow Otto panel, ServiceNow Otto for Virtual Agent, and on mobile.

The value of AI capabilities is realized when users can access them through the interfaces they use every day. Deliver AI experiences internally to both fulfillers working in workspaces and requesters using self-service portals. Use ServiceNow Otto for Virtual Agent to fulfill self-service needs anywhere your users are.

ServiceNow Otto context menu

The ServiceNow Otto context menu provides an additional interaction pattern for record views. Users can generate record summaries and answer queries on demand, without opening the ServiceNow Otto panel.

For more information, see ServiceNow Otto context menu.

ServiceNow Otto for Mobile

ServiceNow Otto for Mobile brings AI capabilities to users on mobile devices, making the same generative AI experiences available on desktop accessible wherever your users are working.

For more information, see ServiceNow Otto for Mobile.

Chatting with AI

ServiceNow Otto is the conversational AI experience across the ServiceNow AI Platform. ServiceNow Otto provides a natural language interface that makes it easier to look for information, complete a task, get help with work, or interact with AI-powered experiences.

ServiceNow Otto is the new name for experiences previously known as Now Assist, including ServiceNow Otto for Virtual Agent and the ServiceNow Otto panel. The underlying capabilities remain the same, with a unified brand and user experience across the platform.

ServiceNow Otto for Virtual Agent

ServiceNow Otto for Virtual Agent brings generative and agentic AI capabilities to self-service conversations. It helps employees and customers find information, complete requests, and resolve issues through natural language interactions. The experience combines traditional Virtual Agent conversations with large language models (LLMs), enabling more flexible, intelligent, and human-like interactions. Users can ask questions in their own words and receive answers grounded in enterprise knowledge, service catalog content, AI Search results, and configured conversational topics. New premium chat experiences provide a unified search and chat interface, allowing users to move seamlessly from asking questions to taking action.

Chat experiences in ServiceNow Otto for Virtual Agent are defined in assistants, which define the AI experience that users interact with. Depending on your needs, you can have different assistants for internal users, customers, and specific teams. The assistant can maintain context across multiple questions, provide personalized responses when configured, and guide users through tasks without requiring them to navigate multiple pages or applications. Admins can create assistants in Assistant Designer.

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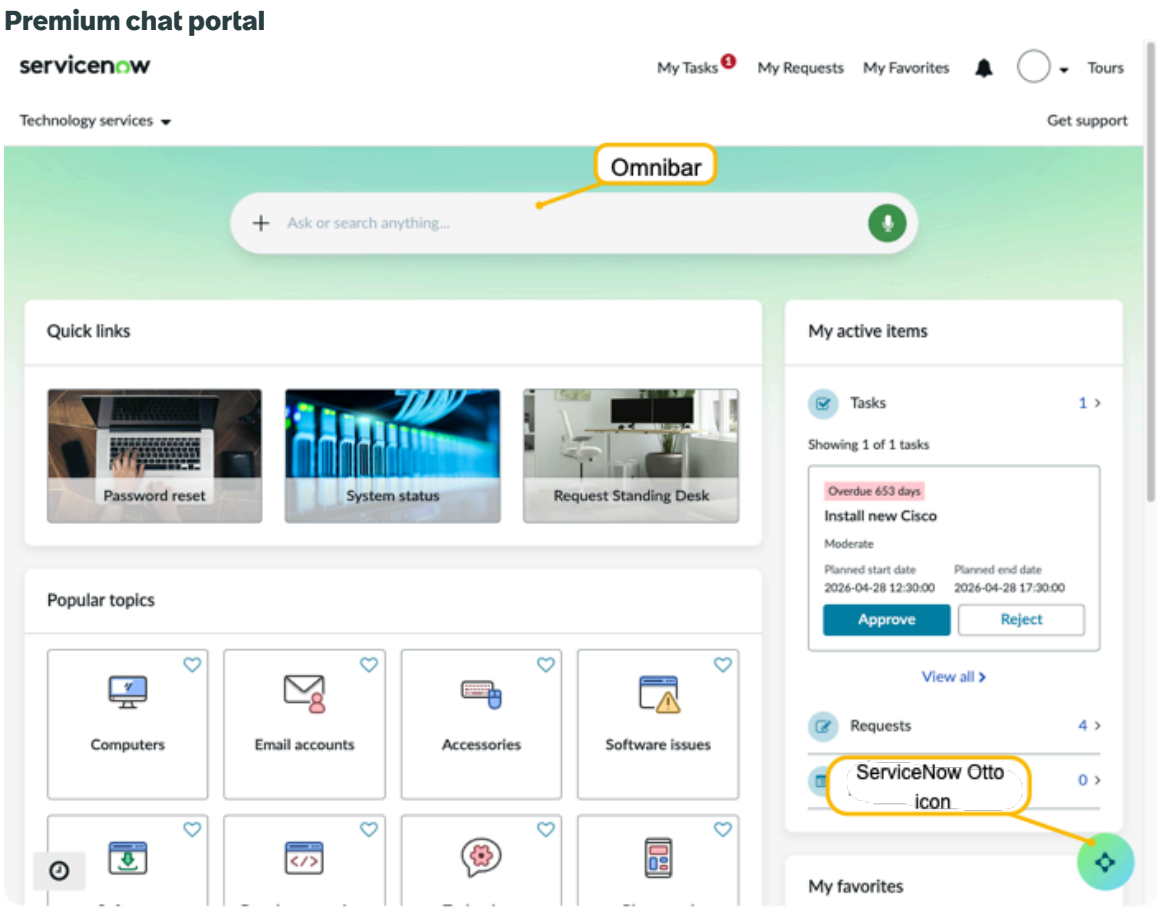

For more information, see Assistants and conversations in Assistant Designer and Premium chat.

ServiceNow Otto panel

The ServiceNow Otto panel is a conversational AI companion that is available across the ServiceNow AI Platform. The panel provides users with a centralized place to interact with AI while they work and is accessible from the ServiceNow Otto icon in the platform navigation.

Unlike ServiceNow Otto for Virtual Agent, which is focused on self-service conversations and customer or employee interactions, the ServiceNow Otto panel assists users directly within the context of their work. It detects where users are in the platform and can provide contextual assistance, helping them complete tasks more efficiently. Fulfillers can summarize a chat, case, or incident, get contextual help, or generate resolution notes directly within their workspace. Requesters interact with the panel through service portals where AI Search, Virtual Agent topics, and catalog recommendations come together. Learning the distinction between the fulfiller experience and the requestor experience is important for configuration. Each experience has different configuration options, available skills, and activation requirements.

The panel's premium chat experience brings together AI chat, search, file uploads, and multi-step AI-assisted tasks in a single interface. Users can search organizational knowledge, interact with records, and perform work without switching between multiple tools or applications.

The ServiceNow Otto panel experience has an assistant of its own where admins can configure it in Assistant Designer. For more information, see Assistants overview.

For more information about the panel, see ServiceNow Otto panel and Premium chat.

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Assistants and conversations in Assistant Designer

Assistant Designer is the central workspace for creating, configuring, testing, and managing assistants and their conversational experiences. Administrators use it as a single place to define an assistant's knowledge sources, capabilities, behavior, and deployment channels.

Assistants

An assistant can answer questions, provide guidance, retrieve information, and help users complete tasks through natural language conversations. It brings together the capabilities needed for a conversational experience. These include knowledge sources, AI agents, topics, skills, actions, branding, and channel-specific settings.

Organizations can create multiple assistants for different audiences, use cases, or business functions. For example, a company might create separate assistants for employee support, customer self-service, IT help, or HR guidance. Each assistant can be deployed across channels such as portals, mobile apps, Microsoft Teams, and Slack while maintaining a consistent conversational experience. An assistant's effectiveness comes from the assets and information sources connected to it. These can include Virtual Agent topics, AI agents, skills, workflows, actions, search sources, and knowledge content. Together, these capabilities determine what the assistant can answer, what tasks it can perform, and how it engages with users.

Use Assistant Designer to create, configure, manage, and test LLM-based chat and voice assistants. How the assistant is configured impacts the quality of the experience that the user has when interacting with the assistant.

Assistant Designer has three primary tabs:

- **Assistants**
- **Asset library**
- **Analytics**

Assistants tab

The **Assistants** tab is where you create and configure individual assistants and define the overall experience. Administrators can create multiple assistants and tailor each one to a specific audience or purpose. Common configuration areas include the following:

- The channels where the assistant is available
- Branding and visual identity
- Greeting, closing, and fallback messages
- Search and knowledge configuration
- AI agent enablement and orchestration settings
- Overall conversational experience settings

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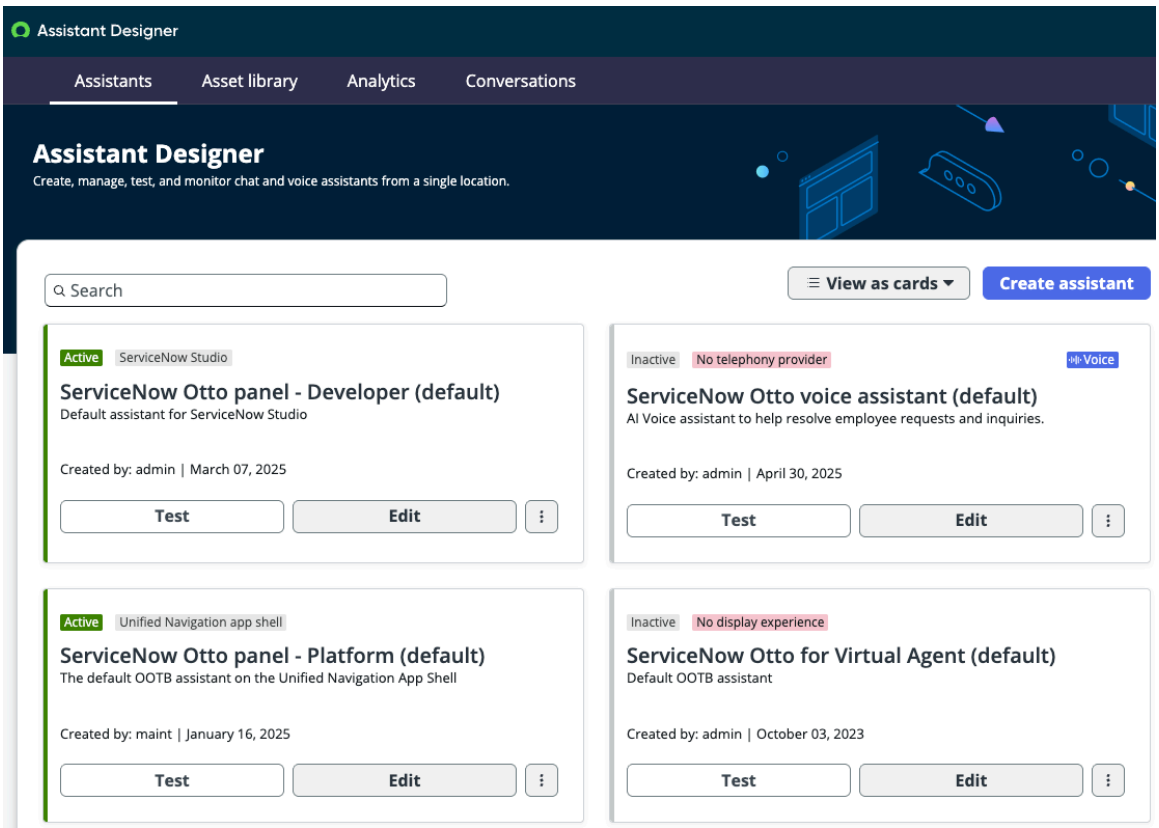
Assistants tab



For more information, see Assistants overview.

Asset library tab

The **Asset library** tab is where you define the capabilities available to assistants. Assets represent the problems an assistant can help solve and the actions it can take during a conversation. Administrators create, organize, and manage these reusable conversational components, then make them available to one or more assistants.

Asset types include the following:

- Conversational topics (Virtual Agent topics)
- Subflows and actions
- AI agents
- Custom generative AI skills

By separating assets from assistants, organizations can reuse capabilities across multiple conversational experiences while maintaining centralized management.

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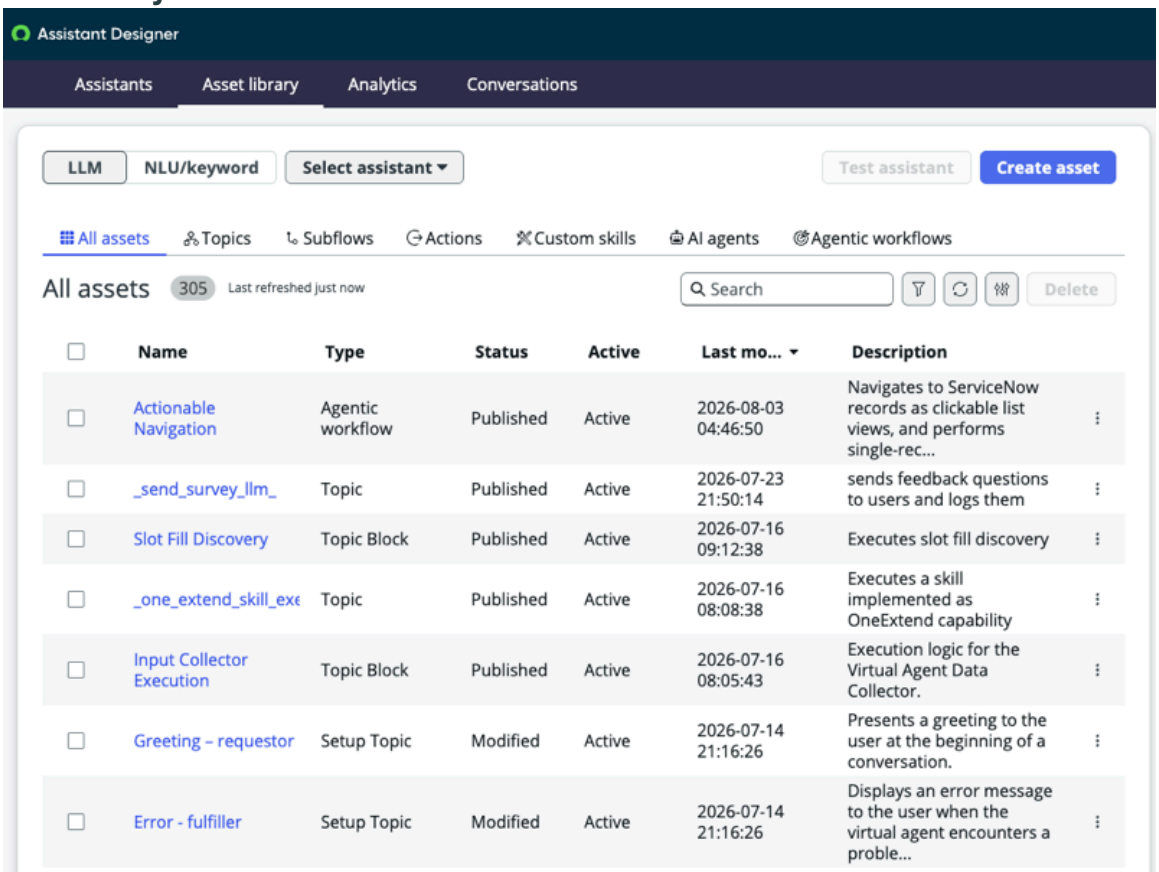
Asset library tab



The Asset library includes the functionality of Virtual Agent Designer, a graphical design program that you can use to create Virtual Agent conversations. For more information, see Build conversations in the Asset library in Assistant Designer.

Analytics tab

The **Analytics** tab helps assistant administrators monitor the performance of their AI-powered assistants across channels and workflows. It provides actionable insights into how assistants are being used, how effectively they are resolving user issues, and where improvements can be made to enhance the self-service experience. Assistant analytics looks at usage trends, adoption and engagement, user sentiment, and assist consumption.

The **Analytics** tab has several page views, each answering a different question, including the following:

- Overview: overall assist usage and CSAT scores across everything
- Usage: conversation volumes, which channels users use, such as Microsoft Teams, Slack, web, and mobile, and resolution vs. escalation rates
- Adoption & Engagement: user growth over time, engagement patterns, and the assist-to-execution ratio, which measures how often a suggested assist becomes a completed action
- Sentiment: satisfaction scores, empathy indicators, and frustration signals, and indicators of the emotional quality of the conversation
- Self-solve performance: deflection rates (how many issues get solved without a human agent) and effort scores (how much work the user had to do)
- Assists: AI resource consumption, useful for understanding compute cost and which AI features are used
- Voice: AI resource consumption for telephony and voice channels

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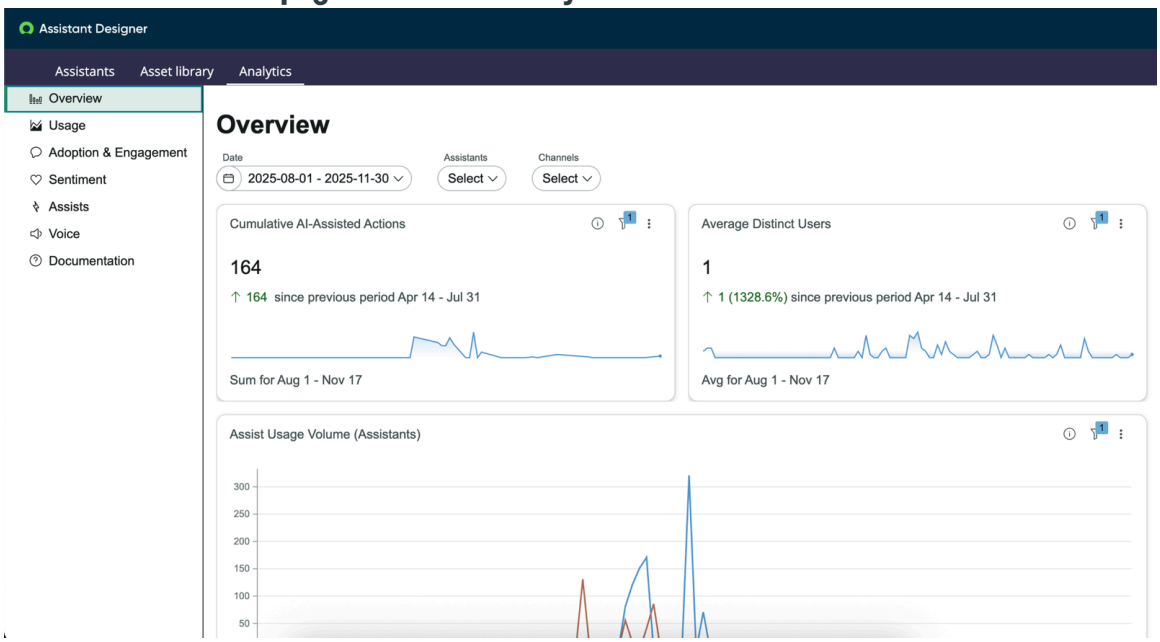
Overview dashboard page in Assistant analytics



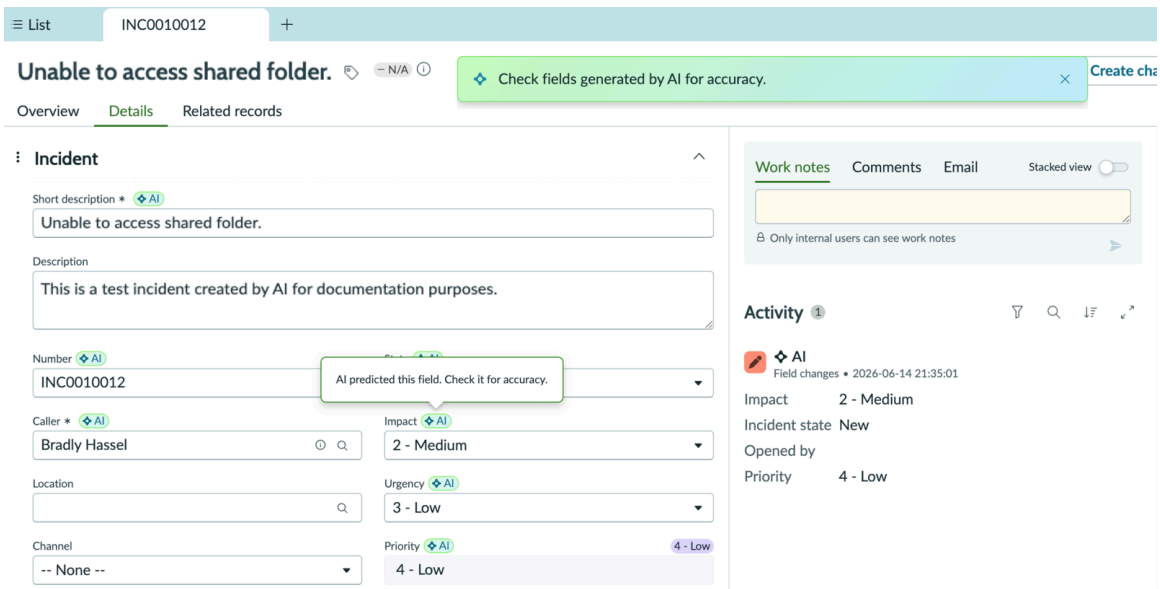
For more information, see Analyzing assistants.

AI indicators on form fields

The AI indicator is a badge that identifies form fields containing content generated or updated by an AI agent in Core UI and configurable workspaces.

AI indicators help distinguish AI-generated updates from human edits on a record. When an AI agent updates a field, an AI indicator appears next to the field label. Selecting the indicator opens a popover that displays a brief message. When a record contains one or more AI-updated fields, a record-level alert appears as a reminder to review AI-generated content before using or acting on it. AI-generated content may be inaccurate.

Note: The popover and alert messages aren't configurable.



AI indicators appear:

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- When you open a record that contains one or more fields updated by an AI agent.
- When an AI workflow updates a field while the record is open.

AI indicators clear:

- When you manually modify the AI-generated value. Actions such as hovering over the indicator, selecting it, moving focus to the field, or saving the form do not clear the indicator.
- When a client script overwrites the AI-generated value.

AI indicators reappear when the field value is restored to the AI-generated value.

Configuration and AI activity tracking

AI indicators are included in the AI Field Activity (com.glide.ai_field_activity) plugin, which is activated with the Generative AI Controller (sn.generative.ai) plugin. No additional configuration is required.

- Information about AI-generated activity is stored in the sys_ai_record_activity table.
- This tracking data distinguishes AI-generated updates from manual edits, enables the display of AI indicators on form fields, and supports auditing, compliance, and AI governance.
- AI indicator activity records are retained for 365 days by default unless the associated AI indicator is cleared when the field value is manually modified.
- Admins can modify this retention period by configuring sys_auto_flush for the sys_ai_record_activity table.

AI tracking applies to all tables except the following:

- Tables with the prefixes:
  - sys_
  - v_
  - sysevent
  - syslog
  - sysrule
  - sysauto
  - sn_
  - one_
  - var_
- Infrastructure-related tables with the prefixes:
  - wf_
  - jrobin
  - ecc_
  - hermes
  - pa_
  - sa_
  - ua_
  - report_stats

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- High-volume telemetry, log, and queue tables, including:
  - report_executions
  - metric_instance
  - service_mapping_status
  - sp_log
  - sla_async_queue
  - attachment_scan_history
  - itam_asset_usage
  - itam_ci_usage
  - ts_query_kb
  - ts_search_summary
  - label_entry
  - label_history
  - qc_node_metric
  - qc_candidate_query
- To enable AI activity tracking for a specific table, add the dictionary attribute *no_ai_record_activity* and set it to **false**. To disable tracking, set the dictionary attribute to **true**.

Note: To disable AI indicators on form fields, create a system property named *glide.ai.field_indicators.enabled*, and set it to **false**. By default, this property is set to **true**.

Extending AI with external systems and providers

Connect to large language model (LLM) providers through the Generative AI Controller and integrate AI agents with external tools and services using the Model Context Protocol (MCP).

The ServiceNow AI Platform works with external systems and model providers, giving you flexibility to choose the LLM providers that meet your requirements and connect AI agents to tools and services beyond the platform.

Generative AI Controller

The Generative AI Controller integrates third-party generative AI into the platform. The controller supports external LLM providers, including OpenAI, Azure OpenAI, Google Cloud (AI Studio and Vertex), IBM watsonx, and Amazon Bedrock. These capabilities are available in Workflow Studio flows, Virtual Agent topics, and scripting such as background scripts and business rules. The Generative AI Controller is installed automatically with any AI application.

To bring third-party LLM providers such as OpenAI, Google, and Amazon Bedrock into flows, Virtual Agent, and scripts, see Generative AI Controller.

MCP Client

The Model Context Protocol (MCP) is a standardized client-server protocol that enables AI applications to discover and interact seamlessly with external tools, data sources, and services. MCP Client manages communication between a host application, such as AI Agent Studio, and one or more MCP servers that expose specific capabilities. MCP tools enable you to connect

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your AI agent with a wide variety of external tools and add multiple MCP tools to an AI agent to perform a broader range of tasks.

To connect your AI agents to external tools, data sources, and services through the Model Context Protocol, see Model Context Protocol Client.

MCP Server Console

MCP Server Console console lets you create MCP servers on your instance and configure the tools they expose to external clients. Tools define which functionality and data a server makes available and the actions that can be performed on the instance. You can create tools based on existing capabilities such as generative AI skills, and you can create multiple servers that expose different tools for different use cases, such as HR or IT workflows, or for different clients.

Any AI application, such as Microsoft Copilot or AWS Claude, can call a server using OAuth 2.0 authentication and get a list of available tools. Employees using the MCP Client can then prompt the server for information from the instance or to perform an action, such as summarizing a list of recently closed incidents or cases.

Note: With AI Gateway in AI Control Tower, administrators can monitor MCP Server Console and access and view metrics for servers and their tools.

To create MCP servers that expose your instance's tools, including generative AI skills, to external clients such as Microsoft Copilot or AWS Claude, see MCP Server Console.

Generative AI Controller

Use Generative AI Controller to integrate your ServiceNow applications with third-party large language models (LLMs) and manage how generative AI requests are governed, protected, and logged.

Get started

Configure Generative AI Controller to set up your preferred external LLM provider, manage data privacy and AI Guardian controls, and monitor generative AI activity through logs. For more information about building custom generative AI skills and workflows, see Generative AI skills.

Explore	Configure	Reference
Explore generative AI concepts and terminology.	Configure Generative AI Controller provider capabilities.	Reference for Generative AI Controller.

Troubleshoot and get help

- ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

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AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

Exploring Generative AI Controller

Learn how Generative AI Controller works as the control and visibility layer for all generative AI requests across your ServiceNow applications, what it controls, and how it integrates with third-party LLM providers.

Generative AI Controller overview

Every AI request from generative AI features, AI agents, and custom skills passes through Generative AI Controller before reaching your LLM provider. The controller enforces governance policies, applies privacy controls, and records activity for monitoring and troubleshooting.

Generative AI Controller integrates with external LLMs, including ones by OpenAI, Azure OpenAI, Google Cloud (AI Studio and Vertex), IBM watsonx, and Amazon Bedrock.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

Generative AI Controller governance and controls

Generative AI Controller manages the following controls for generative AI activity across your ServiceNow applications:

Logging

Records all generative AI requests and responses for debugging and auditing.

Rate limiting

Restricts the number of requests to an LLM provider within a given time frame.

Data privacy

Masks personally identifiable information in prompts before they are sent to an LLM.

External LLM connectivity

Connects your Now Assist applications to a third-party LLM provider.

Guardian guardrails

Applies content and safety policies to generative AI requests.

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Generative AI Controller benefits

Benefit	Feature
Integrate with third-party AI service providers to customize your AI experience	OpenAI, Azure OpenAI, Google AI, IBM watsonx, Amazon Bedrock
Govern and monitor all generative AI activity in your ServiceNow applications	Data Privacy, Guardian guardrails, Rate limiting, and Activity logging
Use your own API keys for AI processing	Bring your own key for third-party AI provider integration

Get started with Generative AI Controller

- The Generative AI Controller application is installed automatically with any ServiceNow AI application.
- Sign up and create an account with a generative AI provider.
  - To sign up with OpenAI, go to their official platform website.
  - To get started with Azure OpenAI, go to their documentation.
  - To start using AI Studio with Gemini API, go to the AI Studio homepage.
  - To use Vertex AI on the Google Cloud, go to the Vertex AI homepage.
  - To get started with IBM watsonx, go to Getting started with IBM watsonx as a Service.
  - To get started with Amazon Bedrock, set up an IAM user with the correct permissions and then explore the Converse API.
- Configure credentials for your preferred AI service provider for the Generative AI Controller capabilities.
- Activate AI assets for your workflows and configure governance settings such as data privacy, guardrails, and rate limiting.
- Build custom skills for your organization's unique requirements using AI Skill Kit.
- Monitor generative AI activity through logs for troubleshooting and compliance.

Domain separation and Generative AI Controller

Domain separation is supported for Generative AI Controller. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Standard

- Includes all aspects of **Basic** level support.
- Application properties are domain-aware as needed.
- Business logic: The service provider (SP) creates or modifies processes per customer. The use cases reflect proper use of the application by multiple SP customers in a single instance.
- The instance owner must configure the minimum viable product (MVP) business logic and data parameters per tenant as expected for the specific application.

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Sample use case: An admin must be able to make comments required when a record closes for one tenant, but not for another.

For more information on support levels, see Application support for domain separation.

Domain separation enables you to create partitions in the application data and administrative processes. Because the generative AI tables are domain separated, Generative AI Controller supports domain separation for OneExtend capabilities. The capabilities are the basic building blocks for generative AI features across the ServiceNow AI Platform. With domain separation, you can isolate the data and control access so that users in one domain don't have access to the capabilities of another domain.

How domain separation works in Generative AI Controller

Domain separation is possible at the generative AI OneExtend capability level. Records that are related to the execution and configuration of OneExtend capabilities, such as log tables that are accessible to ServiceNow personnel, are also separated according to the capability's domain.

If you want to create a copy of an existing generative AI capability in a different domain, you must create a record in the OneExtend Capabilities (sys_one_extend_capability) table. For more information about the OneExtend Capabilities table, see Reference for Generative AI Controller.

You set the domain when the record is created. The domain is based on the domain that you're in at the time that you create the record. When you're creating a capability record, you can use an existing OneExtend Capability record as a blueprint to help confirm that the capability works as intended.

After you create the OneExtend Capability record, you must create records for the following attribute and config records in the new domain:

- OneExtend Capability Attribute records with the same values as the capability in the global domain.
- A OneExtend Capability Definition that corresponds to the new capability.
- A OneExtend Definition Config definition record that includes the OneExtend Capability Definition for the new domain.

Note: The OneExtend Capability Definition record that you add must be the same as the capability that you want in the new domain. For example, if you're creating a capability in a new domain for an Amazon Bedrock integration, you could add the corresponding Amazon Bedrock Capability Definition record. Adding a different capability definition than the one you intend could result in unexpected behavior. The OneExtend Definition Config record that you select should include the OneExtend Capability Definition record that you added.

Use cases

With domain-separated capabilities, you can isolate generative AI configurations so that different domains use different LLM providers or settings.

Related topics

Domain separation for service providers

Configuring Generative AI Controller

Configure Generative AI Controller providers and capabilities.

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Configuration overview

Generative AI Controller enables you to choose between several AI providers or a generic connector.

- Microsoft Azure OpenAI
- OpenAI
- Google AI Studio
- Google Vertex AI
- IBM watsonx
- Amazon Bedrock

After you configure Generative AI Controller, activate and manage generative AI skills through the AI Admin Hub console to deliver generative AI capabilities to your users. For more information, see Generative AI skills.

Configure API credentials

Configure your large language model (LLM) credentials to use third-party integrations with OpenAI, Azure OpenAI, Google Cloud, IBM watsonx, Amazon Bedrock, and generic models to control the third-party integration.

Configure a generic LLM connector

Set up an external LLM to use generative AI capabilities to add finer control over prompts and transformer scripts.

Configure an AI service provider for a capability

Set your preferred AI service provider for each capability and tailor generative AI content to suit your business needs.

Enable recursive summarization for large inputs

Enable recursive summarization to retain context for large inputs in LLM calls.

Enable Dynamic Translation for generative AI capabilities

Use Dynamic Translation for in-product generative AI capabilities to support users who speak different languages.

Installing Generative AI Controller

The Generative AI Controller application (sn.generative.ai) is automatically installed with ServiceNow AI applications.

Installation requirements

You must be on Vancouver patch 2 or later.

Generative AI Controller is included as a dependency for all ServiceNow AI applications, such as ServiceNow Otto for IT Service Management (ITSM) or ITSM - Foundation, Advanced, or Prime. You can install ServiceNow AI applications from the AI Admin Hub console or directly from the ServiceNow Store. For details, see Install plugins for ServiceNow Otto.

Configuring API credentials for generative AI capabilities

Configure the credentials and connections for your preferred generative AI service provider to integrate third-party generative AI on the ServiceNow AI Platform.

You can use several different models and generative AI service providers to integrate into your custom flows, scripts, and topics.

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- Amazon Bedrock
- Azure OpenAI
- Google - AI Studio
- Google - Vertex AI
- IBM watsonx
- OpenAI
- Generic third-party LLM

Configure API Credentials for Amazon Bedrock

Configure your API credentials to use AWS Bedrock as your LLM provider for Generative AI Controller capabilities.

Before you begin

You must have an AWS account and the IAM user needs permission to access the bedrock:InvokeModel action.

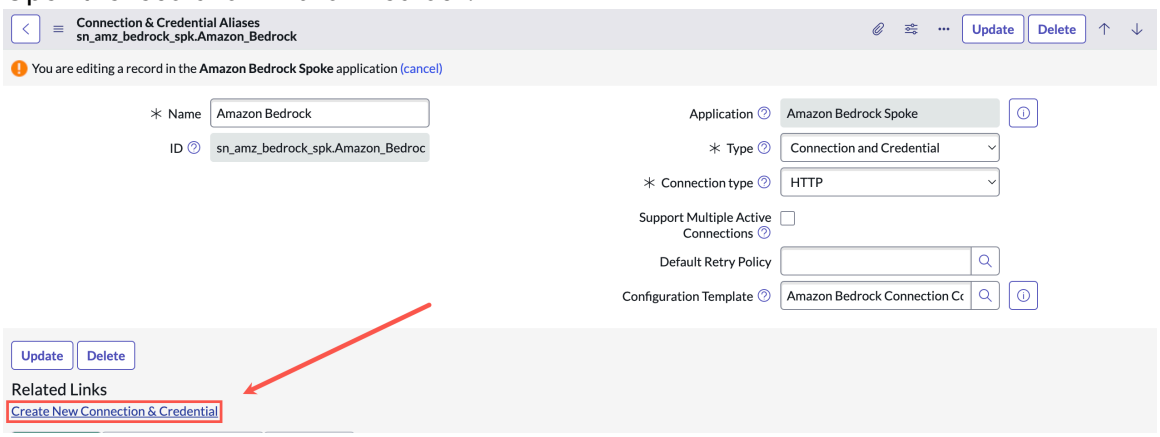
Role required: admin

About this task

To use Amazon Bedrock as your LLM provider for Generative AI Controller capabilities, you must have an active connection configured.

Procedure

1. Navigate to **All** > **Connections & Credentials** > **Connections & Credential Aliases**.
2. Open the record for Amazon Bedrock.



3. Select the **Create New Connection & Credential** related link.
4. Enter your **Region**, such as `us-east-1`.
5. Enter your API key.
   For more information, see AWS documentation on generating API keys.
6. Select **Create**.

Result

You can use Amazon Bedrock as your LLM provider for Generative AI Controller capabilities.

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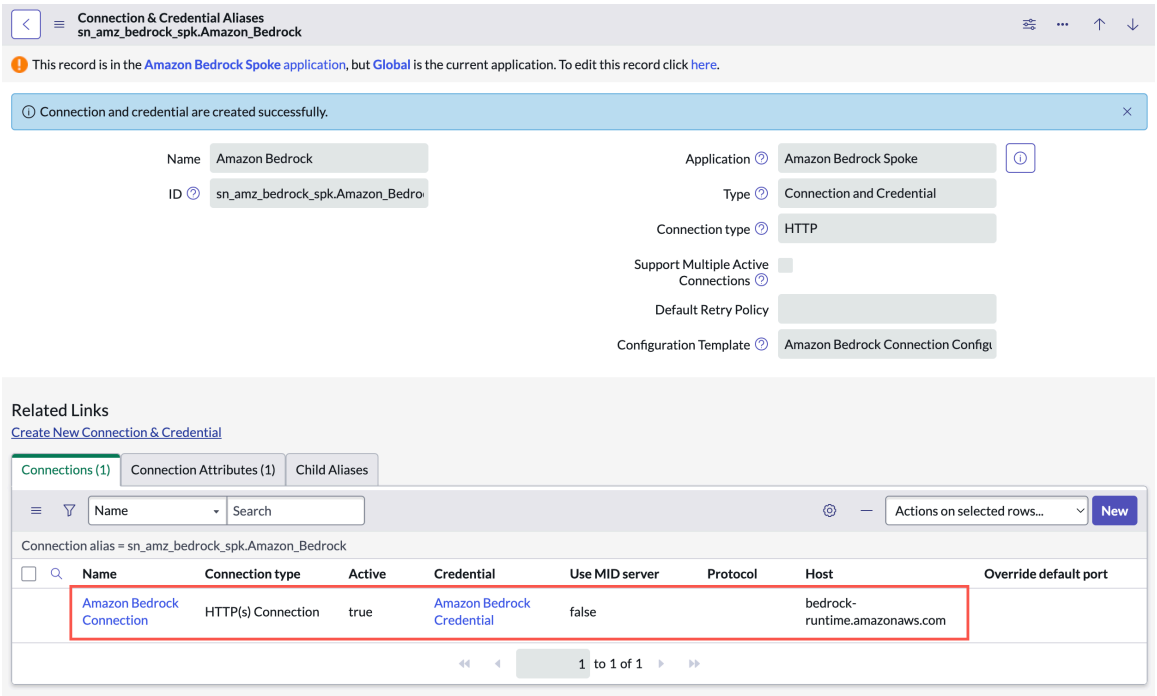

What to do next

Activate generative AI skills in the AI Admin Hub console for your workflow. For more information, see Generative AI skills.

Configure API credentials for Azure OpenAI

Configure your API credentials to use Azure OpenAI as your LLM provider for Generative AI Controller capabilities.

Before you begin

To use generative AI capabilities with Azure OpenAI, you must have an Azure resource with an API key.

Role required: admin

About this task

To use models with Azure OpenAI as your LLM provider for Generative AI Controller capabilities, you must have an active connection configured.

Procedure

1. Navigate to **All** > **Connections & Credentials** > **Connections & Credential Aliases**.
2. Open the Generative AI provider record for Azure OpenAI.
3. Select the **Create New Connection & Credential** related link.

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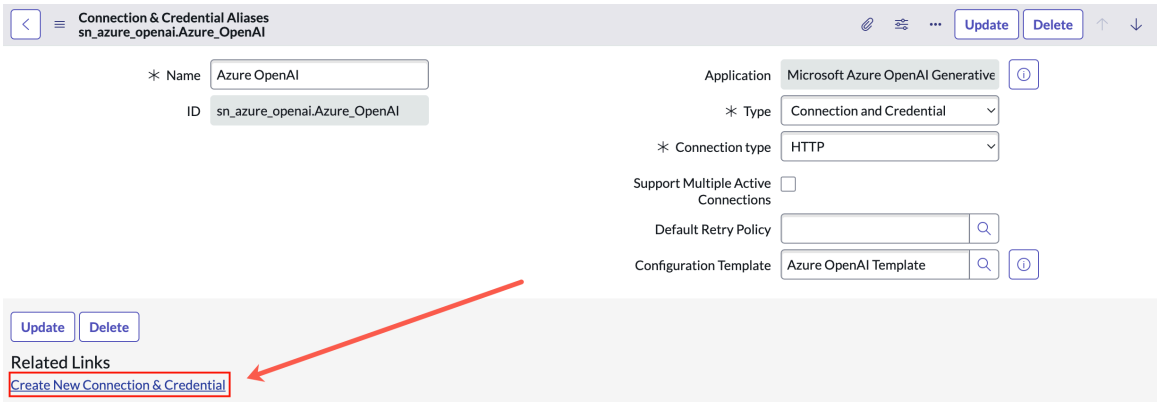


4. Edit the Connection URL to include your resource name.

   For Azure OpenAI, your Connection URL is in the form `https://{your-resource-name}.openai.azure.com`. See the Azure OpenAI documentation for more information.

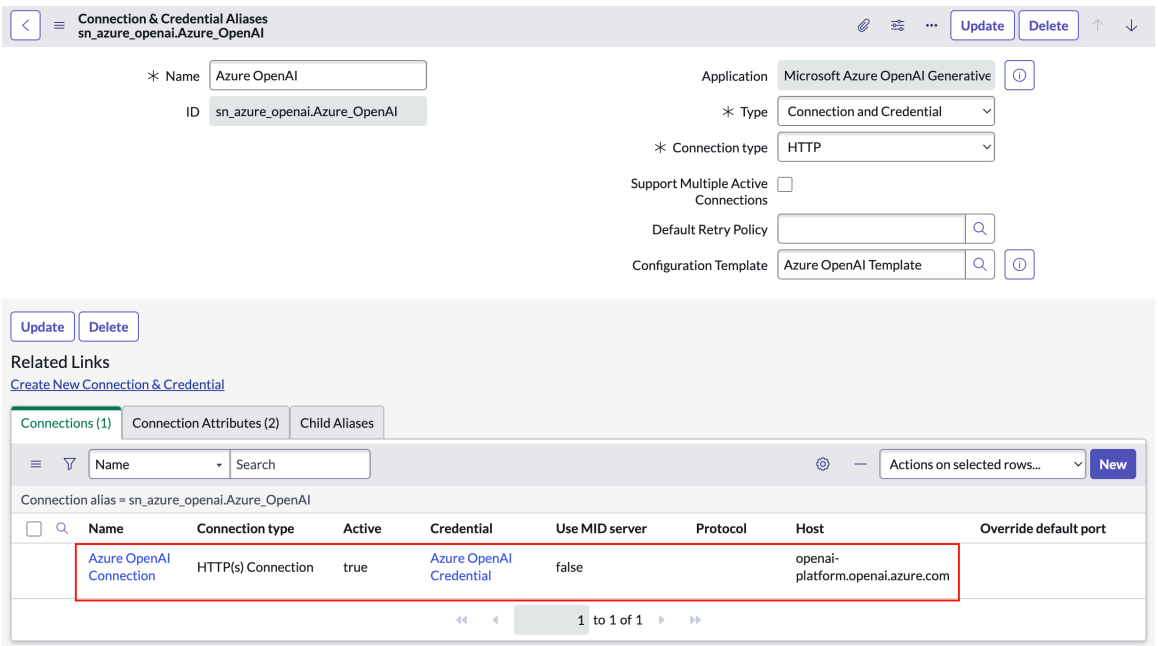
5. In the API key field, enter the API key for the provider.

   Note: The characters in the API key field are masked in the user interface.

6. Create a connection by selecting **Create**.

Result

You can now use capabilities labeled with Azure OpenAI as your LLM provider for Generative AI Controller capabilities.



What to do next

If you want to use generative AI capabilities through your MID Server, open the new Connection record, select the **Use MID server** check box, and save the record.

Activate generative AI skills in the AI Admin Hub console for your workflow. For more information, see AI Admin Hub.

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Configure API credentials for Google AI Studio

Configure your API credentials to use Google AI Studio as your LLM provider for Generative AI Controller capabilities.

Before you begin

You must have a Google account to use AI Studio.

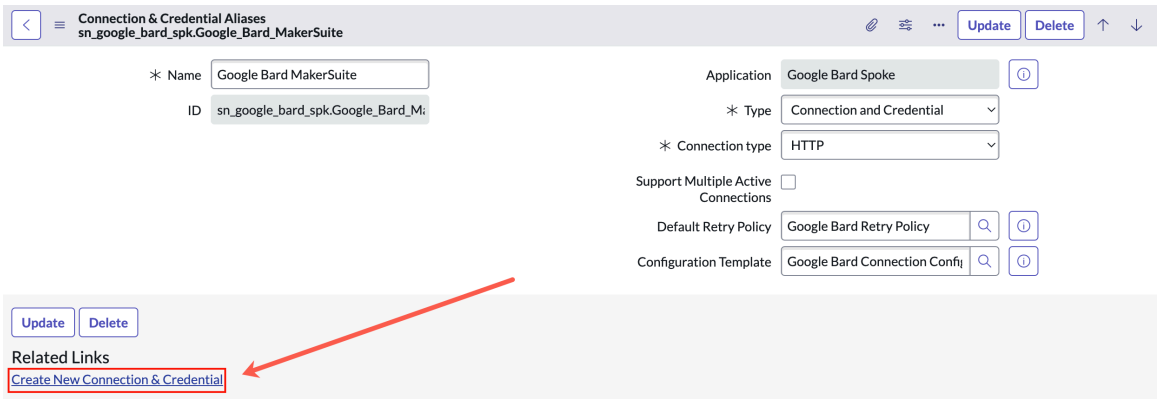
Role required: admin

About this task

To use Google AI Studio as your LLM provider for Generative AI Controller capabilities, you must have an active connection configured.

Procedure

1. Navigate to **All** > **Connections & Credentials** > **Connections & Credentials Aliases**.
2. Open the record for Google Bard MakerSuite.
3. Select the **Create New Connection & Credential** related link.



4. Enter your API key.
   You can find your API key in AI Studio by selecting **Get API Key** from the navigation menu.
5. Select **Create**.

Result

You can now use AI Studio (Google Cloud Chat Completion) as your LLM provider for Generative AI Controller capabilities.

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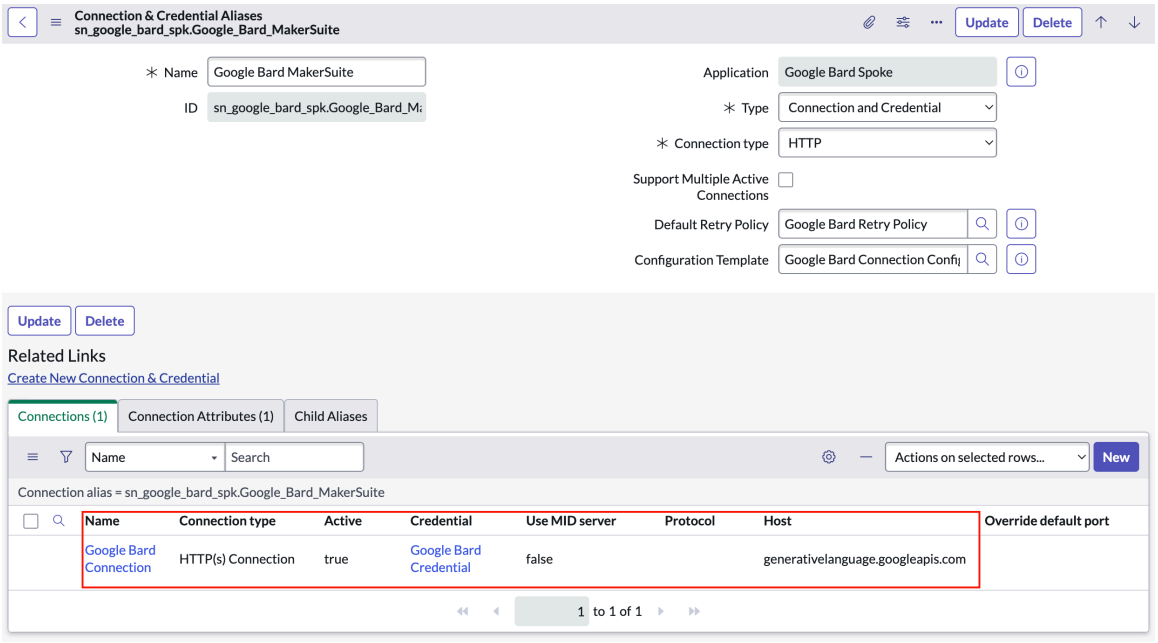


What to do next

Activate generative AI skills in the AI Admin Hub console for your workflow. For more information, see AI Admin Hub.

Configure API credentials for Google Vertex AI

Configure your API credentials to use Google Vertex AI as your LLM provider for Generative AI Controller capabilities.

Before you begin

You must have a Google Cloud project and the permissions to generate new OAuth credentials.

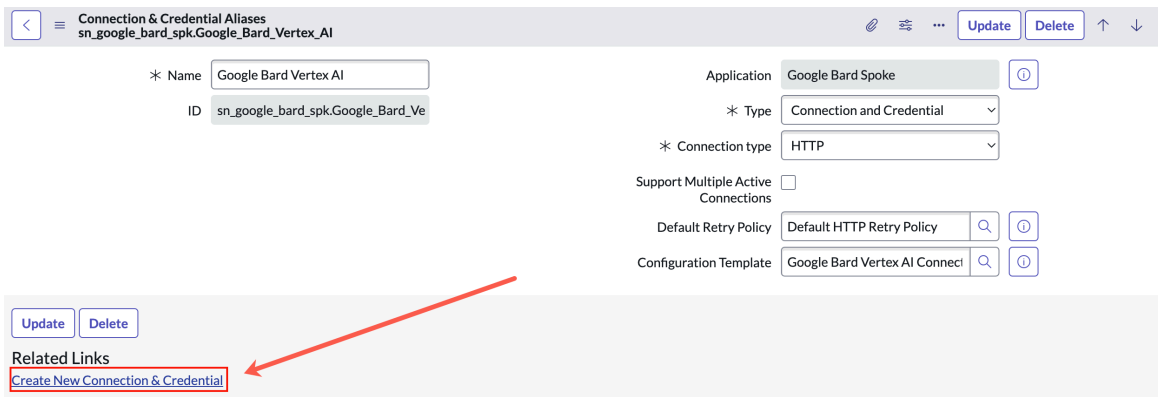
Role required: admin

About this task

To use Google Vertex AI as your LLM provider for Generative AI Controller capabilities, configure an active connection.

Procedure

1. Navigate to **All** > **Connections & Credentials** > **Connections & Credentials Aliases**.
2. Open the record for Google Bard Vertex AI.
3. Select the **Create New Connection & Credential** related link.



4. Complete the required fields.

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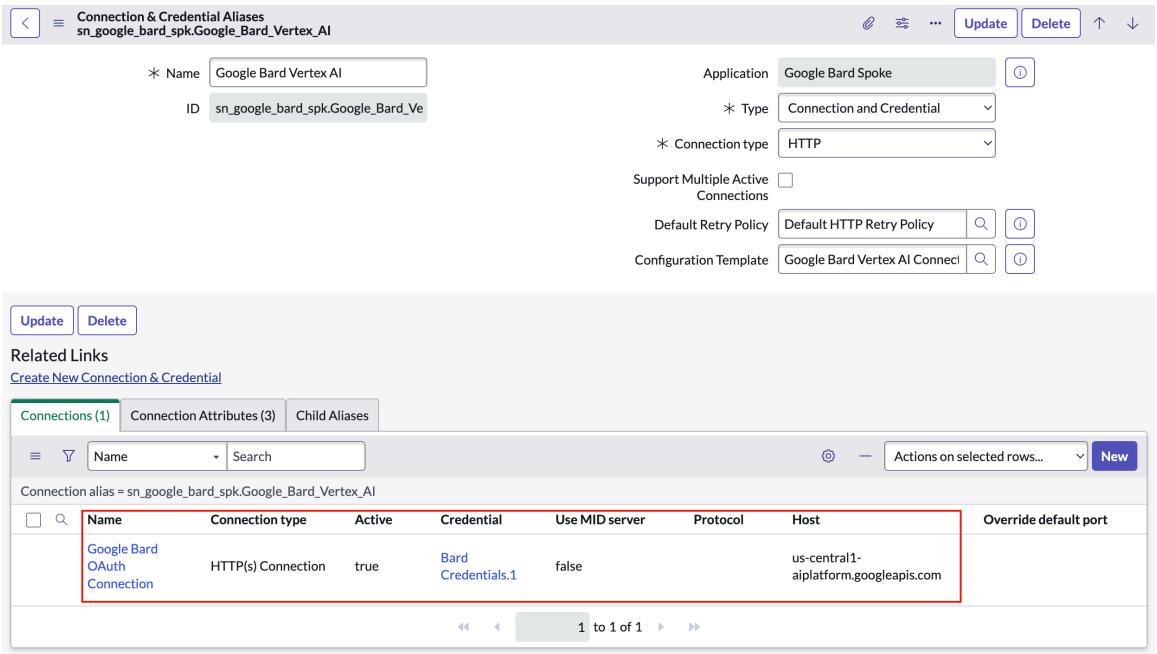
Google OAuth Connection

Field	Value
Project ID	The Project ID found in the Google Cloud console
Credential Name	The name of your credential, such as `Google OAuth Credential`
OAuth Name	The name of your OAuth authentication, such as `Google Registry`
OAuth Client ID	To get the OAuth Client ID, create a new OAuth Client ID with the Google Cloud console with the following attributes: **a.** Application type: `Web application` **b.** Authorized redirect URI: URL in the OAuth Redirect URL field, usually `<instance>.service-now.com/oauth_redirect.do` For more information, see the Google documentation for creating OAuth client IDs. After you create the OAuth client, a dialog box displays the Client ID and Client secret for you to copy.
OAuth Client Secret	Client secret from your OAuth Client ID found in the Google Cloud console

5. In the dialog box, log in to a Google Account with access to the project.
6. When prompted for Google Cloud access for gsuite spokes, select **Allow**.

Result

You can now use Completions – Vertex AI and Chat Completions – Vertex AI as your LLM provider for Generative AI Controller capabilities.



What to do next

Activate generative AI skills in the AI Admin Hub console for your workflow. For more information, see AI Admin Hub.

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Configure API credentials for IBM watsonx

Configure your API credentials to use IBM watsonx Granite models as your LLM provider for Generative AI Controller capabilities.

Before you begin

To use IBM watsonx large language models (LLMs), you must configure your credentials to use the Generative AI Controller capabilities.

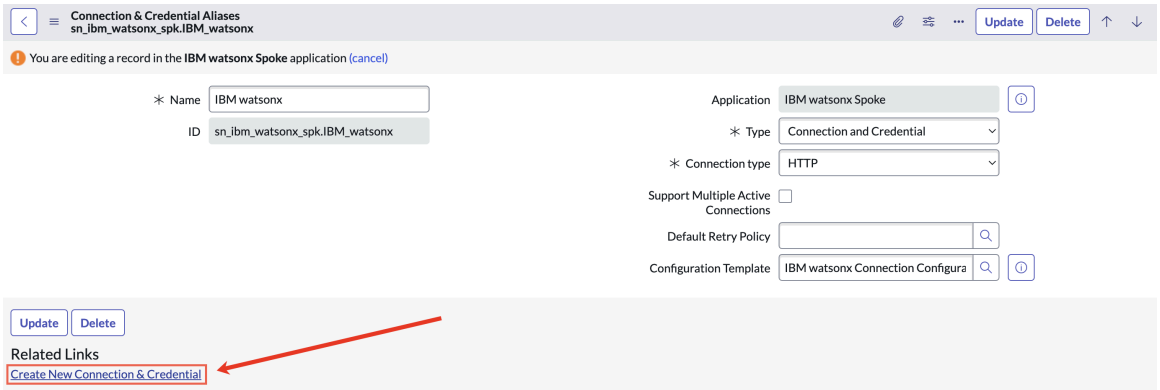
Role required: admin

About this task

To use models with IBM watsonx as your LLM provider for Generative AI Controller capabilities, you must have an active connection configured.

Procedure

1. Navigate to **All** > **Connections & Credentials** > **Connections & Credential Aliases**.
2. Open the record named IBM watsonx.
3. Select the **Create New Connection & Credential** related link.



4. In the API key field, enter your API key.

   For more information about generating an API key, see IBM's documentation for generating API keys for authentication.

5. Create a connection by selecting **Create**.

Result

You can now use capabilities labeled with IBM watson as your LLM provider for Generative AI Controller capabilities.

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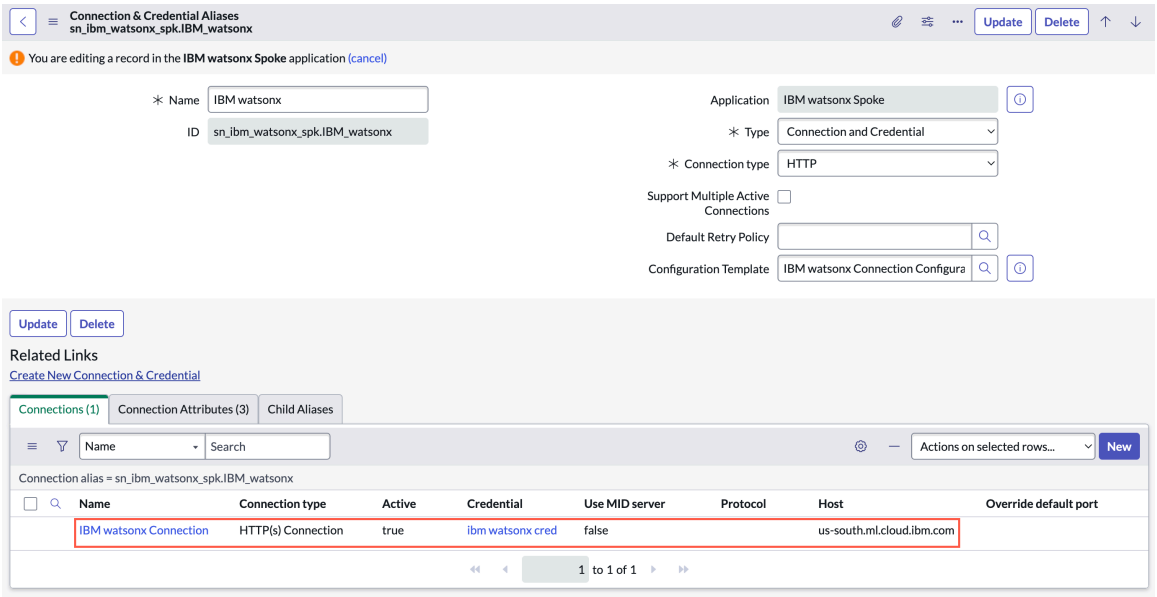

What to do next

If you want to use generative AI capabilities through your MID Server, open the new Connection record, select the **Use MID server** check box, and save the record.

Activate generative AI skills in the AI Admin Hub console for your workflow. For more information, see AI Admin Hub.

Configure API credentials for OpenAI

Configure your API credentials to use OpenAI as your LLM provider for Generative AI Controller capabilities.

Before you begin

To use the OpenAI and Azure OpenAI large language models (LLMs), you must configure your credentials to use the Generative AI Controller capabilities.

Role required: admin

About this task

To use models with Azure OpenAI as your LLM provider for Generative AI Controller capabilities, you must have an active connection configured.

Procedure

1. Navigate to **All** > **Connections & Credentials** > **Connections & Credential Aliases**.
2. Open the Generative AI provider record for OpenAI.
3. Select the **Create New Connection & Credential** related link.

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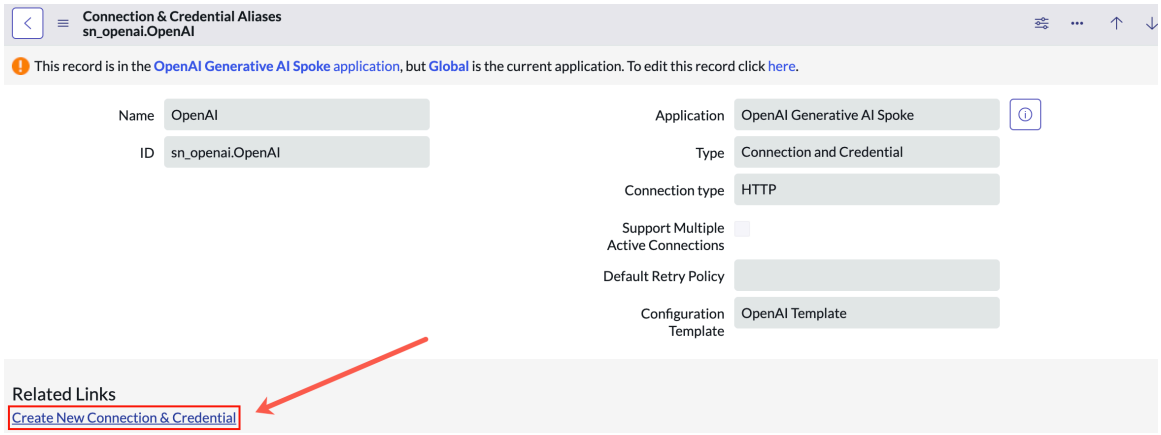


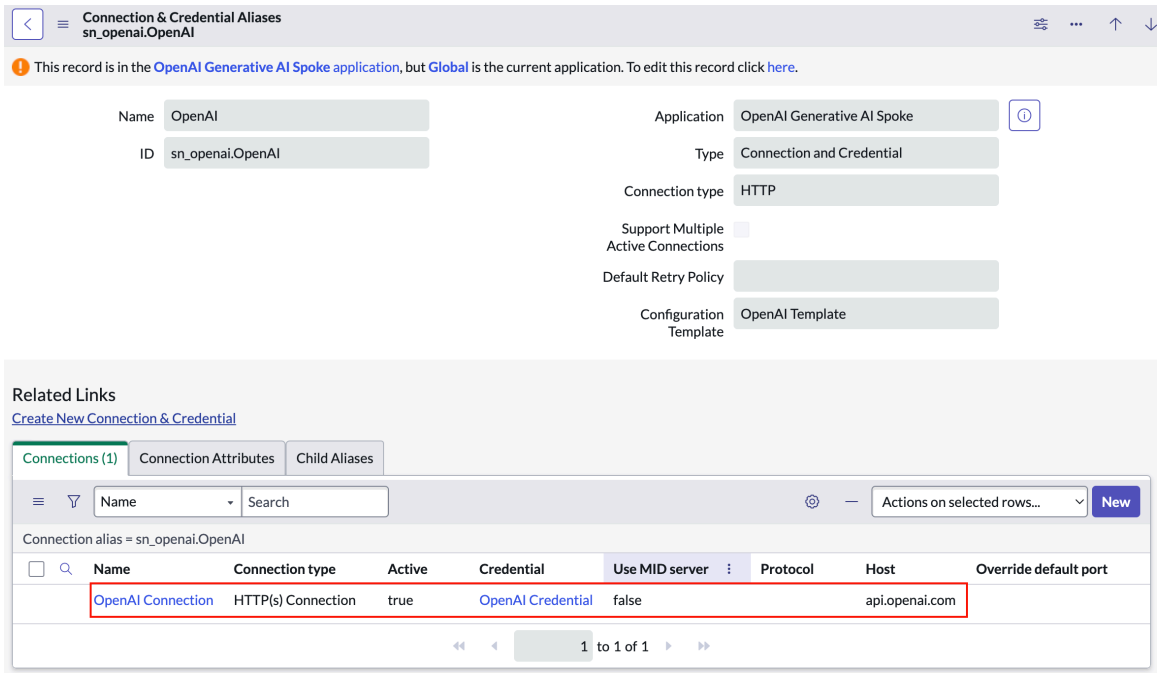
4. In the API key field, enter the API key.

   For OpenAI, see your OpenAI API keys for the credentials information.

5. Create a connection by selecting **Create**.

Result

You can now use capabilities labeled with OpenAI as your LLM provider for Generative AI Controller capabilities.



What to do next

If you want to use generative AI capabilities through your MID Server, open the new Connection record, select the **Use MID server** check box, and save the record.

Activate generative AI skills in the AI Admin Hub console for your workflow. For more information, see AI Admin Hub.

Configure API credentials for a generic large language model (LLM) connector

Use a generic LLM connector to connect an external AI provider to Generative AI Controller to use generative AI capabilities in your instance.

Before you begin

You must have access to the API of an external LLM to configure the credentials.

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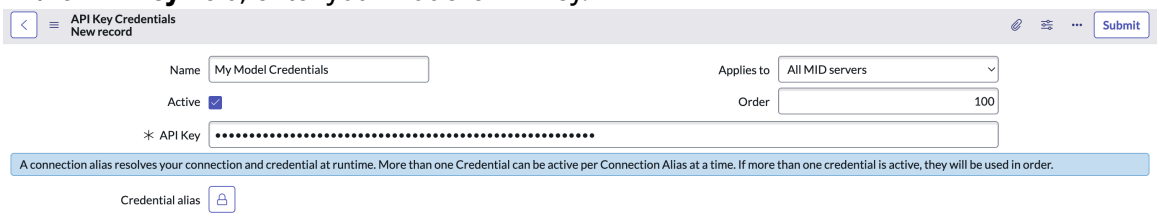
Role required: admin

About this task

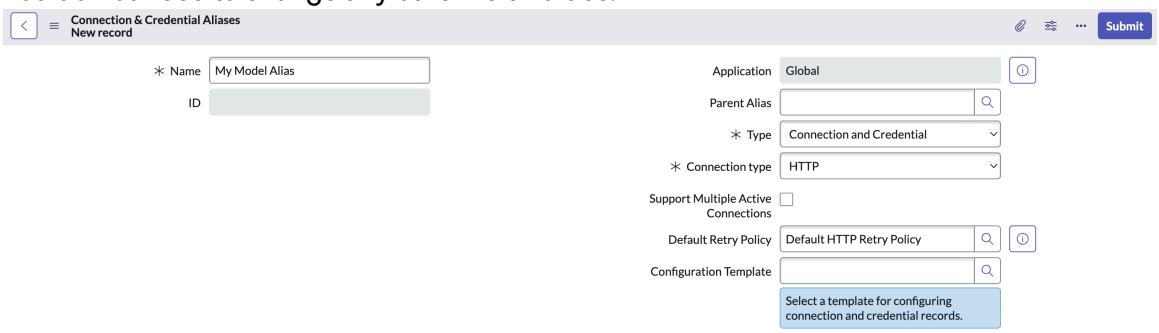
You can connect an external LLM to the ServiceNow AI Platform by creating a connection alias to the model, create a model record that points to the alias, create a prompt record for the model, and then create a transformer record to transform the request or response from the LLM.

Procedure

1. Navigate to **All** > **Connections & Credentials** > **Credentials**.
2. Select **API Key Credentials**
3. In the **Name** field, give your API credential a name.
   Including the name of the model in the API Key Credential makes it easier to identify later.
4. In the **API Key** field, enter your model's API key.



5. Select **Submit** to create the Credential.
   At this step, you have the API key information for the external LLM configured.
6. Navigate to **All** > **Connections & Credentials** > **Connections & Credential Aliases**.
7. Select **New**.
8. In the **Name** field, enter a name for the credential alias.
   You do not need to change any other field values.



9. Select **Submit.**
10. After you are redirected to the List view, find and open the record you just created.
11. Select **New** in the Connections related list to create a new Connection record.
12. Enter the name of the connection in the Name field.
13. In the **Credential** field, select the Credential record you created with the model's API key.
    You can search the list of Credentials by typing the name of the Credential in the field. You can also select the lookup icon ( ) to open a modal with the full list.
14. In the **Connection alias** field, select the alias record you created.
15. For the Connection URL, enter the endpoint URL for the model.

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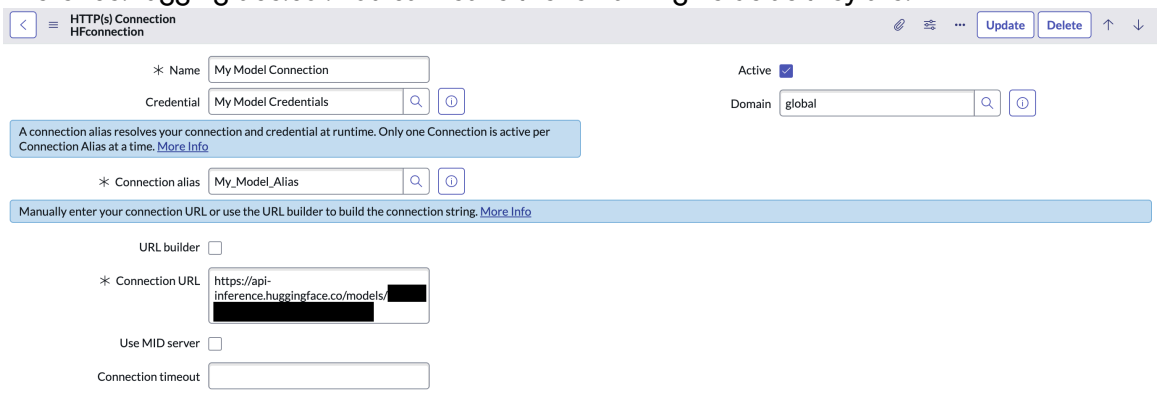
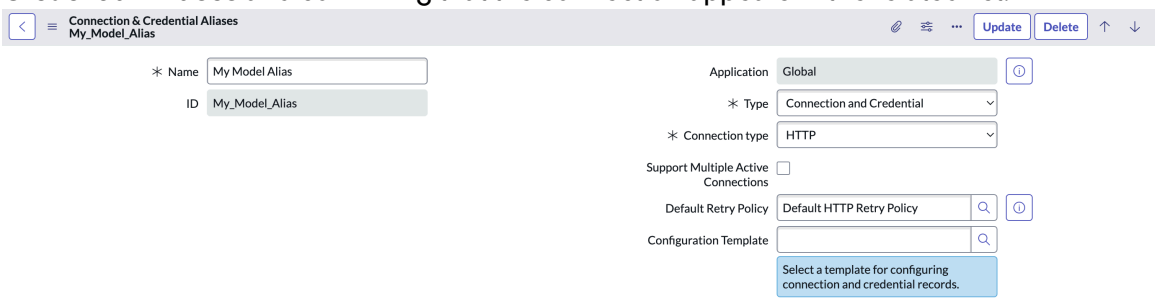
For example, a model from Hugging Face might start with "https://api-inference.huggingface.co". You can leave the remaining fields as they are.

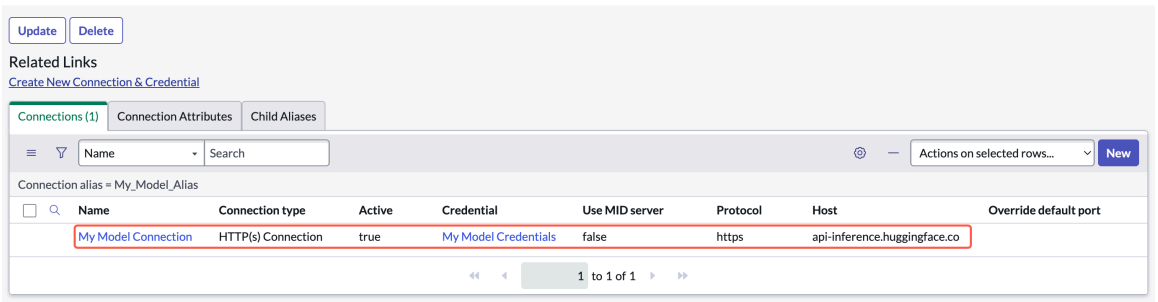


16. Select **Submit**.

Result

You have the connection and credential alias to use for connecting a generic LLM to use generative AI capabilities on the ServiceNow AI Platform. You can confirm this by navigating to **All** > **Connections & Credentials** > **Connections & Credential Aliases** and confirming that the connection appears in the related list.





What to do next

For more information on configuring a generic LLM, see configure a generic LLM connector

To build custom skills with this LLM, see AI Skill Kit.

Activate generative AI skills in the AI Admin Hub console for your workflow. For more information, see AI Admin Hub.

Configure a generic large language model (LLM) connector

Connect an external LLM to the ServiceNow AI Platform by using a generic LLM connector. With a connector, you can write your own prompts to send to the LLM and create your own generative AI capabilities.

Before you begin

You must configure API credentials for your LLM before setting up the connector. For more information, see configure API credentials for a generic LLM.

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Role required: admin

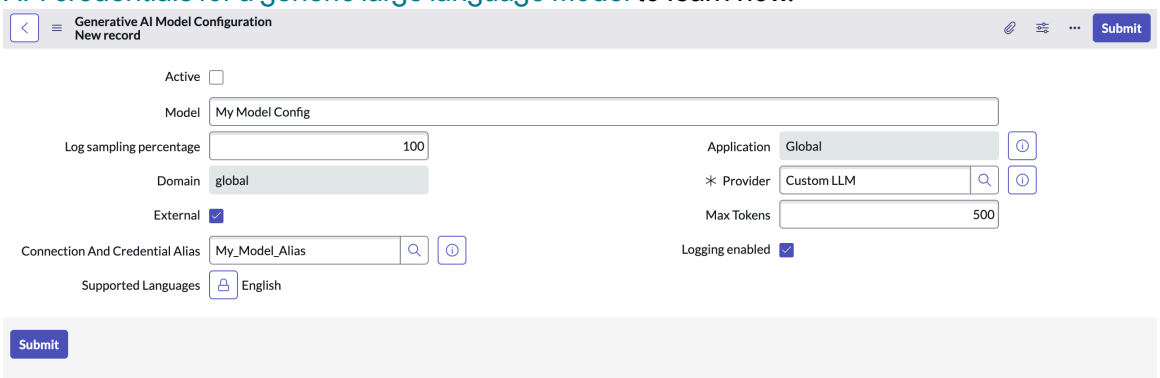
About this task

Generative AI Controller offers several base system connections to popular AI service providers such as Azure OpenAI and Google Vertex. However, you might want to incorporate an industry LLM, a case-specific LLM into your custom workflows, or an LLM that adheres to your organization's data handling policies.

Note: Generative AI Controller only supports text generation.

Procedure

1. In the navigation filter, go to the Generative AI Model Configuration [sys_generative_ai_model_config] table by entering `sys_generative_ai_model_config.list`.
2. Select **New**.
3. In the **Model** field, enter the name of the model.
   If you're using Azure OpenAI, then the model name is the deployment name of your resource.
4. In the **Provider** field, select **Custom LLM**.
5. In the **Connection and Credential Alias** field, select the alias that you created when you set up your credentials.
   If you haven't already configured your API credentials, see configure API credentials for a generic large language model to learn how.



6. Create the model configuration by selecting **Submit**.
   The model configuration is associated with the API key of the external model.
7. In the navigation filter, go to the Generative AI Configuration [sys_generative_ai_config] table by entering `sys_generative_ai_config.list`.
8. Select **New**.
9. Select the list lookup icon ( ) next to the **Definition** field.
10. In the Select the document modal, select a capability that you want to configure with the Custom LLM provider.
    For example, if you're configuring a Summarize capability with a generic LLM provider, select **Summarize (Custom LLM)**.
11. Select **OK** to save your selection and close the modal.
12. In the **Model** field, choose the model configuration that you created in step 6.
    After you select a **Definition**, the **Model** field changes into a drop-down menu with options that use the Custom LLM provider. The model configuration that you made should appear in this list. If it doesn't, go back to step 1 and make sure that your model configuration has the **Provider** field set to **Custom LLM**.
13. In the **Prompt template** field, enter the prompt for the capability.

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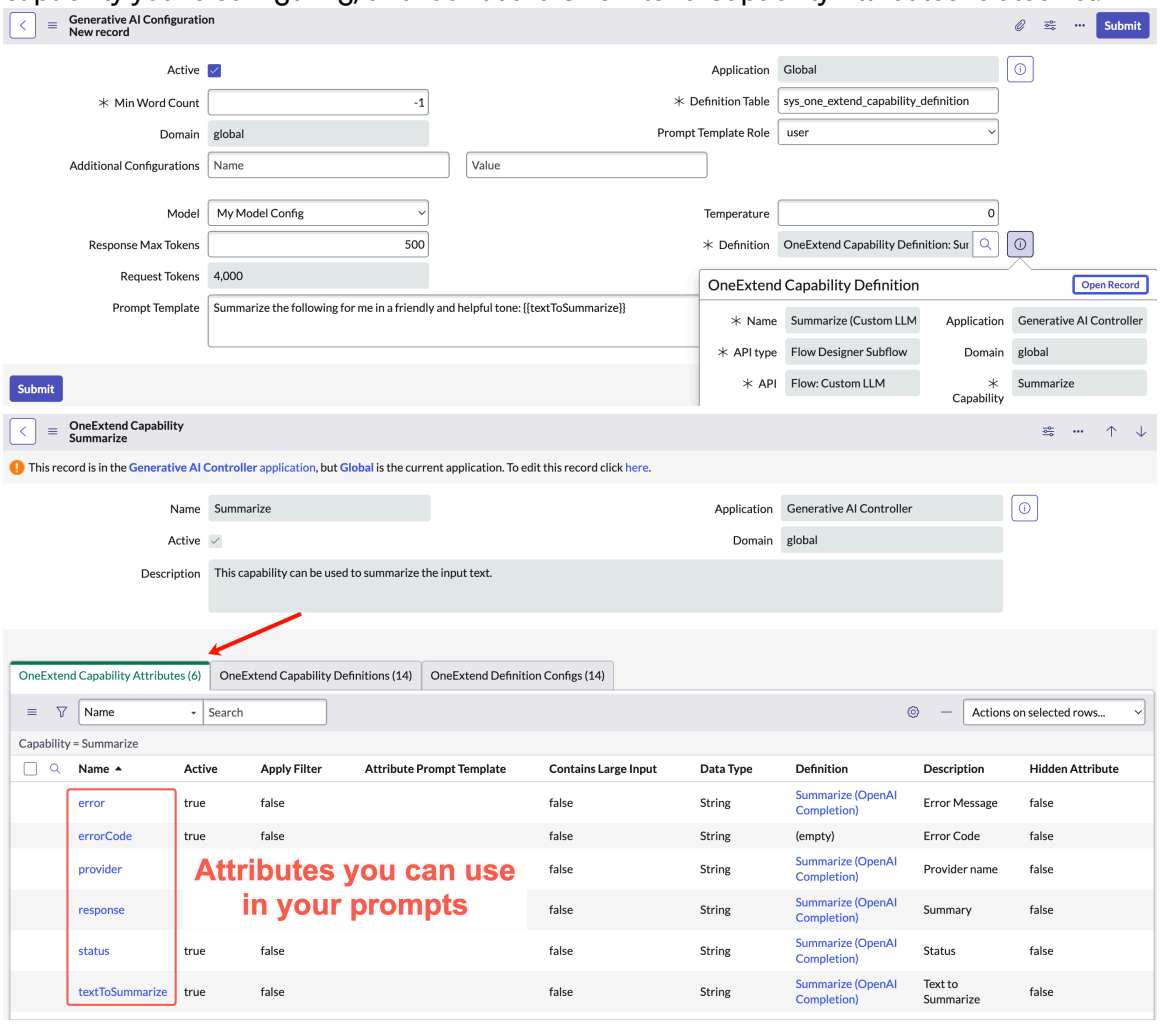
The prompt template is the instruction that is sent to the LLM to execute a capability. Use two braces around the capability attribute names to incorporate them into the prompt template. For example, if you're configuring a Summarize capability, your prompt template could be `Summarize the following for me in a friendly and helpful tone: {{textToSummarize}}`. To learn which attributes are available to include in the prompt, go to the OneExtend Capability [sys_one_extend_capability] table, find the record for the capability you're configuring, and look at the OneExtend Capability Attributes related list.



You might need to experiment with different prompts to determine what works best for your use cases.

14. Create the new Generative AI Configuration by selecting **Submit**.
15. In the navigation filter, go to the Generative AI Custom LLM Transformer [sys_generative_ai_custom_llm_transformer] table by entering `sys_generative_ai_custom_llm_transformer`.
16. Select **New**.
17. Write transformer scripts.
    To have Generative AI Controller understand the format of the inputs and outputs of your custom LLM, you must write transformer scripts. When you create a transformer record, code and comments are provided for you to use as a guide while you edit. These scripts depend on the expected request and response objects that are interpreted by your model.

    For example, the Azure OpenAI request structure looks like the following script:

```
{"messages": [{"role":"user", "content":"Summarize the
 following text: <<content>>"}], "max_tokens": 800,
 "temperature": 0.7}
```

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The request transformer script for that request structure is the following script:

```
(function(inputs) {
    /* write code here to construct the request body and any
 custom headers needed using the inputs object.
    inputs structure: {
        prompt_data: object,
        request_data: object
    } */
    var requestData = inputs.request_data;
    var promptData = inputs.prompt_data;
    var prompt = promptData.prompt;
    var model = promptData.model;

    // construct body using the inputs
    var body = {
        messages: [{
        "role": "user",
        "content": prompt
        }],
        max_tokens: parseInt(promptData.max_tokens),
        temperature: parseInt(promptData.temperature)
    };

    //construct headers using the inputs
    var headers = {};
    return {
        body: body,
        headers: headers
    };
})(inputs);
```

The response structure from Azure OpenAI looks like this script:

```
{
    "choices": [{
    "finish_reason": "stop",
    "index": 0,
    "message": {
        "content": "<<response>>",
        "role": "assistant"
        }
    }],
    "created": 1714994995,
    "id": "chatcmpl-9LqpXeLVXDAi6kciPfLeIDjmALeea",
    "model": "gpt-35-turbo-16k",
    "object": "chat.completion",
    "usage": {
        "completion_tokens": 47,
        "prompt_tokens": 70,
        "total_tokens": 117
    }
}
```

Because of that response structure, the response transformer script looks like this script:

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```
(function(inputs) {
    /* write code here to transform the llm response into an
 array of text responses, using the inputs object
    inputs structure: {
        prompt_data: object,
        request_data: object,
        response_body: string,
        response_headers: string
    } */
    var requestData = inputs.request_data;
    var promptData = inputs.prompt_data;
    var responseBody = JSON.parse(inputs.response_body);
    gs.info("response : " + inputs.response_body);
    var responseTexts = [];

    // write code here to populate the responseTexts array.

 responseTexts.push(responseBody.choices[0].message.content);

    return responseTexts;

})(inputs);
```

18. Create the transformer scripts by selecting **Submit**.

Result
Your external LLM is connected to Generative AI Controller. You can use the AI service provider for generative AI capabilities on the ServiceNow AI Platform.

What to do next
After you connect the LLM, you can set a provider for the generative AI capabilities of Generative AI Controller. For more information, see Set a provider for a generative AI capability.

Build custom skills with this capability using AI Skill Kit. For more information, see AI Skill Kit.

Set a provider for a generative AI capability

Configure LLM providers for Generative AI Controller at the backend level. For most use cases, configure capabilities using AI Admin Hub.

Before you begin
Configure your credentials for your preferred provider. See Configuring API credentials for generative AI capabilities for more details.

Role required: admin

About this task
Use this procedure to configure LLM providers at the OneExtend Capability level. Generative AI capabilities are configured using the AI Admin Hub, which is the recommended approach. This procedure is for backend configuration when you need to manage custom OneExtend configurations.

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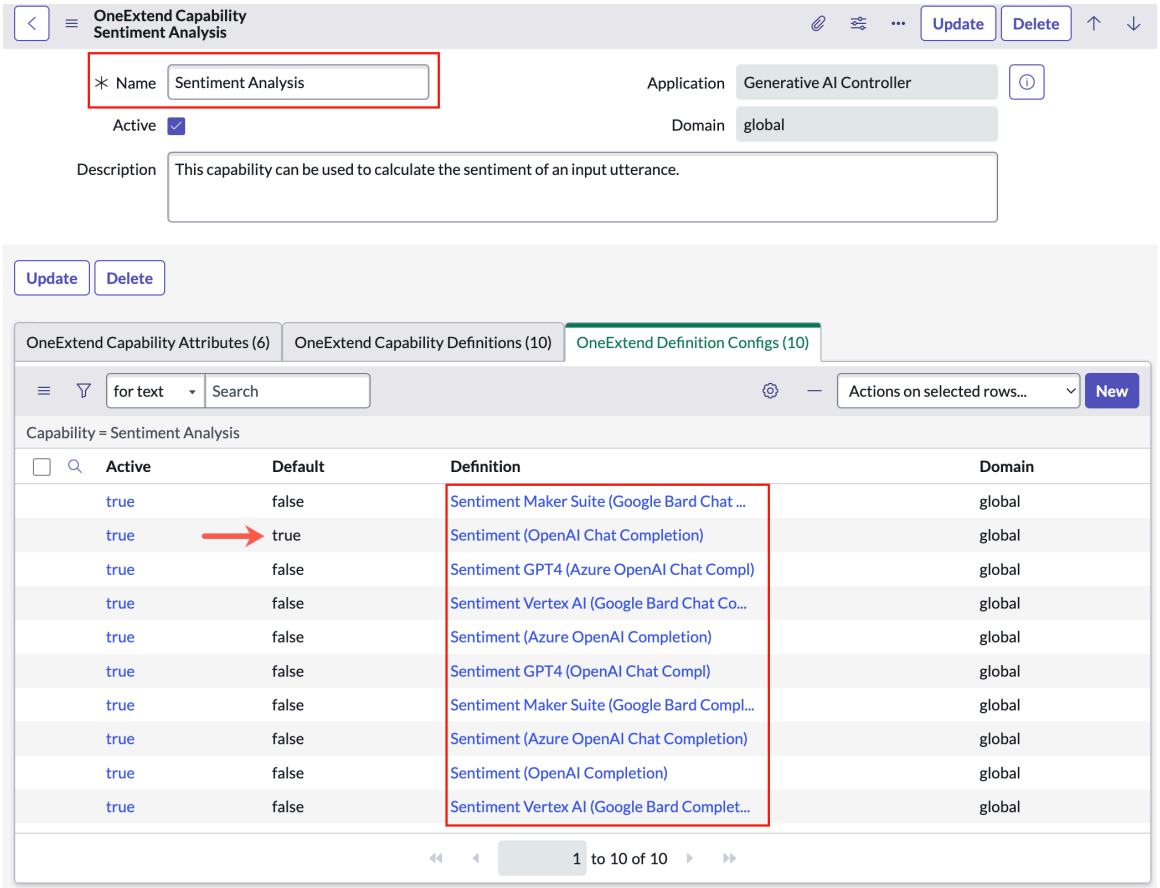
Procedure

1. In the navigation filter, search for the OneExtend Capability table by entering `sys_one_extend_capability.list`.
2. In the OneExtend Definition Configs related list, set **Default** to `true` for your preferred capability provider.

> **Note:** By default, you can choose only one provider for a capability. For example, if **Default** is `true` for Sentiment (OpenAI Completion), you must set **Default** to `false` before changing **Default** to `true` for Sentiment (Azure OpenAI).



Model Options

You have the option to choose between several different models for each capability.

Capability Definition	Model
○ OpenAI Completion ○ Azure OpenAI Completion	GPT-3
○ OpenAI Chat Completion ○ Azure OpenAI Chat Completion	GPT-3.5
○ GPT4 (OpenAI Chat Compl) ○ GPT4 (Azure OpenAI Chat Compl)	GPT-4

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Capability Definition	Model
○ AI Studio (Google Cloud Completion) ○ AI Studio (Google Cloud Chat Completion) ○ Vertex AI (Google Cloud Completion) ○ Vertex AI (Google Cloud Chat Completion)	Google Gemini
IBM watsonx	Granite

Result
The provider configuration is applied at the OneExtend Capability level and is available for use by generative AI capabilities in your instance.

What to do next
To configure generative AI capabilities through the standard approach, see Generative AI skills, AI Skill Kit, and AI Admin Hub.

Select a model for Amazon Bedrock

Choose which large language model (LLM) to use with Amazon Bedrock for custom skills.

Before you begin
You must have the latest version of Generative AI Controller and the Amazon Bedrock spoke installed on your instance. You must also set up your API credentials. For more information, see Configure API credentials for Amazon Bedrock.

Role required: admin

About this task
You may have multiple models configured to use with Amazon Bedrock. By default, the settings use Amazon's Titan model, but you can configure the spoke to use a different model by changing the Generative AI Model Config record.

Procedure
1. In the filter navigator, navigate to the Generative AI Model Config table by entering `sys_generative_ai_model_config.list`.
2. Search in the Provider field column for `Amazon Bedrock`, then open the resulting record.
3. In the Model field, enter the ID of the model that you want to use.
   You can find the model ID on the **Foundation models** > **Base models** page on Amazon Bedrock.
4. Select **Save** to update the record.
5. Map the chosen model to a custom skill.

   a. In the filter navigator, go to the Generative AI Config table by entering `sys_generative_ai_config.list`.

   b. Search for the custom skill you've created that uses Amazon Bedrock as the service provider, and open the record.
   The Definition should be OneExtend Capability Definition: <Name of Skill>.

   c. Set the Model field to the model ID you entered in step 3.

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Result
Your chosen model with the Amazon Bedrock provider will be used for custom skills.

What to do next
You can create custom skills with the Amazon Bedrock provider in AI Skill Kit and perform step 6 to set the new model.

Configure generative AI skills in the AI Admin Hub console to use this capability. For more information, see AI Admin Hub.

Configure small talk filters

Redirect users to different Virtual Agent topics if small talk, such as greetings, expressions of gratitude, complaints, or requests to close, are detected in conversations.

Before you begin
Role required: admin

About this task
When engaging with generative AI, many people send conversational messages that are ultimately unhelpful for the Virtual Agent when determining how to help the user achieve their goals. You can configure small talk filters that catch these conversational messages. When a user is sending a message such as a greeting or expressing complaints about the conversation, you can redirect them to serve their needs.

Procedure
1. In the navigator, go to the Generative AI Filter [sys_gen_ai_filter] table by entering `sys_gen_ai_filter.list`.
2. Open the record for the small talk filter that you want to configure or select **New** to create one.
   By default, the four available filters for small talk are Greetings, Gratitude, Complaint, and Closure. If you see other filters, those filters are sensitive topic filters that can be set up with the Now Assist Admin console. See Configure subject filters for generative AI for more information.
3. If creating a filter, add a **Name** and **Description** for the filter.
4. Choose the Filter Error Topic that you want to redirect users to when the small talk filter is detected.
   By default, the user is redirected to the Small Talk Response Processor topic.
5. For the **Order** field, choose the order to apply the filters.
   Filters are processed by lowest order to highest. A filter with order 100 is processed before a filter with order 200.
6. **Optional:** In the **Filter Configurations** field, use the name "portal" to determine where the filter should be run, such as setting "portal" to value "sp" to apply only the filter on the sp portal.
   Use a comma-separated list to select multiple values.

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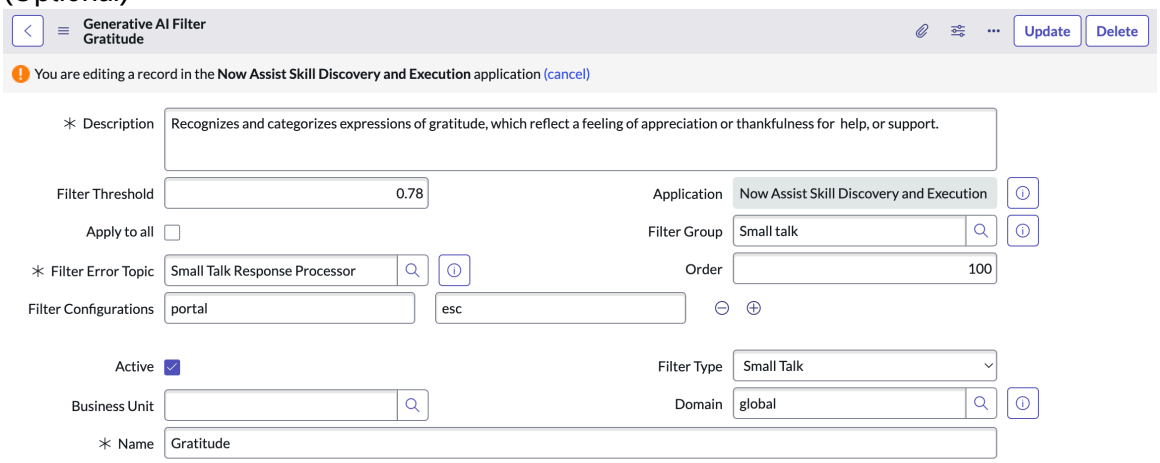
(Optional)



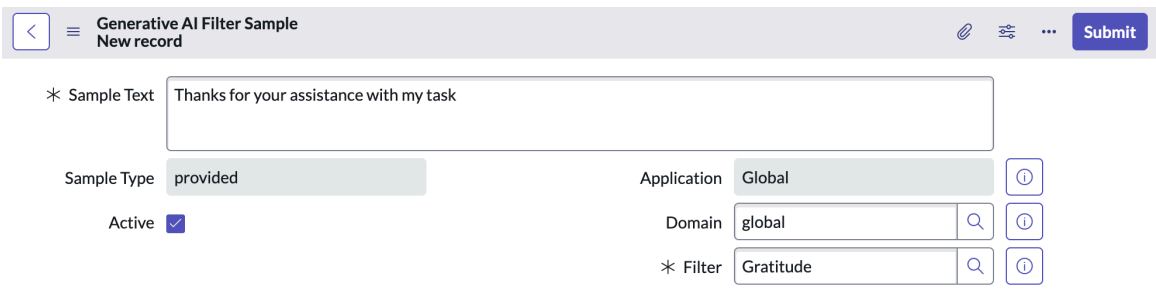
7. Select **Save** to save any changes.
8. In the navigator, go to the Generative AI Filter Sample [sys_gen_ai_filter_sample] table by entering `sys_gen_ai_filter_sample.list`.
9. **Optional:** Review the sample phrases for each filter.
   Statements that match these sample phrases activate the selected filter. You can create sample phrases manually by creating records on the table or by using generative AI to generate samples for you.

   a. To create a sample manually, select **New**.

   b. In the **Sample text** field, enter the sample text of what you want to be caught by the filter.

   c. In the **Filter** field, select the filter you want the sample to be applied to.

   d. If you want to generate more sample phrases with generative AI, open a record for a sample phrase for the desired filter.
   An example might be the "Thanks for your assistance with my task" sample filter for the Gratitude filter.



   (Optional)

   e. Select **Generate Samples** to create additional example statements to trigger the filter.
   The more sample statements that you provide, the more likely that the filter aligns with your expectations of its behavior.

Result

When engaging in conversations with generative AI, users are redirected to a new topic when filtered subjects or sentiments are detected.

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Configure AI search answers capability for web search

AI web search is a OneExtend capability that enables end users to perform web searches and receive AI-powered answers. The capability supports multiple AI providers and integrates with virtual assistants and workflows.

Before you begin

When web search is turned on, Google Gemini is the default AI provider. To switch AI providers, admins must configure the AI Search answers OneExtend capability. The instance or skills default AI provider that is set in AI Admin Hub can differ from the web search AI provider. For more information on the default instance or skills AI provider, see Manage model providers.

Some of the AI providers require API keys whereas others don't require API keys because they use OEM. The following table highlights the four AI providers and whether they use API keys or OEM.

AI providers that require API keys	AI providers that use OEM
OpenAI	Gemini **Note:** Google Gemini is the default web search AI provider in the AI Search answers OneExtend capability. If you selected Google Gemini as the LLM provider in AI Admin Hub and you want to use Google Gemini as your web search AI provider, you don't need to configure the AI Search answers OneExtend capability.
Perplexity	Azure **Note:** Azure doesn't currently support web search.

Role required: admin

Procedure

1. In the navigator filter, go to the OneExtend Capability list by entering `sys_one_extend_capability.list`.
2. Search for the `AI Search answers` OneExtend capability.
3. Select the AI Search answers record.
4. In the OneExtend Definition Configs related list, view the Default column.
   When the AI provider's Default column is set to `true`, that is the AI search provider used for the web search. Gemini defaults to `true`. To change the AI search provider to an AI provider that requires the use of API keys, such as Perplexity or OpenAI, continue with the following steps.

   Note: Although Azure OpenAI answer is an option for an AI search provider, Azure doesn't support web search and should remain set to `false`.

5. In the OneExtend Capability Definitions related list, select the value in the Connection And Credential Alias column for the AI search provider you want to use.

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For example, if you want to switch the web search AI provider to OpenAI, select **sn_openai.OpenAI** from the Connection And Credential Alias column.
The Connection & Credential Alias form opens. If no connections are available within the Connections related list, you must create a connection.

6. Complete one of the following actions based on the following scenarios.

Scenario	Action required
Connection is available	If a connection is already available within the Connections related list, continue to the next step.
Connection isn't available and must be created	**a.** Select **New** within the Connections related list to create a connection. **b.** In the **Name** field, enter the connection name. For example, `Open AI connection`. **Note:** For more information about the fields on the HTTP(s) Connections New record form, see Create an **c.** Select the Lookup using list icon ( ) next to **Credential**. **d.** Select **New** to create a credential for your connection. **Note:** You may see an existing credential that you can select from the Credentials list, but some AI providers, like OpenAI, do not come with default credentials. **e.** Select **API Key Credentials**. **f.** Enter a name in the **Name** field. For example, `Open AI key`. **g.** Enter the API key in the **API key** field. **Note:** For more information about the fields on the API Key Credentials New record form, see API key creden **h.** Select **Submit**. You're redirected back to the HTTP(s) Connections new record form. **i.** Enter the connection URL in the **Connection URL** field.

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Scenario	Action required
	For example, enter `https://api.openai.com` for Open AI. **j.** Select **Submit**.

a. In the OneExtend Definition Configs related list, set the existing default AI provider from `true` to `false`.

b. In the OneExtend Definition Configs related list, set the AI provider that you want to use from `false` to `true`.

7. Select **Update**.
The AI provider for web search is now updated.

Result
End users can now perform an internet search to answer a query whenever in web search mode. For more information about web search mode for end users, see Web search.

What to do next
If you switched the AI provider to Perplexity, you must work with the *sn_ai_websearch.perplexity_model_name* system property. For more information on this system property, see ServiceNow® Otto for Virtual Agent system properties.

Enable recursive summarization for large inputs

Use recursive summarization to break down the requests to the large language models (LLMs) into smaller pieces so that you can maintain the context for generative AI capabilities.

Before you begin
Role required: admin

About this task
LLMs have a maximum number of tokens that can be processed in a single request. Certain fields, such as activity fields, can have more information than can fit in within those restrictions. Recursive summarization breaks the information given to an LLM into chunks, summarizes each chunk individually, and then processes the original request with the summarized chunks. The chunks are organized with overlaps between the pieces so that the context is retained across every piece. For more information about provider-specific token limits, see [KB2038552].

Note: Enabling recursive summarization may cause the capabilities to process large inputs more slowly because they must make multiple calls to the LLM instead of just one call.

Procedure
1. In the navigator filter, go to the OneExtend Capability list by entering `sys_one_extend_capability.list`.

2. Open the record for the OneExtend capability that you want to change.

3. In the OneExtend Definition Config related list, set **Enable Large Input Support** to true for the OneExtend Definition that you want to enable recursive summarization for.

4. In the OneExtend Capability Attributes related list, set **Contains Large Input** to true for the fields that you want to add recursive summarization in.
The fields that are most likely to contain a large amount of data, such as an activities field, should have their values set to true. You can also select the **Contains Large Input** check box on the OneExtend Capability Attribute record and save the record to set the value to true.

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Result
Recursive summarization is enabled for the OneExtend Capability for the fields specified in this procedure.

What to do next
Configure generative AI skills in the AI Admin Hub console to use this capability. For more information, see AI Admin Hub.

Enable Dynamic Translation for capabilities in Generative AI Controller

Use Dynamic Translation to add multiple language support for generative AI capabilities to support users who speak languages other than English.

Before you begin
You must have the Dynamic Translation and Conversational Dynamic Translation plugins installed and enabled on your instance. For more information on setting up Dynamic Translation, see Configuring Dynamic Translation.

You must have a default Translation Configuration set in the Translation Configuration table (sn_dt_translator_configuration).

Role required: admin

About this task
By default, Dynamic Translation is inactive for capabilities with Generative AI Controller.

Dynamic Translation isn't available for capabilities in Virtual Agent or ServiceNow Otto panel.

Procedure
1. Navigate to the OneExtend Capability (sys_one_extend_capability) table by entering `sys_one_extend_capability.list` in the navigator.
2. Open the record for the capability that you want to enable Dynamic Translation for.
3. In the OneExtend Capability Attributes related list, open the record for the attribute you would like to be translated, such as response.
4. Select **Translate** to enable translation.
   If you don't see the field on the form, you must edit the form to display the **Translate**. One way of adding the field to the form is by selecting the menu icon by the table name of the form and choosing **Configure** > **Form Layout**. Add the **Translate** field to the Selected list. Then, select **Save** to save the form. You're then redirected back to the record with the field available to select.
5. Select **Submit** to save the record.

Result
Dynamic Translation is installed for your generative AI capability on the attribute that you selected.

What to do next
Configure generative AI skills in the AI Admin Hub console to use this capability. For more information, see AI Admin Hub.

Disable Dynamic Translation for LLM Virtual Agent conversations

Enable dynamic translation of chat messages into English before they are sent to the large language model in generative AI topics to support users who speak other languages.

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Before you begin
You must have Dynamic Translation for Virtual Agent installed and active for your Virtual Agent. For more information, check out .

Role required: admin

About this task
Dynamic Translation is enabled by default.

There are certain limitations of Dynamic Translation for Virtual Agent. Catalog item names aren't automatically translated, and only languages configured for language detection will be recognized.

Procedure
1. Navigate to **All**, and then enter `sys_properties.list` in the filter.
2. Select the magnifying glass icon ( ) to expand the column search row.
3. In the Name column, enter `sn_generative_ai.disable_dynamic_translation` and then press **Enter** to search.
4. Open the matching record.
5. Set the property value to `true`.
6. Select **Save** to save the record.

Result
Chat requester utterances are translated into English before being sent to the LLM, and output messages are translated back into the requester's preferred language.

Configure rate limiting for providers

Configure rate limiting to control the traffic flow to the one_extend request by restricting the number of requests that can be made within a certain time frame.

Before you begin
Role required: admin

About this task
To rate limit the one_extend request, you must define the rate limit rules for the incoming requests. You can create your own rule in the One Extend Rate Limit Rules table.

Procedure
1. On your ServiceNow instance, navigate to the One Extend Rate Limit Rules [sys_one_extend_rate_limit_rules] table and select **New**.
2. On the form, fill in the fields.

One Extend Rate Limit Rule form

Field	Description
Name	Name of the rate limit rule. Identify the rate limit rule with a name.
Application	Application scope that must be set to Global.
Resource	Resources to select for your rate limit rule.

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Field	Description
	Use one of the following resources for your rate limit rule: ○ **LLM Provider**: For the LLM Provider, select the generative AI provider mapping. ○ **Capability Definition**: For the Capability Definition, select the One Extend Capability Definition. ○ **All Capabilities**: Applies to all providers and all capability definitions.
Rule Type	Rule type for the rate limit rule. Define the rule type using the following options: ○ **Instance**: Accumulates data from all the users of that instance. ○ **User**: Keeps the count of the requests per user.
Request limit per hour	Maximum number of requests to be received per hour.
Active	Status of the rate limit rule.

3. Select **Submit**.

Bring your own key for third-party AI provider integration

The bring-your-own-key (BYOK) feature enables you to use your own API credentials from supported cloud AI providers, such as Azure OpenAI, Amazon Bedrock, and Google Gemini, to run generative AI skills and AI agents.

When BYOK is enabled, AI model requests are sent through your cloud AI provider account instead of ServiceNow AI Platform infrastructure. This approach lets you maintain ownership of your AI configuration, security controls, and data processing environment while continuing to use ServiceNow AI Platform capabilities.

BYOK supports the same AI models that the ServiceNow AI Platform supports. After you configure your API credentials, your provider resources are used to process requests instead of the default ServiceNow AI provider. BYOK keeps your keys under your control and AI workloads running within your cloud environment.

Note: Using your organization's cloud AI provider account might result in additional charges from that provider. Review the provider's pricing and terms of service before enabling BYOK.

ServiceNow integrated model providers

BYOK supports the following cloud AI providers:

- Azure OpenAI
- Anthropic Claude on AWS, which is accessible through Amazon Bedrock
- Google Gemini

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Configuring a BYOK connection with a cloud AI provider

To use your cloud AI provider resources within your ServiceNow instance, configure a connection between ServiceNow and your provider. Configuration steps vary by provider, but follow a similar high-level configuration workflow, such as the following:

1. Create connection and credentials for the provider, such as endpoint, API key, and region.
2. Enable BYOK for the provider in AI Admin Hub.
3. Map ServiceNow model aliases to provider model versions.

   For example, map `gemini_large` → 2.5 Pro.
4. Override variants in each skill in Version Management.
5. Validate that requests are using your AI provider account by reviewing outbound HTTPS logs.

For step-by-step instructions for each supported cloud AI provider, see Configure Bring Your Own Key (BYOK) for Now Assist and AI Agents [KB2666298] article in the Now Support Knowledge Base.

Example: High-level BYOK configuration for Azure OpenAI

1. Set up Azure OpenAI connection with your own key to use Azure OpenAI within your ServiceNow instance.

   For more information, see Configure API credentials for Azure OpenAI.
2. Configure your Azure OpenAI model and deployment name in Generative AI Controller so your ServiceNow instance can recognize and use it.

   For more information, see Create a custom embedding model.
3. Modify the prompt configuration to write your own prompts to send to the Azure OpenAI LLMs.

   For more information, see Configure a generic large language model (LLM) connector.
4. Switch providers to use BYOK for AI processing.

   For more information, see Manage Integration.

Related topics

Configure a custom resource path for BYOK models

Configure a custom resource path for BYOK models

Enter a custom resource path in your bring-your-own-key (BYOK) model configuration so that Generative AI Controller can connect to AI service providers that use a different web address than the default.

Before you begin

Role required: admin

About this task

When you configure a bring your own key (BYOK) model provider in Generative AI Controller, it uses the connection and credential alias to send requests to your AI provider. The alias contains the base URL and API key for your provider. Some AI providers, such as Azure OpenAI, include an extra path segment in their web address that Generative AI Controller does not add

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by default. Without this segment, Generative AI Controller requests don't reach your provider correctly.

The Resource Path field in the model configuration record is where you provide that extra segment.

Note: The custom resource path configuration is currently supported for Azure OpenAI only.

Procedure

1. Navigate to **All** > **Connections & Credentials** > **Connections & Credential Aliases**.
2. Open the Generative AI provider record for Azure OpenAI.
3. In the Connections Attributes related list, select the **Chat Completions Resource Path** attribute.
4. Enter the custom resource path for your provider's endpoint in the **Default value** field.
   For example, for Azure OpenAI, if your full endpoint URL is:

   ```
   https://<your-resource-name>.openai.azure.com/openai/deployments/<your-deployment-name>
   ```

   Enter the following resource path in the **Default value** field:

   ```
   /openai/deployments/<your-deployment-name>
   ```

   Note: You can find your resource name and deployment name in the Azure portal.

5. Select **Update**.

Result

Generative AI Controller now connects to your AI provider using the resource path you entered. Your agentic AI skills are ready to use this provider.

Reference for Generative AI Controller

Reference topics provide information about Generative AI Controller tables, and properties.

Tables installed

Name	Table	Description
OneExtend Capability	sys_one_extend_capability	Generative AI Controller capabilities for routing and governing generative AI requests for your ServiceNow AI applications.
OneExtend Capability Definition	sys_one_extend_capability_definition	Attribute configuration for input and output variables for for generative AI capability definitions.
OneExtend Capability Definition Attribute	sys_one_extend_definition_attribute	Input and output variables for for generative AI capability definitions. Variable names can't be changed if the capability is active and used on the instance. You can check whether

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Name	Table	Description
		a capability is used by going to the OneExtend Usages table.
OneExtend Builder Config	sys_one_extend_builder_config	Determines which capability and provider is related to each generative AI builder component.
OneExtend Builder Capability	sys_one_extend_builder_capability	Definitions for a capacity and its provider for builder components.
OneExtend Usage	sys_one_extend_usage	Each usage of a generative AI capability across your Now Assist applications.
Gen AI Log Metadata	sys_gen_ai_log_metadata	Log data about requests to the LLMs, including information about definition, errors, user, and feedback provided. AI-generated content can be tracked for a duration beyond six months. You can export historical data by writing a script to copy it into a different table without deleting the information.
Generative AI Metric	sys_generative_ai_metric	Logs various metrics to help evaluate the performance and accuracy of LLM responses, such as edit score, edit distance, guardrail activity, and details about the LLM model used.
Gen AI Model Version Mapping	sys_gen_ai_model_version_mapping	Maintains mappings between AI model versions, their providers, and configuration details, providing a clear understanding of how source models map to target models. It also includes associated metadata, such as skill type, model type, resource associations, and provider information.
Generative AI Log	sys_generative_ai_log	Logs Generative AI prompts, responses, and edited responses to debug LLM calls. Log records are retained for 180 days. HR-related logs are restricted to HR Administrators, ensuring sensitive information remains protected. For more information, see Generative AI Controller tables.

Properties

Generative AI Controller properties

Property	Description
com.sn.generative.ai.provider	Default provider when capability definition has no default.

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Generative AI Controller properties (continued)

Property	Description
	Type: choice list No default value
com.sn.generative.ai.ais.message	Message that is displayed when AI Search fails to find an answer to a query. Type: string Default value: No answer found.
com.sn.generative.ai.log_prompt	Prompt that determines whether generative AI API calls are logged. Type: true | false Default value: true
com.sn.generative.ai.moderation.message	Message that is displayed if the OpenAI or Azure OpenAI moderation tools identify the content that goes against their terms of service. Type: string Default value: The response cannot be displayed as it's deemed inappropriate by OpenAI.
com.glide.one.extend.token.buffer	Buffer that checks the request for the number of tokens before a OneExtend capability is executed. The maximum allowed request tokens are calculated based on the maximum tokens that are permitted by the AI provider's API minus the response token and buffer value that is specified in this system property. Type: integer Default value: 250
domain.llm.usage.entitled	Determines whether to use the LLM for a specific domain to process data or restrict its use. Type: true | false Default value: true

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External links

Provider	Data policy	Usage policy
Amazon Bedrock	Data protection	AWS Service Terms
Google Cloud	Google Cloud Platform Terms of Service	Google Cloud Platform Terms of Service
IBM watsonx	Keeping your data secure and compliant	Foundation model terms of use in watsonx.ai
Microsoft Azure OpenAI	Data, privacy, and security for Azure OpenAI Service	Code of conduct for Azure OpenAI Service
OpenAI	API data usage policies	Usage policies

Generative AI Controller tables

Generative AI Controller use dedicated tables to log AI activities and track AI usage across the platform.

Generative AI Log [sys_generative_ai_log] table

Logs generative AI prompts, responses, and edited responses for debugging LLM calls. Log records are retained for 180 days.

HR-related log entries are restricted to HR administrator to protect sensitive information.

Generative AI Log [sys_generative_ai_log]

Column	Data type	Description
Additional Data	String	Contains concatenated values for actions performed on the generated LLM response, such as copied or edited. This field is populated through the feedback API.
Caller	String	Contains information about the calling application that generated the log entry.
Completed At	Date/Time	Timestamp when the generative AI execution completed.
Conversation	Reference	Reference to the conversation this log is part of.
Created	Date/Time	Date and time when the log entry was created.
Created By	String	Contains user information that initiated the execution or flow.
Definition	Reference	Reference to the capability definition responsible for generating the log entry.

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Generative AI Log [sys_generative_ai_log] (continued)

Column	Data type	Description
Derived Scope	Reference	Associated scope of the application that generated the log entry.
Domain	Domain ID	Domain associated with the execution that generated the log entry.
Domain Path	Domain Path	Path associated with the domain from where the capability is executed. When domain separation is enabled, this column is automatically populated by the platform.
Edited Response	String	Captures the edited version of the response when a user modifies it.
Error	String	Error message, if the request encountered an error.
Error Code	String	Error code associated with the error message.
External	True/False	Indicates whether the log entry is for a request sent to an external third-party LLM provider. The default value is False.
Feedback	Choice	Feedback on the LLM response. Possible values: Accepted, Rejected, Ignored, SlightlyPositive, SlightlyNegative, LikelyPositive.
Feedback Timestamp	Date/Time	Timestamp when the feedback was submitted.
Gen AI Usage Log	Reference	Reference to the Gen AI Usage Log.
Metadata Document	Document ID	Document ID for metadata used for the requested execution, if only a single document is used.
Metadata Documents	Glide List	Document IDs for metadata used for the requested execution, if multiple documents are used.
Metadata Table	Table Name	Table name for the metadata.
Model Name	String	Name of the model used for processing the generative AI

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Generative AI Log [sys_generative_ai_log] (continued)

Column	Data type	Description
		request, such as gpt_large, claude_small, or gemini_small.
Model Version	String	Version of the LLM model used.
Output Metadata	String	Metadata received from the model or LLM, including tokens, processing time, and response time.
Prompt	String	Final prompt passed to the model.
Prompt Config	Reference	Reference to the prompt configuration, which contains settings such as model and temperature used in the request to the LLM.
Prompt Token Count	Integer	Number of tokens used in the prompt.
Response	String	The response generated by the LLM.
Response Token Count	Integer	Number of tokens in the response.
Skill Config Id	Reference	Reference to the skill configuration.
Source	String	Source feature responsible for the execution, such as ChatSummary, Now Assist in AI Search, or WWNA: Refine.
Started At	Date/Time	Timestamp when the generative AI execution started.
Status	String	Status of the AI log. Possible values: Success, Error.
Target Language	String	Target language for the AI log.
Time Taken	Integer	Time taken for the AI log process.
Untranslated Prompt	String	The untranslated version of the prompt.
Updated	Date/Time	Date and time when the log entry was last updated.
Updated By	String	User who made updates to the log.
Updates	Integer	Number of updates made to the log record.

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Gen AI Usage Log [sys_gen_ai_usage_log] table

Tracks each use of an AI capability on the platform. Use this log to monitor how your organization consumes assists, review trial assist usage, and understand generative AI activity at the user or team level.

To access the log, enter `sys_gen_ai_usage_log.list` in the navigation filter.

Gen AI Usage Log [sys_gen_ai_usage_log]

Column	Data Type	Description
Assists	Integer	Number of assists used or consumed.
Created	Date/Time	Date and time when the log entry was created.
Created By	String	Contains user information that initiated the execution or flow.
Document	Document ID	Document ID for metadata used for the requested execution.
Document Table	String	Table name for the document table.
Domain	Domain ID	Domain associated with the execution that generated the log entry.
Domain Path	Domain Path	Path associated with the domain from where the capability is executed.
Execution Type	Choice	Type of execution. Possible values: Test, Evaluation, Auto Prompt Tuning.
Feature	Reference	Source feature for the assist usage.
Line Item Name	String	License line item name associated with the assist usage.
License Name	String	License name associated with the assist usage.
Plugin Name	String	Plugin name that the feature responsible for the assist usage is part of.
Skill Config Id	Reference	ID of the skill responsible for the assist usage.
Status	Choice	Status of the usage log. Possible values: Completed, Pending.
Strategy	Choice	Strategy used for pricing the assist usage.

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Gen AI Usage Log [sys_gen_ai_usage_log] (continued)

Column	Data Type	Description
Trial Assists	Integer	Number of assists counted as trial assists.
User	Reference	User associated with the assist usage.

Model Context Protocol Client

The ServiceNow® Model Context Protocol Client (MCP Client) enables you to access the Model Context Protocol tools that are hosted externally and published using an MCP Server in the ServiceNow® AI Agent Studio.

Get started

Explore

Learn more about MCP Client

Configure

Configure the Model Context Protocol Client in AI Agent Studio

Add MCP Server in AI Agent Studio

Add MCP Servers in AI Agent Studio

Reference

Learn more about the user roles, tables, and properties in MCP Client

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Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

For more information, see the Now Assist documentation.

Exploring Model Context Protocol Client

The Model Context Protocol (MCP) is a standardized client-server protocol that enables AI applications to discover and interact seamlessly with external tools, data sources, and services. MCP facilitates communication between an AI host application (like AI Agent Studio), an MCP Client embedded in the host, and one or more MCP Servers that expose specific capabilities such as tools.

Model Context Protocol Client terminology

- **MCP Host**: The AI application environment where the tasks are initiated.
- **MCP Client**: Manages communication between the host and the MCP Servers, handling the requests and responses.

  The MCP Client architecture enables AI agents to extend their capabilities by invoking external systems dynamically, enabling tasks like accessing APIs, databases, or file systems in a standardized way.

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- **MCP Server**: Provides external functionalities by exposing tools for AI agents to use.
- **MCP Tools**: The external tools exposed by the MCP Servers to be used by AI agents.

Why use MCP Tools

MCP tools enable seamless integration to:

- Connect your AI agent with a wide variety of external tools with minimal setup.
- Add multiple MCP tools to an AI agent to perform a broader range of tasks.
- Review and edit tool input parameters as needed before saving.

Configuring Model Context Protocol Client

Configure the MCP Client to execute agentic workflows with AI agents and mapped tools.

Configuring MCP Client enables you to:

- Incorporate external tools in AI agents built on ServiceNow.
- Access tools offered on external MCP Servers.
- Integrate MCP Client with the AI Agent Studio.

By setting up MCP Servers, AI agents in your environment can leverage external tools efficiently, enhancing their ability to perform complex tasks with up-to-date information.

Install Model Context Protocol Client

Install the MCP Client application on your ServiceNow instance to enable using the tools from the MCP Server in AI agents.

Before you begin

Role required: sn_mcp_client.admin

Verify that you:

- Install the AI Agent Studio plugin [com.snc.sn_aia] and the Generative AI Controller plugin [com.sn.generative.ai] to use the MCP Client.
- Enable the MCP Tool experience in your instance by setting the *sn_aia.enable_mcp_tool* system property to **true**.

Note: ServiceNow supports Protocol version 2025-03-26 of the MCP Servers for MCP Client.

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for Model Context Protocol Client plugin [sn_mcp_client].
3. Select **Install**.

Adding an MCP Server in AI Agent Studio

An MCP Server hosts the APIs and tools required by an AI application, enabling it to receive and process calls from MCP Clients to govern ingress traffic and to promote secure and efficient access to tools. Adding an MCP Server in the AI Agent Studio helps you to leverage the Model Context Protocol as a tool in an AI agent.

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Connecting an MCP Server with the AI Agent Studio simplifies the integration process, making it easier to discover and invoke services. This connection enhances security and governance, providing a streamlined setup experience for administrators.

Adding an MCP Server requires you to add an MCP Server in the AI Agent Studio. You can add an MCP Server with one of the following authentication options:

1. **OAuth 2.1**: Helps add an MCP Server with an authentication code. For more information, see Add an MCP Server with OAuth 2.1.
2. **API Key**: Helps add an MCP Server with an API Key. For more information, see Add an MCP Server with API Key.
3. **Others**: Helps add an MCP Server in a manual way by selecting a Connection and Credential Alias record. For more information, see Add an MCP Server with Connection and Credential Alias.

Note: You must authenticate the users with the MCP Server to add the MCP tool to an AI agent and without prior authentication, you can't add the MCP Servers.

Add an MCP Server with OAuth 2.1

Add an MCP Server with OAuth 2.1 in the AI Agent Studio.

Before you begin

Role required: sn_mcp_client.admin

About this task

OAuth is the usual method to authenticate the MCP servers. If your MCP server supports it, choose OAuth 2.1 in the Authentication method.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Settings**.
2. Navigate to **Manage MCP Servers** and select **New**.
3. On the form, fill in the fields.

Add MCP Server

Field	Description
Name	Name for your MCP Server.
Authentication Type	The authentication type with which you want to add your MCP Server. Select **OAuth 2.1**.
MCP Server URL	The web address of your MCP Server.

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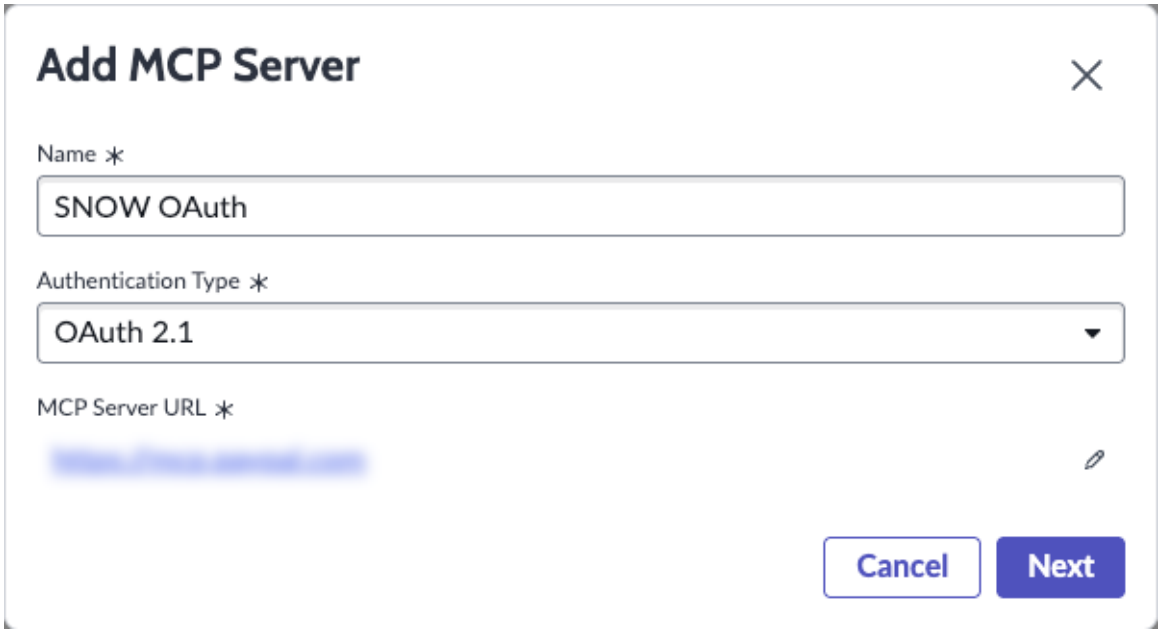

4. Select **Next**.
   The form extends with the registration details.
5. On the form, fill in the fields:

   The dynamic client registration auto-populates the data in the form fields.

   Note: If dynamic registration is supported by the MCP Server, you'll be prompted to confirm the grant type and other inputs. If dynamic registration isn't supported, you can continue with the Manual Registration method in Step 6.

Dynamic Client Registration

Field	Description
Grant Type	The way you want to obtain an access token for accessing protected resources. One of the following two options is used here with auto-populated data. ○ **Authorization Code**: A system-generated code that is used for granting access to an application or resource. ○ **Client Credentials**: Access token provided by the administrator to access the application directly.
Token Authentication Method	Unique token granted to access resources. Select the value from the drop-down list.
Auth Scopes	Define the specific permissions for an application. **Note:** The Auth scopes must be comma-separated values.

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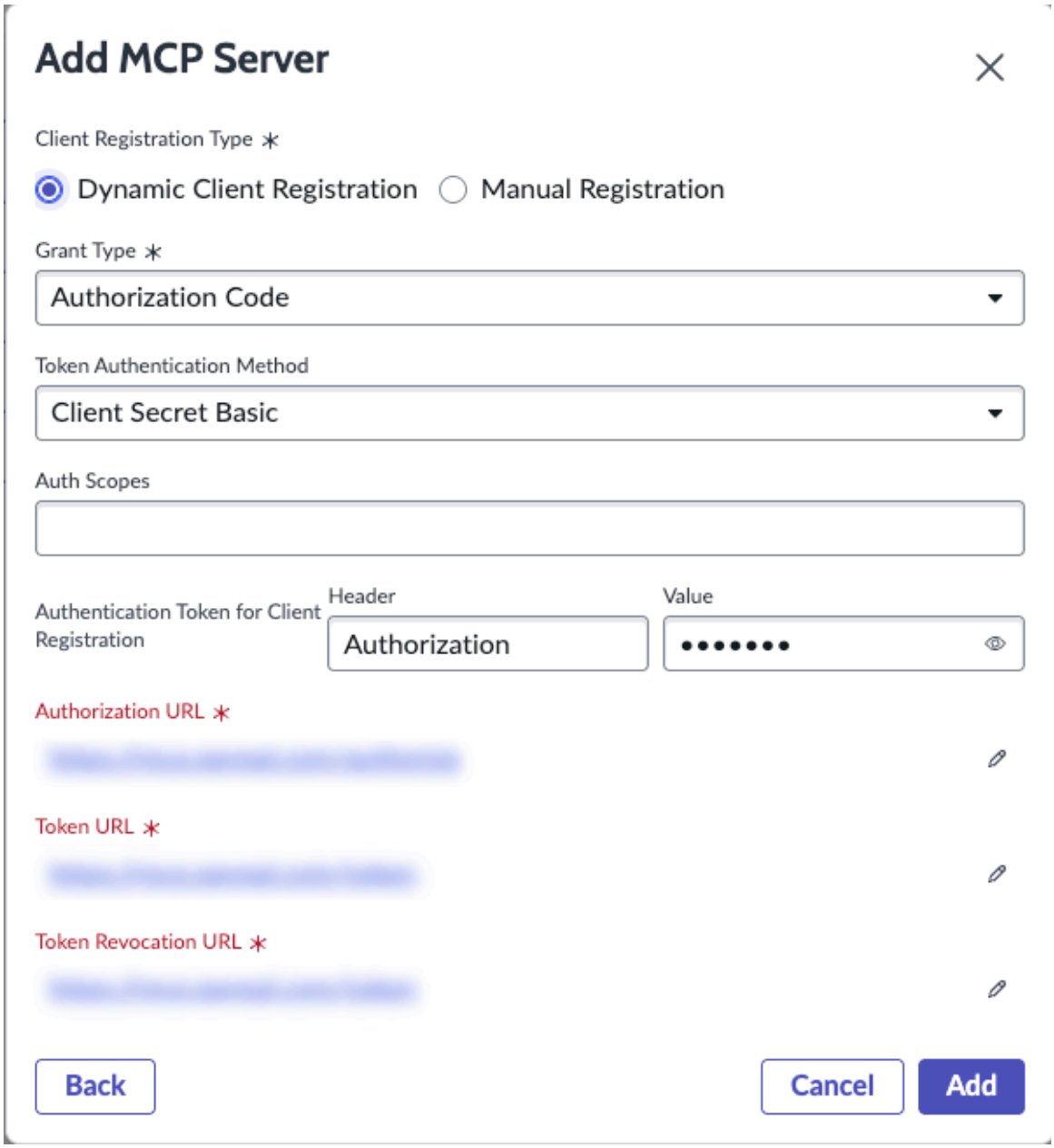
Field	Description
Authentication Token for Client Registration	Authentication token used to verify client's identity and grant it permission to register with an authorization token. Provide the following values: ○ **Header**: Authorization header. ○ **Value**: Authentication password.
Authorization URL	Web address of your server to direct authorization.
Token URL	Web address containing the token.
Token Revocation URL	Web address to revoke the previously provided token.



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The MCP Server with dynamic client registration is added as a simple connection and credential alias.

6. On the form, fill in the fields:

Note:

- If your MCP Server doesn't support Dynamic Client Registration, then you can register the OAuth client for AI agents in your MCP Server manually and update those client details in AI Agent Studio.
- The manual client registration doesn't auto-populate the data in the form fields and must be manually provided.

Manual Registration

Field	Description
Grant Type	The way you want to obtain an access token for accessing protected resources. You can select one of the two options: ○ **Authorization Code**: A system-generated code that is used for grating access to an application or resource. ○ **Client Credentials**: Access token provided by the administrator to access the application directly.
Token Authentication Method	Unique token granted to access resources. Select the value from the drop-down list.
Client ID	Unique ID for authentication and authorization purposes.
Client Secret	Unique credentials used for authentication.
Auth Scopes	Define the specific permissions for an application. **Note:** The Auth scopes must be comma-separated values.
Authentication Token for Client Registration	Authentication token used to verify client's identity and grant it permission to register with an authorization token. Provide the following values: ○ **Header**: Authorization header. ○ **Value**: Authentication password.
Authorization URL	Web address of your server to direct authorization.
Token URL	Web address containing the token.
Token Revocation URL	Web address to revoke the previously provided token.

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7. Select **Add**.
   Selecting Add takes you to the MCP Server record where you must authenticate it for adding an MCP tool to an AI agent.
8. Select **Authenticate**.

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Selecting **Authenticate** takes you to the third-party authorization page where you must select a workspace and select **Authorize**.

Note: When the OAuth access or refresh tokens aren't available, you must authenticate the OAuth configuration on the MCP Server record to add it as a tool to an AI agent.

Add an MCP Server with API Key

Add an MCP Server with an API Key in the AI Agent Studio.

Before you begin

Role required: sn_mcp_client.admin

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Settings**.
2. Navigate to **Manage MCP Servers** and select **New**.
3. On the form, fill in the fields.

Add MCP Server

Field	Description
Name	Name for your MCP Server.
Authentication Type	The authentication type with which you want to add your MCP Server. Select **API Key**.
MCP Server URL	The web address of your MCP Server.
API Key	A unique code or password to identify and authenticate the user or application when accessing the API. **Note:** The API Key adds a Connection alias dynamically at runtime and maps with the MCP Server.

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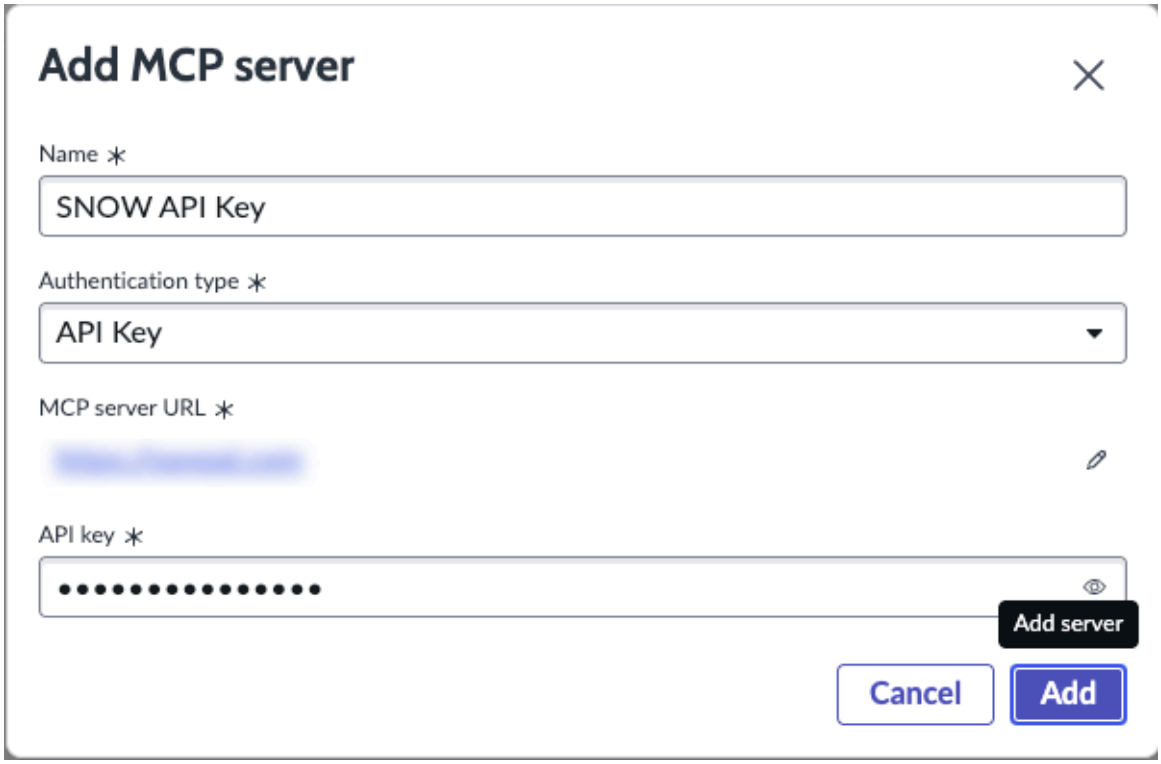

4. Select **Add**.

Result
An MCP Server with the name you provided appears in the list of MCP Servers.

Add an MCP Server with Connection and Credential Alias

Add an MCP Server by selecting a Connection and Credential Alias record.

Before you begin

- Role required: sn_mcp_client.admin
- Verify that you have a Connection and Credential alias record created before adding an MCP Server with Others as the option.

  For more information, see Create a Connection & Credential alias.

About this task
For using the Authentication methods not supported in MCP Server, you can use the Connection and Credential Alias method to create the Alias manually and then update it in the MCP Server. For using OAuth based authentication method, first create the OAuth entity profile and then create the Connection and Credential Alias. For other authentication methods like API Key, Basic Auth, AWS Credentials, SSH Credentials, create the connection and credential Alias directly.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Settings**.
2. Navigate to **Manage MCP Servers** and select **New**.
3. On the form, fill in the fields.

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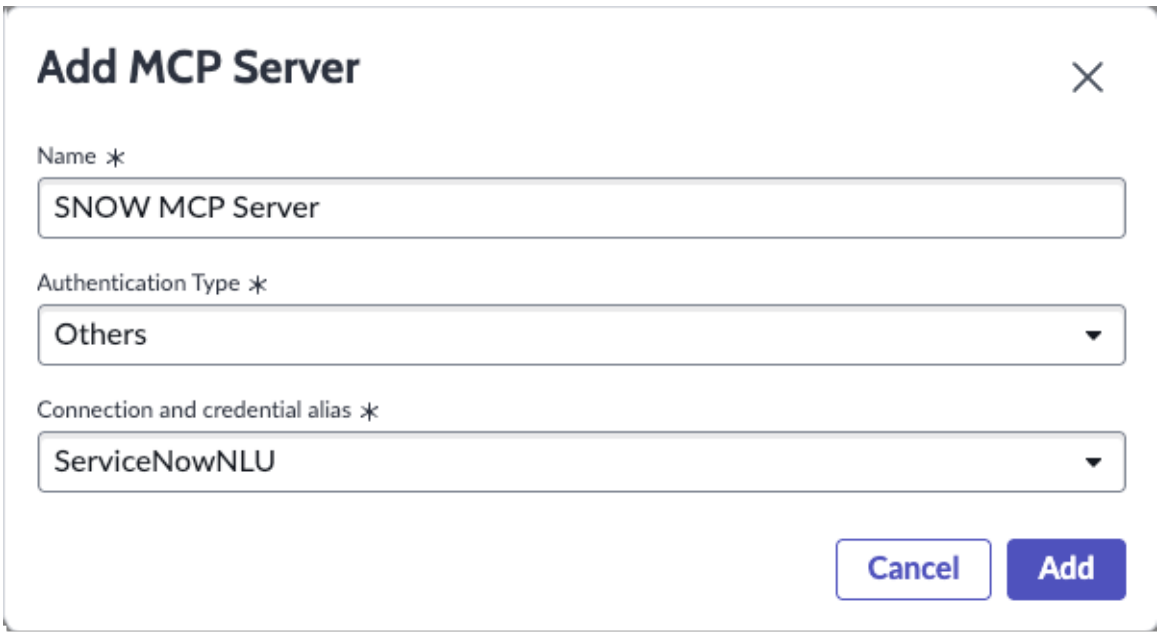
Add MCP Server

Field	Description
Name	Name for your MCP Server.
Authentication Type	The authentication type with which you want to add your MCP Server. Select **Others**.
Connection and credential alias	Select a Connection and credential alias record to map with your MCP Server.



4. Select **Add**.

Note: Authenticate the MCP Server if you see the message requiring it.

Result
An MCP Server with the name you provided appears in the list of MCP Servers.

Add a Model Context Protocol to an AI agent

Add a Model Context Protocol tool to an AI agent in the AI Agent Studio so that your users can access the MCP Server.

Before you begin
Role required: sn_aia.admin

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **AI agents**.
2. Open the AI agent that you want to add a Model Context Protocol tool to and navigate to the Add tools and information section.
3. In the Add tool drop-down list, select **MCP server tool**.
4. On the form, fill in the fields.

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Add a Model Context Protocol Tool

Field	Description
Select Model Context Protocol Server	The Model Context Protocol Server that you want to add to the tool. **Note:** Verify that the MCP Server is authenticated before adding the MCP tool to an AI agent. If the MCP Server isn't authenticated, then you receive an error message - "Authentication is needed to display tools. Open the MCP server record to authenticate."
Select Tool	The tool that you want to add from the Model Context Protocol Server.
Name	Name of the Model Context Protocol tool.
Tool and Description	Description of the Model Context Protocol and what it's going to do to assist your AI agent. **Note:** This description is sent to the LLM (LLM).
Execution Mode	Mode of execution for your selected Model Context Protocol tool: ○ **Supervised**: Inputs from your live agent are required during the execution of this Model Context Protocol tool while the AI agent runs. ○ **Autonomous**: Doesn't require any input from your live agent during the execution of this Model Context Protocol tool while the AI agent runs.
Display output	Permission to display the output of the execution in the Now Assist panel or in Virtual Agent: ○ **Yes** ○ **No**
Processing message	Message to display to users when the tool is running.
Output transformation strategy	Style for the LLM to present the results. ○ None ○ Concise ○ Paragraph ○ Verbose ○ Custom

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5. Select **Add**.
   A Model Context Protocol tool is added in the Model Context Protocol Tools list on the Add tools and information page.

Test an AI agent

Analyze the performance of an AI agent with a Model Context Protocol tool added to it to verify that it functions the way that you defined it.

Before you begin

Role required: sn_aia.admin

About this task

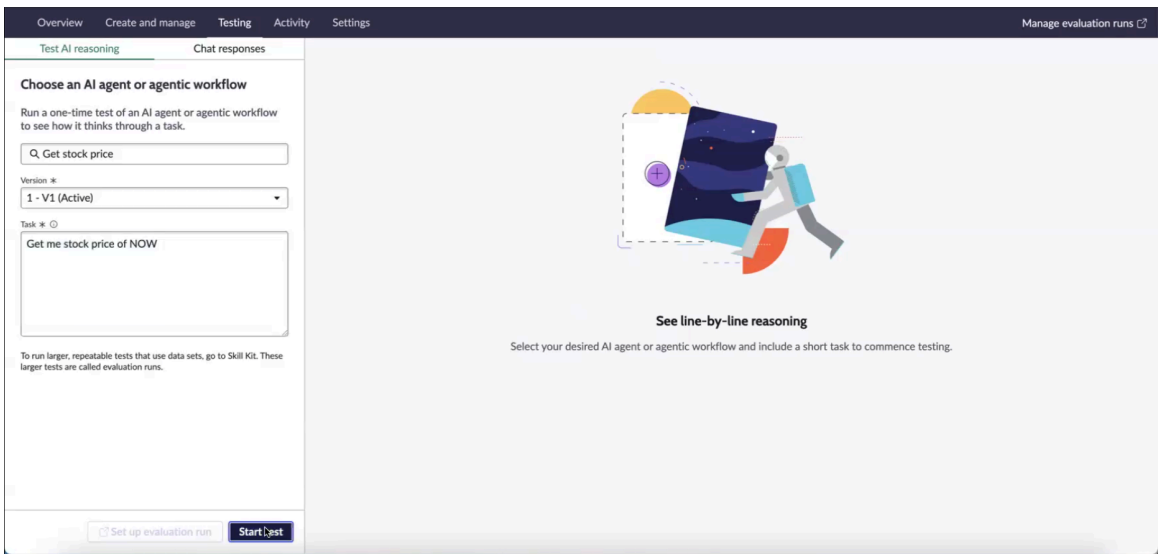
After you create an AI agent and a Model Context Protocol to it as a tool, test it to see that it functions the way that you defined it. Search for the AI agent that you want to test and select the version from the Version drop-down and provide a task with a concise summary and a reference number in the **Task** field to begin testing the AI agent.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Testing**.
2. In the **Test AI reasoning** tab, use the Search bar to search and select the AI agent that you want to test.
3. In the Version drop-down list, select the version of the AI agent.
4. In the **Task** field, provide a concise summary of the task to be achieved.

   Note: In the task summary, include a reference number or specific record for better results during your testing.

5. Select **Start test**.



You're directed to the **Chat responses** tab, where you can see Now Assist executing operations to test the AI agent.

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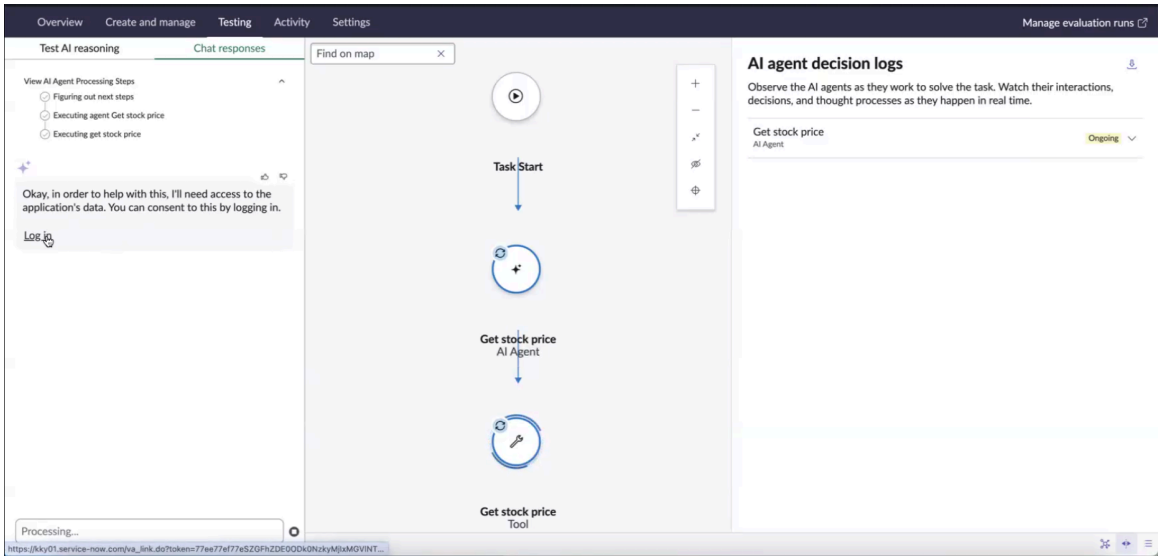
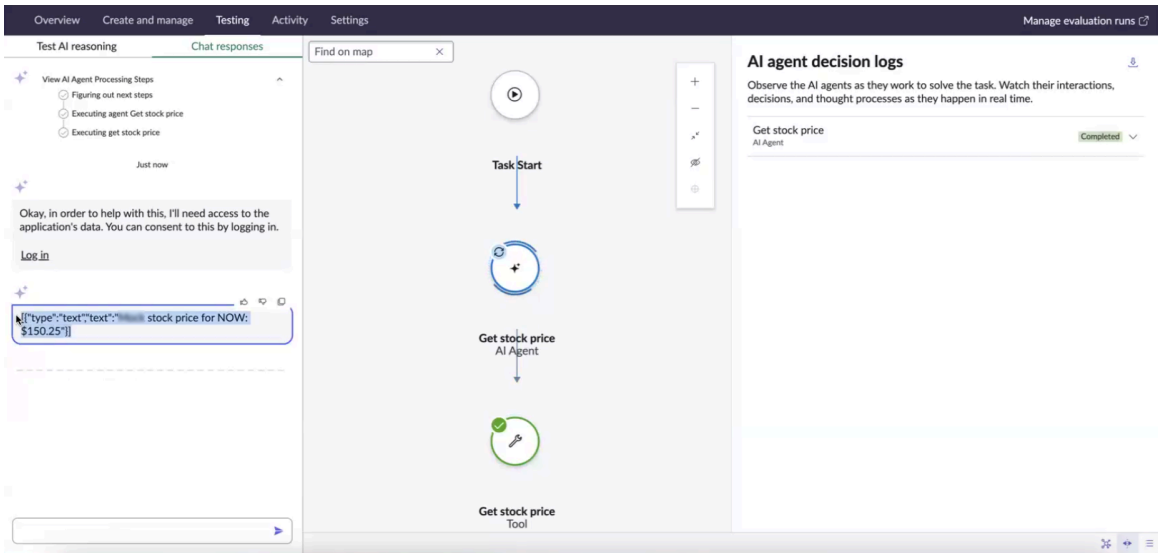


6. Select **Log in** and authenticate the MCP server to complete the testing.

Note:

- Log in will be visible only if the server isn't authenticated.
- Enabling access to the MCP Server refreshes the whole Testing page and resumes testing in the Chat responses tab. The OAuth token used for the authentication is saved in the OAuth Credentials table [oauth_credential].



Model Context Protocol Client reference

Find more information about user roles, tables, and the different properties that are installed with the Model Context Protocol Client application.

MCP Client Roles

The following roles are installed with the Model Context Protocol Client plugin [sn_mcp_client].

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Roles used in MCP Client

Role	Description
MCP Client Admin [sn_mcp_client.admin]	Administrator of the application. A user with the sn_mcp-client.admin role can create, read, update, and delete records. **Note:** The sn_aia.admin role contains the sn_mcp_client.admin role, a role inheritance on plugin activation.
MCP Client Viewer [sn_mcp_client.viewer]	Read-only access to the application. A user with the sn_mcp_client.viewer role has read and report access on all tables. **Note:** The sn_aia.viewer role contains the sn_mcp_client.viewer role, a role inheritance on plugin activation.

MCP Client system properties

The following system properties are installed with the Model Context Protocol Client plugin [sn_mcp_client].

System properties used for configuring MCP Client

System property	Description
sn_aia.enable_mcp_tool	Enables access to the MCP Client tool on your ServiceNow instance. Default value: **false**

MCP Client tables

The following tables are installed by default with the installation of the Model Context Protocol Client plugin [sn_mcp_client].

Tables used for configuring MCP Client

Table	Description
MCP Execution Logs [sn_mcp_execution_logs]	Lists the request and response, the method (tool call or tool list) that was carried out along with the mapped session. The execution logs table also helps to debug and shows if there are any errors.
MCP Client Server Session Mappings[sn_mcp_client_server_session_mapping]	Lists the sessions mapped to the server based on the capabilities support.
Model Context Protocol Severs [sn_mcp_server]	Lists the MCP Servers.

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MCP Server Console

MCP Server Console enables secure and governed access to functionality on a ServiceNow instance for AI applications with Model Context Protocol (MCP) servers. MCP servers extend ServiceNow AI Platform® functionality into any external MCP client and employee experience over the Model Context Protocol.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see ServiceNow product tiers.

https://player.vimeo.com/video/1154347099?h=fd6c7893de&badge=0&autopause=0&player_id=0&app_id=58479

In this video, learn about the Model Context Protocol and how to create and use MCP servers with MCP Server Console.

Get started

Explore Learn about MCP Server Console.	Configure Create an MCP server and configure its tools.
Connect Call an MCP server from an MCP client.	Reference Get details about components installed with MCP Server Console.

Helpful resources

Some ServiceNow resources that can provide you with helpful information are:

- Model Context Protocol Server listing in the ServiceNow Store
- MCP Server Console FAQ article in the ServiceNow Community
- Designing your first custom ServiceNow MCP server with MCP Server Console article in the ServiceNow Community
- Action Fabric: MCP Server, MCP Client, and A2A explained article in the ServiceNow Community

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AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

Exploring MCP Server Console

Learn about how you can use Model Context Protocol (MCP) servers to allow AI applications to access data and perform actions on a ServiceNow instance.

MCP Server Console overview

The Model Context Protocol defines a standard method of communication between large language models (LLMs) and external systems, such as a ServiceNow instance. AI applications connect to an external system from an MCP client, such as an AI agent, using an MCP server. The server tells the client which external resources it can access and how to access them. Then, from an MCP client, users can request information from the server and automate functionality using the available tools and data that the server returns. For general information about the Model Context Protocol and MCP terminology, see the Model Context Protocol documentation on the modelcontextprotocol.io website.

With MCP Server Console, you can create MCP servers on an instance and configure the tools that they expose or use a preconfigured Quickstart Server. Tools define which functionality and data a server exposes to clients and the actions that can be performed on an instance by clients. You can create tools based on existing capabilities, such as AI skills.

Then any AI application, such as Microsoft Copilot or Claude, can call a server from a client using OAuth 2.0 authentication and get a list of available tools. With these tools, employees using MCP clients can prompt the server for information from the instance or to perform an action on the instance, such as to summarize a list of recently closed incidents or cases. You can also use the ServiceNow Model Context Protocol Client to let an AI application on one instance access tools from an MCP server on another instance.

Note: MCP Server Console currently has the following limitations:

- Only stateless and remote servers are supported.
- MCP resources and prompts aren't supported.
- MCP Server Console supports the Streamable HTTP transport. By default, tool calls return a single JSON response. Server-Sent Events (SSE) are optionally available for streaming response types. Stdio is not supported.
- The MCP rate limit is not configurable currently, and adjusting the rate limit requires a service restart. Contact your ServiceNow representative to learn more.

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MCP Server Console users

User	Description
AI administrator	AI administrators can create MCP servers and configure which tools they expose to MCP clients. They also create OAuth inbound integrations on the instance for each client and configure clients with the server and authentication details.

MCP Server Console workflow

The following infographic shows the workflow for AI administrators to get started managing MCP servers with MCP Server Console.

Managing MCP servers with MCP Server Console

1. As an AI administrator, you identify which functionality on an instance to access from an external MCP client and employee experience.
2. You can use the preconfigured Quickstart Server or create an MCP server with the appropriate tools to use the desired functionality.

   You can create one or more servers that expose different tools for different use cases, such as for HR or IT workflows, or for different clients.
3. If needed, you can create additional tools from AI skills and configure which fields are exposed to clients and then add the tools to servers.
4. You create OAuth inbound integrations for each client to secure access to servers on an instance.
5. You configure clients to connect to a server using the server and OAuth inbound integration details.

   Then the client calls the server, which validates the OAuth token and responds with the list of tools available for use with the server.
6. Employees use clients, such as AI agents, to prompt the server for data from the instance or to perform an action on the instance.

Note: With AI Gateway in AI Control Tower, AI administrators can monitor MCP server access and view metrics for servers and their tools. For more information, see AI Gateway.

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MCP Server Console benefits

Benefit	Feature	Users
Integrate with any AI application and MCP client using a standard protocol.	Create a Model Context Protocol server	AI administrator
Control which tools and fields are exposed to MCP clients.	Creating tools for a Model Context Protocol server	AI administrator
Securely access functionality from a ServiceNow instance in any external employee experience.	Configure an MCP client to connect to an MCP server	AI administrator

Quickstart Server in MCP Server Console

MCP Server Console includes a preconfigured Quickstart Server to help you get started learning about MCP servers and connecting MCP clients to a ServiceNow instance. The Quickstart Server includes tools for looking up and summarizing incident and case records, depending on the applications installed on your instance, such as ServiceNow Otto for CSM or ServiceNow Otto for ITSM.

Quickstart Server tools

Name	Description
Case summarization	Get a summary of details in a case record generated by ServiceNow Otto.
Incident summarization	Get a summary of details in an incident record generated by ServiceNow Otto.
Look up Case Records	Look up case records to enable summarizing them with the Case Summarization tool.
Look up Incident Records	Look up incident records to enable summarizing them with Incident summarization tool.

What to explore next

To learn more about configuring and using MCP Server Console, see:

- Configuring MCP Server Console
- Configure an MCP client to connect to an MCP server
- MCP Server Console reference

Related topics

Model Context Protocol Client

Configuring MCP Server Console

Create a Model Context Protocol (MCP) server and configure the tools and inputs it exposes to MCP clients.

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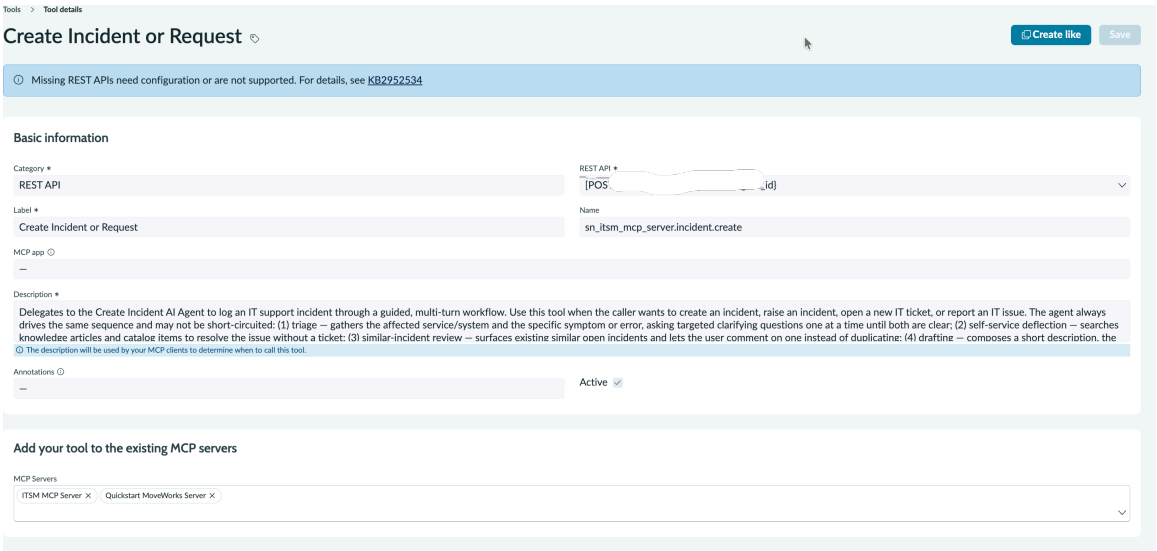
Configuration overview

1. Create a Model Context Protocol server

   An AI administrator creates a server and adds tools to the server.

2.
   - Out-of-box tools
     - Access the out-of-box tools of platform and business specific types to manage capabilities that AI agents and other clients can use through your MCP servers.
     - You can also clone these default tools into fully editable copies by selecting **Create like** option.

       Important: The minimum version required to access this feature is Australia patch 6 and Brazil patch 0.

       When the OOB source tool is updated, the clone owner gets a notification and can easily pull the update into their copy.
   - If additional tools are needed, the AI administrator identifies which functionality to expose and creates tools based on AI skills. From the tools, they configure which fields are exposed to clients as tool inputs.

     Tip: Creation of custom tools requires configuring the tool's from the scratch. However, cloning a default tool presents pre-filled fields on the tools creation form.

3. Create an MCP app

   Optionally, the AI administrator can also create an MCP app to deliver an interactive interface for tools that can be displayed by clients.

After configuring a server, the AI administrator configures OAuth inbound integrations for each client or configures an integration with a third-party identity provider (IDP) for authentication. Then they can configure clients to connect to the server using the server and authentication details. For more information, see Connecting to an MCP server from an MCP client.

Create a Model Context Protocol server

Create a Model Context Protocol (MCP) server and configure which tools it exposes to MCP clients.

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Before you begin
Role required: sn_mcp_server.admin or admin

About this task
Depending on your requirements, you can create servers that expose different tools for different use cases, such as for HR or IT workflows, or for different clients. You can also use the preconfigured Quickstart Server. For general guidelines on designing a server based on the job to be done, see the Designing your first custom ServiceNow MCP server with MCP Server Console article in the ServiceNow Community.

Only stateless and remote servers are supported. Servers must be in the same application scope as any tools that they use.

Procedure
1. Navigate to **All** > **MCP Server Console** or **Admin** > **MCP Server Console**.
2. From the Configuration tab, select **Servers**.
3. Select **Create server**.
4. On the form, fill in the fields.

Server form

Field	Description
Label	An internal name of your choice, for the server.
Name	An auto-created server name derived from the label you chose. This will be used in the URL endpoint. The server URL is created accordingly.
Application	The current application scope. **Note:** Servers must be in the same application scope as any tools that they use.
Short description	A description of the capabilities and purpose of the server.
Tools	The tools that the server exposes.

5. From the Tools section, add the tools that the server exposes.
   a. Select **Add tools**.
   b. Search for tools from the list and select the tools to expose.
   The tool must be in the same application scope as the server. If you need to create a tool, select **Create tool**. For more information, see Creating tools for a Model Context Protocol server.
   c. Select **Add**.
6. Select **Create** to make the server active.

Note: To save your changes but not make the server active yet, select **Save as draft** instead. To activate it later, you can select **Activate** from the server record or the Servers page.

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After creating the server, the Server URL field is populated with the endpoint that you use to integrate with clients: `https://<instance>.service-now.com/sncapps/mcp-server/mcp/<server-name>`.

Trouble?
If you need to turn off access to an existing server, select **Deactivate** from the server record or the Servers page.

What to do next

Configure clients to connect to the server. For more information, see Connecting to an MCP server from an MCP client.

Creating tools for a Model Context Protocol server

You can create tools from various tool categories to expose ServiceNow capabilities to Model Context Protocol (MCP) clients from MCP servers.

MCP tools overview

Tools define which functionality and data an MCP server exposes to clients and the actions that can be performed on an instance by MCP clients. You can create tools based on the following capabilities:

- Subflows
- Actions
- Knowledge Graph schemas
- REST APIs
- AI skills, including custom skills created with AI Skill Kit

Tools include inputs that correspond to the fields of the existing capability. Any inputs that are enabled for a tool are exposed to clients. Each server must include at least one tool, and tools must be in the same application scope as any servers that contain them.

When clients receive a list of available tools from a server, they rely on tool descriptions to decide whether to call a tool and how to call it. Every tool description should answer two questions: what does this tool do and when should it be called. When creating tools, particularly REST API tools, make sure the description is clear and complete, otherwise clients may select the wrong tool for the job.

Note: A tool can be used by multiple servers. Changes that you make to a tool's name, description, or enabled inputs apply to any servers that use the tool. Before editing a tool, review which servers it's associated with to determine the impact for every server.

MCP tools access

Existing access control lists (ACLs), role-based permissions, and field-level security all apply to tool calls made through an MCP server. MCP servers and tools don't bypass any ServiceNow access controls applied to the capabilities that tools are based on.

Evaluating ACL enforcement depends on who is calling a tool and which capability the tool is based on. If a caller lacks permission, tools can return an empty or incomplete result rather than an explicit authorization error so it's important to understand which type of enforcement applies to a given caller and tool type when troubleshooting unexpected results. MCP tool calls execute under one of two identities, which are evaluated differently:

Human users

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Tool calls execute under the authenticated user's own ServiceNow user identity. A user who can't read incident records in the platform can't retrieve them through an MCP tool either. All four layers of the standard access model apply: role-based access, contextual script-based ACLs, row- and field-level security, and deny-unless-permitted defaults.

Autonomous agents

Tool calls execute under the identity of the integration user account rather than any individual end user's identity. What an agent can access is controlled by the integration user's roles and by the tool-level ACLs two layers, which are evaluated independently and both must permit the call for a tool to return data:

- The integration user must hold the roles required for every tool the agent will call. Under-provisioning this account causes tool calls to fail while over-provisioning creates unnecessary risk. For more information about configuring this account, see Create an OAuth inbound integration for an MCP client.
- Tool-level ACLs control whether execution is permitted at the level of the tool itself, independent of the integration user's roles. Configuration requirements differ by tool type.

ACL requirements for MCP tools

The configuration required for tool-level enforcement depends on which capability the tool is built from.

Tool-level ACL configuration by tool type

Tool type	ACL configuration
AI skill tools	An execute ACL and role masking is required for any custom AI skill to be used as a tool. Otherwise a tool can return empty results instead of an authorization error, which can be difficult to diagnose as a permissions issue rather than a data issue. For more information, see Create a skill and Create a tool from an AI skill.
Subflow and Action tools	An AI ACL is required for any Subflow or Action to be used as an MCP tool. For more information, see Create an AI ACL for a Subflow or Action and Check the compatibility of a Subflow or Action.
Knowledge Graph tools	ACL enforcement happens at the node level during every graph traversal. Two users or agents with different permissions issuing the identical query can receive different results, based on what each caller is permitted to see. For more information, see Knowledge Graph and Create a tool from a Knowledge Graph.

Related topics

Create an AI ACL for a Subflow or Action

Check the compatibility of a Subflow or Action

Create an OAuth inbound integration for an MCP client

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Create a tool from a Subflow

Create a tool from a Subflow to expose it to Model Context Protocol (MCP) clients from an MCP Server Console.

Before you begin

Perform these steps before creating a tool from a Subflow:

- Create a Subflow in Workflow Studio using supported input and output data types. See Create a subflow in Workflow Studio to learn more.

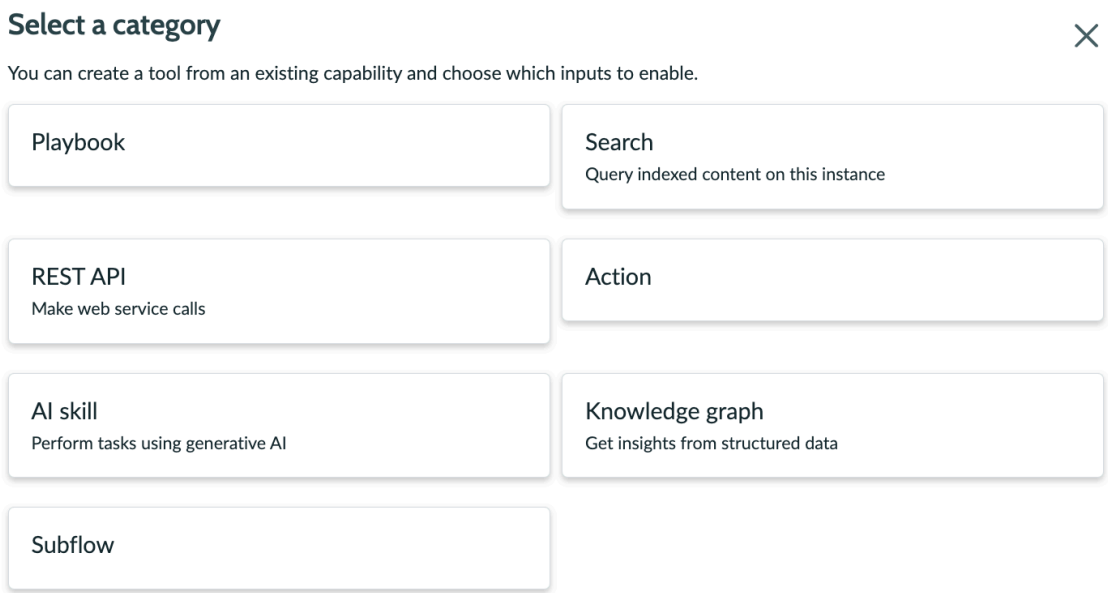
  Note: Only synchronous Subflows are supported. Subflows with wait steps, asynchronous execution, or human intervention steps can't be used as tools.

- Establish the required AI ACL (access control list) to enable external calls to the subflow. See Create an AI ACL for a Subflow or Action to learn more.
- Confirm the compatibility status in the staging table. See Check the compatibility of a Subflow or Action to learn more.

Role required: sn_mcp_server.tools_admin, sn_mcp_server.admin, or admin

Procedure

1. Select Subflow from these categories.



2. On the form, fill in the fields.

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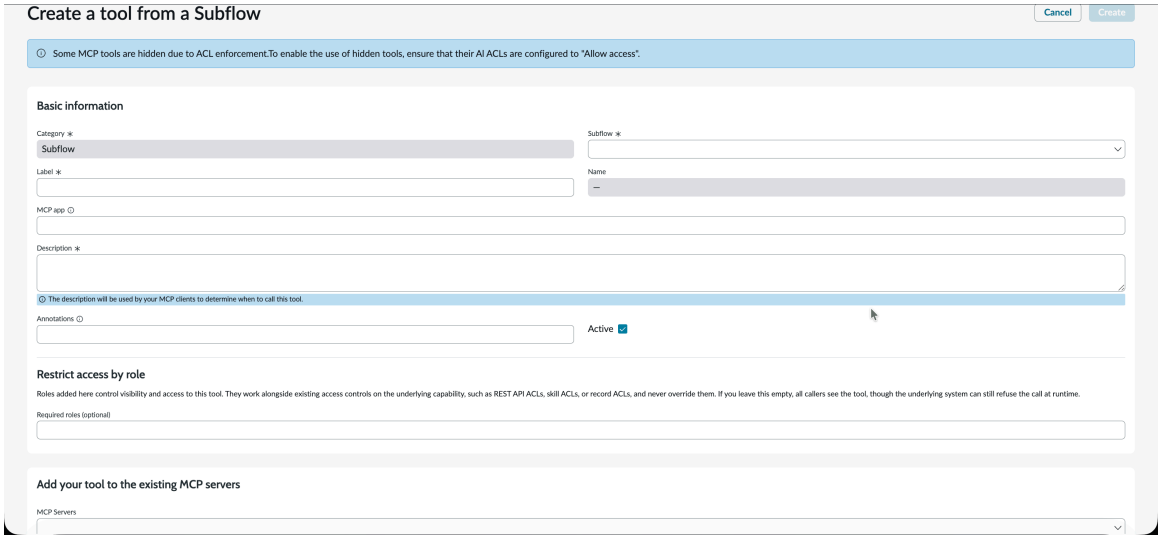

Note: The **category** is automatically populated if selected in the last modal.

Tool form

Field	Description
Subflow	Select a Subflow type from the list.
Label	An internal name for the tool.
MCP app	An active MCP app linked to this subflow.
Description	The description of what the tool intends to do. This input is exposed to AI clients and used to determine when to call this tool. **Note:** Add a specific, action-oriented description so AI clients can determine when to invoke the tool.
Annotations	Indication of the tool's behavior with MCP clients, including whether it only reads data, is idempotent, makes destructive changes or updates, or can call external links. You can also specifically combine these annotations as needed. The MCP client uses the selected annotations to categorize tools according to their behavior.
Required roles	The MCP Tools admin selects one or more roles from the User Role [sys_user_role] table to specify which roles can access and use the tool.
MCP Servers	One or more servers to add the tool to.

Note: A tool can be used by multiple servers so any changes that you make to a tool apply to all servers that use the tool. Before editing a tool, review which servers it's associated with to determine the impact for every server.

In the Tool inputs section, the fields associated with the capability are added.

3. **Optional:** Turn off inputs from the tool that you don't want to expose.

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a. In the Tool inputs section, locate the tool input.

b. From the Enabled column, select the toggle to turn off the input.

Note: Some tool inputs are required and can't be turned off.

4. Select **Create**.

What to do next

Invoke the tool using an MCP client and verify that it works as expected. Launch MCP client to test end-to-end execution. For more information, see Connecting to an MCP server from an MCP client.

Create a tool from an Action

Create a tool from an Action to expose it to Model Context Protocol (MCP) clients from an MCP Server.

Before you begin

Perform these steps before creating a tool from an Action:

1. Create an Action in Workflow Studio using supported input and output data types. See Create an action in Workflow Studio to learn more.

   Note: Only synchronous actions are supported. Actions with wait steps, asynchronous execution, or human intervention steps can't be used as tools.

2. Establish the requisite AI Access Control List (ACL) to facilitate external invocation of the component. See Create an AI ACL for a Subflow or Action to learn more.
3. Confirm the compatibility status in the staging table. See Check the compatibility of a Subflow or Action to learn more.

Role required: sn_mcp_server.tools_admin, sn_mcp_server.admin, or admin

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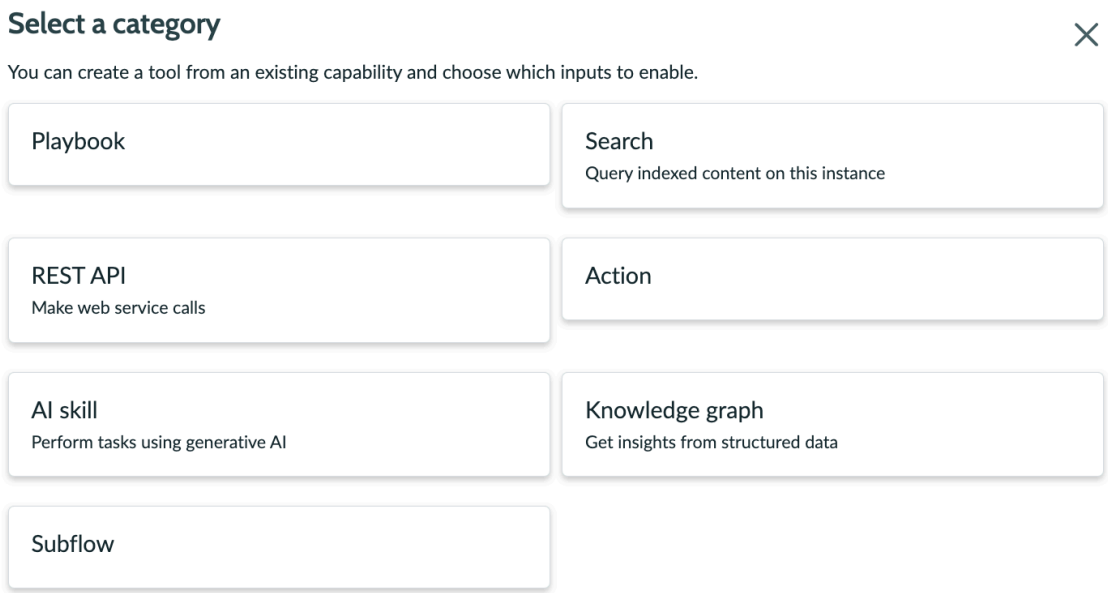
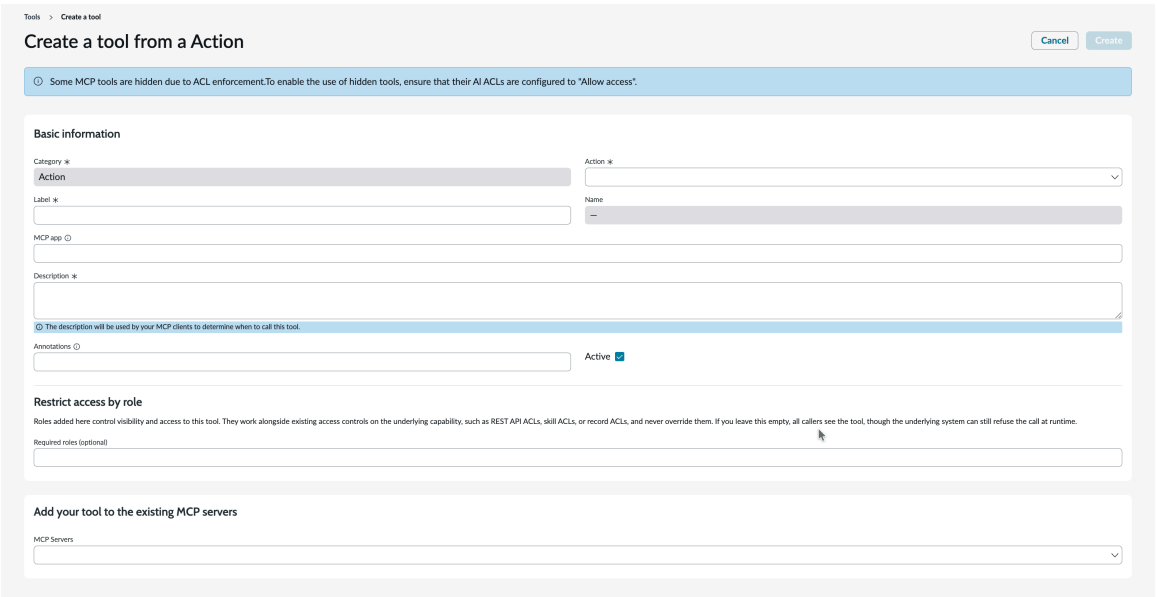
Procedure

1. Select Action from these categories.



2. On the form, fill in the fields.



Note: The **category** is auto-populated if selected in the last modal.

Tool form

Field	Description
Action	Select an Action type from the list.
Label	An internal name for the tool.
MCP app	An active MCP app linked to this action.

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Field	Description
Description	The description of what the tool intends to do. This input is exposed to AI clients and used to determine when to call this tool. **Note:** Admins must add specific and action-oriented description as the AI clients access it to decide when to invoke the tool.
Annotations	Indication of the tool's behavior with MCP clients, including whether it only reads data, is idempotent, makes destructive changes or updates, or can call external links. You can also specifically combine these annotations as needed. The MCP client will use the selected annotations to categorise tools according to their behavior.
Required roles	The MCP Tools admin selects one or more roles from the User Role [sys_user_role] table to specify which roles can access and use the tool.
MCP Servers	One or more servers you want to add your tool to.

Note: A tool can be used by multiple servers so any changes that you make to a tool apply to all servers that use the tool. Before editing a tool, review which servers it's associated with to determine the impact for every server.

In the Tool inputs section, the fields associated with the capability are added.

3. **Optional:** Turn off inputs from the tool that you don't want to expose.
   a. In the Tool inputs section, locate the tool input.
   b. From the Enabled column, select the toggle to turn off the input.

      Note: Some tool inputs are required and can't be turned off.

4. Select **Create**.

What to do next

Invoke the tool via Claude or an alternative MCP client and verify that it functions as intended with the tool you registered. Launch MCP client to test end-to-end execution. For more information, see Connecting to an MCP server from an MCP client.

Create a tool from a Knowledge Graph

Create a tool from a Knowledge Graph to expose it to Model Context Protocol (MCP) clients from an MCP Server.

Before you begin

Role required: sn_mcp_server.tools_admin, sn_mcp_server.admin, or admin

About this task

Knowledge Graph provides agents with accurate, relationship-aware access to live instance data. This enables more precise, context-aware responses in every workflow by directly querying

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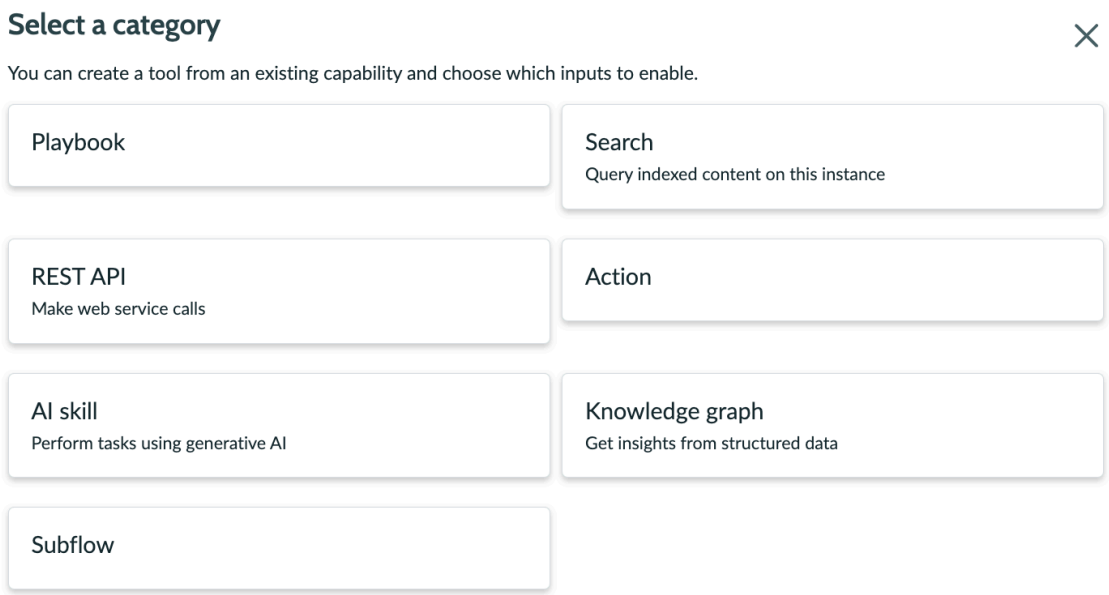
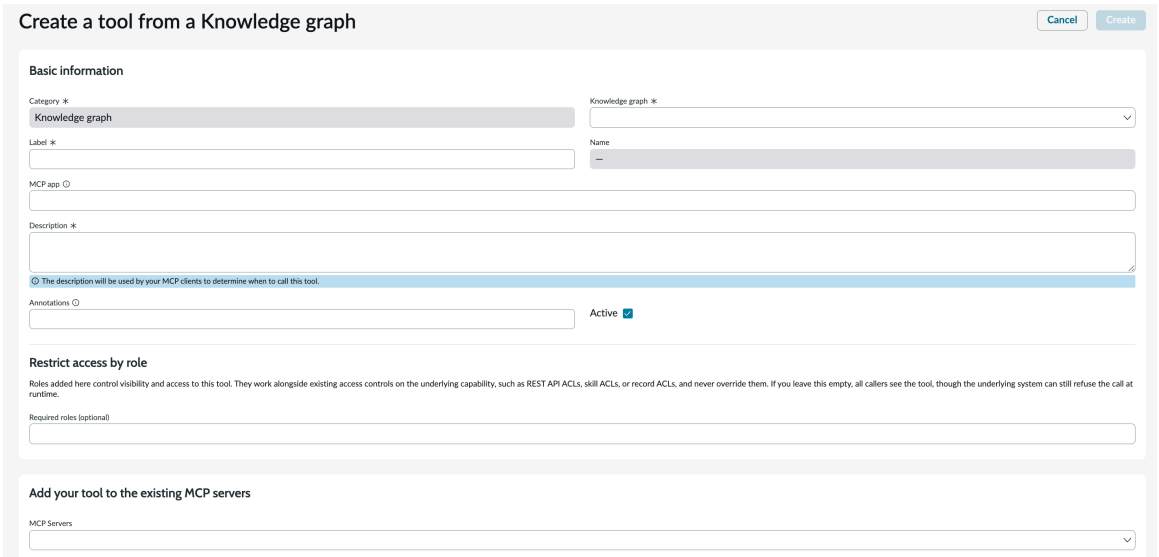
relationships. Some Knowledge Graph schemas are available by default when creating a tool. For more information, see Knowledge Graph schema support in MCP Server Console. To learn about creating Knowledge Graph schemas, see Exploring Knowledge Graph.

Procedure

1. Select Knowledge Graph from these categories.



2. On the form, fill in the fields.



Note: The **category** is auto-populated if selected in the last modal.

Tool form

Field	Description
Knowledge Graph	Select a Knowledge Graph type from the list. You can either choose Enterprise Graph or one of the custom graphs.
Label	An internal name for the tool.

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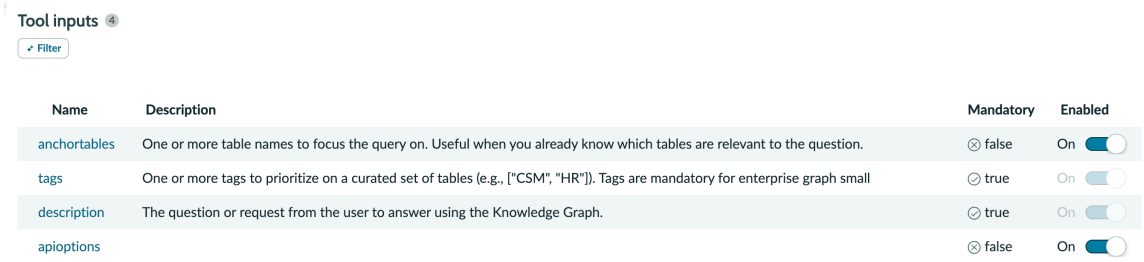
Field	Description
MCP app	An active MCP app linked to this knowledge graph tool.
Description	The description of what the tool intends to do. This input is exposed to AI clients and used to determine when to call this tool. **Note:** Admins must add specific and action-oriented description as the AI clients access it to decide when to invoke the tool.
Annotations	Indication of the tool's behavior with MCP clients. 'Read Only' is the default annotation or tool behavior Knowledge Graph. The MCP client will use the selected annotations to categorise tools according to their behavior.
Required roles	The MCP Tools admin selects one or more roles from the User Role [sys_user_role] table to specify which roles can access and use the tool.
MCP Servers	One or more servers you want to add your tool to.

Note: A tool can be used by multiple servers so any changes that you make to a tool apply to all servers that use the tool. Before editing a tool, review which servers it's associated with to determine the impact for every server.

In the Tool inputs section, the fields associated with the capability are added.



- anchortables: Use one or more table names to make your query more specific when you select Enterprise Graph or Enterprise Graph (small). This is helpful when you know which tables are relevant to your question. This is an optional field.
- tags: Include one or more tags to prioritize a specific group of tables. For example, you can use tags like 'CSM', 'HR'. These tags are required for the Enterprise Graph and Enterprise Graph (small) though they are only mandatory for the latter. See Create Knowledge Graph tag for details on creating Knowledge Graph tags.
- description: Your query or request that will use Knowledge Graph.
- apioptions: Manually enter the JSON object as a collection of key-value pairs. It configures how to run queries and organizes the response:

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API option type and purpose

Option	Type	Default	Purpose
`resultLimit`	Number	10	Control how many records are returned in the response
`getEncodedQuery`	Boolean	false	Include a ServiceNow encoded query per table — useful for navigating to matching records in the UI
`getStatusMessages`	Boolean	false	Include a `meta` field with messages about result truncation and execution errors
`showColumnProperties`	Boolean	false	Include metadata for each column (table name, display value, sys_id) alongside the raw value
`groupByTable`	Boolean	false	Group result columns by their source table name — results structured as `{ tableName: { columnName: value } }`
`getExplanation`	Boolean	false	Include an explanation of the query — the tables, relationships, etc. to get the results

3. **Optional:** Turn off inputs from the tool that you don't want to expose.

   a. In the Tool inputs section, locate the tool input.

   b. From the Enabled column, select the toggle to turn off the input.

   Note: Some tool inputs are required and can't be turned off.

4. Select **Create**.

What to do next

Configure clients to connect to the server and use the tool. For more information, see Connecting to an MCP server from an MCP client.

Create a tool from a REST API

Use a REST API to create a tool and expose it to Model Context Protocol (MCP Server Console) clients from an MCP Server Console.

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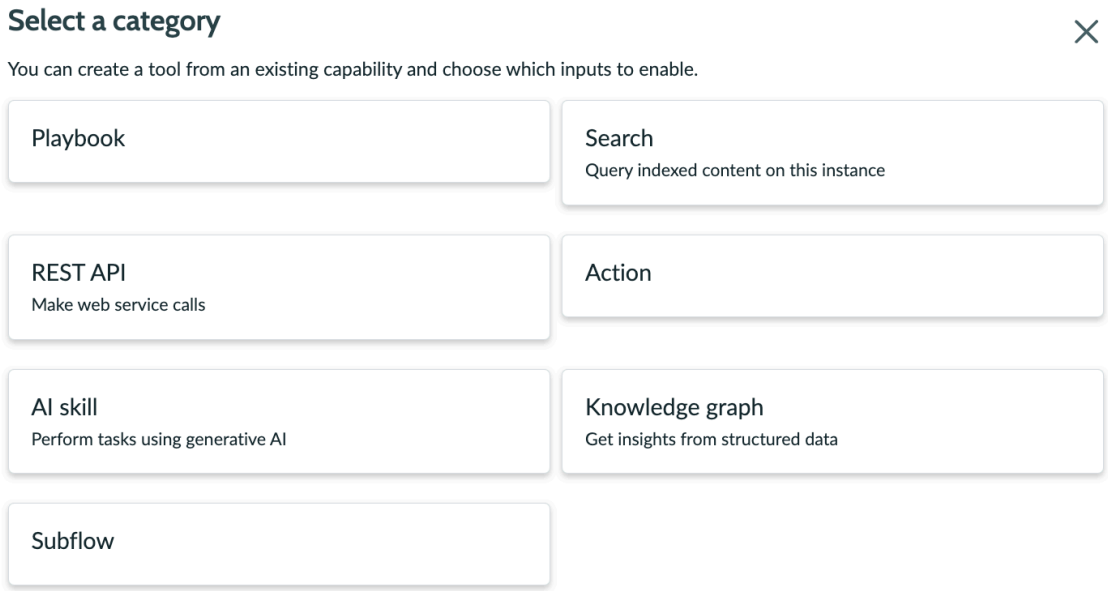
Before you begin

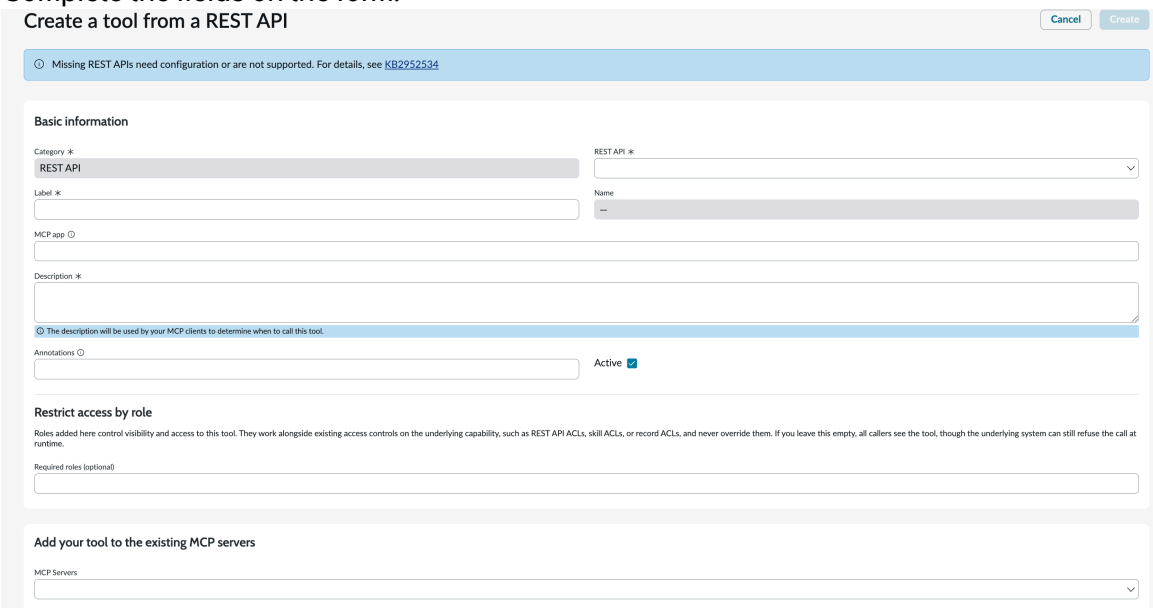
Role required: sn_mcp_server.tools_admin, sn_mcp_server.admin, or admin

Procedure

1. Select REST API from these categories.



2. Complete the fields on the form.



Note: The **Category** is auto-populated if selected in the previous dialog.

Tool form

Field	Description
REST API	REST API type for the tool.
Label	An internal name for the tool.

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Field	Description
MCP app	An active MCP app linked to this REST API.
Description	The description of what the tool does. This input is exposed to AI clients and used to determine when to call this tool. **Note:** Add a specific, action-oriented description. AI clients use it to decide when to invoke the tool. Client requests to Scripted REST API tools must include the inputs required by the API. The tool description must clearly state which inputs are required and what format they should be in so clients know exactly what to include in their request. For example, a well-written tool description could say: "Returns all open incidents assigned to a specified assignment group within a given date range. Requires: assignment_group (string, the exact group name), start_date (string, format YYYY-MM-DD), end_date (string, format YYYY-MM-DD)." The calling agent uses this description to determine what to collect from the user before invoking the tool.
Annotations	Indication of the tool's behavior with MCP clients, including whether it only reads data, is idempotent, makes destructive changes or updates, or can call external links. You can also specifically combine these annotations as needed. The MCP client will use the selected annotations to categorize tools according to their behavior.
Required roles	One or more roles from the sys_user_role [sys_user_role] table that control access to the tool.
MCP Servers	One or more servers to add the tool to.

Note: A tool can be used by multiple servers so any changes that you make to a tool apply to all servers that use the tool. Before editing a tool, review which servers it's associated with to determine the impact for every server.

In the Tool inputs section, the fields associated with the capability are added.

3. **Optional:** Turn off inputs from the tool that you don't want to expose.

   a. In the Tool inputs section, locate the tool input.

   b. From the Enabled column, select the toggle to turn off the input.

      Note: Some tool inputs are required and can't be turned off.

4. Select **Create**.

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What to do next

Configure clients to connect to the server and use the tool. For more information, see Connecting to an MCP server from an MCP client.

Note: When calling a Scripted REST API tool from a client, you must provide inputs in your request. If a required parameter, such as a record number, a date range, or a filter value, is not present in the request, the tool cannot complete the task.

Related topics

Create a scripted REST API resource

Create a tool from an AI skill

Create a tool from a generative AI skill to expose it to Model Context Protocol (MCP) clients from an MCP Server.

Before you begin

Role required: sn_mcp_server.tools_admin, sn_mcp_server.admin, or admin

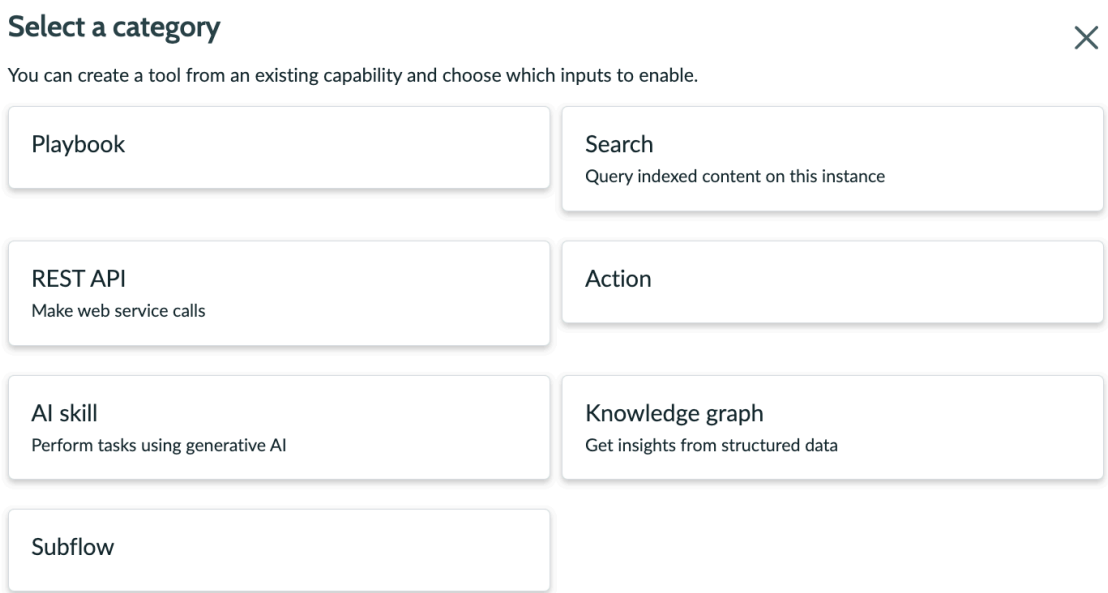
About this task

Prebuilt and custom AI skills are organized as governed MCP tools, enabling seamless discovery and accessibility for any standards-conforming MCP client. This structure enhances usability and encourages effective integration of these skills across various platforms. See AI skill support in MCP Server Console to learn about the pre-configured AI skills.

Note: Only AI skills that don't rely on internal information as inputs, such as sys_ids, are available to be created as tools. For more information about why a skill might not be available for creation as a tool, see the AI Skill Eligibility Criteria for MCP Tool Integration [KB2952564] article in the Now Support Knowledge Base.

Procedure

1. Select AI skill from these categories.



2. On the form, fill in the fields.

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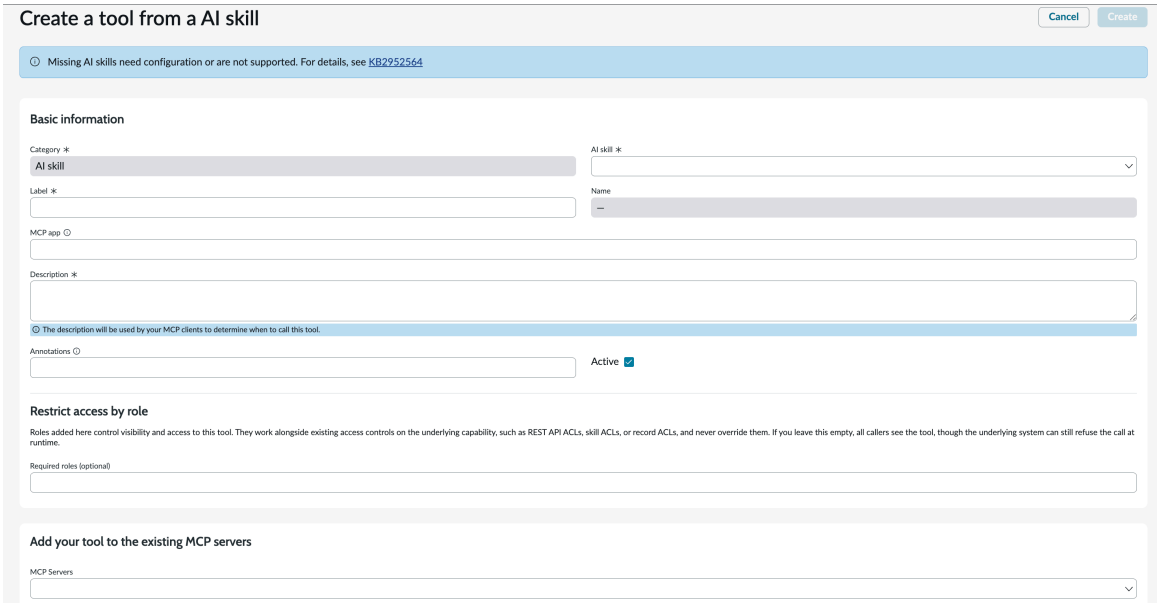

Note: The **category** is auto-populated if selected in the last modal.

Tool form

Field	Description
AI skill	Select an AI skill type from the list.
Label	An internal name for the tool.
MCP app	An active MCP app linked to this tool.
Description	The description of what the tool intends to do. This input is exposed to AI clients and used to determine when to call this tool. **Note:** Admins must add specific and action-oriented description as the AI clients access it to decide when to invoke the tool.
Annotations	Indication of the tool's behavior with MCP clients, including whether it only reads data, is idempotent, makes destructive changes or updates, or can call external links. You can also specifically combine these annotations as needed. The MCP client will use the selected annotations to categorize tools according to their behavior.
Required roles	The MCP Tools admin selects one or more roles from the User Role [sys_user_role] table to specify which roles can access and use the tool.
MCP Servers	One or more servers you want to add your tool to.

Note: A tool can be used by multiple servers so any changes that you make to a tool apply to all servers that use the tool. Before editing a tool, review which servers it's associated with to determine the impact for every server.

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In the Tool inputs section, the fields associated with the capability are added.

3. **Optional:** Turn off inputs from the tool that you don't want to expose.

   a. In the Tool inputs section, locate the tool input.

   b. From the Enabled column, select the toggle to turn off the input.

      Note: Some tool inputs are required and can't be turned off.

4. Select **Create**.

Trouble?

Note: If you add inputs to a Now Assist skill definition after a tool has been created for the skill, you must create another tool to include the additional inputs and replace the existing tool.

What to do next

Configure clients to connect to the server and use the tool. For more information, see Connecting to an MCP server from an MCP client.

Create an MCP app

Build, register, and display user interfaces along with your tool's logic with MCP apps. This allows you to implement and manage interactive interfaces for your tools that can be displayed by MCP clients.

Before you begin

Role required: sn_mcp_server.tools_admin (for configuration)

About this task

Create an MCP app and enable MCP tools to deliver interactive user interfaces to hosts. It defines how tools declare UI resources, that hosts render securely in iframes, and how the two communicate.

Create apps as a pre-step before MCP tools creations, so that you can choose one of the created apps while configuring the tool.

Note: The minimum version required is: Zurich patch 11 and Australia patch 4.

Procedure

1. Navigate to **All** > **MCP Server Console**.
2. From the Configuration tab, select **Apps**.
3. View the tools created from various categories, and their associated attributes.
4. Select **Create app**.

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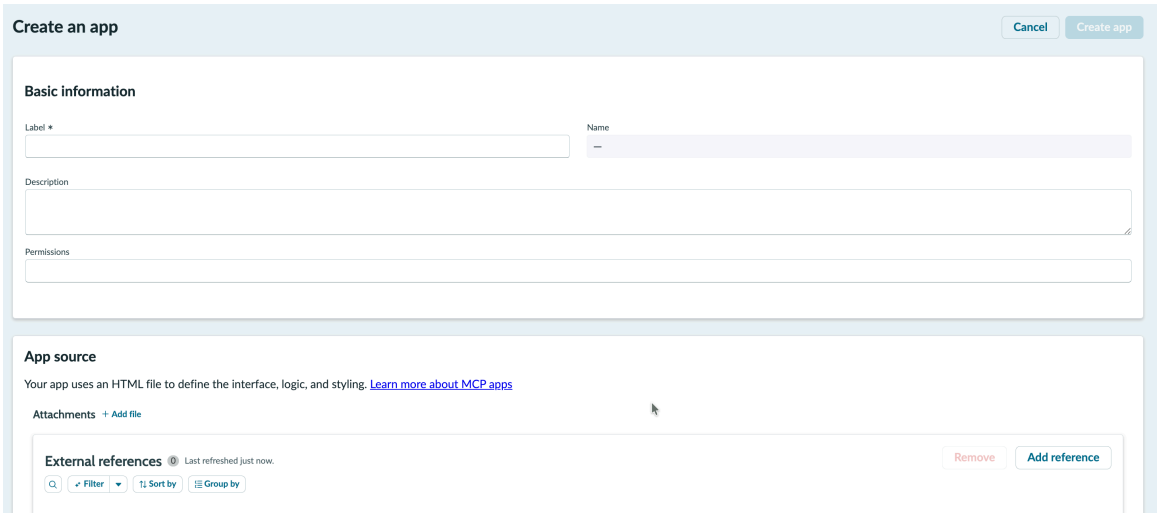

Apps form

Field	Description
Label	An internal name for the app.
Name	The name of the app generated automatically based on the label you enter.
Description	The description of what the app intends to do. This input is exposed to AI clients and used to determine when to use this app. **Note:** Admins must add specific and action-oriented description as the AI clients access it to decide when to call the app.
Permissions	Access granted to different browsers and devices needed to create the app. The options are microphone, camera, geolocation and clipboard.

5. Select **Add reference** to add references to the HTML files that will be used to style, script or define the logic your app.
6. Add details in the form:

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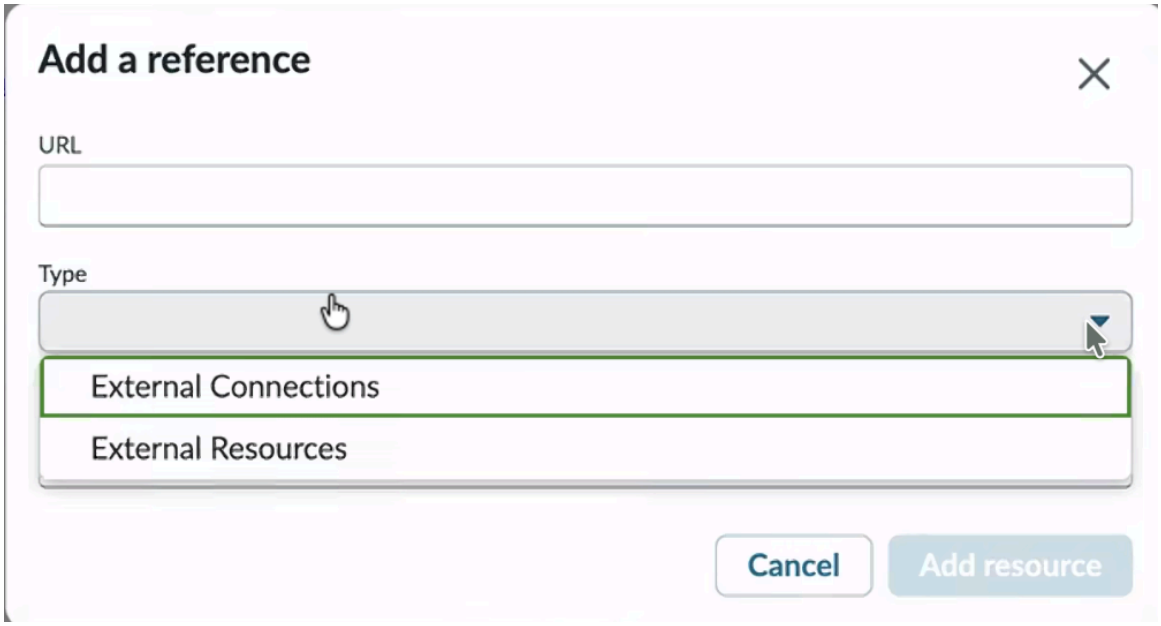

a. Declare the link to the external connection or resources to be referred.

b. Select **Type** of the reference.

c. Add link to the **Library**.

7. Add link to the HTML file containing the interactive interface in 'Attachments'.
   See https://apps.extensions.modelcontextprotocol.io/api/documents/csp-and-cors.html to learn more.

What to do next

Create an MCP tool and add one of these apps, created to render an interactive user experience displayed by the MCP client.

Monitoring dashboard

Explore MCP Server monitoring dashboard to review the performance and usage of the MCP servers and tools in a specific time frame.

Before you begin

Role required: sn_mcp_server.viewer

About this task

Review the successes, failures, throttling incidents, and denial events associated with servers and tools for the specified time period. This enables a detailed understanding of performance metrics and issues encountered.

Procedure

1. Navigate to **Admin** > **MCP Server Console** > **Configuration** > **Monitoring**.
2. Track the tools call volume and outcomes across your MCP servers.
3. Choose to view the tools or server data.
4. View the findings sorted by each tool used or by each server involved.
   - Calls: Number of times the tool/server call was attempted
   - Success: Number of times the tool/server was successively called

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- Failed: Number of times the tool/server call failed. This count includes throttled, denied, and other failed calls
- Success rate: Percentage of successful tool/server calls
- Throttled: Number of calls that failed as they were over the call limit set by the platform or the server
- Denied: Calls denied due to authorization or policy

5. You can also turn on the **Show per-server details** to sort and view server-wise tools data.

Create an AI ACL for a Subflow or Action

Create the necessary AI Access Control List (ACL) for the component to be called externally.

Before you begin
Role required: admin

About this task
AI ACLs are required for any Subflow or Action to be used as an MCP tool. An AI ACL is essential for ensuring security compatibility of the component, regardless of data types or execution logic. This approach embraces a proactive deny-by-default model. For more information, see the Understanding invoke_from_ai ACL in ServiceNow article in the ServiceNow Community.

Procedure

1. Navigate to navigation filter and enter **Access Control List**.
2. Select **New**.
3. Set the **type** to flow_action.
4. Set the **Operation** to 'Invoked from AI'.
   This is the critical distinction. A standard record ACL will not work.
5. In the **Name**, paste the component's internal name (scope-qualified, e.g., global.get_flow_description).

   You can find this by publishing the component first, then, checking the three-dot menu or the staging table.
6. Under **Requires Role**, add sn_mcp_server.admin (or the appropriate role for the MCP server user).
7. Submit the ACL.
   Confirm that a record-type ACL isn't created in error, instead of an AI ACL (invoked from AI operation). If the staging table still shows security_compatible = false after publishing, verify the ACL type.

Check the compatibility of a Subflow or Action

After establishing the ACL, publish the component and check the compatibility staging table.

Before you begin
Role required: admin

Procedure

1. Go to Workflow Studio and publish the Subflow.
   You can also run a full compatibility scan via the scheduled job.
2. Open the compatibility staging table for the relevant Subflow.

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3. Locate your component by name or sort by updated date.
4. Verify all the three compatibility columns: security_compatible = true, data_compatible = true, execution_compatible = true.
   The overall status should read as compatible. If security_compatible is false, the other columns will show N/A (not applicable). The system uses a fail-fast approach, fix security first, then re-check.
5. Republish the component after making ACL changes for re-evaluation.
   Once marked as compatible, the component can be added to an MCP server as a tool.

What to do next

Subflows must be activated for AI use in Flow Designer to be available as MCP tools. Open the subflow, go to Manage Security, enable Callable by Client API, and add a Client Callable Flow Object ACL with execute permission. Skipping this step will prevent the subflow from appearing in the tool creation list.

Connecting to an MCP server from an MCP client

Connect to a Model Context Protocol (MCP) server from an MCP client by creating an OAuth inbound integration and configuring the client with the server details.

With the Quickstart Server or after creating a server, you can complete the following steps to connect to a server from a client:

1. Create an OAuth inbound integration for an MCP client or Integrate with a third-party identity provider
2. Configure an MCP client to connect to an MCP server

The process to configure a client to connect to a server is dependent on the client used. For more information, refer to the documentation for your AI application and client.

Create an OAuth inbound integration for an MCP client

Secure access to Model Context Protocol (MCP) servers on an instance by creating an OAuth inbound integration for each MCP client.

Before you begin

Role required: oauth_admin, mi_admin, admin

About this task

For each client that you want to access servers on an instance, create an OAuth inbound integration in Machine Identity Console. To create the OAuth integration, you need a redirect URL from the client. For more information, refer to the documentation for your AI application and client.

Procedure

1. Navigate to **All** > **MCP Server Console**.
2. From the Configuration tab, select **Servers**.
3. From the OAuth setup required banner, select **Set up OAuth**.
   Alternatively, you can navigate to **All** > **Machine Identity Console** and select the **Inbound integrations** tab.

> **Note:** In the list of existing inbound integrations, you might see integrations created with the same names as servers (including underscores). These are integrations for monitoring servers from AI Control Tower and shouldn't be used to integrate with clients.

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4. Select **New integration**.
5. Select **OAuth - Authorization code grant**.
6. On the form, fill in the required fields.
   For more information about this form, see Configure an OAuth authorization code grant.

Inbound integration form

Field	Value
Details section	
Name	Enter a name for the OAuth integration.
Redirect URLs	Enter the redirect URL for a client. The authorization code is sent to this URL after authentication. To get the redirect URL, refer to the documentation for your AI application and client. To connect to the ServiceNow MCP client on another instance, use the following redirect URL: `https://<client-instance>.service-now.com/oauth_redirect.do`. For more information, see the Model Context Protocol Client documentation.
Auth scope section	
Allow access only to APIs in selected scope	Clear the check box to make the OAuth integration broadly scoped. **Important:** You must leave this option cleared. If you select this option, clients are unable to fetch tools from the server.
Advanced options section	
Token Format	Select **JWT**.

7. Select **Save**.

Note: If you're prompted to assign an auth scope, select **Skip for now**.

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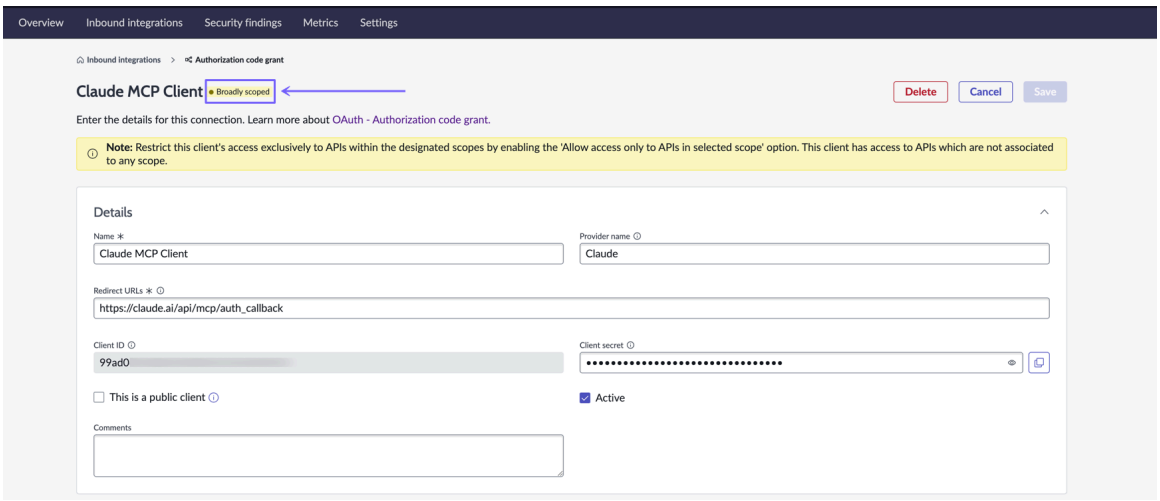
The OAuth inbound integration is created as broadly scoped with a client ID and client secret that you use when configuring the client to connect to servers on the instance.



What to do next

Configure the client to use the client ID and client secret to authenticate with servers on the instance. For more information, see Configure an MCP client to connect to an MCP server.

Create client authorizations

Establish connections between your MCP clients and servers with client authorizations.

Before you begin

Role required: sn_mcp_server.admin (create); sn_mcp_server.viewer (to view)

About this task

Explore an alternate way of OAth creation with Client Authorization option within the left navigation of MCP Server Console. The process of creating an MCP Server by integrating OAuth Client registration directly within the MCP Server Console is streamlined. This feature eliminates the need to switch between different consoles. You don't have to leave the Machine Identity Console to register an OAuth Client, manually copy secrets and return to complete the MCP Client setup.

The the OAuth fields are auto-populated, generating the Client ID and Secret without the need for navigation, and providing a one-time Connection Summary that displays the necessary credentials.

Procedure

1. Navigate to **All** > **MCP Server Console** > **Servers**.
2. You can also navigate to **Admin** > **MCP Server Console** > **Servers**.
3. Select **Client authorization** on the left navigation.
4. Review all the authorization details that you will need, to integrate the MCP client. See Configure an MCP client to connect to an MCP server to details on these URLs.
   - Authorization URL
   - Token URL
   - Refresh URL
   - Host URL
5. Select **Create integration**.

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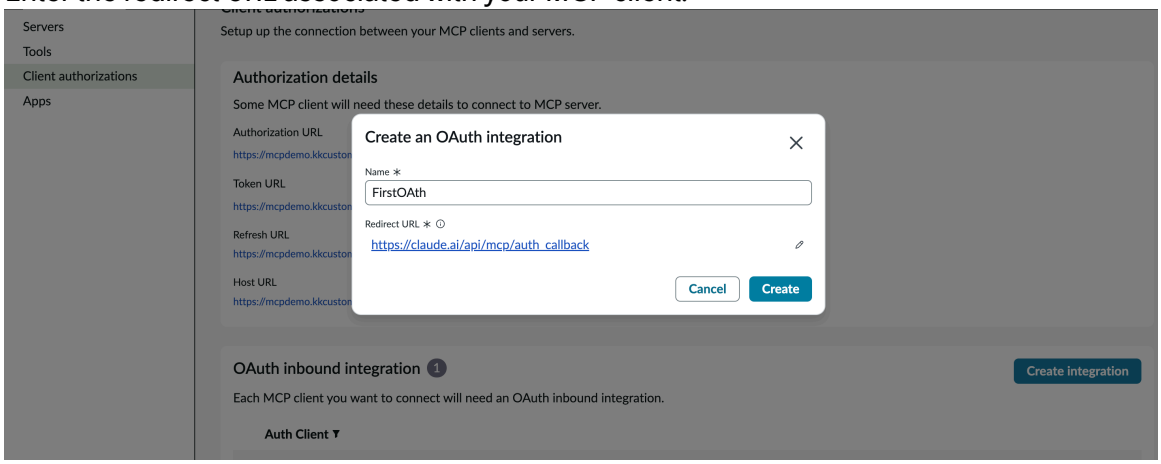
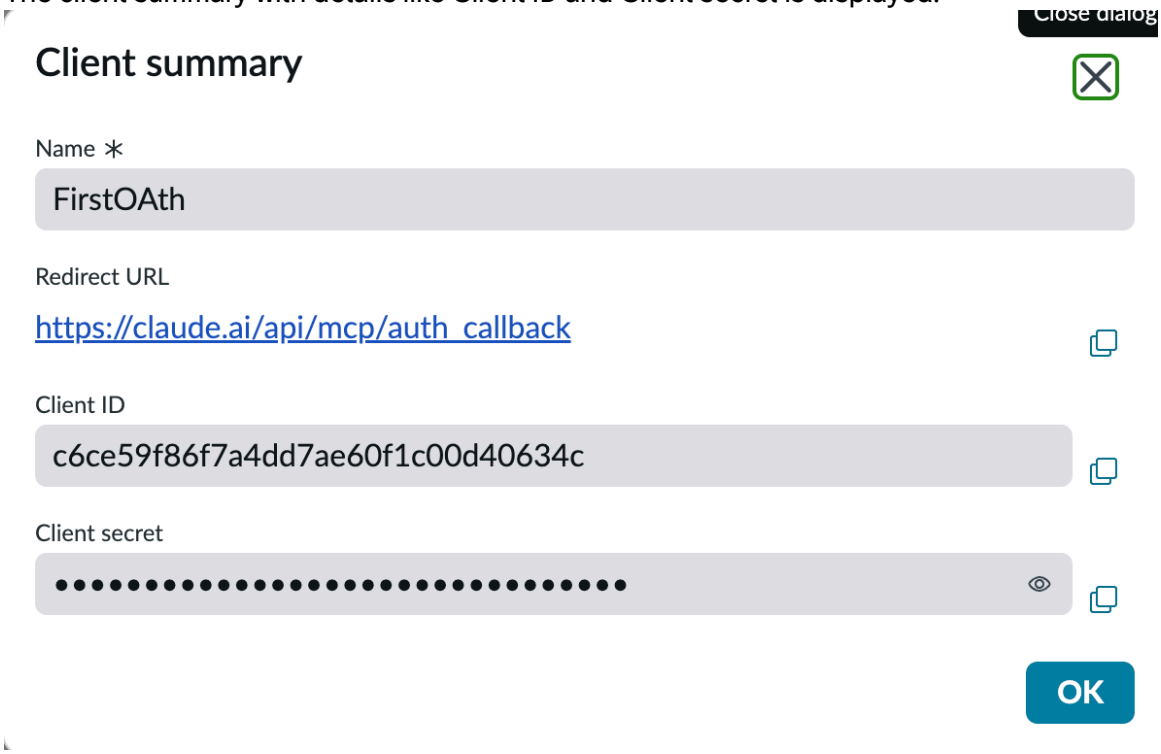
6. Enter a name for the OAuth integration you create.
7. Enter the redirect URL associated with your MCP client.



8. Select **Create**.
9. Select the authorization client you created.
   The client summary with details like Client ID and Client secret is displayed.



10. Copy the Client ID, Client Secret, Redirect URL, and connection URLs using the copy options.
11. Enter these details on the MCP client's OAuth configuration.
    MCP Server and Client connection is established with client authorization.

What to do next

Configure the MCP Client to connect to MCP Server. See Configure an MCP client to connect to an MCP server.

Integrating MCP server with third-party identity providers

Configure the ServiceNow® Model Context Protocol (MCP) server to authenticate users through a third-party identity provider (IDP).

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When you integrate a third-party IDP with an MCP server, users authenticate through the external IDP instead of ServiceNow's native authentication. This process involves three phases:

1. ServiceNow (Glide) configuration
2. Third-part IDP setup
3. Integration and testing

The first phase is ServiceNow (Glide) configuration that involves setting up the necessary tables and mappings within your ServiceNow instance. This has three steps:

1. Configure the OIDC provider
2. Create the MCP server
3. Map the resource to the IDP

The second phase is Third-party IDP setup that involves setting up the application and authorization server within the IDP. This has three steps:

1. Account setup
2. Create an app integration
3. Configure the authorization server

The final phase is Integration and testing that involves connecting the MCP client (such as Claude Desktop) to the configured systems. This involves three steps:

1. Connect to the MCP client
2. Authenticate
3. Verify tool calls

Related topics

Integrate and test IDP with MCP server

ServiceNow(Glide) configuration for IDP

ServiceNow(Glide) configuration for IDP

This process involves setting up the necessary tables and mappings within your ServiceNow instance. This includes configuring ServiceNow, creating the MCP server, and connecting the MCP client.

Before you begin
Role required: admin

Important: The minimum version required is Australia patch 3 or Zurich patch 10. Microsoft Entra is supported in Australia patch 4 or Zurich patch 11 onwards.

Procedure
Configure the OIDC provider

Note: Okta is used as the use case to guide you through the steps.

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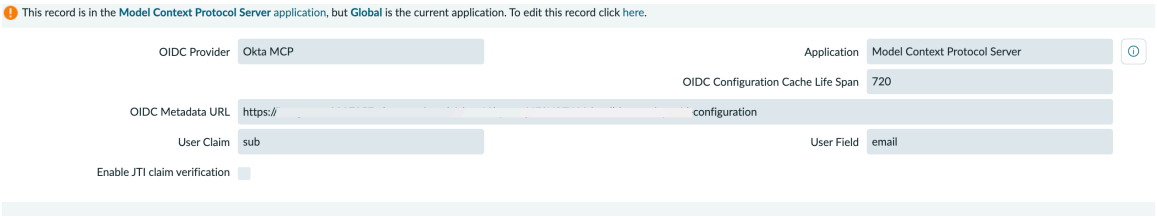


1. Navigate to the **oidc_provider_configuration** table and select **New**.
2. Enter a **Name** for the OIDC provider.

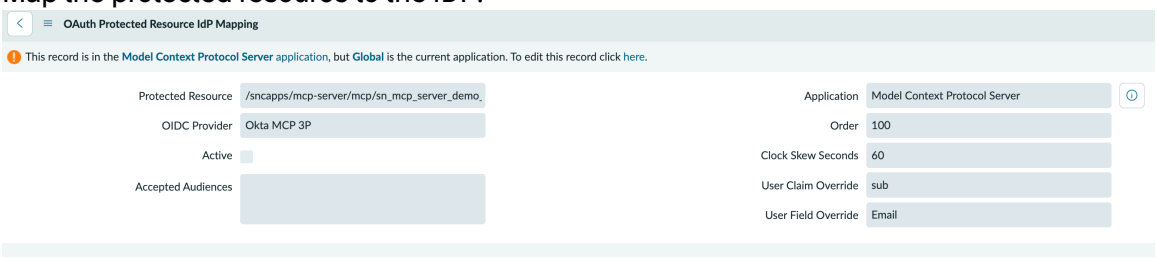
   Example
   For example, `Okta MCP Third Party`.
3. Set the **Cache Configuration Lifespan**.
   The maximum value is 720 hours.
4. Enter the IDP metadata URL into the **Metadata URL** field.
5. In the **User Field**, select **email**.
   This maps the user claim from the IDP token to the `email` field in the `sys_user` table.
6. Let **Enable JT1 claim verification** option remain unchecked.
   Enabling the JSON Web Token Identifier (JTI) would require the MCP client to reauthenticate with every request. Therefore, disabling the JTI check in the OIDC provider configuration is recommended for MCP third-party integrations. This is because the client reuses the same token for tool calls until it expires.
7. Select **Submit**.

Create the MCP server

8. Navigate to the MCP server console and select **Create Server**.
9. Enter a name for the server and add the required tools.

   Example
   For example, `MCP with Third Party IDP`.
   After you create the server, automatically generates an entry in the **oauth_protected_resource** table and populates it with the list of APIs allowed for that server.

Map the protected resource to the IDP:



10. Navigate to the **oauth_protected_resource_idp_mapping** table and select **New**.
11. In the **Protected Resource** field, select the resource that was created for your MCP server.

    Example
    If your MCP server name is `sn_mcp_server_default`, the protected resource path is `/sncapps/mcp-server/mcp/sn_mcp_server_default`.
12. In the **OIDC Provider** field, select the OIDC provider configuration you created earlier.

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a. For Microsoft Entra integrations only, configure the **Accepted Audiences** field in the `oauth_protected_resource_idp_mapping` table with the Entra Application ID URI (for example, api://<Application-ID>.
This allows ServiceNow to accept Entra-issued access tokens whose audience claim matches the configured Application ID URI.

13. Select **Submit**.

Result
Your MCP server is now configured to authenticate users through the third-party IDP. Users who connect an MCP client to this server are redirected to the related IDP to authenticate.

What to do next

1. Configure and set up the third-party IDP. This process involves setting up the application and authorization server within the third-party IDP setup. This document uses Okta as the use case, however, Microsoft Entra is also recommended.
2. Integrate and test from your MCP Client.

Integrate and test IDP with MCP server

This phase within integration of MCP server with IDP involves connecting the MCP client (such as Claude Desktop) to the configured systems.

Before you begin
Role required: admin

Procedure
Connect the MCP client

1. Navigate to your MCP client and go to **Manage Connectors** > **Add a custom connector**.

   Example
   For example, open Claude Desktop.
2. Enter the **Remote MCP Server URL** from your ServiceNow MCP server console.
3. Enter the **Client ID** and **Client Secret** from your third-party IDP application configuration.

Authenticate

4. Select **Connect** and authenticate with your third-party IDP credentials.
   You're redirected to the IDP login page. Enter your credentials and verify.

Verify tool calls

5. Test your tool calls to verify the connection is working correctly.

Result
Your MCP server is now configured to authenticate users through the third-party IDP. Users who connect an MCP client to this server are redirected to the IDP to authenticate.

Configure an MCP client to connect to an MCP server

Configure a Model Context Protocol (MCP) client to connect to an MCP server and prompt the server to perform a task.

Before you begin
Role required: sn_mcp_server.viewer

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About this task

The process to configure a client to connect to a server is dependent on the client used. The following procedure is a high-level overview of the workflow to configure a client to call a server. For more information, refer to the documentation for your AI application and client. For an example that demonstrates how to connect from a server on one instance to the ServiceNow Model Context Protocol Client on another instance, see the example following this procedure.

Note:

- MCP Server Console supports the Streamable HTTP transport. By default, tool calls return a single JSON response. Server-Sent Events (SSE) are optionally available for streaming response types. Stdio is not supported.
- The MCP rate limit is not configurable currently, and adjusting the rate limit requires a service restart. Contact your ServiceNow representative to learn more.

Procedure

1. Configure a client with the required server details as determined by the client.

Server details for MCP client configuration

Server details	Value
Server URL	`https://<server-instance>.service-now.com/sncapps/mcp-server/mcp/<server-name>` To connect to the preconfigured Quickstart Server, use `https://<server-instance>.service-now.com/sncapps/mcp-server/mcp/sn_mcp_server_default`.
Host	`<server-instance>.service-now.com`
Base URL	`/sncapps/mcp-server`
Scope	mcp_server
Authentication type	OAuth 2.0
Identity Provider	Generic OAuth 2
Authorization URL	`https://<server-instance>.service-now.com/oauth_auth.do`
Access Token URL	`https://<server-instance>.service-now.com/oauth_token.do`
Token Revocation URL	`https://<server-instance>.service-now.com/oauth_revoke.do`
Refresh Token URL	`https://<server-instance>.service-now.com/oauth_auth.do`
Redirect or Callback URL	`https://<server-instance>.service-now.com/oauth/callback`
Client ID	The client ID from the OAuth inbound integration on the server instance.

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Server details	Value
	Note: For clients that support Client ID Metadata Document (CIMD) authentication, you can register a CIMD client and provide a CIMD URL instead of a client ID. For more information, see Configure a CIMD client
Client secret	The client secret from the OAuth inbound integration on the server instance. If you use CIMD authentication, you don't need to provide a client secret.

After configuring these details, the client calls the server with the `Authorization: Bearer <token>` header. If the token is validated by the server, the client receives the list of tools available for use.

2. From the client, you can view the list of tools available to determine how to prompt the server.
3. Enter a prompt for the information you need or for the tool to perform an action on the instance.

   For example, if the Look up Incident Records tool is available, you could enter "Get all open incidents". With the Case summarization tool, you could enter "Summarize all cases closed this week".

   Note: When calling a Scripted REST API tool from a client, you must provide inputs in your request. If a required parameter, such as a record number, a date range, or a filter value, is not present in the request, the tool will not be able to complete the task.

   The server runs the relevant tools and returns the result to the client as JSON data. The client presents the response as formatted text.

Important: The MCP service limits the size of tool call payloads. If a request payload from the MCP client exceeds 26 KB, the MCP service returns an error stating that the request payload is too big. If a response payload exceeds 64 KB, the MCP service returns an error stating that the response payload is too big. The minimum version for this restriction is Brail patch 1, Australia patch 7 and Zurich patch 13.

Trouble?

Note: If you don't receive the expected data in the response, review the following troubleshooting tips:

- If you receive an empty or incomplete response rather than an error, first check the ACL configuration for the invoked tool. For more information, see Creating tools for a Model Context Protocol server.
- If you receive a 401 error, generate a new authentication token from the client.
- If you receive a 403 error, confirm that the calling user or client has the required role and ACL access for the invoked tool.

Trouble?

If you run into other issues connecting to a server, see the following additional resources to help you troubleshoot:

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- Creating tools for a Model Context Protocol server
- MCP Server Console FAQ in the ServiceNow Community
- OAuth Inbound Authentication with ServiceNow: Authorization Code Grant Flow Using Postman article in the Now Support Knowledge Base

Example: Connecting to an MCP server from ServiceNow Model Context Protocol Client

This example demonstrates how to connect to a server from an AI agent on another instance using the ServiceNow Model Context Protocol Client. First, you configure the client to call the preconfigured Quickstart Server. From an AI agent, you access the Quickstart Server's list of tools and add individual tools to the agent. Lastly, you test the agent in AI Agent Studio by providing a prompt and seeing the agent's response. For more information, see the Model Context Protocol Client documentation.

Role required: sn_mcp_server.viewer and sn_mcp_client.admin

1. On the server instance, create an OAuth inbound integration for the ServiceNow Model Context Protocol Client.

   For more information, see Create an OAuth inbound integration for an MCP client.

2. On the client instance, navigate to **All** > **AI Agent Studio** > **Settings**.
3. Select **Manage MCP Servers**.
4. Select **New**.
5. Add the Quickstart Server.

   For more information about this step, see Add an MCP Server with OAuth 2.1.

   a. On the Add MCP server form, fill in the fields.

Add MCP server form

Field	Value
Name	Quickstart Server
Authentication Type	OAuth 2.1
MCP server URL	`https://<server-instance>.service-now.com/sncapps/mcp-server/mcp/sn_mcp_server_default`

   b. Select **Next**.

   c. On the form, fill in the fields.

Add MCP server form

Field	Value
Client registration type	Manual Registration
Grant type	Authorization Code
Token authentication method	Client Secret Post

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Field	Value
Client ID	The client ID from the OAuth inbound integration for the Model Context Protocol Client on the server instance.
Client secret	The client secret from the OAuth inbound integration for the Model Context Protocol Client on the server instance.
Authorization URL	`https://<server-instance>.service-now.com/oauth_auth.do`
Token URL	`https://<server-instance>.service-now.com/oauth_token.do`
Token Revocation URL	`https://<server-instance>.service-now.com/oauth_revoke.do`

d. Select **Save**.

6. Verify the OAuth configuration.

a. Select **Authenticate**.

b. Select **Allow** to allow the client to connect to the server.

7. Add tools from the Quickstart Server to an AI agent.

For more information about this step, see Add a Model Context Protocol to an AI agent.

a. In AI Agent Studio, select the **Create and manage** tab.

b. From the AI agents tab, select an existing agent or create one.

For information about creating an agent, see Create an AI agent.

c. Select **Add tools and information**.

d. Select **Add tool** > **MCP server tool**.

e. On the form, fill in the fields.

Add a Model Context Protocol Tool form

Field	Value
Select Model Context Protocol server	Quickstart Server
Select tool	Select the tools from the Quickstart Server that you want to use with this AI agent.

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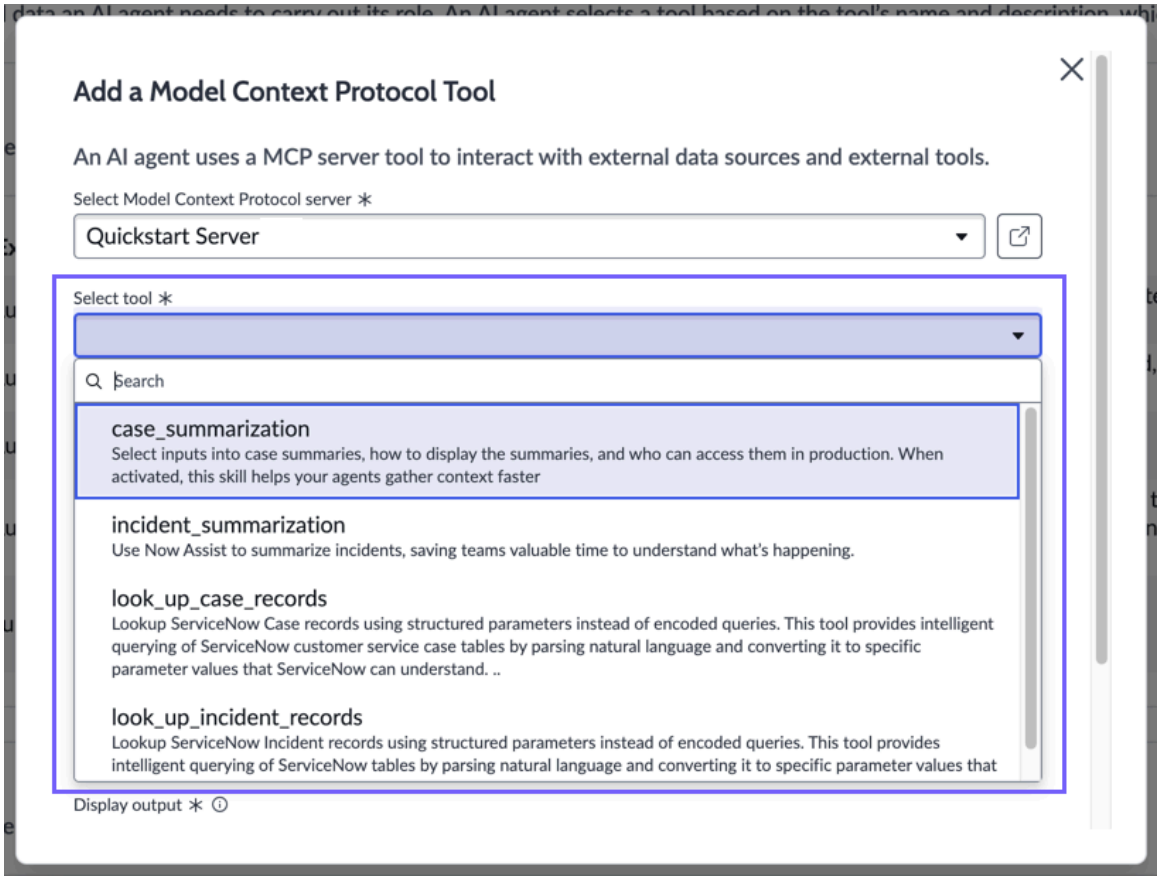

f. Select **Add**.

g. Select **Save and continue**.

8. Test the AI agent.

   For more information about this step, see Test an AI agent.

   a. In AI Agent Studio, select the **Testing** tab.

   b. Select **Start manual test**.

   c. In the Choose a test type field, select **AI agent or workflow**.

   d. Select the AI agent you configured and its version.

   e. In the Task field, enter a prompt to get information or to perform an action on the instance.

      The prompt should be based on which tools are available. For example, if you added the Look up Case Records and Case summarization tools, you can enter "Summarize all cases closed this week."

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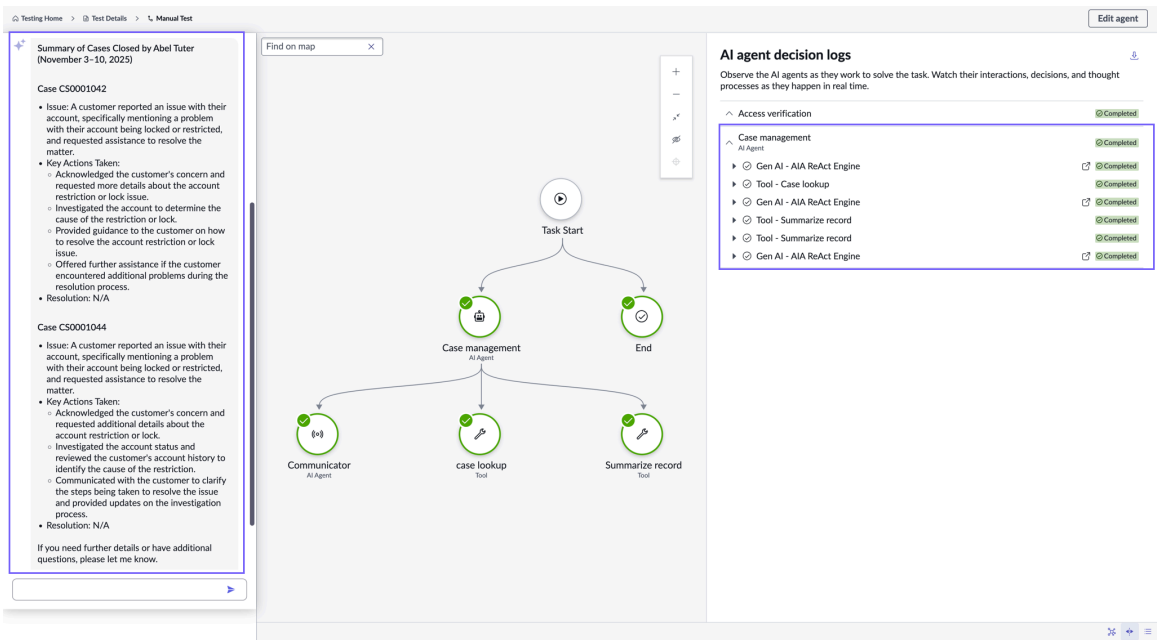
f. Select **Continue to Test Chat Response**.

The AI agent calls the server, and the server runs the tools requested based on the prompt. The server returns the information to the agent as JSON data, and the agent presents it as formatted text. In this example, the agent returns summaries of the cases closed by Abel Tuter in the past week.



MCP Server Console reference

Reference topics include information about MCP Server Console roles, tables, and more.

Components installed with MCP Server Console

Several types of components are installed with activation of the MCP Server Console application, including tables and user roles.

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Roles installed

Role	Description	Contains roles
MCP Server administrator [sn_mcp_server.admin]	Performs create, read, update, and delete (CRUD) operations on all MCP Server Console tables.	sn_mcp_server.tools_admin
MCP Server tools administrator [sn_mcp_server.tools_admin]	Performs create, read, update, and delete (CRUD) operations for tools.	• canvas_user • sn_nowassist_admin.user • web_service_admin
MCP Server viewer [sn_mcp_server.viewer]	Invokes tools and views all MCP Server Console tables (read-only access).	• one_extend_viewer • canvas_user • sn_nowassist_admin.user • web_service_admin

Tables installed

Table	Description
AI Skill Tool Definition [sn_mcp_ai_skill_tool_definition]	Tools based on Now Assist skills. Extends the Tool Definition table.
AI Skill Tool Input [sn_mcp_ai_skill_tool_input]	Inputs for tools based on Now Assist skills. Extends the Tool Input table.
Provisioned MCP Server [sn_mcp_server_registry]	MCP servers deployed on the instance.
Scripted REST Tool Definition [sn_mcp_scripted_rest_tool_definition]	Tools based on Scripted REST APIs that enable other tools. Extends the Tool Definition table.
Scripted REST Tool Input [sn_mcp_scripted_rest_input]	Inputs for tools based on Scripted REST APIs. Extends the Tool Input table.
Tool Definition [sn_mcp_tool_definition]	Tools defined for use by MCP servers.

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Table	Description
Tool Input [sn_mcp_tool_input]	Inputs defined for use by MCP server tools.

Model Context Protocol Server Console tools

Use the following tools that are available by default with Model Context Protocol Server Console depending on the applications installed on your instance, such as ServiceNow Otto for CSM or ServiceNow Otto for ITSM.

Tool definitions installed with Model Context Protocol Server Console

Name	Category	Description
case_summarization	AI Skill	Get a summary of details in a case record.
email_recommendation	AI Skill	Get a recommended response to an email.
incident_summarization	AI Skill	Get a summary of details in an incident record.
lookup_case_records	Scripted REST API	This API enables looks up case records for the case_summarization tool.
lookup_incident_records	Scripted REST API	This API looks up incident records for the incident_summarization tool.
lookup_kb_records	Scripted REST API	

AI skill support in MCP Server Console

MCP Server Console supports creating tools for Model Context Protocol (MCP) servers from a subset of AI skills.

The following AI skills are preconfigured as tools MCP Server Console:

- Case summarization
- Incident summarization

In addition, you can create tools from the following AI skills or from custom skills created with AI Skill Kit. Only AI skills that don't rely on internal information as inputs, such as sys_ids, are available to be created as tools. Some AI skills don't currently meet the criteria required to be used as tools. For more information, contact your ServiceNow representative.

- Analyze the CMDB Search request
- Change request risk explanation
- Code Assist AutoComplete
- Code Assist Edit
- Code Assist Generation
- Code Assist Summarization

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- Common control objective creation
- Correlation insights generation
- Customer Service Summary
- Docs summarization in Collaborative Work Management
- Duration to Days convertor
- EAP doc summarization
- Error resolution recommendation
- Feedback summarization
- Flow generation
- Invoice Inquiry solution generator skill
- Multi feedback summarization
- Playbook Generation
- Playbook generation with images
- Policy Based HR Case Evaluator
- Problem investigator skill
- Project doc summarization
- Recommend preferred solution for VIT
- Refine content
- Regulatory alert impacted citations
- Regulatory alert impacted control objectives
- Regulatory alert impacted controls
- Relevant invoice finder
- Resume Skill Extraction
- Skill keyword extractor
- Spoke Generation
- Subflows and actions
- Supplier recommendation
- Survey Filler Answer Suggestion skill
- Text2Test Sentinel
- Text2Test Skill
- Vulnerable item deduplication

Related topics

Create a tool from an AI skill

Generative AI skills

AI Skill Kit

Knowledge Graph schema support in MCP Server Console

MCP Server Console supports creating tools from several preconfigured Knowledge Graph schemas, each suited to different types of queries.

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The following Knowledge Graph schemas are available by default when creating a tool from a Knowledge Graph. Select a schema based on the type of query your tool needs to run and how the underlying tables are used across your instance.

Tip: Start with Enterprise Graph (Small). Move to the full Enterprise Graph only if your workflows require cross-domain traversal that the smaller schema doesn't cover. For people and organizational structure queries, User Graph or NLQ User Graph is the more targeted choice.

Available Knowledge Graph schemas for MCP tools

Schema	Description
Enterprise Graph	Covers all tables on your instance. Best for complex queries that span multiple domains.
Enterprise Graph (Small)	A curated subset of the most commonly queried tables. Faster and more token-efficient than the full Enterprise Graph. Best starting point for most IT and HR workflows.
User Graph	Focused on people, organizational structure, roles, and relationships. Best for organization hierarchy look ups or manager relationships.
NLQ User Graph	A variant of the User Graph schema optimized for natural language queries. Consult your implementation guide for specific use cases.
Table Look up Graph	Designed for structured table and record look ups. Consult your implementation guide for specific use cases.
Identify Survey Instance	A specialized schema for survey-related workflows. Consult your implementation guide for specific use cases.

Related topics

Create a tool from a Knowledge Graph

Knowledge Graph

Domain separation and MCP Server Console

Domain separation is supported for MCP Server Console. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Standard

- Includes all aspects of **Basic** level support.
- Application properties are domain-aware as needed.
- Business logic: The service provider (SP) creates or modifies processes per customer. The use cases reflect proper use of the application by multiple SP customers in a single instance.
- The instance owner must configure the minimum viable product (MVP) business logic and data parameters per tenant as expected for the specific application.

Sample use case: An admin must be able to make comments required when a record closes for one tenant, but not for another.

For more information on support levels, see Application support for domain separation.

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How domain separation works in MCP Server Console

Domain separation limits the MCP tools and servers that a user can access based on their current domain. The rules follow a top-down hierarchy: a domain can view its own records, all records from descendant domains, and global records. The domain can't access records from ancestor or sibling domains.

- To enable domain separation in your MCP instance, install the domain separation plugin.
- The parent domain can view the servers, tools, and apps created within its child domains, and those created within its own domain.

> **Note:** A domain can view it's own records, descendent domain's and global records. But it can't view ancestor's and sibling domain records.

- An MCP tool can be attached to a server within the same domain.
- When a tool or server is created via the UI, it is stamped with the creating user's current `sys_domain`. This stamp is the source of truth for all visibility and scoping decisions.
-

Related topics

Domain separation for service providers

ServiceNow Cowork

ServiceNow Cowork is an enterprise autonomous AI agent that connects to your enterprise applications and systems and executes complex and multi-step tasks autonomously, and operates within defined security, access, and governance policies.

Get started

Explore Learn what Cowork can do, who uses it, and how it fits into your organization's workflows.	Configure Install Cowork, connect your integrations, and set up your agent for the first time.
User Use ServiceNow Cowork start tasks and work with skills, workflows, and sub agents.	Reference Additional information about ServiceNow Cowork

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Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Note: We have controls in place to enable/disable the data collection and data processing.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

Exploring ServiceNow Cowork

ServiceNow Cowork is an autonomous AI agent that performs complex tasks, executes multi-step workflows, interacts with enterprise applications, and takes actions based on defined policies.

ServiceNow Cowork overview

ServiceNow Cowork completes tasks by identifying the required actions, running those actions, and adjusting its approach when conditions change or an action fails. Cowork executes within the security, access, and governance policies of your enterprise environment. Administrators define policies that control which actions Cowork can take autonomously. Users can delegate complex tasks that require several steps.

Cowork combines natural language interaction with direct access to ServiceNow APIs, Microsoft 365, file systems, GitHub and a sandboxed execution environment. With these capabilities together, it completes workflows end to end without needing constant human direction. Rather than running through a fixed sequence of predefined steps, Cowork analyzes each task, selects an approach, and executes the actions needed to complete it. Cowork works across your connected systems and delivers a completed result rather than a progress update.

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With Cowork, enterprise professionals can delegate work across their systems, and administrators can deploy and govern it.

Note: Cowork operates as a native desktop application on macOS. The agent runs locally and stores all data on your device. No data leaves the device unless you explicitly connect an integration that sends it externally.

ServiceNow Cowork users

Users

User	Role	Description
ServiceNow Cowork admin	sn_app_cowork.admin	Sets policies and approval gates, governs connectors and MCP servers, and controls which models are available.
ServiceNow Cowork user	sn_app_cowork.user	Uses the Cowork to perform tasks, interact with AI agents, use connectors, answers approval prompts, runs skills, workflows, and subagents.

ServiceNow Cowork key features and benefits

- **Autonomous task execution**

  Cowork takes an objective and determines the steps needed to complete it. It plans, executes actions, checks results, retries and adjusts the approach when something fails. Policies determine where approvals are required.

- **Enterprise governance and controls**

  Organizations can monitor what agents accessed and what actions were performed. Administrators control agent permissions and activity through policies and AI Control Tower.

- **Skills and workflows**

  Skill packs extend what the agent can do and repair their own scripts when they fail. Workflows are reusable step sequences.

- **Works across applications**

  Cowork is not limited to the ServiceNow applications. It can interact with files, terminals, APIs, and enterprise systems to complete a task or a set of tasks.

- **Governed connections**

  Administrators control which external services Cowork can connect to through Model Context Protocol (MCP) servers. Connections can be disabled or isolated as needed.

- **Extensibility**

  Cowork connects to skills, sub-agents, MCP servers, and external services through a built-in settings library.

- **Tiered approvals**

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Approval rules are configured as hard gates or soft gates. Hard gates block actions until approval is granted. Soft gates allow actions to execute without requiring approval first, but approval remains available if needed. An auto mode capability automatically routes lower-risk calls past the approval prompt.

- **Usage insights and skill telemetry**

  Usage insights report adoption rates, intervention frequency, policy events, and cost signals. Skill telemetry tracks performance metrics and compliance across deployed skills.

- **Semantic memory and knowledge graph**

  Cowork keeps two memory layers. Long-term memory stores preferences, decisions, and facts that persist across sessions. The knowledge graph, which automatically builds a structured map of people, projects, decisions, and action items from conversations and activity, is also maintained.

- **Automatic insight capture**

  Cowork captures activity and meetings, extracts decisions and action items, and delivers a structured summary with follow-up tasks.

- **Usage insights and skill observability**

  Administrators can view Cowork usage telemetry through usage insights for sessions, conversation counts, connector activity, and policy events. Skill observability tracks invocation counts, success rates, latency, and token consumption per skill, with detailed traces available in AI Control Tower.

What to explore next

To learn more about configuring and using ServiceNow Cowork, see:

- Configuring ServiceNow Cowork
- Using ServiceNow Cowork
- ServiceNow Cowork reference

ServiceNow Cowork architecture

ServiceNow Cowork separates the client, the agent host, and an isolated sandbox so that planning happens on the host and agent commands run inside a container with its own network policy. Cowork runs on the desktop and connects to your ServiceNow instance, which governs what Cowork can do.

The high level architecture has three layers: the ServiceNow instance, Cowork, which governs Cowork based on the policy defined, the Cowork desktop application, which runs tasks; and the connected systems that Cowork works with.

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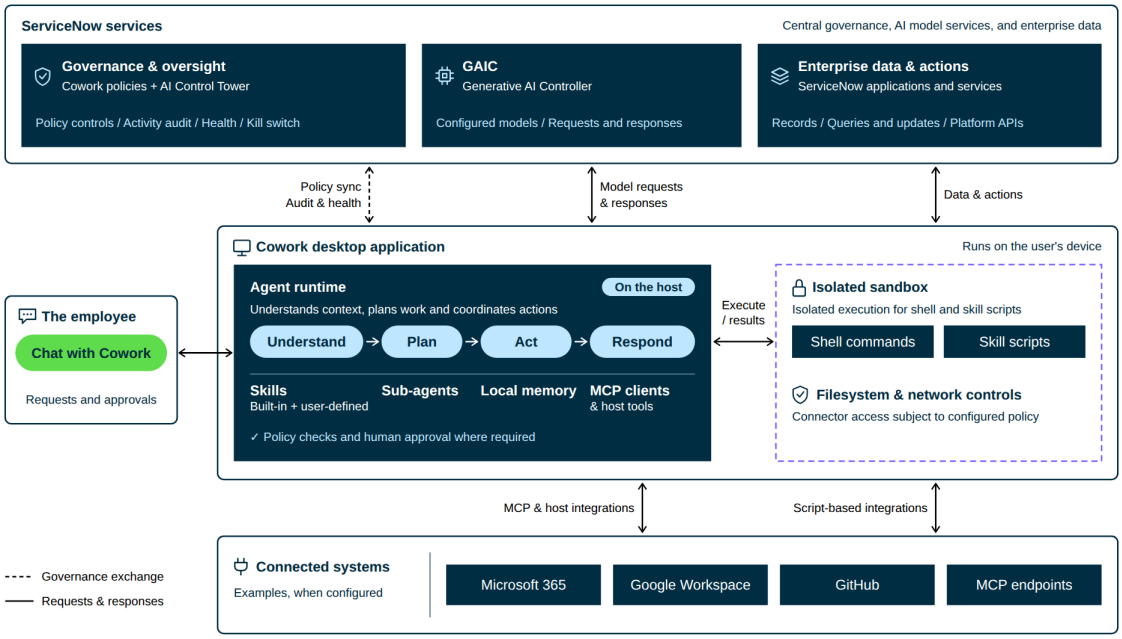

ServiceNow instance

The ServiceNow instance governs Cowork, logs its activity, and provides access to your data.

AI Control Tower manages policy and auditing, for Cowork when needed. It syncs policies to Cowork and registers each Cowork installation. Each installation sends AI Control Tower a periodic heartbeat, so AI Control Tower can show which installations are active and healthy. Administrators can use the kill switch in AI Control Tower to stop Cowork from taking further actions. For more information, see AI Control Tower.

Generative AI Controller (GAIC) logs every LLM (large language model) call that Cowork makes. User initiated requests consume assists and are recorded in the Generative AI Log under the feature name ServiceNow Cowork Execution. Requests that Cowork makes on its own, such as evaluating actions in Auto mode, don't consume assists. For more information, see Exploring Generative AI Controller.

Data and System of Action provides access to records, automation, and agents. Cowork reaches these resources through Action Fabric, the interface that connects Cowork to ServiceNow data and actions. For more information, see .

ServiceNow Cowork desktop application

ServiceNow Cowork runs on the user's desktop and has two main parts: the Cowork runtime and the secure sandbox.

The Cowork runtime includes the agent loop, sub-agents, skills, and memory. The agent loop plans a task, runs each step, checks the result, and adjusts when a step fails. Skills and connectors extend what Cowork can do, and memory stores preferences, decisions, and context across sessions.

The secure sandbox is an isolated environment on the device where tool execution, connectors, and the LLM client run under policy control. The LLM client sends requests to the large language model. Connectors run only when AI Control Tower policy allows them, so every action stays within the limits your administrator sets.

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Connected systems

Users provide a task to Cowork through chat. Cowork uses its connectors to gather context and take action in connected systems, including Slack, Microsoft 365, GitHub, Model Context Protocol (MCP) endpoints, and the ServiceNow instance. The same policy managed connectors handle both incoming work and outgoing actions.

Cowork runs tasks on the user's desktop. The Cowork runtime, memory, and tool execution stay on the device. Some data leaves the device:

- Requests from the LLM client to the large language model, which GAIC logs
- Policy sync and registration with AI Control Tower
- Data that connectors send to connected systems

Policy management and governance in ServiceNow Cowork

Policies are governance rules on your ServiceNow instance that control what ServiceNow Cowork can do, which actions need approval, and which actions are blocked.

ServiceNow Cowork is an autonomous AI agent that runs commands, reads and writes files, and reaches external systems on behalf of users. Because the agent acts for users, your organization needs control over what the agent can do.

Policies give you that control. You author policies on the ServiceNow instance, and every ServiceNow Cowork client enforces them on every action before the action runs. Users work within the boundaries set and approve actions when a policy requires it. Policies are the centrally managed rules and governance components that control what the agent can and can't do, preventing it from taking actions outside the boundaries you define. Every action the agent attempts is evaluated against the active policy before it runs.

The following properties make policy a governance mechanism rather than guidance:

Central authoring

Policies live in ServiceNow tables on your instance, not in local configuration that a user can edit.

Enforcement in code

ServiceNow Cowork enforces policy on every action, and neither the agent nor end users can bypass policy rules. Enforcement happens in code, not through the agent's instructions, so it doesn't depend on the agent choosing to conform.

Mandatory policy

ServiceNow Cowork runs nothing without a policy. Until the client retrieves an active policy from your instance, Cowork doesn't perform any action.

How policy reaches the client

The instance merges every policy that applies to a user and sends the client one effective policy bundle. Clients never see the individual policy records.

When you change a policy, the instance pushes the change to clients in near real time. Clients also check for changes in case they miss a push. Users can see the last policy sync time in their ServiceNow Cowork application under **Settings** > **Agent Sandbox**.

A policy bundle doesn't expire. If the instance becomes unreachable, the client keeps enforcing the last policy it retrieved.

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Default Policy

Every instance includes the **Default Policy**. It's active, applies to all users, and includes values for all seven policy components. You can't edit the **Default Policy**. To change its behavior, create a policy with a lower priority number. For more information, see Policy stacking and precedence in ServiceNow Cowork.

For what each component controls, see Policy components in ServiceNow Cowork.

Policy components in ServiceNow Cowork

A ServiceNow Cowork policy has seven components, each controlling a different part of what the agent can do.

Each component is a separate record that you link to a policy from its tab on the policy record.

Default policy components

Every instance includes the **Default Policy**. It's active, applies to all users, and has values for all seven components.

Policy components

Component	Tab	Table	What it controls
Tool gates	**Policy Tool Gates**	sn_app_cowork_tool_gate	Sets each tool to **Allow**, **Deny**, **HITL**, or **Auto**.
Approval patterns	**Policy Patterns**	sn_app_cowork_approval_pattern	Defines which commands need a human decision, and whether the decision can be remembered (soft gate) or must be made every time (hard gate).
Network rules	**Policy Network Rules**	sn_app_cowork_network_rule	Lists the hosts and ports the sandbox can reach. Anything not on the allowlist is unreachable.
Sandbox rules	**Policy Sandbox Rules**	sn_app_cowork_sandbox_rule	Sets the sandbox filesystem boundary and network permissions for individual binaries. Rules can restrict access further but can't loosen the built in protection of credential paths and system directories.
File type rules	**Policy File Type Rules**	sn_app_cowork_file_type_rule	Sets read, write, or deny access for each file extension.
Connector scopes	**Policy Connector Scopes**	sn_app_cowork_connector_scope	Turns OAuth scopes on or off for each connector. Microsoft 365 is supported. By default, read scopes are on and send and write scopes are off.
Capabilities	**Capability Overrides**	sn_app_cowork_capability, sn_app_cowork_capability_override	Feature switches and numeric limits, such as subagents, auto approval, the feedback URL,

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Policy components (continued)

Component	Tab	Table	What it controls
			and MCP override. Overrides change a capability's value for the users a policy covers.

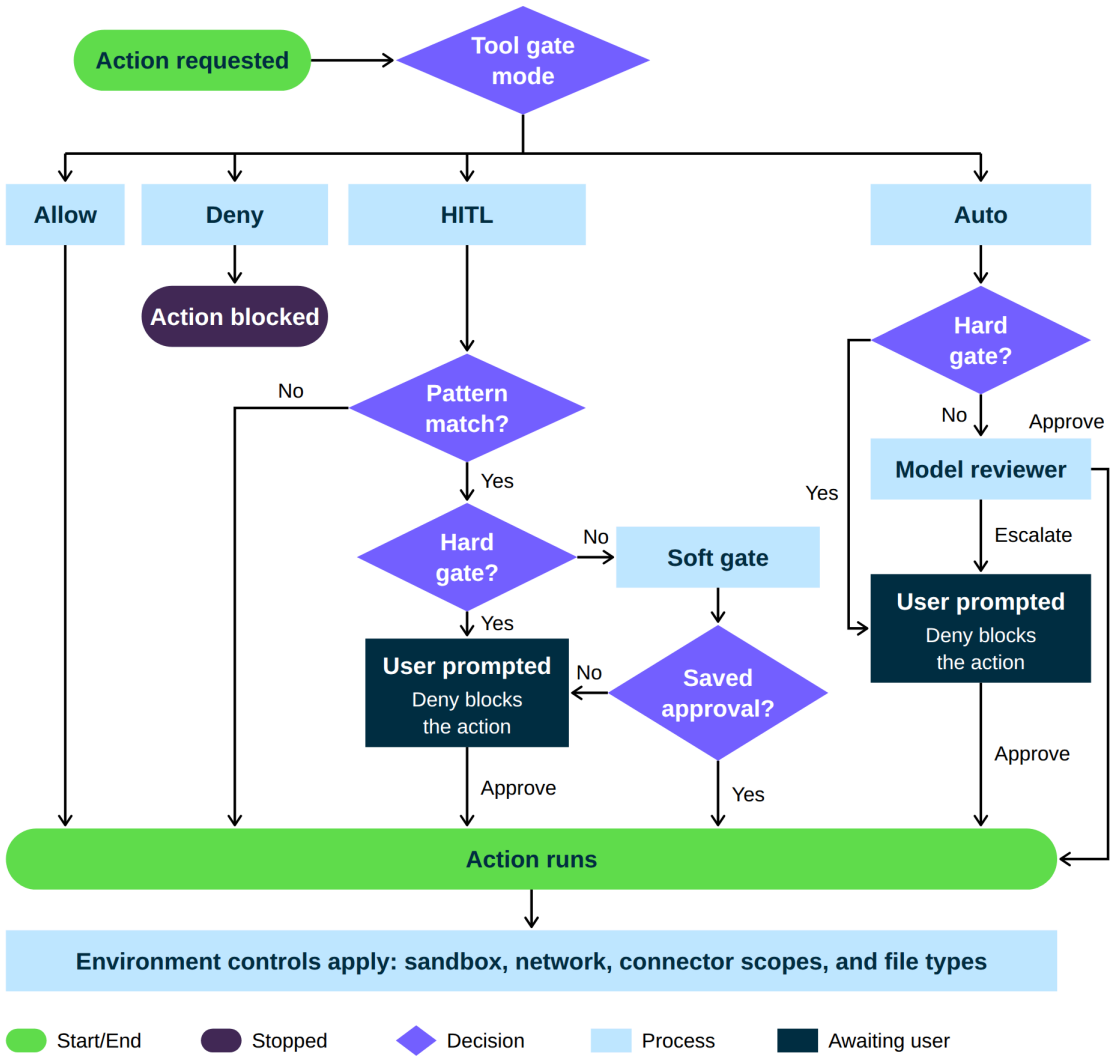
For how each tool gate setting handles an action, see Action approval flow in ServiceNow Cowork.

Action approval flow in ServiceNow Cowork

Tool gates, approval patterns, and auto approval determine whether each action in Cowork runs, requires approval, or is blocked.

Three controls determine whether an action runs. Tool gates set how Cowork handles each tool. Approval patterns identify commands that need approval. Auto approval lets an AI model reviewer approve some actions without prompting the user.

Action evaluation flow in Cowork



Every action passes through these controls in the following order:

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1. Cowork checks for an active policy. If no active policy is available, Cowork refuses the action.
2. Cowork applies the tool gate for the tool. **Allow** runs the action, **Deny** blocks it, the (Human in the loop) HITL sends it to approval patterns, and **Auto** sends it to auto approval.
3. For HITL, Cowork compares the command against approval patterns. If no pattern matches, the action runs. If a hard gate pattern matches, Cowork prompts the user. If a soft gate pattern matches, the action runs when a saved approval exists. Otherwise, Cowork prompts the user.
4. For **Auto**, Cowork prompts the user if the action is under a hard gate. Otherwise, the model reviewer approves the action or escalates it to the user.
5. When prompted, the user approves the action to run it or denies the action to block it.
6. When the action runs, sandbox, network, connector scope, and file type rules limit what the action can access.

Gate strengths

Some actions require a human decision before they run. Approval patterns, described later in this topic, identify these actions and assign each one a gate strength:

Gate strengths

Gate	Behavior	Use
Hard gate	Requires a human decision each time the action runs.	Destructive actions, such as actions that delete data or make changes to external systems
Soft gate	Requires a human decision, which the user can save for later occurrences of the action.	Routine actions with low impact that users repeat

Tool gates

You set a mode on each tool. The modes and the tools each mode suits are described in the following table.

Tool gate modes

Mode	Behavior	Use
Allow	Runs the action with no pattern matching and no prompt.	Tools with low impact, such as tools that only read data
Deny	Blocks the action with no option to approve it.	Tools that your organization doesn't permit
Human in the loop (HITL)	Checks the action against approval patterns.	Tools where specific commands require human review

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Tool gate modes (continued)

Mode	Behavior	Use
Auto	Sends the action to auto approval.	Frequently used tools where repeated prompts slow users down

Because **Auto** is a gate mode, you control it per tool. You can reduce prompts on one frequently used tool while keeping stricter handling on others.

Approval patterns

Approval patterns identify the commands that need approval when a tool gate is set to **HITL**. The Default Policy includes predefined approval patterns organized by action category. Each pattern uses one of the match tiers in the following table.

Approval pattern match tiers

Tier	You configure	Matches when
Pattern matching, exact	A literal string or regular expression	The command matches the pattern as written.
Pattern matching, relaxed fallback	A pattern of several words	The words appear in the command in order, even with flags and values between them.
Keyword matching	A list of write verbs	The command contains one of the listed verbs.

Note: Under **HITL**, a command that matches no approval pattern runs without a prompt. If you rely on keyword matching, a command that writes data with a verb that isn't in your list runs without approval.

Use exact matching when you know the precise command to control. Exact matching can miss variations of that command. Use relaxed matching to catch variations, but relaxed matching can match a word that appears where you didn't intend. Use keyword matching to require approval for any command that writes data.

Cowork applies a fixed guard on credential paths that you can't turn off.

Each pattern has one of the following gate strengths:

Hard gate

Requires a human decision each time the action runs.

Soft gate

Requires a human decision, which the user can save for later occurrences of the action.

The Default Policy applies hard gates to destructive operations and actions that delete data or make changes to external systems, and soft gates to selected routine patterns with low impact.

Use a soft gate for routine actions that users repeat.

When a pattern requires approval, Cowork holds the action and displays an approval card to the user. The approval card offers **Allow** for every matched action and **Allow always** only for soft gate patterns.

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When a user selects **Allow always**, Cowork saves the decision and runs later actions of the same type without a prompt, such as the same command run on different files. An action of a different type prompts the user again. Users can view and revoke saved approvals in **Settings** > **Approvals**.

Auto approval

When you set a tool gate to **Auto**, Cowork prompts the user for any action under a hard gate. An AI model reviewer evaluates every other action, including actions that match no pattern, against the user's request.

The model reviewer escalates actions that are destructive, irreversible, or visible outside Cowork. Some of these actions escalate every time. Others escalate unless the user's request clearly identifies what to act on. For example, "close INCXXXXXXX" identifies a specific record, but "clean up the incidents" doesn't. An approved action proceeds. An escalated action appears to the user as a standard approval card.

The model reviewer is an AI model, and its decisions may be inaccurate or inappropriate. Because the reviewer evaluates context, its decisions can vary. Hard gate actions go to the user for approval, not to the model reviewer. To keep a human review step for sensitive actions, place those actions under hard gates.

Ways an action runs without a prompt

Under **HITL** or **Auto**, an action can run without a prompt in the ways described in the following table.

Ways an action runs without a prompt

Attribute	Saved approvals	Model review
Tool gate mode	HITL	Auto
Decision basis	A saved user decision for that type of action	An AI model's evaluation of the action in context
Set by	End user, one approval at a time	Administrator, by setting a tool gate to Auto
Scope	Soft gate patterns only	Actions not under a hard gate, including actions that match no pattern
Suited for	Repeated actions of a known, stable type	Actions that a static pattern can't classify in advance

Neither method approves a hard gate action or runs an action on a tool set to **Deny**. Hard gate actions go to a human for approval.

Cowork also exempts read only commands from prompts, so routine work isn't interrupted.

Policy stacking and precedence in ServiceNow Cowork

When more than one policy applies to a user, ServiceNow Cowork merges them and resolves conflicts by priority in a fixed order, specificity, and restrictiveness.

More than one policy can apply to the same user, for example the **Default Policy** and a policy for a support team. The **User Criteria** field on each policy record decides which users the policy applies to. The instance merges every policy whose user criteria match the user, then resolves conflicts in the following order:

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1. Priority: Each policy has a priority number, and a lower number means a higher priority. The rule from the policy with the lowest priority number wins. For example, if the Default Policy has priority 999 and a support team policy has priority 100, the support team policy's rules override the Default Policy for users in that team.
2. Specificity: If two conflicting approval patterns come from policies with the same priority, the pattern that matches more of the command wins. For example, when a user runs git push --force, a pattern for git push --force takes precedence over a pattern for git push.
3. Restrictiveness: If rules still tie, the more restrictive rule applies, so an ambiguous configuration always resolves toward the safer outcome.

Restrictiveness by component

Restrictiveness by component

Component	Most restrictive to least restrictive
Tool gate	**Deny**, then **HITL** or **Auto**, then **Allow**
Approval pattern	Hard gate, then soft gate
File type rule	Deny, then allow write, then allow read
Network rule	Not allowlisted, then allowlisted
Sandbox filesystem	Deny, then read and write, then read
Connector scope	Scope off, then scope on

Change default behavior

To change a default, create a policy instead of editing the **Default Policy**:

1. Create a policy and set its user criteria to the users or groups it applies to.
2. Set a priority number lower than the policy you want to override. The **Default Policy** has priority 999. New policies have priority 1,000 by default, so change the priority, or the new policy doesn't override the **Default Policy**.
3. Add only the rules you want to change. Anything you don't add keeps coming from the **Default Policy**.

To undo the change, delete your policy. The previous behavior returns.

This approach has the following advantages:

Intact defaults

The **Default Policy** stays unchanged and keeps receiving product updates.

Explainable policy

The override and the rule it overrides both exist as records, so you can explain the effective policy.

Reversible changes

Reverting means deleting one record.

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Example: Example: Allow a site that the Default Policy blocks

Your developers need Cowork to reach your internal package registry at registry.example.com, which isn't on the Default Policy network allowlist. To allow it, create a policy for the developer group, add a network rule for registry.example.com, and make sure the rule is active. At the next sync, the client receives the Default Policy allowlist and your rule merged together, so the registry is reachable for developers only.

How policy affects ServiceNow Cowork users

Your administrator's policies decide what ServiceNow Cowork can do for you. You see the result as approval prompts and blocked actions, and you can narrow some permissions yourself.

You can't see or change policy records. What you experience is the result:

Approval prompts

A card describes an action before it runs and asks you to approve or deny it. For some actions, the card also offers **Allow always**, which remembers your decision. Other actions ask every time.

Blocked actions

When a policy blocks an action or an external network call, Cowork tells you why.

Read only work

Commands that only read are exempt from prompts, so routine work isn't interrupted.

Controls you can set

These controls can only narrow what your administrator allows.

User controls

Control	Where	What it does
Microsoft 365 connector scopes	**Settings** > **Microsoft 365**	Turn off individual scopes your administrator enabled, for example letting Cowork read mail but not send it. You can't turn on a scope your administrator hasn't enabled.
Remembered approvals	**Settings** > **Approvals**	See every **Allow always** decision you've made, and revoke any of them.
Soft deletes	**Settings** > **General**	Keep deleted files recoverable in a dump folder instead of removing them right away.

Configuring ServiceNow Cowork

Activate ServiceNow Cowork plugin to download, install and setup Cowork.

Activate the ServiceNow Cowork plugin

You can activate the ServiceNow Cowork plugin (sn_app_cowork) for ServiceNow Cowork if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

ServiceNow Cowork requires a separate subscription from the rest of the ServiceNow AI Platform.

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To purchase a subscription, contact your ServiceNow account manager. When you purchase a subscription, certain plugins are activated automatically. If a paid plugin isn't activated automatically, you can manually activate it from the All Applications list in your instance.

Note:

Before purchasing a subscription, you can evaluate the feature on a non-production instance without charge by requesting it from the Now Support Service Catalog.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the ServiceNow Cowork plugin (sn_app_cowork) using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Download and install ServiceNow Cowork

Install ServiceNow Cowork on a Mac with an M-series processor to use the AI desktop agent on your computer.

Before you begin

Role required: sn_app_cowork.admin or sn_app_cowork.user

Procedure

1. Navigate to **All** > **ServiceNow Cowork** > **Downloads**.
2. Download the Mac installer.

   Note: ServiceNow Cowork is only available for macOS that uses M-series processors, such as M1, M2, M3, and M4.
3. Go to your **Downloads** folder and select ServiceNow Cowork installer package.
4. Open the ServiceNow Cowork installer package.
5. On the Introduction screen, select **Continue**.
6. On the Installation Type screen, select **Install** to perform a standard installation in your home folder.
7. **Optional:** Select **Change Install Location** to select a destination.
8. On the Destination Select screen, select how you want to install the software.

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- Install for all users of this computer: Installs Cowork for every user account on the computer.
- Install for me only: Installs Cowork in your home folder. Only you can use the software.
- Install on a specific disk: Installs Cowork on a disk that you choose.

9. Select **Continue**.
10. After the installation completes, select **Close**.

What to do next

After you install Cowork, it keeps itself up to date. It checks for updates at startup, during onboarding, every 30 minutes, and when you check for updates from **Settings**.

A required update shows the **Update and Restart** screen, and you install the update before you continue. An update found in the background appears as a notification that you can dismiss. Cowork verifies the signature of each update before it installs.

Set up ServiceNow Cowork

Connect Cowork to your ServiceNow instance and prepare your workspace and secure sandbox.

Before you begin

Role required: sn_app_cowork.admin or sn_app_cowork.user

Procedure

1. Select and open the ServiceNow Cowork application.
2. When macOS asks for access to your keychain, enter your login keychain password, and then select **Always Allow** or **Allow** to grant access for this session only.

   Your login keychain is your macOS password.

3. On the Meet ServiceNow Cowork screen, select **Get Started**.
4. On the Connect ServiceNow screen, enter your instance name in the **Instance URL** field.
5. Select a sign in method.
   - **Sign in within ServiceNow Cowork**: Use your password or PIN.
   - **Sign in via browser**: Use any sign in option your instance supports, such as SSO.
6. Select **Sign in with ServiceNow**.
7. Enter your user name and password, and then select **Log in**.
8. If the Update Required dialog appears, select **Update & Restart**.

   After Cowork restarts, sign in again.

9. On the Workspace & Security screen, confirm the default workspace folder or select **Choose** to pick a different folder.
10. Monitor the secure sandbox setup progress.

    Setup completes when **Secure Sandbox** shows **Ready** and these checks finish:

    - Rootfs image ready
    - OpenShell gateway started
    - MicroVM sandbox ready

    If setup stalls or fails, select **Retry**.

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11. Select **Continue**.
12. On the You're All Set screen, confirm the model that Cowork uses, and then select **Start Using ServiceNow Cowork**.

Result
Cowork opens and is ready to use. You can change your workspace and other options anytime in **Settings**.

Create a ServiceNow Cowork agent policy

Create a policy to define what ServiceNow Cowork can do, which actions need human approval, and which actions are blocked.

Before you begin
Role required: sn_app_cowork.admin

About this task
A policy record sets which users the policy applies to and its priority. After you create the policy, you add components to it, such as tool gates, network rules, and sandbox rules.

Procedure
1. Navigate to **All** > **ServiceNow Cowork** > **Policies** > **Cowork Agent Policy**.
2. Select **New**.
3. **Optional:** In the **Domain** field, select the domain.
4. In the **User Criteria** field, select the user criteria record.

   The user criteria decide which users the policy applies to.
5. **Optional:** In the **Description** field, enter a description of the policy.
6. Confirm that **Active** is selected.

   An inactive policy doesn't apply to any users.
7. In the **Priority** field, enter a value.

   When more than one policy applies to a user, the policy with the lowest priority number takes precedence. The **Default Policy** has priority 999, and new policies default to 1,000. To override the **Default Policy**, enter a number lower than 999.
8. In the **Policy Name** field, enter the policy name.
9. Select **Submit**.

Result
The policy is created and applies to the users that its user criteria cover.

What to do next
Add components to the policy. For more information, see Configure a ServiceNow Cowork agent policy.

Configure a ServiceNow Cowork agent policy

Add tool gates, approval patterns, network rules, sandbox rules, capability overrides, connector scopes, and file type rules to a policy to control what Cowork can do for the users the policy applies to.

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Before you begin

Create the policy. For more information, see Create a ServiceNow Cowork agent policy.

Role required: sn_app_cowork.admin

About this task

Each tab on a policy record links existing rule records to the policy. Add only the components you need. The number on each tab shows how many records are linked to the policy.

You can't edit or remove the predefined rules in the **Default Policy**, but you can add new ones.

When you use a policy to override the **Default Policy**, add only the rules you want to change. Anything you don't add keeps coming from the **Default Policy**.

Procedure

1. Navigate to **All** > **ServiceNow Cowork** > **Policies** > **Cowork Agent Policy**.
2. Open the policy you want to configure.
3. Add a tool gate.
   a. Select the **Policy Tool Gates** tab, and then select **New**.
   b. In the **Tool Gate** field, select the tool gate.
   c. **Optional:** In the **Domain** field, select the domain.
   d. Select **Submit**.
4. Add an approval pattern.
   a. Select the **Policy Patterns** tab, and then select **New**.
   b. In the **Approval Pattern** field, select the approval pattern.
   c. **Optional:** In the **Domain** field, select the domain.
   d. Select **Submit**.
5. Add a network rule.
   a. Select the **Policy Network Rules** tab, and then select **New**.
   b. In the **Network Rule** field, select the network rule.
   c. **Optional:** In the **Domain** field, select the domain.
   d. Select **Submit**.
6. Add a sandbox rule.
   a. Select the **Policy Sandbox Rules** tab, and then select **New**.
   b. In the **Sandbox Rule** field, select the sandbox rule.
   c. **Optional:** In the **Domain** field, select the domain.
   d. Select **Submit**.
7. Add a capability override.
   a. Select the **Capability Overrides** tab, and then select **New**.
   b. In the **Capability** field, select the capability.
   c. In the **Override Value** field, enter the value for the capability.
   d. **Optional:** In the **Description** field, enter a description of the override.
   e. **Optional:** In the **Domain** field, select the domain.

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f. Confirm that **Active** is selected.

g. Select **Submit**.

8. Add a connector scope.

   a. Select the **Policy Connector Scopes** tab, and then select **New**.

   b. In the **Connector Scope** field, select the connector scope.

   c. Select **Active**.

      The **Active** check box is cleared by default. If you don't select it, the connector scope doesn't take effect.

   d. **Optional:** In the **Domain** field, select the domain.

   e. Select **Submit**.

9. Add a file type rule.

   a. Select the **Policy File Type Rules** tab, and then select **New**.

   b. In the **File Type Rule** field, select the file type rule.

   c. **Optional:** In the **Domain** field, select the domain.

   d. Select **Submit**.

10. Select **Update**.

Result

The policy includes the components you added, and Cowork enforces them for every user that the policy's user criteria covers.

Trace evaluation for Cowork in AI Control Tower

AI Control Tower scores the traces that Cowork sends for quality and safety. Review the scores to understand usage patterns and identify where responses fall short.

As users work in Cowork, it records how its agents and skills run and sends that record to your ServiceNow instance in OpenTelemetry (OTel) format. AI Control Tower evaluates the records against a set of metrics and shows the results on the Cowork asset.

How traces reach AI Control Tower

When a user logs in to Cowork with a ServiceNow instance, Cowork registers itself on that instance as an AI application. The registration appears in the AI Control Tower inventory as the ServiceNow Cowork Agent asset. See Managing your AI asset inventory.

No trace connection is required. Cowork sends traces to the instance the user is logged in to and authenticates with that user's login.

AI systems that don't send traces this way connect to AI Control Tower through SDK instrumentation or a trace connection. See Activate evaluation scoring for external AI systems and Configuring trace connections.

Cowork sends traces whether or not the asset is managed, but AI Control Tower shows them only after an administrator moves the asset to the **Managed** state.

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For more on asset states, see Managed and unmanaged AI assets. To move the asset and review its traces, see Review Cowork traces in AI Control Tower.

A managed asset becomes eligible for life cycle review. See Managing your AI asset lifecycle.

Cowork doesn't display the traces it sends. Review traces and change the asset state in AI Control Tower.

Blocking access to Cowork

An AI Control Tower administrator can block access to Cowork with an Explicit Block policy. A policy scoped to a specific user ends that user's active Cowork session and helps prevent that user from starting a new one. A policy that doesn't name a user blocks everyone who has used Cowork. The policy stays in effect until it's deleted.

For how these policies work, see Explicit Block policies. To block access, see Create an Explicit Block policy.

Sessions, traces, and spans

Session

One Cowork conversation. Every trace from the conversation belongs to the same session, including background work that runs after a response, such as updating memory.

Trace

One agent run, from the user's request to the response. For example, asking Cowork to retrieve all incidents produces one trace. The agent run is the parent of every other span in the trace.

Span

One operation inside a trace, such as the agent run, a tool call, or a model call. Cowork sends the agent run and tool spans. The ServiceNow generative AI controller adds a span for each model call and places it under the agent run.

For how AI Control Tower structures and scores each level, see Sessions, traces, and spans.

Review Cowork traces in AI Control Tower

Check the quality and safety scores of Cowork sessions in AI Control Tower, then open a session or trace to see which metric scores and details.

Before you begin

Role required: sn_app_cowork.admin and sn_ai_governance.ai_steward

About this task

In AI Control Tower, each AI system is tracked as an asset in the Inventory Cowork appears as the ServiceNow CoworkAgent asset, which AI Control Tower creates when a user connects Cowork to the instance. The asset starts in the Unmanaged state, with limited functionality, and shows traces only after you move it to the Managed state. Nothing else needs to be configured to receive traces. For more on asset states, see Managed and unmanaged AI assets.

Review traces to see how users work with Cowork and to catch a drop in quality or safety scores, or a security issue in a response.

For how AI Control Tower scores traces, see Trace evaluation for Cowork in AI Control Tower.

Procedure

1. Navigate to **All** > **AI Control Tower** > **Home**,

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2. Select **Inventory**.
3. In the search field, enter `Cowork`.
4. Select **ServiceNow Cowork Agent**.
5. **Optional:** Select **Move to Managed** to move the asset to **Managed**.

   (Optional) The asset shows Managed, and the **Monitor** tab appears.

   To move several assets at once from the Inventory list, see Move AI assets to managed.
6. Select the **Monitor** tab.

   The tab shows the average overall quality and safety scores, the metrics evaluated and their sample rate, average latency and tokens per session, and agent activity over time.

   Note: Scores appear only after evaluation finishes, which takes some time after a trace arrives. Until then, the score cards show no data. Refresh the page to see new scores.
7. Scroll to **Recent evaluated sessions** and review the quality and safety score for each session.
8. Select a session.

   The session page lists the lowest scoring metrics, a score and reason for each metric, and the traces in the session.
9. Select a trace, then select a span.

   The span details show each metric score and the reason behind it.

   To trace a low score to its cause, see Investigate a low-scoring session.
10. **Optional:** To change which metrics run on this asset, select the gear icon on the **Metrics evaluated** card.

    (Optional) Select the metrics in **Edit metrics evaluated for this asset**, then select **Save metric**.

    For the available metrics, see Evaluation metrics.

    For more options, including sample rates for this asset, see Configure asset-specific metrics for external AI systems.
11. **Optional:** To score more traces, navigate to **All** > **AI Control Tower** > **Home** > **Settings** > **Rules and templates** > **Evaluation**, and raise the **Sample rate** on the **AI evaluations** sub tab.

    (Optional) Select **Update** to save the change.

    For more about evaluation settings, see Activate evaluation scoring for external AI systems.

    To set the sample rate for each metric, see Configure global metrics for external AI systems.

Using ServiceNow Cowork

Use ServiceNow Cowork to get started with tasks, connect systems and extend Cowork capabilities.

Start a ServiceNow Cowork chat session

Send your first request to ServiceNow Cowork, from a simple question to a complex multi-step task, and track its progress.

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Before you begin
Role required: sn_app_cowork.user

Procedure

1. Open ServiceNow Cowork application.
   The home screen opens with the message box and suggestions.
2. **Optional:** Select a suggestion category below the message box, and then select a prompt.

Suggestion categories

Category	Use it to
Get Started	Connect Microsoft 365, try a skill such as `/plan-my-time`, or browse the available skills.
For you	Ask about your meetings, pending approvals, assigned incidents, and upcoming SLA breaches.
IT Helpdesk	Work with incidents, change requests, the knowledge base, and the service catalog.
Ask Anything	Get help with everyday work, such as writing an email, drafting an agenda, or setting a reminder.

3. In the message box, describe what you need done, or edit the selected prompt.

   You can ask for a single answer or a complete piece of work. Cowork identifies the steps and completes them for you.

   To speak your request instead, select the microphone icon.

4. **Optional:** Select the add icon in the message box, and then select an option to add context or change how Cowork handles the request.

Message options

Option	Description
Attach files or photos	Add a file or photo as context for your request. Attached items don't change your workspace.
Web search	Turn web search on or off. A check mark shows that web search is on.
Workspace	View your default workspace folder. To change it, select **Open in Settings**.
ServiceNow	View the ServiceNow instance Cowork connects to.
Diagnose issues	Run a health check on Cowork and get suggested fixes.

5. Select the send icon.
   The chat appears in the sidebar so you can return to it later.

Select AI model and workspace folders

Select the AI model the agent uses, confirm its connection, and set the folders it works in. These settings control the quality of the agent's responses and limits file access to the selected folders.

Before you begin
Role required: sn_app_cowork.user

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Procedure

1. Navigate to **Settings** > **General**.
2. Under Connection & Model, select a model from the **AI Model** list.

   To use a different model for a single chat, select a model from the model list in the conversation box.
3. Select **Test Connection**.
4. Under Workspace, set the folders the agent can read and write without prompting for approval.
   - To add a folder, select **Add folder** and **Mark as primary** to make it your primary folder.
   - To change a folder, select the edit icon next to it.
   - To remove a folder, select the remove icon next to it and select **Remove folder** in the dialog box.
   - To return to your home folder as the only workspace, select **Reset to Home**.
5. Under Local Models, confirm that each model shows **Installed**.

   These models run on your device, so dictation and semantic search are processed locally on your device.

Result

The agent uses the model you selected, and a prompt appears before the agent reads or writes anything outside your workspace folders.

Respond to approval requests in Cowork

Before Cowork takes a sensitive action, such as changing a record or deleting a file, it pauses and asks for your permission. Responding to these requests keeps you in control of what the agent does on your behalf.

Before you begin

Role required: sn_app_cowork.user

About this task

When Cowork needs permission, an approval card appears in the chat and processing pauses until you respond.

Procedure

1. Open the chat that shows the approval card.
2. Review the action on the card.
3. Select how Cowork should proceed.

Permission options

Permission options	Result
Allow	Coworktakes this action now and asks again next time.
Allow always	Cowork takes this action now and doesn't ask again. The action is added to your standing approvals. This action is saved

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Permission options	Result
	Note: Select **Allow always** only for actions you would approve every time. You can revoke a standing approval at any time in **Settings** > **Approvals**.
Deny	Cowork doesn't take the action. **Note:** If an action looks unexpected or outside what you asked for, deny it and stop the task.

4. **Optional:** If you have set up TOTP authorization, enter the six-digit code from your authenticator app.

Assign tasks to ServiceNow Cowork

Use ServiceNow Cowork to complete multi-step work, such as investigating incidents, creating reports, or coordinating updates across platforms. Combine skills, sub-agents, and connectors in a single request so Cowork can complete the whole piece of work from start to finish.

Before you begin

Role required: sn_app_cowork.user

The platforms the task uses, such as ServiceNow instance, Microsoft 365, or GitHub, must be connected. For more information, see Connectors in ServiceNow Cowork.

Procedure

1. In the message box, describe the outcome you want, including the goal, the sources to use, and the format of the result.

   For example: Find my open P1 incidents, check each one for related changes in the last week, summarize the likely cause, and draft an update email to each assignment group.

   Cowork determines the steps automatically, so describe the result, not the steps.

2. **Optional:** Enter a slash followed by the skill name, such as /plan-my-time, to run a skill as part of the task.

   (Optional) Cowork also uses skills automatically when your request matches a skill's description.

3. **Optional:** Name a sub-agent in your request to hand part of the work to a specialist.

   (Optional) For example: Use the researcher sub-agent to find the API documentation, and then use the build-fixer sub-agent to fix the failing test. Cowork automatically routes work to sub-agents when a task requires focused expertise.

4. **Optional:** Include when the task should run, such as every Monday at 9 a.m., to run it on a schedule.
5. **Optional:** Select a model from the model list in the message box to use a different model for this task.
6. Select the send icon.
7. **Optional:** Select **Kanban** in the sidebar to follow the task.
8. If Cowork asks for approval or input, respond in the chat so the task can continue.

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Example request: Every Monday, summarize last week's P1 incidents, create a PowerPoint presentation with a slide per incident, and post the summary to my team's Teams channel.

Cowork processes this request in stages:

a. Queries ServiceNow for P1 incidents through the ServiceNow connector.

b. Assigns the analysis to the sn-analyst sub-agent.

c. Uses the pptx skill to create the presentation.

d. Asks for your approval before it posts to Teams through the Microsoft 365 connector.

e. Saves the request as a scheduled task that runs every Monday.

Result

Cowork executes each step of the task, using the required skills, sub-agents, and connectors. When the task is done, it moves to **Completed** on the **Kanban** board, and the results appear in the chat.

What to do next

For better results with complex tasks:

- Name specific sources, such as a ServiceNow table, a Microsoft SharePoint folder, or a GitHub repository.
- State the output format, such as an email draft, a spreadsheet, or a slide per item.
- For work you repeat, turn it into a custom skill.

Track tasks in Cowork

Check and track the progress of the tasks you have delegated and respond when Cowork needs your input. Tracking tasks lets you keep working while Cowork completes them, and responding quickly keeps paused tasks from stalling.

Before you begin

Role required: sn_app_cowork.user

Procedure

1. Select **Kanban** in the ServiceNow Cowork application.
2. Review the status of each task.

Task status

Column	Description
Queued	The task is waiting to start.
Running	Cowork is working on the task.
Awaiting Input	The task needs a response from you before it continues.
Completed	The task is done.
Failed / Stopped	The task ended before it completed.

3. If a task is in **Awaiting Input**, select it.
4. Respond to the request in the chat.

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Result
Cowork continues the task after you respond, and the task moves to **Completed** when it's done.

Connectors in ServiceNow Cowork

Connectors link ServiceNow Cowork to the platforms you work in, so Cowork can read and update your real data, not just answer questions.

With connector, Cowork works across your platforms as part of any task you assign. For example, it can update incidents, schedule meetings, send email, and review GitHub pull requests, and it can combine these actions to complete larger pieces of work from start to finish.

Cowork includes connectors for ServiceNow, Microsoft 365, and GitHub. Each connector uses the authentication method that its platform supports. For example, the Microsoft 365 connector uses your Microsoft account sign in and covers mail, calendar, OneDrive files, Teams chats and channels, and directory users and groups. Cowork stores the connector tokens locally and refreshes them automatically, about every 90 days.

Connectors and MCP servers

Connectors and Model Context Protocol (MCP) servers both extend what Cowork can do, but they serve different purposes. Connectors are integrations with deep capabilities for ServiceNow, Microsoft 365, and GitHub. MCP servers add tools from other services, such as Sentry, SerpApi, or Postman, and you can choose which MCP servers each subagent can use. Use a connector when one is available for your platform, and add an MCP server for services that connectors don't cover. A remote MCP server connects through a server URL, while a local MCP server runs on your device outside the agent sandbox.

You can view and add connectors from **Settings** > **Connectors**.

Connect ServiceNow Cowork to Microsoft 365

Connect your Microsoft account so ServiceNow Cowork can work with your mail, calendar, Microsoft OneDrive files, and Teams chats and channels. After you connect, you can ask Cowork to draft and send email, schedule meetings, find files, and post to Microsoft Teams.

Before you begin
Role required: sn_app_cowork.user

About this task
Your organization must configure the Microsoft 365 app.

Procedure

1. From your user name, navigate to **Settings** > **Connectors**.
2. Select **Add**.
3. From the Connector type list, select **Microsoft 365**.
   Signing in with your Microsoft account includes your Microsoft Outlook email, calendar, Microsoft OneDrive and Microsoft SharePoint files, and Microsoft Teams chats and channels.
4. Select **Connect Microsoft 365**.
5. Select your Microsoft account.
6. Complete your organization's identity verification.
7. When Authorization Successful appears, close the browser tab and return to ServiceNow Cowork.

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Result

Microsoft 365 appears in the Connectors list with a Connected status, which confirms that the connector is configured and active. Cowork can now read and send mail, read your calendar, Microsoft OneDrive files, Microsoft SharePoint content, Microsoft Teams messages, and user profiles.

Connect ServiceNow Cowork to GitHub

Connect ServiceNow Cowork to GitHub or GitHub Enterprise to enable pull request review, CI checks, read code, and manage issues.

Before you begin

Role required: sn_app_cowork.user

Procedure

1. From your user name, navigate to **Settings** > **Connectors**.
2. Select **Add**.
3. From the **Connector type** list, select **GitHub**.
4. In **Hostname**, enter your GitHub host, such as github.com or your GitHub Enterprise hostname.
5. In the **Token** field, paste your personal access token.
   To obtain a personal access token from GitHub:
   a. Go to https://code.devsnc.com/
   b. Select the user icon on the top right.
   c. Go to **Settings** > **Developer Settings** > **Personal access tokens**.
   d. Select scopes **repo** check box and under **admin.org** select **read.org** check box.
   e. Copy the token starting with `ghp_` or `gho_`.
6. **Optional:** Select **Show setup instructions** to see how to get a token through CLI.
7. **Optional:** In **Label (optional)**, enter a name for the connection.
8. Select **Add Host**.
   Host is added and the token is stored securely.

Extend ServiceNow Cowork

Extend Cowork with skills, scheduled task, Model Context Protocol (MCP) servers, and sub-agents so the agent can handle more of your work. Each option adds new instructions, tools, or specialized agents, and you control what the agent can access.

Skills and custom skills

Skills give Cowork instructions for specific kinds of work, such as creating documents, summarizing data, or planning your time. Each skill is a folder of instructions, so you can version it, review it, and share it with a teammate.

ServiceNow provides default skills, and you can add custom skills for workflows that the defaults don't cover. Some skills run automatically when a request matches their description, so the right skill loads when the work calls for it and you don't need to memorize commands. Others run as slash commands that you enter in a chat. Some skills require a connector, such as Microsoft 365 or ServiceNow. In Settings > Skills, you can filter skills by source, invocation type, and connector.

Go to **Settings** > **Skills** to filter skills by source, invocation type, and connector.

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A custom skill captures how you do a task, including the steps, format, and sources, so the next run takes one prompt instead of detailed instructions. You can turn a task you already do well into a custom skill and share it with your team. Cowork includes a default skill that creates custom skills for you from a description of the task. When no skill fits a request, Cowork can build one and save it for next time. i

MCP servers

MCP servers add tools and data from other services, such as Sentry, SerpApi, and Postman. You can add servers from the available list or add your own. Each server uses the authentication method that its service requires, such as an API key or OAuth.

Sub-Agents

Sub-Agents are specialized agents that the main agent hands work to. Each sub-agent has its own instructions and uses only the skills and MCP servers that you grant it. ServiceNow provides built in sub-agents for tasks such as research, ServiceNow analysis, and code review, and you can create custom sub-agents for your own specialized tasks.Cowork provides built in sub-agents, including:

- default: Plans the work and keeps context across tools.
- sn-analyst: Analyzes incidents, changes, and operations with deep platform expertise.
- comms-scheduler: Drafts email and schedules meetings using context from memory.
- explorer: Gives fast, read only answers across files, ServiceNow data, and documentation.

Skills tell Cowork how to do the work, MCP servers and connectors give it access to the services it needs, and sub-agents divide larger work into focused tasks. For example, a custom sub-agent for weekly reporting can use a status summary skill and the tools from an MCP server, while the main agent coordinates the overall task.

Extending Cowork doesn't change your safeguards. Cowork still asks for approval before sensitive actions, and commands run in the agent sandbox. Local MCP servers are the exception. They run on the device outside the agent sandbox and can act without asking for approval, so administrators can turn them off. For more information, see Turn off local MCP servers. To limit access, grant each sub-agent only the skills and MCP servers it needs.

Create a custom skill in ServiceNow Cowork

Create a skill for Cowork to do a specific task, customizing it to fit your needs. After running the same type of task a few times, turn it into a skill so future runs require just one prompt instead of detailed instructions.

Before you begin

Role required: sn_app_cowork.user

About this task

Cowork includes a default skill, that builds new skills for you. You describe the task, and Cowork creates the skill with a name, a description that the agent uses to determine when to apply it, and instructions.

Procedure

1. In the message box, ask Cowork to create a skill and describe what it should do.

   For example: Create a skill that turns my weekly incident notes into a status summary for my manager, using the same headings every time.

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2. Select the send icon.
3. Answer any questions Cowork asks about the steps, format, or sources.
4. Review the skill in the chat, and ask for changes if needed.
5. Navigate to **Settings** > **Skills**.
6. Select the refresh icon to view the skill.

   The skill appears in the list.
7. **Optional:** Filter the list by selecting **Custom** under **Filters**.

Result
Cowork uses the skill automatically when a request matches its description. If the skill is user invoked, enter its name as a slash command (/) in the message box.

What to do next
Be specific about the output you need. A skill that names its format and sources gives more consistent results. To edit a skill's files, navigate to the Skills page.

Create a sub-agent

Create a custom sub-agent to hand off a specialized task, such as code review or security analysis, to a reusable agent with focused instructions and limited access. A narrow scope helps produce consistent results, limiting the sub-agent to only the skills and MCP servers it requires.

Before you begin
Role required: sn_app_cowork.user

Procedure
1. Navigate to **Settings** > **Sub-Agents**.
2. Select the add icon.
   The **New Sub-Agent** dialog opens.
3. Enter the sub-agent details.

Field	Description
Name (slug format)	Unique name in lowercase letters and hyphens only, used to reference the sub-agent in `spawn_subagent`.
Description	A short summary of what the sub-agent does.
Skills (optional)	The skills the sub-agent can use.
MCP Servers (optional)	The MCP servers the sub-agent can use.
System Prompt (Markdown)	Instructions that define the sub-agent's role and guidelines.

4. Select **Create**.
5. **Optional:** Select the refresh icon to reload the list after you add or change a sub-agent.
6. **Optional:** Select the folder icon to open the folder where sub-agents are stored.

Result
The new sub-agent appears in the **Sub-Agents** list.

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View and edit a sub-agent

Review a sub-agent's system prompt to understand how it behaves, and edit it when its results don't match what you need or its scope needs to change.

Before you begin
Role required: sn_app_cowork.user

Procedure

1. Navigate to **Settings** > **Sub-Agents**.
2. **Optional:** Enter a term in the **Search sub-agents** field to find a sub-agent.
3. Select the sub-agent.

   A details panel opens with the sub-agent's name, description, system prompt, and the file that stores it.
4. **Optional:** Select **Preview** for formatted text or **Source** for Markdown to change how the system prompt displays.
5. Select **Edit Sub-Agent**.
6. Make the updates.
7. Select **Update**.

Result
The sub-agent uses your updated settings the next time it runs.

Connect ServiceNow Cowork to MCP servers

Connect MCP servers so Cowork can use tools and data from other services, such as GitHub, Sentry, SerpApi, and Postman. Each server you connect adds capabilities to the agent, and you control which servers each sub-agent can use.

Before you begin
Role required: sn_app_cowork.user

About this task

Important: Local MCP servers run on your device outside the Cowork sandbox. After you connect one, it can take actions on your device without asking you to approve each action, and it stays configured when Cowork restarts. Your administrator can turn off local MCP servers. For more information, see Turn off local MCP servers.

Procedure

1. Navigate to **Settings** > **MCP Servers**.
2. In the **Available** list, select the install icon for the server you want to add.
3. In the **Server name** field, enter a name for the server.
4. In the **Server URL** field, enter the server's URL.

   For servers from the Available list, the name and URL are filled in for you.
5. **Optional:** Expand **Authentication (optional)** and enter the credentials if the server requires them.
6. Select **Add & Connect**.

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Result
The server appears under **Configured**. If the connection succeeds, the agent can use the server's tools, and you can grant access to it when you create a sub-agent.

What to do next
To reconnect, edit, or remove a server, select the connect, edit, or delete icon on its card under **Configured**.

If a server card shows **Error**, read the message on the card. For example, a message about a missing Authorization header means the server requires credentials. Select the edit icon, add the credentials under **Authentication (optional)**, and then select the connect icon.

Review and revoke standing approvals

Review the actions you have allowed Cowork to take without asking, and revoke any you no longer require.

Before you begin
Role required: sn_app_cowork.user

About this task
A standing approval exists only after you select **Allow always** on an approval card when Cowork asks permission for an action.

Procedure
1. Navigate to **Settings** > **Approvals**.
2. Review the list of standing approvals.
3. Select **Revoke** for each approval to remove the approval.

   If you revoke the permission, Cowork requests permission again before running the action.

Set up TOTP authorization for sensitive actions

Set up TOTP authorization to add another layer of security check before performing any sensitive action, such as changing records, deleting files, or sending messages on your behalf.

Before you begin
Install and set up an authenticator app on your mobile device.

Role required: sn_app_cowork.user

Procedure
1. Navigate to **Settings** > **Security**.
2. Under **TOTP Authorization**, select **Set Up TOTP**.

   A QR code and a secret code appear.
3. Add Cowork to your authenticator app.
   - To use the QR code, scan it with your authenticator app.
   - To enter the secret code manually, copy the value in the **Secret** field and enter it in your authenticator app.
4. In the **Verify** field, enter the six-digit code from your authenticator app.
5. Select **Verify**.
6. Select the **Require TOTP for action approvals** check box.

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Result
Cowork prompts you for a code from your authenticator app before approving sensitive actions.

Set agent limits and safeguards

Set limits on how long the agent runs and when it checks in with you, so it doesn't use more time or resources than a task needs and you stay in control of long runs.

Before you begin
Role required: sn_app_cowork.user

About this task
These limits work alongside the agent's own retry limit. When the agent makes several attempts at the same task without success, it stops and reports the problem instead of retrying indefinitely.

When a policy blocks an action, the agent reports the block and the reason and makes no further attempts. It doesn't try to work around the block.

Procedure
1. Navigate to **Settings** > **General**.
2. Scroll down to **Agent controls**.
3. In **Max turns**, move the slider to the number of turns the agent can take before it stops with an error.
4. In **Check-in at turn**, move the slider to the turn where the agent pauses and prompts you to confirm whether to continue.

   To turn off the pause, move the slider to 0. Set this value lower than **Max turns** so that the pause occurs before the hard stop.
5. **Optional:** Select **Let the agent decide** to have the agent evaluate its own progress at the **Check-in at turn** instead of pausing.

   (Optional) The agent still pauses when it cannot determine how to proceed.
6. **Optional:** Select **Read Aloud** to listen to long responses through your browser's built-in text-to-speech feature.

   (Optional) A speaker button appears on agent responses.
7. **Optional:** Select **Soft Deletes** to keep deleted files and folders recoverable.

   (Optional) The agent moves deleted items to a `dump/` directory with restore instructions instead of removing them permanently.
8. **Optional:** In **Retention (days)**, specify how many days to keep deleted items.

   (Optional) On startup, items older than the retention period are permanently removed.
9. **Optional:** Select **Browse Deleted Files** to view or restore deleted items.
10. **Optional:** Select **Reset to defaults** to return all settings to their original values.

Result
The agent uses your settings on its next run.

Update ServiceNow Cowork

ServiceNow Cowork checks for updates automatically and verifies each update before it installs. You can also check for updates yourself at any time.

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Before you begin
Role required: sn_app_cowork.user

About this task
Cowork checks for updates at startup,When it finds a required update, it shows the **Update and Restart** screen. When it finds an update in the background, it shows a notification that you can dismiss.

Procedure
1. In ServiceNow Cowork application, open **Settings**.
2. Select **About**.
3. Select **Update**.

   The **Update** button appears only when an update is available. If Cowork is current, **About** shows **Up to date** with the version number, for example **Up to date (v1.0.0)**.

ServiceNow Cowork reference

PLACEHOLDER: Short description of the reference information provided for ServiceNow Cowork.

Turn off local MCP servers

Turn off local MCP servers for users or user groups so that Cowork can't run MCP server actions directly on user devices.

Before you begin
Role required: sn_app_cowork.admin

About this task
Users can connect local MCP servers that run on their own device rather than through a remote server URL. A local MCP server runs outside the Cowork sandbox. After a user connects one, performs actions on the device without requiring approval for each one, and its configuration persists when Cowork restarts.

Administrators control whether users can connect local MCP servers.

Procedure
1. Navigate to **All** > **ServiceNow Cowork** > **Policies** > **Cowork Agent Policy**.
2. Open the policy assigned to the users or user groups you want to restrict.
3. Select the **Capability Overrides** tab, and then select **New**.
4. In the **Policy** field, select the policy you opened.
5. In the **Capability** field, select the capability.
6. In the **Override Value** field, enter .
7. In the **Description** field, enter a description of the override.
8. In the **Domain** field, select the domain.
9. Confirm that **Active** is selected.
10. Select **Submit**.

Result
Users covered by the policy can't connect local MCP servers.

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Prevent changes to sandbox files

Add a filesystem deny rule to your sandbox policy so that agent actions can't modify files in the sandbox runtime directory on user devices.

Before you begin

Role required: sn_app_cowork.admin

About this task

Cowork runs agent commands in an isolated sandbox. The sandbox reaches permitted files on the device through an authenticated file bridge, which is how tasks such as reading and saving documents work.

In affected releases, the file bridge doesn't prevent writes to the sandbox runtime directory. Cowork launches sandbox components from this directory when it creates a sandbox, so a replaced file there can run on the device with the privileges of the user running Cowork, outside the sandbox restrictions. The deny rule blocks these writes until you deploy a release that contains the permanent fix.

Procedure

1. Navigate to **All** > **ServiceNow Cowork** > **Policies** > **Cowork Agent Policy**.
2. Open the policy assigned to your affected Cowork users.
3. Select the **Policy Sandbox Rules** tab, and then select **New**.
4. In the **Sandbox Rule** field, select a sandbox rule.
5. In the **Domain** field, select the domain.
6. Select **Submit**.
7. In the **Policy Sandbox Rules** tab, select the rule you created.
8. Configure the rule.
   a. From the **Rule type** list, select **filesystem**.
   b. From the **Access mode** list, select **deny**.
   c. In the **Path** field, enter `.local/share/openshell/vm-runtime`.

      Enter the path exactly as shown. The path is relative to the user's home directory. Don't add ~/, environment variables, or wildcard characters. Apply the rule to the directory itself, not to a version folder or a file, because each new version creates its own subfolder.
9. Select **Update**.
10. Sync the policy to your Cowork clients.
11. Verify the rule.
    a. Confirm the rule is active and linked to the correct policy.
    b. Confirm each affected client received the rule.
    c. In a test environment, confirm that writes to the protected directory are denied.
    d. Confirm that normal file tasks outside that directory still work.

    A device is protected only after it receives and applies the policy. If verification fails, resolve the policy or sync issue before you treat the device as protected.

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Important: Don't test the rule by overwriting, renaming, deleting, or running a real sandbox runtime file, because this can break the sandbox on that device. Use a separate test file in a test environment.

If your deployment uses a custom sandbox runtime location, add a separate deny rule for that location. Contact ServiceNow Support to confirm the path.

Result

Agent actions can't write to the sandbox runtime directory. Typical tasks are unaffected: users can open permitted documents, process them in the sandbox, and save results to permitted locations. Before wide deployment, validate your business critical workflows and any custom skills in a test environment.

Note:

The rule protects the configured path for operations that the sandbox policy controls. It doesn't cover:

- Custom runtime locations, unless you add rules for them
- Other processes that run on the device under the same user account
- Runtime files that were modified before you applied the rule

Approval prompts add oversight but don't replace this rule.

What to do next

Keep the rule in place until a release that contains the permanent fix is deployed to all affected devices and you verify protection on them. Remove the rule only through your normal change approval process.

If you suspect a runtime file on a device was already modified, follow your organization's security incident process and reinstall Cowork from a trusted source on that device.

Environment and capability controls

Environment and capability controls limit what ServiceNow Cowork can access while an action runs, keeping the agent within the boundaries you set.

Environment and capability controls govern what an action can access when it begins executing. Tool gates and approval policies determine whether an action can run, while environment and capability controls determine what a running action can access and do.

Sandbox rules

Cowork runs actions inside an isolated virtual environment. Sandbox rules set the file system boundary and network access for the execution environment. You can add restrictions to the default protections for credential paths and system directories but can't remove them. You can also add filesystem deny rules that block the agent from writing to specific paths. For an example, see .

Network rules

By default, Cowork blocks all outbound traffic except to the hosts, domains, and ports in the network allow list. The Default Policy includes a predefined list of trusted domains.

Connector scopes

A connection credential for a service from a third-party may grant broad access. Connector scopes restrict what Cowork can do on that service, independent of

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the credential. Scopes apply to capabilities on a resource. For example, you can restrict write access to mail without affecting calendar access. For the Microsoft 365 connector, the OAuth scopes that you turn on determine which operations are available. Users can narrow their own permissions but can't widen them beyond what you turn on.

Capabilities

Capabilities are feature switches and numeric limits. You can turn features and connectors on or off for specific users or user groups, including connectors that are turned off by default. Capability overrides change an effective value without altering the default.

File type rules

File type rules set read, write, or deny access for each file extension. Rules apply in priority order, and ties resolve toward the more restrictive rule.

Test a ServiceNow Cowork policy change

Verify that a policy change works as intended before you apply it to all users.

Before you begin

Create the policy with user criteria that cover only a test user.

Role required: sn_app_cowork.admin

About this task

The instance merges policies and sends only the result, so a mistake in a broadly scoped policy affects every user it covers at their next sync. Test with a scoped policy first.

Procedure

1. Save the policy on the instance.
2. Sync the policy to the client.

   Wait for the change to arrive, which happens in near real time, or ask Cowork application on the client to restart the sandbox.

3. On the client, confirm the last policy sync time in **Settings** > **Agent Sandbox**.
4. Run the action you intended to control, and confirm that the policy handles it as expected.
5. Run an action that the change shouldn't affect, and confirm that it still works.

   Testing both confirms that the rule is doing what you intend, not blocking actions for an unrelated reason.

6. Update the policy's user criteria to cover the users or groups it's meant for.

Result

The policy change applies to its intended users at their next sync.

Agentic Usage Overview Dashboard

Monitor usage from inbound agentic connections to MCP servers from the Agentic Usage Overview Dashboard.

The Agentic Usage Overview Dashboard contains visualizations that help you assess the usage from Model Context Protocol (MCP) clients calling MCP servers in MCP Server Console.

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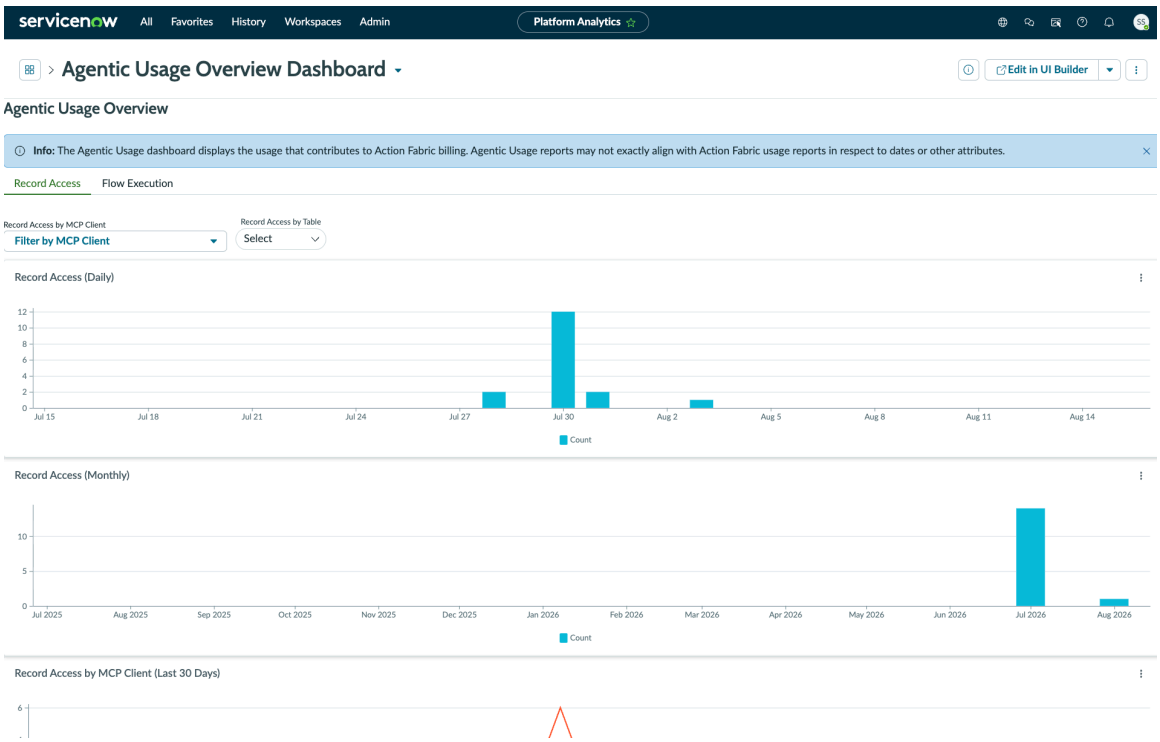
The Agentic Usage Overview Dashboard (sn_agentic_usage) is active by default. You can access the dashboard by navigating to **All** > **Agentic Usage** > **Agentic Usage Overview Dashboard**. With the sn_agentic_usage.user or sn_agentic_usage.admin role, you can view usage data across two tabs: Record Access and Flow Execution.



Record Access tab

The Record Access tab shows the number of records accessed through MCP servers. Use this tab to monitor record access volume over time and filter by MCP client or table. Select a bar or a point on a line chart to drill down to the records accessed with any currently applied filters retained.

Record Access tab visualizations

Visualization	Description
Record Access (Daily)	The number of records accessed for each day over the last 30 days.
Record Access (Monthly)	The number of records accessed for each month over the last 13 months.
Record Access by MCP Client (Last 30 days)	A trend line of records accessed by MCP client over the last 30 days.
Record Access by Table (Last 30 days)	A trend line of records accessed by table over the last 30 days.

Flow Execution tab

The Flow Execution tab shows the number of flows executed through MCP servers. Use this tab to monitor flow execution volume over time and filter by MCP client or flow name. Select a bar or a point on a line chart to drill down to the flows executed with any currently applied filters retained.

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Flow Execution tab visualizations

Visualization	Description
Flow Execution (Daily)	The number of flows executed for each day over the last 30 days.
Flow Execution (Monthly)	The number of flows executed for each month over the last 13 months.
Flow Execution by MCP Client (Last 30 days)	A trend line of flows executed by MCP client over the last 30 days.

Related topics

MCP Server Console

Analyzing AI effectiveness

Measure the performance and adoption of AI capabilities on your instance to identify what is working and where to improve.

Deploying AI capabilities is only the beginning. Measure performance and adoption continuously to confirm that your AI investments deliver value and to identify opportunities for improvement.

AI analytics

Effective AI measurement spans several dimensions: adoption (how many users engage with AI features), usage (which features are used and how often), sentiment (whether users find AI outputs helpful), accuracy (how well AI responses meet quality standards), and value (quantifiable outcomes such as time saved or cases deflected). Establishing baselines for these metrics before launching AI capabilities enables you to assess impact accurately.

AI Admin Center provides built-in analytics dashboards that track usage, adoption, skills performance, and user feedback across your instance.

For information about built-in analytics dashboards, see AI analytics.

Conversation Insights

Conversation Insights delivers Inferred CSAT scores and explanatory factors for conversations in Virtual Agent and agentic workflows. The application uses AI to analyze conversations in real time and provides insights that help improve Virtual Agent interactions, live agent interactions, and agentic workflows.

Inferred CSAT is a score from 1 (least satisfied) to 5 (most satisfied) predicted entirely from conversation transcripts without requiring input from the user. Along with the score, the model predicts contributing factors such as resolution, confusion, effort, empathy, next steps, frustration, and transfers and escalations. These factors explain user satisfaction or dissatisfaction, helping you target specific improvements.

To measure Inferred CSAT and the factors behind it across Virtual Agent and agentic workflow conversations, see Conversation Insights.

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Conversation Improvement Themes

Conversation Improvement Themes automatically surfaces common topics and patterns across conversations, helping you prioritize which enhancements will have the greatest impact on the user experience. Use these themes to identify recurring issues, understand where conversations succeed or fail, and focus improvement efforts where they matter most.

Note: Analytics capabilities across the platform are consolidating. Monitor the AI Admin Hub console for the latest analytics features added in each release.

To surface recurring themes across conversations and prioritize the improvements with the greatest impact, see Conversation Improvement Themes.

AI analytics

AI Admin Center consolidates analytics for generative AI skills, AI agents, and assistants into a single monitoring experience.

The **Monitor** section in AI Admin Center groups dashboards by AI asset type into a single destination for reviewing performance across your AI deployment. For enterprise-level governance and value tracking, AI Control Tower provides additional capabilities outside of AI Admin Center.

AI Admin Center

The **Monitor** section in AI Admin Center organizes analytics dashboards into tabs based on asset type. Each tab surfaces the dashboards available in the corresponding standalone analytics application, so you can monitor all AI asset types without switching between applications.

The **Skills** tab provides dashboards for monitoring the usage and performance of generative AI skills, including usage summary, adoption, skill performance, offensiveness, and user search analysis. For more information, see Analyzing AI performance.

The **AI Agents** tab provides dashboards for monitoring the usage, performance, and operational health of AI agents and agentic workflows, including execution status, insights, assist consumption, and troubleshooting. For more information, see AI Agent Analytics dashboard.

The **Assistants** tab provides dashboards for monitoring AI-powered assistant performance, including usage, adoption and engagement, self-solve rates, sentiment, and assist consumption. For more information, see Analyzing assistants.

To open the **Monitor** section, see View AI assets usage and performance in AI Admin Center (Next Experience UI).

AI Control Tower

AI Control Tower provides governance, value tracking, and cost analysis for AI systems across your enterprise. Use it to track the value of your AI investments, monitor spending across AI vendors, and review your AI systems against governance policies.

For more information, see AI Control Tower.

Conversation Insights

The ServiceNow® Conversation Insights application is designed to deliver Inferred customer satisfaction (CSAT) scores, with underlying factors that can help improve CSAT actionability.

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Get started

Get started with Conversation Insights to integrate Inferred CSAT scores and factors into your analytics dashboard.

Explore	Install	Reference
Learn more about Conversation Insights	Install Conversation Insights	Additional information about Conversation Insights

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

Exploring Conversation Insights

Learn how Conversation Insights can help you to augment conversation insights with AI-based Inferred customer satisfaction (CSAT) scores and factors.

Conversation Insights overview

Conversation Insights is designed to deliver Inferred CSAT scores and explanatory factors for conversations in Virtual Agent and agentic workflows. It leverages AI to analyze conversations in real time, and provides actionable insights that help improve Virtual Agent and live agent interactions, and agentic workflows.

Inferred CSAT is a numerical score from 1 (least satisfied) to 5 (most satisfied). It's predicted entirely from conversation transcripts in real time without any input from the user. In addition to the CSAT score, the model also predicts CSAT factors that contributed to the CSAT score. The following CSAT factors are associated with the Inferred CSAT score.

- Resolution: Indicates whether the Virtual Agent or AI agent successfully resolved the user's issue without human intervention.
- Confusion: Indicates how often the Virtual Agent or AI agent misunderstood or failed to interpret the user's intent.

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- Effort: Indicates the number of user turns or interactions required to reach a resolution.
- Empathy: Indicates how well the Virtual Agent or AI agent acknowledged and responded to the user's emotional tone.
- Next Steps: Captures whether the Virtual Agent or AI agent clearly communicated what the user should do next.
- Frustration: Flags signs of user dissatisfaction or repeated failed attempts during the interaction.
- Transfers and Escalations: Tracks how often the Virtual Agent or AI agent handed off the conversation to a human agent or another system.

Inferred CSAT scores and factors are calculated for each conversation. Conversational analytics applications can leverage the scores written to the Conversation Insights [sn_aci_insights] table to create custom dashboards and workflows. The AI Agent Analytics dashboard includes visualizations with Inferred CSAT scores and factors by default.

The data retention period for the Conversation Insights [sn_aci_insights] table is two years. For more information on creating custom dashboards, see Create a dashboard with the in-line editor and Select a table data source for a data visualization.

Conversation Insights are also supported by Voice Agents, ServiceNow Otto panel, and Virtual Agent.

To view the conversation insights for Voice Agents, go to **Assistant Designer** > **Analytics** > **Sentiment** dashboard.

To view the conversation insights for ServiceNow Otto panel or Virtual Agent, go to **Platform Analytics** > **Dashboards** > **AI Engagement Analytics**.

Inferred CSAT segmented by intent

Use the additional insights introduced to report on Inferred CSAT segmented by intent. It gives better insights into why customers contact the brand and how well their needs are met. This helps companies quickly spot and fix issues with their top customer intents.

The score for Inferred CSAT segmented by intent is automatically generated when customers upgrade the Conversation Insights app. It requires a minimum sample size of 500 conversations to start and samples up to 2000 records every 15 minutes.

These metrics are available in the AI Agent Analytics dashboard, under the Insights tab, where you can find two new charts.

You can also explore the conversational insights for ServiceNow Otto panel and Virtual Agent. To view the dashboard, go to **Dashboards** > **AI Engagement Analytics** > **Platform Analytics** section or **Dashboards** > **AI Engagement Analytics** > **Voice Agents** Agents section.

Additionally you can also go to **Assistant Designer** > **Analytics** > **Sentiment** dashboard to view these insights.

Conversation Insights workflow

The Conversation Insights workflow illustrates how each interaction, whether handled by Virtual Agent or an AI agent, is transformed into actionable insights. You can feed the insights directly into the dashboards for analysis and decision making. The Conversation Insights workflow shows the journey from conversations to insights on dashboards.

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Conversation Insights workflow

1. Conversation sources
   - Agentic AI chats
   - Virtual Agent chats
2. Data aggregation
   - Agentic AI and Virtual Agent interactions are captured in the Conversation table [sys_cs_conversation].
   - The conversation transcript, including user query, agent response, timestamps, and metadata such as the session ID and channel type are also stored in the Conversation table for processing.
3. Insight generation
   - The model analyzes the conversation transcript.
   - Inferred CSAT scores are generated for CSAT factors such as Empathy, Resolution, Frustration, and so on.
4. Insights storage
   - Inferred CSAT scores and factors are stored in the Conversation Insights table [sn_aci_insights].
   - The Conversation Insights table acts as a structured repository for the extracted insights.
5. Dashboards
   - The insights are made available to create adhoc dashboards and workflows.
   - You can explore trends, performance metrics, and target improvements based on the Inferred CSAT scores.

Conversation Insights benefits

Problem	Solution
Traditional surveys often reflect extreme opinions and low response rates.	Inferred CSAT helps solve this problem by using AI to estimate CSAT score for conversations in real time, based on full conversation transcript. This CSAT score can help to eliminate bias and

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Problem	Solution
	reduce the need for reliance on explicit survey feedback.
Post-interaction feedback delays insights resulting in lagging indicators.	CSAT scores are generated immediately after the interaction, enabling faster detection of issues and trends.
Lack of actionable insight behind CSAT scores.	CSAT factors like Resolution, Empathy, Effort, and so on explain user satisfaction or dissatisfaction, helping you to target improvements.

What to explore next

To learn more about configuring and using Conversation Insights, see:

- Install Conversation Insights
- Conversation Insights reference

Install Conversation Insights

If you have the admin role, you can install the Conversation Insights application (sn_aci).The application includes demo data and installs related ServiceNow® Store applications and plugins, if they aren't already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- Inferred CSAT is calculated by an internal service that communicates with the instance using mutual Transport Layer Security (mTLS). To enable this, the instance must be configured to support Application Delivery Controller-to-Application (ADC-to-APP) mTLS. This setup ensures strong authentication and encrypted data exchange between internal services and the instance, requiring both client and server to present and validate certificates during the TLS handshake. For more information on mTLS configuration, refer to steps 1 and 2 in the Prerequisites section of KB0993615.

Role required: admin

About this task

The following items are installed with Conversation Insights:

- Plugins
- Store applications
- Roles
- Scheduled jobs
- Conversation Insights [sn_aci_insights] table

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Conversation Insights application (sn_aci) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find the application, you might have to request it from the ServiceNow Store.

   A list of the versions available to you're displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Conversation Insights reference

The following topics provide additional information about the features and properties installed with Conversation Insights.

Components installed with Conversation Insights

Installation of the Conversation Insights application also installs the Conversation Insights [sn_aci_insights] table.

Tables installed with Conversation Insights

The installation of Conversation Insights installs the Conversation Insights [sn_aci_insights] table. The data retention period for the Conversation Insights table is two years.

Conversation Insights table

Column	Description
Human Agent CSAT	Estimated Inferred customer satisfaction (CSAT) score based on the human agent's responses. The value range is 1–5 with 1 meaning that the user is extremely dissatisfied and 5 meaning that the user is extremely satisfied with the interaction.
Effort Score	A score of time and energy that the user had to put in during the interaction. The values are on a 3-point scale of low, medium, and high.
AI agent CSAT	Estimated CSAT score based on the AI agent's responses. The value range is 1–5 with 1 meaning that the user is extremely dissatisfied and 5 meaning that the user is extremely satisfied with the interaction.

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Conversation Insights table (continued)

Column	Description
Frustration	Estimated CSAT score that indicates whether the user expressed frustration during the interaction. The values are Yes or No.
Empathy	Estimated CSAT score that indicates empathy shown toward the user during the interaction. The values are on a 3-point scale of low, medium, and high.
Session CSAT	Estimated CSAT score calculated based on the overall session interactions of a user. The value range is 1–5 with 1 meaning that the user is extremely dissatisfied and 5 meaning that the user is extremely satisfied with the interaction.
Next Steps	Estimated CSAT score that indicates whether the agent recapped the outcome and provided clear instructions on what the user should do next. The values are on a 3-point scale of low, medium, and high.
CSAT processed	Boolean flag indicating whether CSAT data has been processed for the interaction record.
Transfer and Escalation	Estimated CSAT score that indicates whether the conversation was transferred or escalated to a human agent. The values are Yes or No.
Closed At	Timestamp showing when the conversation was closed.
Conversation	Refers to the associated conversation record in the Conversation [sys_cs_conversation] table.
Resolved	Estimated CSAT score that indicates whether the issue was resolved. The values are Yes or No.
Confusion	Estimated CSAT score that indicates whether the user expressed confusion or the agent didn’t understand the user's intent. The values are Yes or No.

Conversation Improvement Themes

The Conversation Improvement Themes application helps to transform Conversation Evaluators evaluations that are part of AI Control Tower into long-term performance insights by analyzing conversation quality data over time.

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Get started

Explore	Activate	Use
Learn more about Conversation Improvement Themes	Activate Conversation Improvement Themes	Use Conversation Improvement Themes
Reference		
Additional information about Conversation Improvement Themes		

Important:

- Not all model providers are available for customers with in-country SKUs, and some AI products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some AI products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base. Be sure to check for availability updates in future releases.
- Some AI products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

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Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the AI Opt-Out page.

Exploring Conversation Improvement Themes

The Conversation Improvement Themes application helps to transform conversation evaluations into long-term performance insights.

Conversation Improvement Themes overview

The Conversation Improvement Themes analyzes conversation quality data over time. The approach focuses on identifying recurring patterns linked to low conversation quality (and high) and categorizing user requests into actionable themes using metadata-driven classification powered by large language models (LLMs).

Note: Conversation Improvement Themes can use OpenAI, Gemini, or Claude. It's observed in certain instances that Gemini and Claude could consume a higher number of assists, compared to the OpenAI model, which is observed to have optimal use of assists.

How themes are created

To create themes, metadata like name, short description, and so on, from different content types like knowledge base articles, catalog items, virtual agent topics, and AI agents are analyzed. Theme generation is performed using an LLM-based categorization process that relies only on metadata rather than full article content, which helps limit token usage, reducing processing overhead. For each created theme, definitions are created using the tagged content from the LLM-based classification process, which helps in tagging primary requests from conversations.

Approach:

1. Filter by User Satisfaction Score. For example, select conversations where evaluator results are associated with low user satisfaction score (<=1.5) or High Score >= 4.5.
2. Extract and standardize Primary requests:
   a. Parse the user's Primary request, removing noise from different writing styles or phrasing.
   b. Apply standardization so similar intents, for example, reset my password versus can't log in are grouped consistently.
3. Frequency analysis:
   a. Link each standardized request to a theme.
   b. Count how often each theme appears when the virtual agent underperforms or performs well.
   c. Highlight themes where the virtual agent handles requests poorly or well on the screen.

Activating Conversation Improvement Themes

Activate the Conversation Improvement Themes application to analyze conversation quality.

Before you begin

Role required: admin

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Conversation evaluations have to be enabled in AI Control Tower. For more information, see Enabling evaluations.

Procedure

1. Navigate to **All** > **AI Admin Hub** > **Skills**.
2. Within the Platform category, select the feature **Conversation Evaluator** and verify that all the skills shipped with the Conversation Evaluator application are activated.
3. After that, activate the skills shipped with this application.
   - Theme Extraction
   - Themes Update Definition
   - Themes Primary Request Tagging
4. Navigate to **All** > **System Definition** > **Scheduled Jobs**.

   Apply the filter: `Application = Conversation Improvement themes`. Activate all scheduled jobs.

   - Create thematic executions
   - Evaluations for themes [Daily job]
   - Evaluations for themes [Historic job]
   - Themes - Create Daily Primary Request Executions
   - Update Theme Effective and Ineffective Scores
5. For access to the application, assign the following roles to the users:
   - sn_na_thematic.theme_admin
   - sn_na_conv_eval.eval_admin

   Note:

   Only users who have access to the roles mentioned previously can access the data on the Conversation Improvements dashboard and the tables. But they won't be able to see live agent invocations.

   User must have the following roles to access all the data on the themes dashboard:

   - sn_na_thematic.theme_admin
   - sn_na_conv_eval.eval_admin
   - Interaction_admin

Using Conversation Improvement Themes

View performance insights using the widgets in Conversation Improvement Themes.

To access the application, navigate to **All** > **Conversation Improvement Themes** > **Overview**.

The Overview page has the following widgets:

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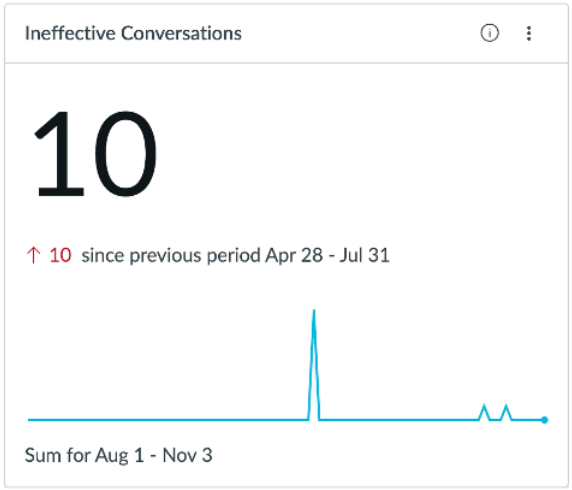
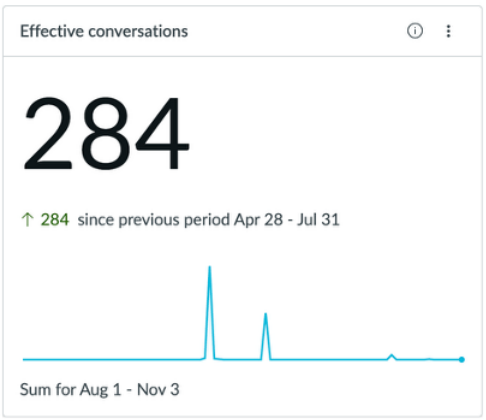
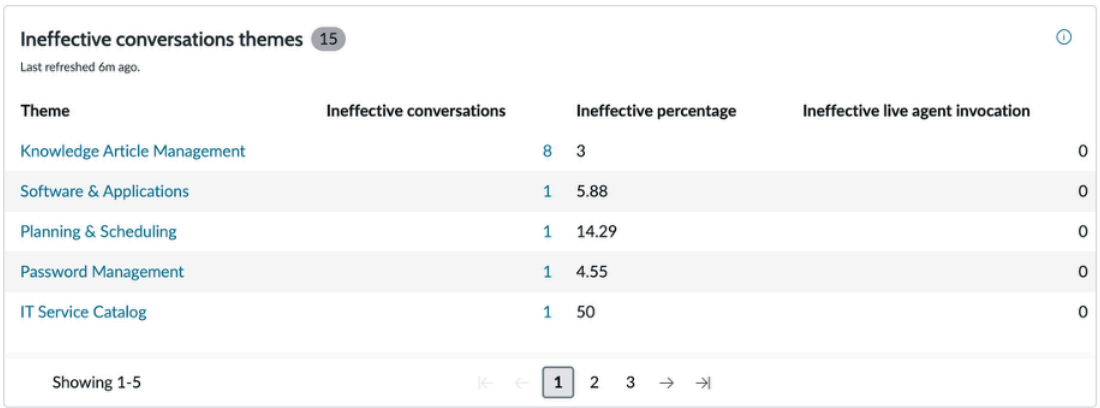
- Ineffective Conversations: The number of conversations with Auto evaluated user satisfaction scores of less than or equal to 1.5.



- Effective Conversations: The number of conversations with Auto evaluated user satisfaction scores of greater than or equal to 4.5.



- Ineffective conversation themes: The themes that have ineffective conversations.



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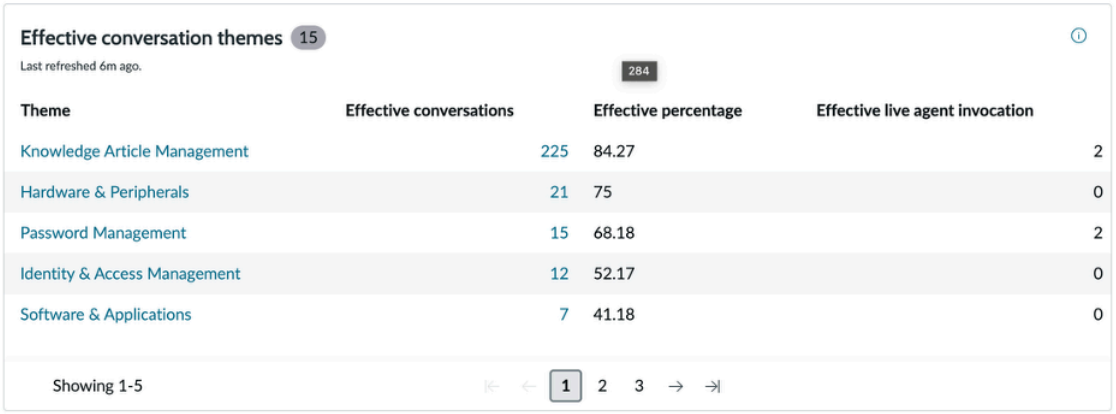
- Effective conversation themes: The themes that have effective conversations.

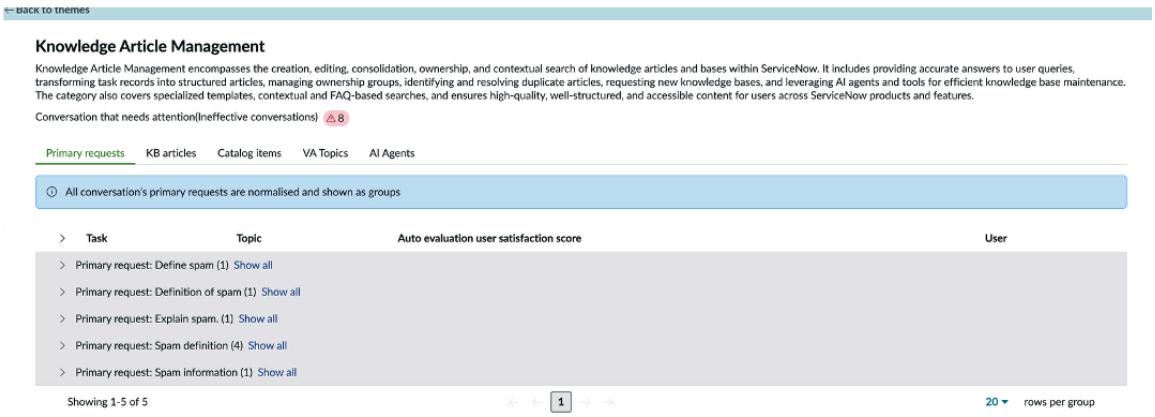


When you select any of themes under **Ineffective conversations themes** or **Effective conversations themes**, you're redirected to the theme.

For example, if you select Knowledge Article Management, it takes you to the page showing the theme name with its description and then shows the primary requests, knowledge articles, catalog items, VA topics, and AI Agents tagged to the theme. When you select on any of the tagged Primary requests, KB articles, Catalog Items, VA Topics, or AI Agents, you're redirected to these items.

Note: You can only see the sections to which you have access.

For example, you need access to AI Control Tower to access primary requests, Knowledge Base to access KB articles, Service Catalog to access catalog items, VA administrator to access VA topics, AI Agent Studio to access AI agents.



Reference for Conversation Improvement Themes

The following topics provide additional information about the features and properties installed with Conversation Improvement Themes.

Components installed with Conversation Improvement Themes

Several types of components are part of Conversation Improvement Themes, including scheduled jobs, tables, system properties, and flows.

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Roles added

Role	Description
sn_na_thematic.theme_admin	Primary role to access dashboard and tables installed with the application.

Scheduled jobs installed

Scheduled job	Description
Create thematic executions	This scheduled job runs once a month and creates Themes Execution Staging Records that create themes and their description and tags knowledge articles, catalog items, VA topics, AI Agents, and conversations to these themes.
Themes - Create Daily Primary Request Executions	Runs daily and creates Themes Execution Staging Records that tags conversations to the existing themes, and if necessary, creates new themes
Update Theme Effective and Ineffective Scores	Runs daily and populates number of effective conversations and number of ineffective conversations for every theme.

Tables installed

Label	Name
Themes Configurations [sn_na_thematic_themes_configurations]	Contains various configurations for Conversation Improvement Themes. Configuration Name - Last scan date: Contains the last scanned date of the theme creation. After the first run, theme extraction and theme description update will only run on content updated or created after the last run date.
Themes [sn_na_thematic_themes]	Contains the themes created along with their descriptions.
Themes associations [sn_na_thematic_associates]	Contains the relationship between themes and different content types tagged to that theme.
Primary Requests [sn_na_thematic_primary_requests]	Contains all the primary requests extracted from evaluated chats.

System properties installed

Property	Description
sn_na_thematic.dataChunkSize	The default chunk size, used for Azure Open AI provider and as a backup. The default chunk size is 100. If you see Themes Execution staging record is either in a failed state or stuck on processing for a long time, reduce the chunk

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Property	Description
	size and change the state of the Execution staging record to draft and then again to processing.
sn_na_thematic.fallbackDataChunkSize	If any of the theme skills are not part of the Azure Open AI provider, the fallback size is used to create execution staging records. If you see Themes Execution staging record is either in a failed state or stuck on processing for a long time, reduce the chunk size and change the state of the Execution staging record to draft and then again to processing. The default chunk size is 25. But it should be set differently for different LLMS. • Gemini: 25 • Claude: 10 • Now LLM: 1

Business rules installed

Name	Description
Theme tagging	An asynchronous business rule that runs the state of the Themes Execution Staging record changes to processing. It invokes the Theme Tagging subflow.
Themes Update next record to processing	Runs state of the Themes Execution Staging record changes to Classification Complete, Complete or Failed.

Subflows installed

Flow	Description
Theme Tagging	Executes when the state of the Themes Execution Staging record changes to processing. The subflow creates themes, updates their description, and then tags knowledge articles, catalog items, VA Topics, AI agents, and conversations with the themes and moves the state of the Themes Execution staging record to complete.
Primary Theme Tagging	The subflow is called from Theme Tagging subflow. It tags conversations to the existing themes and if necessary, creates new themes.

Script includes installed

Script includes	Description
themesUtil	Primary utility function for Conversation Evaluator.

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Troubleshooting for Conversation Improvement Themes

Troubleshooting steps for errors that might occur in Conversation Improvement Themes.

Scenario/Symptom: The dashboard is not showing any data, one week after the install.

Associated Error Codes/Warning: N/A.

Steps to Resolve:

Make sure all the skills and scheduled jobs are active by following the steps given in Activating Conversation Improvement Themes.

Scenario/Symptom: Execution staging records are stuck on Processing/Failed.

Associated Error Codes/Warning: Flow-related logs in syslog.

Steps to Resolve:

Increase flow logging (preferably in dev).

Environment guidance:

- Dev/Test: Set verbose logging to All configurations and runtime value.
- Prod: Use Runtime states and duration only. Don't enable All configurations and runtime value in production.

Steps:

1. Navigate to **Process Automation** > **Flow Administration** > **Properties**.
2. Set Level of reporting data generated by the flow engine to the appropriate level (see the guidance above).
3. Create a conversation through the Portal and end the conversation.
4. Navigate to **Process Automation** > **Flow Designer** > **Theme Tagging(subflow) or Primary Request Tagging(subflow)**.
5. Review flow executions. Identify any actions marked Failed or Error and address the cause.
6. If all actions are Complete and there is no other path indicating failure handling, open a Support ticket.

Scenario/Symptom: Execution staging records Failed when default model is Gemini/Claude/Now LLM.

Associated Error Codes/Warning: Skill Execution timed out.

Steps to Resolve:

This is a known issue with Gemini and Claude as they are slow thinking models, responses may be slow and sometimes can get timed out. To resolve this, reduce the chunk size in system properties by performing the following steps:

1. Navigate to **All** > **System Properties** (sys_properties.list) and search for **sn_na_thematic.dataChunkSize** and reduce it. The ideal chunk size for all the models is:
   - Azure Open AI: 100
   - Gemini: 25

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- Claude: 5
- Now LLM: 1

2. Move the failed Execution staging record to processing.

Generative AI Logs: If an evaluation is not complete, navigate to sys_generative_ai_log and check for the following definitions to see if there are any errors:

- Theme Extraction
- Themes Update Definition
- Themes Primary Request Tagging

Outbound HTTP:

If no Gen AI logs are created, check the Outbound HTTP logs for any issues exist.

Sys Logs: Check sys logs for any errors related to passing with scope as sn_na_thematic.

AI adoption and change management

Apply proven change management strategies to help your workforce embrace AI capabilities and sustain adoption over time.

Activating an AI product is only the first step toward realizing its value. Because end users can choose whether to use AI-powered skills, AI requires more active change management than traditional products. A structured organizational change management approach helps users understand, embrace, and effectively use AI capabilities in their daily work.

An effective adoption program requires learning why change management is critical for AI, applying the four pillars of a structured program, choosing rollout strategies that build momentum, measuring success, and sustaining engagement after launch.

To apply the four pillars of a change management program, choose rollout strategies, measure success, and sustain engagement after launch, see Managing change for AI adoption.

Managing change for AI adoption

A structured organizational change management approach helps users understand, embrace, and effectively leverage AI capabilities in their daily work.

The difference between successful AI adoption and underutilized capabilities often comes down to how well you manage the human side of change. ServiceNow AI requires more active change management than traditional products because end users can choose whether to use AI-powered skills. A structured organizational change management (OCM) approach helps users understand, embrace, and effectively leverage AI capabilities in their daily work.

Why change management matters for AI adoption

Projects with strong change management are significantly more successful than those without structured adoption programs. With generative AI, the stakes are even higher:

- User choice drives adoption. Unlike mandatory system upgrades, AI features are optional tools that users must actively choose to incorporate into their workflows.
- AI changes how people work. Generative AI introduces new interaction patterns that may feel unfamiliar, requiring users to trust AI-generated outputs and adapt established habits.

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- Concerns must be addressed proactively. Users may have questions about trust, accuracy, job impact, and data security that require thoughtful communication.
- Value depends on usage. The return on investment of is directly tied to adoption rates. Features that go unused deliver no business value regardless of their technical capabilities.

Four pillars of effective change management

Successful AI adoption programs address four interconnected areas: stakeholders and champions, messaging and communication, training and enablement, and reinforcement and optimization.

Identify stakeholders and champions

Build a network of people who drive adoption across the organization:

- Executive sponsors provide visible leadership support and communicate strategic importance.
- Business partners take responsibility for messaging within their teams and hold accountability for adoption outcomes.
- Change champions are influential frontline employees or mid-level managers who advocate for AI adoption, help train colleagues, and provide valuable feedback.
- Subject matter experts confirm that AI capabilities align with actual workflow needs and validate that outputs meet quality standards.

Engage business partners early and assign clear ownership. Collaboration between IT and business teams is critical, with business partners taking responsibility for encouraging their teams to drive adoption. Communication is most effective when partners use language that emphasizes personal benefits to individual users.

Craft clear messaging

Develop communications that help users understand why AI matters and how it improves their work:

- Lead with benefits. Frame AI capabilities in terms of the problems they solve and the time they save, not just the features they provide.
- Address concerns directly. Proactively communicate about trust, accuracy, job impact, and data security through strategic messaging rather than waiting for questions to arise.
- Use multiple channels. Communicate through champions, focus groups, and interactive sessions rather than relying solely on email announcements.
- Share success stories. Highlight teams that have seen tangible improvements, such as reduced case review time or faster resolution rates, to build momentum and encourage broader adoption.

Meet users where they are by adapting communication approaches to your organization's preferences, whether virtual, in-office, or remote-first environments.

Provide effective training

Confirm that users are prepared to use AI successfully through structured enablement:

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- Develop role-based training. Different user personas interact with AI in different ways. Tailor training content to specific roles and use cases.
- Use hands-on approaches. Live demos, office hours, and interactive sessions outperform static documentation or slide presentations.
- Make training ongoing. Enablement is not a one-time event. Provide continuous learning opportunities as capabilities evolve and users gain experience.
- Provide digital enablement. Multimedia content, onboarding resources, and self-service learning materials extend the reach of your training program.

Reinforce and optimize

Track progress, gather feedback, and make continuous improvements:

- Measure adoption metrics. Track monthly active user percentages, feature usage rates, and user sentiment to understand adoption patterns.
- Collect and act on feedback. Establish channels for users to report issues, suggest improvements, and share experiences.
- Celebrate wins. Recognize teams and individuals who achieve measurable improvements through AI adoption.
- Iterate based on data. Use adoption analytics to identify areas for improvement and adjust your approach accordingly.

Recommended rollout strategies

How you introduce AI capabilities significantly impacts adoption success. Consider these proven approaches:

Start with pilots

Groups involved in pilots consistently show the highest adoption rates. Pilot programs allow you to gather feedback, refine training approaches, and demonstrate success before broader rollout. Study your users, understand their roles, and target the rollout with assigned access and permissions for active users. Without this focus, non-engaged users can skew adoption metrics.

Use phased rollouts

Implement iteratively with quick feedback loops rather than large, one-time rollouts. Phased approaches combined with persuasion-based communication help move users from curiosity to confident adoption. This approach also allows you to incorporate lessons learned from earlier phases into subsequent ones.

Start with quick wins

Begin with turnkey capabilities such as incident or case summarization that deliver immediate, visible value. Quick wins help you gain insights into user experience, value measurement, and change management while building foundational readiness for more advanced features.

Prioritize user experience

Features that require users to change their behavior need strong user experience design. Early UX research and limited rollouts help optimize the experience before broad deployment. Even small details matter: if a summarize button is positioned outside users' natural line of sight, adoption suffers regardless of how valuable the feature is.

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Measuring adoption success

Before launching any use case, identify the metrics you will use to gauge adoption and usage. Track these key indicators:

- Adoption: the monthly active user percentage of AI users against total potential users.
- Usage: which features are used and how often, based on triggers such as summaries successfully generated.
- Sentiment: the proportion of positive feedback out of total feedback.
- Accuracy: how well AI outputs meet quality standards for the use case, such as search or conversation success rates and summary or code acceptance rates.
- Hours saved: the time savings that form the basis of value calculations for both fulfiller and requester use cases.

Track adoption metrics, analyze them for trends, and layer qualitative and quantitative data into the story to demonstrate impact and identify opportunities for improvement.

Driving ongoing engagement

Sustained adoption requires ongoing attention. Consider these approaches to maintain momentum:

- Promote a culture shift. Position generative AI as a trusted partner that enhances human capabilities rather than replacing them.
- Introduce gamification. Programs that reward high-quality usage, such as recognizing agents who generate the best knowledge base articles using AI, can increase engagement.
- Share success broadly. Feature success stories in newsletters, all-hands meetings, and internal communications to inspire others.
- Respond to feedback quickly. Demonstrate that user input drives improvements by acting on feedback and communicating changes.

Related resources

- The overlooked key to AI success: organizational change management (ServiceNow Community)
- Now Assist Implementation Insights
- Now on Now: Our Now Assist Implementation Lessons Learned
- Establishing AI governance
- Analyzing AI effectiveness

Solving installation and configuration issues with ServiceNow AI features

Use this checklist to address issues or gaps in your AI configuration.

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Common issues by feature

Feature	Issue	Solution
AI and ServiceNow Otto applications	I want to view my subscriptions	See Product subscriptions overview.
AI agents	I can't find agent spokes	Install the ServiceNow Otto for Spokes application from the ServiceNow Store. For details, see Now Assist for Integration Hub.
AI Control Tower	No data on the Evaluations tab	Verify that the Conversation Evaluator [sn_na_conv_eval] plugin is active. Also verify that the Smooth Flowing Conversation Chat Eval skill is active in the AI Admin Hub console. (This skill may appear in the Platform workflow or in the Other workflow, depending on your instance.)
AI Search	External content isn't included in search results	You can use External Content Connectors to include other sources in your search results. For details, see External Content Connectors.
AI Search	ServiceNow Otto for AI Search Genius results don't appear	1. Verify that AI Search and ServiceNow Otto for AI Search are installed and configured. 2. To use Q&A Genius Results in AI Search applications, link the Q&A Genius Result configuration to your search profiles for those applications. For details, see Link a Genius Result configuration to a search profile. 3. Verify that all AI and ServiceNow Otto plugins are up to date. For details, see Update an application or plugin. 4. Try repairing the plugins.
AI setup	Errors after clone	Try repairing affected plugins. For details, see Repair an application or plugin.
AI setup	The Q&A results skill is not in the AI Admin Hub	Set up AI Search. For details, see Configuring AI Search.
AI setup	Features/ skills are missing or generally not working	• Verify that all AI and ServiceNow Otto plugins are up to date. For details, see Update an application or plugin. • Verify that version and dependency requirements are met. For details, see Evaluating version requirements and dependencies. • For skills, verify that they are active in the AI Admin Hub. For details, see Activate an AI skill. • Verify that the user has the correct role for the skill.

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Common issues by feature (continued)

Feature	Issue	Solution
		• Try clearing the cookies and cache in the web browser. • Try repairing Generative AI Controller. For details, see Repair an application or plugin.
AI setup	Can't edit a skill	Verify that you have the AI Admin Hub role: sn_nowassist_admin.nsa_admin. You can edit a skill or make a copy of a skill to edit. For details, see Edit an AI skill and Make a copy of an AI skill.
AI setup	Missing entries, fields, and errors	• Verify that all AI and ServiceNow Otto plugins are up to date. For details, see Update an application or plugin. • Try repairing the application. For details, see Repair an application or plugin. • Try repairing Generative AI Controller. For details, see Repair an application or plugin.
AI setup	Problems upgrading AI and ServiceNow Otto applications	• Verify that you have a license for the application. • If the application was not previously installed, request it from the ServiceNow Store (Opt In). • If the application was previously installed, you may need to procure it from the ServiceNow Store again. For details, see Updating applications.
AI setup	Skills not working in Legacy Agent Workspace	Generative AI skills are not available in Legacy Workspace. Upgrade to Service Operations Workspace to use skills.
AI Skill Kit	AI Skill Kit is not visible on my instance	• Verify that you have at least one AI or ServiceNow Otto product installed. For details, see Install plugins for ServiceNow Otto. • Verify that the sn_skill_builder.admin role is assigned to the user.
AI Skill Kit	Skills are read-only	Verify that the sn_skill_builder.admin role is assigned to the user.
Knowledge generation	I can't generate a knowledge article	1. Verify that ServiceNow Otto for Knowledge Management is installed and configured. 2. Verify that all AI and ServiceNow Otto plugins are up to date. For details, see Update an application or plugin.

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Common issues by feature (continued)

Feature	Issue	Solution
		3. Verify that the knowledge generation skill is activated. For details, see Activate an AI skill. **4.** Try repairing the plugins.
Knowledge generation	The KB generation popup doesn't appear in Core UI	ServiceNow Otto for Knowledge Management formatters may be missing from the form layout, possibly due to form customizations. For details, see KB1710178.
ServiceNow Otto for Code	Don't see code suggestions	• Verify that the skill is active. For details, see Activate an AI skill. • Verify that the user has the appropriate role. Any authenticated builder can use the related active skill. • Verify that autocomplete is enabled. For details, see Generate code with autocomplete.
ServiceNow Otto for Creator	Skills not available or not working	• Verify that the skill is active in AI Admin Hub. • Verify that the user has the appropriate role. Any authenticated builder can use the related active skill.
ServiceNow Otto panel	Can't access skills in the ServiceNow Otto panel	• Verify that the skill is configured to display in the ServiceNow Otto panel. For details, see Edit an AI skill. • If you're using ServiceNow Otto for Virtual Agent, verify that search sources were configured for the ServiceNow Otto panel. You can specify search sources for a ServiceNow Otto panel assistant when you set it up. Search sources are essential for the panel and Virtual Agent. Without them, they cannot discover or rank skills and agentic workflows. For details, see Assistants overview and Assign search sources to a chat assistant. If ServiceNow Otto for Virtual Agent is not installed, the ServiceNow Otto panel uses default search sources.
ServiceNow Otto panel	Some users don't get a response to a question	Many generative AI skills require specific user roles. Verify that there are active skills with the user's role. For details, see Activate an AI skill.
ServiceNow Otto panel	I don't want skills to be available in ServiceNow Otto panel	Disable the ServiceNow Otto panel when you configure the skill. For details, see Edit an AI skill.

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Common issues by feature (continued)

Feature	Issue	Solution
ServiceNow Otto panel	Options for ServiceNow Otto panel are grayed out in AI Admin Hub	The sn_nowassist_admin.user role provides read-only access only. To make configuration changes, the user must have the sn_nowassist_admin.nsa_admin role.
ServiceNow Otto for Virtual Agent	Topic not returning as expected	• Verify that the Virtual Agent topic is in the Active state and is published. For details, see Publish a Virtual Agent topic. • Verify that the topics are using LLM topic discovery. NLU/keyword topics cannot be used in a portal that is using ServiceNow Otto for Virtual Agent. You can migrate NLU/keyword topics to LLM, however. For details, see Migrating NLU/keyword Virtual Agent topics to LLM topics.
ServiceNow Otto for Virtual Agent	Can't add topics to the portal	Verify that the topics are using LLM topic discovery. NLU/keyword topics cannot be added to a portal that is using ServiceNow Otto for Virtual Agent. You can migrate these topics to LLM, however. For details, see Migrating NLU/keyword Virtual Agent topics to LLM topics.
ServiceNow Otto for Virtual Agent	Configuration issues	1. Verify that the plugin is up to date. For details, see Update an application or plugin. 2. Follow the guided setup to install and configure it. For details, see Assistants overview.
ServiceNow Otto for Virtual Agent	Unable to choose fallback options in setup	If you're using a custom fallback topic, this option may be unavailable in guided setup. For details, see KB1760362: Now Assist Chat Setup Not Allowing to Set Fallback Option. You may need to log in to view the article.
ServiceNow Otto for Virtual Agent	Chat is not showing search results	• Verify that all of your AI or ServiceNow Otto plugins are up to date. For details, see Update an application or plugin. • Verify that AI Search and ServiceNow Otto for AI Search are set up and configured. For details, see Configuring AI Search and Install ServiceNow Otto for AI Search. • Verify that search sources were configured for the Virtual Agent assistant. You can specify search sources for an assistant when you set it up. Search sources are essential for Virtual Agent and the ServiceNow Otto panel. Without them, they cannot discover or rank skills and agentic workflows. For details, see Assistants overview and Assign search sources to a chat assistant.
ServiceNow Otto for	Error when attempting to migrate	Verify that you have the correct role, either virtual_agent_admin or sn_vad_genai.topic_migration_admin. For more information, see Migrate NLU topics to LLM topics.

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Common issues by feature (continued)

Feature	Issue	Solution
Virtual Agent	Virtual Agent NLU conversations to LLM	

Machine learning and natural language capabilities

The ServiceNow AI Platform includes non-generative AI capabilities that use machine learning and natural language processing to automate tasks, classify data, and enable natural interactions. These capabilities include Natural Language Understanding (NLU), Natural Language Query (NLQ), Predictive Intelligence, and Task Intelligence.

The ServiceNow AI Platform includes a set of non-generative AI capabilities that use machine learning and natural language processing to automate tasks, classify data, and enable natural interactions. These capabilities complement the generative AI experiences provided by ServiceNow Otto.

Natural Language Understanding (deprecated)

Natural Language Understanding (NLU) powers intent detection in Virtual Agent, enabling chatbots to understand what users are asking and route them to the right topic or response. NLU supports model management, multilingual models, and integration with Virtual Agent through the NLU Workbench. To build and manage the intent models that power Virtual Agent, including multilingual models in the NLU Workbench, see (Legacy) Natural Language Understanding.

Natural Language Query

Natural Language Query (NLQ) lets users query platform data in everyday language, so non-technical users can retrieve information without writing filters or building reports. To let users retrieve platform data in everyday language without building filters or reports, see Natural Language Query.

Predictive Intelligence

Predictive Intelligence applies machine learning across business units. Administrators can train machine learning models that automatically populate fields during record creation, categorize and route work based on how records have been handled in the past, recommend resolutions to cases that are similar to previous ones, and identify major outages based on incoming incidents. To train machine learning models that classify and route work, populate fields, and recommend resolutions from past records, see Predictive Intelligence.

Task Intelligence

Task Intelligence applies machine learning to task management, improving how work is routed and processed across the organization by learning from patterns in instance data.

Note: These machine learning capabilities operate independently of ServiceNow Otto and don't require an LLM. They are trained on instance data and can be deployed alongside generative AI capabilities.

To improve how work is routed and processed by applying machine learning to your task data, see Task Intelligence.

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(Legacy) Natural Language Understanding

ServiceNow® Natural Language Understanding (NLU) provides an NLU Workbench and an NLU inference service that you can use to enable the system to learn and respond to human-expressed intent. By entering natural language examples into the system, you help it understand word meanings and contexts so it can infer user or system actions.

Overview of Natural Language Understanding

Starting with the Brazil release, Natural Language Understanding is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

For an overview of Natural Language Understanding, see (Legacy) Exploring Natural Language Understanding.

NLU terminology

In NLU parlance, these terms identify the key language components the system uses to classify, parse, and otherwise process natural language content.

Intent

Something a user wants to do or what you want your application to handle, such as granting access.

Utterance

A natural language example of a user intent. For example, a text string in an incident's short description, a chat entry, or an email subject line. Utterances are used to build and train intents and should therefore not include several or ambiguous meanings or intents.

Entity

The object of, or context for, an action. For example: a laptop, a user role, or a priority level.

System entity

These are predefined in an instance and have highly reusable meanings, such as date, time, and location.

User defined entity

These are created in the system by users and can be built from words in the utterances they create.

Common Entity

A context commonly used and extracted via a pre-defined entity model, such as currency, organization, people, or quantity.

Vocabulary

Vocabulary is used to define or overwrite word meanings. For example, you can assign the synonym “Microsoft” to the acronym “MS”.

NLU Model

A collection of utterance examples and their associated intents and entities that the system uses as a reference to infer intents and entities in a new utterance. The NLU Workbench comes with pre-built NLU models for specific business units, such as an ITSM model. You can also create custom models.

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NLU Workbench

Use the NLU Workbench to create morphological representations of human language. These models enable you to create intents and entities expressed in natural language utterances. Any ServiceNow application can invoke an NLU model to get an inference of intents and entities in a given utterance.

Using the nlu_admin role, you build your models in the NLU Workbench, where you create, train, test, and publish them iteratively.

For information on how to build and use an NLU model, see: Create an NLU model.

NLU inference service

Natural Language Understanding provides an NLU inference service that helps the system to understand natural language and drive intelligent actions. This service trains and predicts intents and entities for a given user utterance in your model so that its text translates into machine-understandable formats, such as APIs and parameters.

The system uses an inference API to train NLU algorithms by using sample record data to identify intents and entities that are strong candidates for accurate prediction.

NLU model consumption

Other ServiceNow® applications consume NLU model output, such as Virtual Agent.

For example, Virtual Agent administrators can configure a Virtual Agent Designer conversation flow to consume NLU models so that agent chatbots can better understand user statements in the conversation. For more information on how Virtual Agent consumes NLU models, see: Natural Language Understanding (NLU) topic discovery in Virtual Agent.

Get started

Explore Learn about NLU concepts and features.	Use Create, test, translate, and publish your NLU models.
Integrate Learn how Virtual Agent administrators can update NLU models from within Virtual Agent Designer.	Reference Learn about using models in different languages for use in other applications

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Troubleshoot and get help

- Virtual Agent & NLU community page
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

(Legacy) Exploring Natural Language Understanding

ServiceNow® Natural Language Understanding (NLU) provides an NLU Workbench and an NLU inference service that you can use to enable the system to learn and respond to human-expressed intent. By entering natural language examples into the system, you help it understand word meanings and contexts so it can infer user or system actions.

Natural Language Understanding overview

Starting with the Brazil release, Natural Language Understanding is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

Natural Language Understanding (NLU) is a component of artificial intelligence natural-language processing that deals with machine-reading comprehension. Predictive Intelligence uses NLU so the system can understand word meanings and word contexts to infer user or system actions..

Natural Language Understanding benefits

Benefit	Feature	Users
Use the NLU Workbench to create models for Virtual Agent and AI Search.	NLU Workbench	NLU Administrator
Build the model's content by adding intents, entities, vocabulary, and test set utterances. Your NLU model content determines how the model responds to user inputs.	Model Management	NLU Administrator
Add a language to an existing NLU model by translating it. Use one of several translation options to add a secondary model in a supported language.	Model Management	NLU Administrator
Virtual Agent administrators can access and update their NLU models from within the Virtual Agent Designer user interface.	Virtual Agent Integration	Virtual Agent Administrator

(Legacy) Activate the NLU Workbench

Activate the following plugins to activate the NLU Workbench.

Before you begin

Role required: admin

About this task

Starting with the Brazil release, Natural Language Understanding is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

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Activate the following plugins if they aren't already active in your instance.

Plugin	Description
NLU Workbench - Core com.glide.nlu	Installs the required tables for persisting NLU models that are created using the NLU Workbench.
NLU Workbench com.snc.nlu_studio	Enables the creation of Natural Language Understanding (NLU) models. These models can understand the intent (action) and entities (details about the action) for a given user utterance. Any ServiceNow application can invoke an NLU model. Requires the NLU Workbench - Core plugin and the NLU Common Model plugin.
Predictive Intelligence com.glide.platform_ml	Enables the NLU Service APIs used for model creation and inference. Enables the creation of machine learning solutions that are trained on data in your instance. Provides frameworks for classification, similarity, and clustering. A trained solution can be invoked by any application by using a prediction API.
NLU Common Model com.glide.nlu.model	Packages all language NLU common models. Also includes commonly used pattern entities that can be imported and used in any NLU model in the NLU Workbench. Commonly used patterns like email, phone, and ServiceNow specific pattern entities such as INT, RITM are made available. Requires the NLU Workbench - Core plugin.
NLU Active Learning-Properties com.glide.nlu.active_learning_properties	Enables the nlu_admin to configure the system properties for the Expert Feedback Loop application. If you don't use the Expert Feedback Loop application, this plugin is not used and can safely be ignored. For more information about the system properties for the Expert Feedback Loop, see the NLU Expert Feedback Loop documentation.

The following two plugins are for apps associated with a for-fee subscription and are available on the ServiceNow Store. Installing these apps adds additional features to the NLU Workbench. Contact your account manager if you are interested in these apps.

Plugin	Description
(Legacy) Intent Discovery sn_nlu_discovery	Delivers the Intent Discovery feature, which identifies user intents by analyzing incident/case data. Use this application to help identify which intents to model and build for Virtual Agent conversations to attain maximum deflection. For more information, see (Legacy) Install Intent Discovery.

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Plugin	Description
(Legacy) NLU Workbench - Advanced Features sn_nlu_workbench	Delivers the Model Performance, Multi-model Batch Testing, Cross-model Conflict Review, and Expert Feedback Loop features. For more information, see (Legacy) Install NLU Workbench - Advanced Features.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the following plugins using the filter criteria and search bar: NLU Workbench - Core (com.glide.nlu), NLU Workbench (com.snc.nlu_studio), Predictive Intelligence (com.glide.platform_ml), and NLU Common Model (com.glide.nlu.model).

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

(Legacy) NLU Workbench roles

NLU Workbench is installed with these roles.

To learn more about managing per-user subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

NLU user [nlu_user]

Users who have read access to models in NLU Workbench.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Important: Avoid granting an admin role when more specialized roles are available.

This role is installed with NLU Workbench - Core. This role does not have access to NLU Model Performance.

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NLU editor [nlu_editor]

Users who can edit NLU models assigned to them in NLU Workbench.

Contains Roles

List of roles contained within the role.

- import_admin
- sn_ace.ace_user
- nlu_user

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Important: Avoid granting an admin role when more specialized roles are available.

This role is installed with NLU Workbench - Core.

NLU administrator [nlu_admin]

Users who can use NLU Workbench to manage NLU models.

Contains Roles

List of roles contained within the role.

- sn_ace.ace_user
- sn_nlu_workbench.nlu_feedback_admin
- nlu_editor
- nlu_user

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Important: Avoid granting an admin role when more specialized roles are available.

This role is installed with NLU Workbench - Core.

NLU feedback admin [sn_nlu_workbench.nlu_feedback_admin]

Data labelling (NLU feedback) Admin role - to manage data labelling across models also ability to optimize models.

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Contains Roles

List of roles contained within the role.

- sn_ace.ace_user
- platform_ml_write
- platform_ml_create
- ml_labeler

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Important: Avoid granting an admin role when more specialized roles are available.

This role is installed with NLU Workbench - Advanced Features. For more information, see (Legacy) NLU Workbench - Advanced Features.

This role is used in Expert Feedback Loop modules. For more information, see (Legacy) NLU Expert Feedback Loop or (Legacy) Issue Auto Resolution Tuning in NLU.

(Legacy) NLU Workbench properties

Refer to these system properties for the Natural Language Understanding (NLU) application.

NLU Workbench properties and their usage

To access your system properties, use the admin or nlu_admin role and the following path in the application navigator: **All** > **NLU Workbench** > **Settings**.

Model Settings

Label and Name	Default value	Plugin	Recommen usage
Maximum number of utterances per intent *glide.nlu.utterances_per_intent.value_limit*	200	NLU Workbench	Use fewer than 200 utterances per intent t keep your model well balanced in terms of intent size.

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Model Settings (continued)

Label and Name	Default value	Plugin	Recommen usage
			Note: Value must b greate than 5 and le than o equal 300.
Maximum number of records in a Table vocabulary source *glide.platform_ml.api.max_nlu_lookupsource_records*	100,000	NLU Workbench	Keep the value unde 100,000.
Maximum number of values in a List vocabulary source *glide.nlu.static_lookup.value_limit*	1,000	NLU Workbench	Keep the value unde 1,000.
Enable pre-built vocabulary for software names *glide.mlpredictor.option.nlu.@LookupSources:software*	enabled	NLU Workbench	Enable pre-built vocabulary so the system ca recognize software names.
Enable pre-built vocabulary for hardware names *glide.mlpredictor.option.nlu.@LookupSources:hardware*	enabled	NLU Workbench	Enable pre-built vocabulary so the system ca recognize hardware names.

Advanced Settings

Label and Name	Default value	Plugin	Recommended usage
Maximum number of records for Intent Discovery classification *sn_nlu_discovery.intent_discovery_max_classification_limit*	300,000	Intent Discovery	Keep the number of records less than 500,000.
Minimum number of records for Intent Discovery classification *sn_nlu_discovery.intent_discovery_min_classification_limit*	10,000	Intent Discovery	Use at least 10,000 records to get high quality results.

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Advanced Settings (continued)

Label and Name	Default value	Plugin	Recommended usage
Minimum number of records for NLU performance analysis *sn_nlu_workbench.glide.nlu.performance.min_clustering_records*	5,000	NLU Workbench - Advanced Features	Use at least 5,000 records to get high quality results.
NLU Conflict Detection - Moderate Threshold *sn_nlu_workbench.glide.nlu.conflict.moderate_threshold*	.85	NLU Workbench - Advanced Features	Must be a decimal between 0 and 1. Keep this threshold less than the Critical Threshold.
NLU Conflict Detection - Critical Threshold *sn_nlu_workbench.glide.nlu.conflict.critical_threshold*	.95	NLU Workbench - Advanced Features	Must be a decimal between 0 and 1. Keep this threshold greater than the Moderate Threshold.
The maximum number of rows in a batch test import file *sn_nlu_workbench.glide.nlu.batch_test.max_import_rows*	10,000	NLU Workbench - Advanced Features	Make sure your batch test import file has no more than 10,000 rows.
The maximum number of utterances to display for feedback in the expert feedback loop *glide.mlpredictor.option.nlu.activeLearning.label_candidate_table.max_respon*	300	NLU Workbench - Advanced Features	Pull no more than 300 utterances from your users' Virtual Agent chat logs to display for feedback in the Expert Feedback Loop application.The minimum umber of utterances a user should review before tuning the model
The minimum number of utterances a user should review before tuning the model *sn_nlu_workbench.glide.nlu.optimize.min_labeled_data*	100	NLU Workbench - Advanced Features	Provide and save feedback for at least 100 utterances from your users' Virtual Agent chat logs so you can execute the Tune Model feature in the Expert Feedback Loop application.
The maximum number of records to fetch from Virtual Agent chat logs *glide.mlpredictor.option.nlu.activeLearning.va_chat_logs.max_row_limit - 3000*	3,000	NLU Workbench - Advanced Features	If there is high NLU usage, increasing the default value to a maximum of 50,000 records will increase the data available for the active learning job to filter up on and display in the Expert Feedback Loop application to give feedback on.

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Advanced Settings (continued)

Label and Name	Default value	Plugin	Recommended usage
Size limit on Label Candidate Table (used for pruning the table) *glide.mlpredictor.option.nlu.activeLearning.label_candidate_table.max_data_s - 10000*	10,000	NLU Workbench - Advanced Features	The recommended usage for this property is the same as the property above.
Size limit on Labeled Data Table (used for pruning the table) *glide.mlpredictor.option.nlu.activeLearning.label_table.max_data_size - 10000*	10,000	NLU Workbench - Advanced Features	The recommended usage for this property is the same as the property above.
Enable this property to unblock your instance during NLU model training. The training will be scheduled for an off-peak time, and we will notify you when it's done. *glide.mlpredictor.scheduled.nlu.model.training*	False	NLU Workbench - Advanced Features	False

To get more feedback data from Virtual Agent (VA) chat logs, refer to the **Procuring additional VA feedback data on demand** section in the Expert Feedback Loop documentation.

(Legacy) NLU language support

The NLU Workbench application provides support for creating NLU models in different languages for use in other applications, such as Virtual Agent.

The platform supports NLU for 17 languages. Ten of these languages available to your models have both intent and entity support; the remaining 7 languages have intent-only support. (Japanese entity support includes character annotation.)

Note: Install the language plugins for languages you want to use in NLU. Installing and activating language plugins ensures that the languages are available in your instance. For more information see Activate a language.

With intent and entity support, NLU can understand sophisticated utterances such as intent-entity relationships, system entities, and user-defined entities. NLU relays this information to Virtual Agent, and the user is usually taken directly to the conversation topic that offers resolution.

With intent-only support, the focus is on intent recognition. With Virtual Agent using NLU, users are directed to the desired conversation topic, where qualifying follow-up questions may be asked before being taken to a topic that offers resolution.

Utterances for all languages are case insensitive during intent prediction.

The following table lists the currently available NLU languages and the features supported for each language.

All languages support intents, vocabulary, batch testing, NLU performance, fast training, and Virtual Agent model use.

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NLU feature support by language

Language	NLU feature supported
English	System-defined entities, user-defined entities, vocabulary sources, pre-built vocabulary, intent discovery, conflict review, expert feedback loop, Search model use.
French	System-defined entities, user-defined entities, vocabulary sources, intent discovery, conflict review, Search model use.
Spanish	System-defined entities, user-defined entities, vocabulary sources, intent discovery, conflict review, Search model use.
German	System-defined entities, user-defined entities, vocabulary sources, intent discovery, conflict review, Search model use.
Japanese	System-defined entities, user-defined entities, vocabulary sources, intent discovery, conflict review, Search model use.
Portuguese	System-defined entities, user-defined entities, vocabulary sources.
Swedish	Virtual Agent model use.
Italian	User-defined entities, vocabulary sources.
Chinese (simplified)	Virtual Agent model use.
Brazilian Portuguese	System-defined entities, user-defined entities, vocabulary sources.
Dutch	User-defined entities, vocabulary sources.
French Canadian	User-defined entities, vocabulary sources.
Polish	Virtual Agent model use.
Korean	Virtual Agent model use.
Danish	Virtual Agent model use.
Finnish	Virtual Agent model use.
Norwegian	Virtual Agent model use.

(Legacy) NLU Service updates

Refer to this documentation so you are up to date with changes to the NLU Service.

Service update summary

Starting with the Brazil release, Natural Language Understanding is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

The NLU Service helps the system to understand natural language and drive intelligent actions. This service trains and predicts intents and entities for a given user utterance in your NLU model so it can understand human-expressed natural language, whether spoken or written. The source of this documentation is KB0953693.

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This service is updated independently of your instance upgrade, and without any action required by you. These updates are done on a bi-monthly basis (once every two months) to improve the quality of NLU model training and predictions. Major updates are aligned with family releases such as Rome, San Diego, Tokyo, etc. Minor updates are automatically updated so you are using the latest version when you retrain an NLU model. While most of these updates don't impact your existing use of NLU, there may be some changes you need to be aware of.

May 2023 NLU Service update

- Introduced dialog acts to enable natural mid-conversation in Virtual Agent (VA) and improve conversation fluidity. Affirm, negate, and modify dialog acts are supported in English and enabled by default for all new VA topics.
- Migrated all languages to use new language models, boosting average intent prediction quality by 10% across all languages.
- Enabled customers to manage and edit irrelevant utterances for their models to improve irrelevance detection.
- Removed the requirement for a model to have 2 or more intents in the model, making it easier for end-to-end topic testing in VA.

March 2023 NLU Service update

- Improved intent/entity detection through better handling of common words in vocabulary sources.
- Improved latency and memory utilization for system entity (NER) detection.
- Updated version support so that customers will need to use newer versions of the NLU Service and cannot point to n-2 releases older than their current glide version.

January 2023 NLU Service update

- Created the new DATE-TIME system entity (English only) for use in Virtual Agent.
- Added vocabulary source and entity support (simple, mapped, and open ended) for the Dutch and Italian languages, and system entity support for Portuguese and Brazilian Portuguese.
- Upgraded the ServiceNow Language Model for the Danish, Swedish, Finnish, and Norwegian languages, improving their average prediction quality by 17% from Tokyo.
- Improved the handling of punctuation in entities and special characters in vocabulary sources.
- Incorporated feedback provided on intent predictions by admin users in the NLU Workbench to improve model training data for Virtual Agent.

(Legacy) NLU models

Use NLU models to apply ServiceNow Natural Language Understanding on your instances. Create, manage, test, and publish NLU models with the NLU Workbench.

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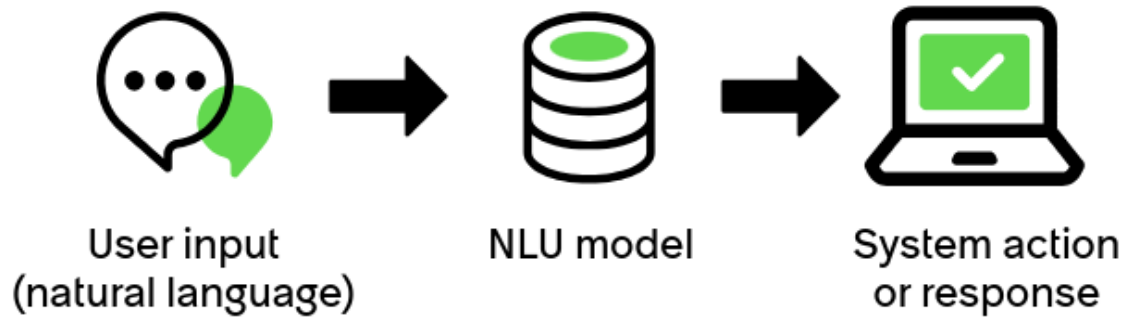
Overview of how user input is transformed to a system action



A model is a collection of utterances, intents, entities, and vocabulary that the system uses to respond to natural language inputs from your users. The model takes the natural language input from your users and matches it to actions to be performed by the system.

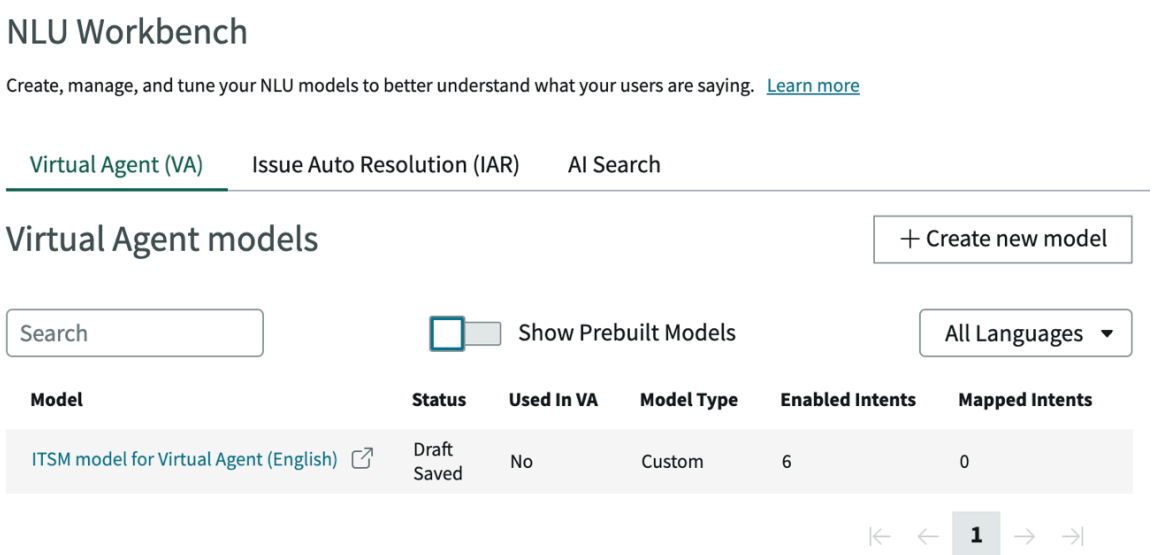
The utterances in your model data are examples of what your users might ask for. These examples are used to train your model to recognize which system actions to perform in response. These system actions are called intents.

Usage, roles, and navigation

Use the nlu_admin role to access the NLU Workbench.

Navigate to **NLU Workbench** > **Models**.

There are three tabs on the NLU Workbench homepage: Virtual Agent, Issue Auto Resolution, and AI Search. The Virtual Agent tab opens by default. Select the correct tab for your application.



You can use the **Search** field to look for models by name.

The default setting of the **All Languages** filter displays all models regardless of their language. You can filter models by language using the list in **All Languages**. To learn more about the available languages, see (Legacy) NLU language support.

If you have a multilingual grouped model, its row in the list of models has an arrow on the left side. Select the arrow to expand the group so that all language versions of the model are displayed. For more information

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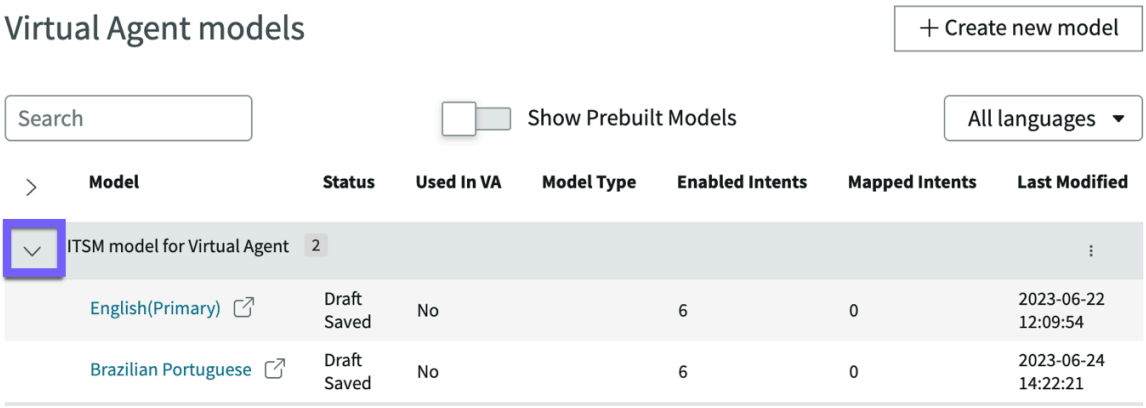
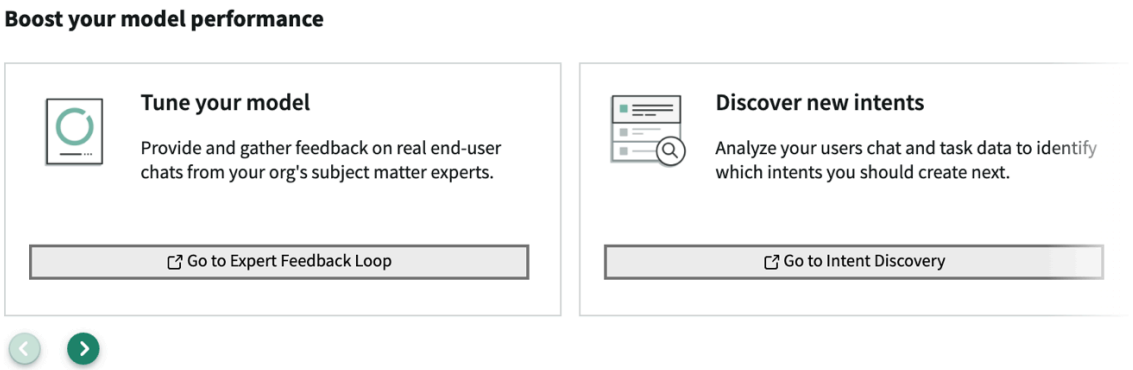
on model languages and grouping, see (Legacy) Multilingual model management.



The **Used In VA** column indicates whether a model has already been linked to another application such as Virtual Agent. For AI Search, this column indicates whether the model has already been linked to a Genius Result. Similarly, the **Mapped Intents** column displays a count of intents that have been mapped or linked to Virtual Agent topics.

Scroll down the NLU Workbench homepage to view the **Boost your model performance** section. This section displays cards you can use to access functions that are available to your model type.



Model applications

The output of your NLU models can be consumed by the ServiceNow applications Virtual Agent, Issue Auto Resolution, and AI Search. The NLU Workbench homepage organizes each application's models by tab. In the list of models, different columns are displayed depending on the application.

NLU Models for Virtual Agent

For more information on Virtual Agent, see Virtual Agent.

- The tab for Virtual Agent displays a list of models. Select a model name to open an overview page for that model.
- The **Show Prebuilt Models** toggle is off by default. Switch this toggle on to display read-only models that can be copied and used as the basis for your custom models.
- The **Boost your model performance** section displays a total of 5 cards for functions available to Virtual Agent.

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NLU Models for IAR

Fewer functions and columns are displayed for IAR than for the other applications in NLU Workbench. This is because the IAR model is prebuilt and is configured in the IAR Admin console.

- When you select the name of your IAR model in NLU Workbench, you are taken to IAR Tuning rather than to a model overview. For more information, see (Legacy) Issue Auto Resolution Tuning in NLU.
- The **Show Prebuilt Models** toggle is not displayed.
- The **Create new model** button is not displayed because the prebuilt model is used directly.
- The section **Boost your model performance** is not displayed.

For more information on setting up IAR, see (Legacy) Using Issue Auto Resolution.

NLU Models for AI Search

- There is one prebuilt model for AI Search. You can copy this model as the basis for a custom model.
- The **Show Prebuilt Models** toggle is on by default.
- The **Create new model** button is available.
- The **Boost your model performance** section displays two cards for functions available to AI Search.

For an introduction to managing AI Search in the NLU Workbench, watch the following video.

For more information, see the AI Search landing page.

What you can do next

To learn more about model content and the model life-cycle, see (Legacy) Model management.

(Legacy) Model management

Manage your NLU model's life cycle in the NLU Workbench. Model management phases guide you through the iterative process of building, testing, and publishing your model.

Bringing your NLU model from creation to deployment requires multiple steps, separated into phases. You can return to earlier phases when you want to adjust and maintain your model.

The phases available for your model depend on the model's application. The system will display a phase, button, or function only when it applies to your model's application.

To use the model management phases, ensure you have all the necessary NLU plugins. For more information, see the following resources:

- (Legacy) Activate the NLU Workbench
- (Legacy) Install NLU Workbench - Advanced Features
- (Legacy) Install Intent Discovery

Note: NLU Workbench - Advanced Features and Intent Discovery are available from the ServiceNow Store. NLU model testing and performance monitoring require NLU Workbench - Advanced Features.

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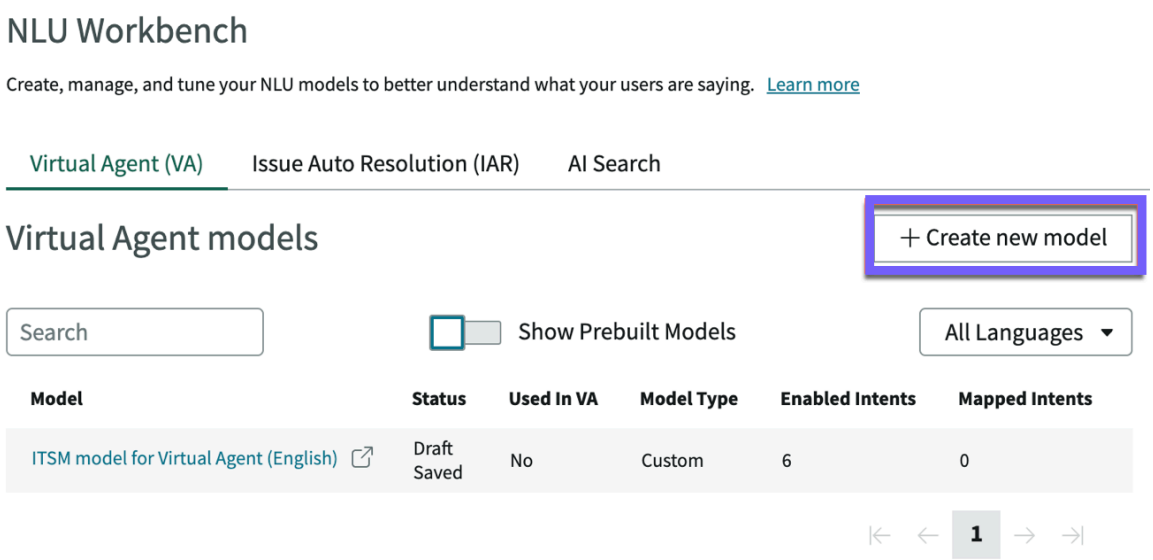
Create a model

To create a model for Virtual Agent or AI Search, navigate to **NLU Workbench** > **Models**. The Virtual Agent tab opens by default. Select the appropriate tab for the model you want to create.



You can choose different ways to create a model:

- **Use prebuilt model**: Copy one of the included read-only models, and add content specific to your business.
- **Import data from CSV**: Upload a CSV file that contains training utterances and matched intents.
- **Start from blank**: Go through the process of setting up a new model from scratch.

To get started, see (Legacy) Creating models.

Model management phases

After creating a model, access its management phases by navigating to **NLU Workbench** > **Models**. Select the tab for your model's application, then the name of the model to open the **Model details** page on the model overview.

There are three phases on a Virtual Agent model's overview page: Build and train your model, Test and publish your model, and Tune your model. These phases guide you as you build and improve your model.

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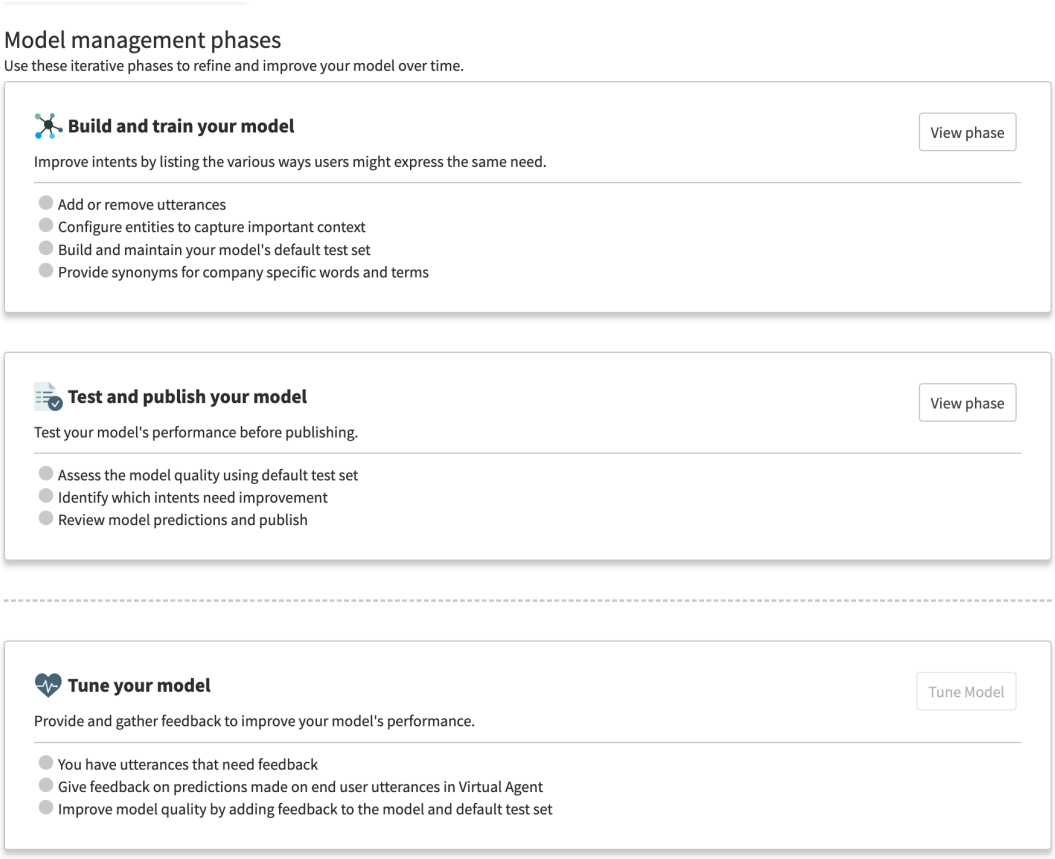

Build and train your model

Build the model by adding and managing content:

- Intents: Add more intents to broaden the range of user requests that your model can understand.
- Entities: Add more entities so that your model can extract more contextual details from your users' requests.
- Vocabulary: Add vocabulary to enable the model to better understand words and phrases that are specific to your business, such as industry terms and acronyms.
- Test set: Add test utterances and their expected intents to your model's default test set.

To learn more, see (Legacy) Build and train your model.

Train your model using utterances that the model is likely to encounter from your users. To learn more, see (Legacy) Train and try your NLU model.

Test and publish your model

Test your model to gauge the performance and identify areas for improvement.

Note: Model testing requires the NLU Workbench - Advanced Features store application. For more information, see (Legacy) NLU Workbench - Advanced Features.

For more information on testing and thresholds, see (Legacy) Test and publish your model.

When you're satisfied with the results of testing, publish your model to make it available for use by other applications. For more information, see (Legacy) Publish your NLU model.

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Tune your model

If NLU Workbench - Advanced Features is installed, and your model is created for Virtual Agent, the **Tune your model** phase is enabled. With this phase, you can use **Expert Feedback Loop** to incorporate actual user utterances into your model.

For more information, see (Legacy) Tune your model.

If your model is created for Issue Auto Resolution, you will be taken to IAR Tuning by selecting the name of your model in the IAR tab of the NLU Workbench homepage. For more information, see (Legacy) Issue Auto Resolution Tuning in NLU.

Model settings

Use the **Settings** page of the model overview to change the name and description of the model. You can also modify the confidence threshold of the model. The confidence threshold determines how confident the model must be to predict an intent.

For more information, see (Legacy) NLU model settings.

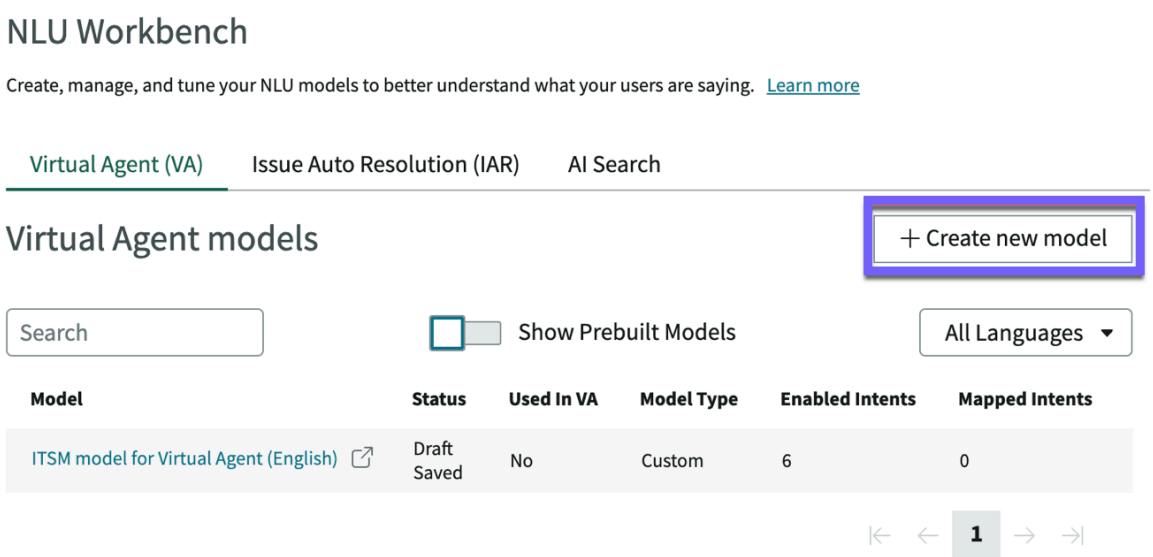
(Legacy) Creating models

Creating models is the first step to taking advantage of Natural Language Understanding (NLU) in your instances. Create models for Virtual Agent and AI Search in the NLU Workbench.

You create NLU models for consumption by the ServiceNow applications Virtual Agent or AI Search.

Note: For Issue Auto Resolution, a prebuilt model is provided for you to configure.

To start creating models, set your scope to the application scope you want for your new model. Then navigate to **NLU Workbench** > **Models**. The Virtual Agent tab opens by default. Select the appropriate tab for the model you want to create.



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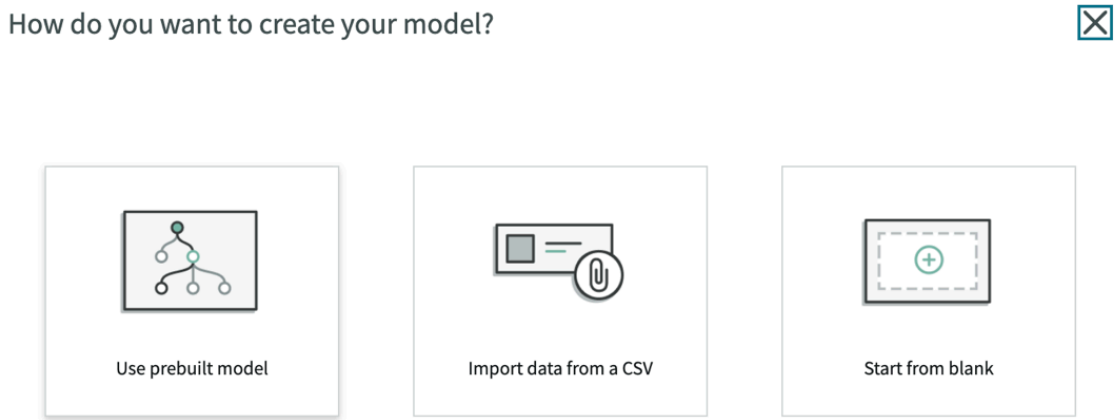
Model creation

When you select the **Create new model** button, a modal opens to display your model creation options. Start by selecting one of the



icons:

- (Legacy) Create an NLU model using a pre-built model: Copy a prebuilt model and its contents as a starting point for your new model.
- (Legacy) Create an NLU model from a CSV file: Upload a CSV file containing a list of intents and corresponding utterances.
- (Legacy) Create an NLU model from blank: Build a model from scratch and add intents and utterances as you go.

After creating, add content to your model. The intents, utterances, entities, and vocabulary you add helps improve the model's ability to interpret natural language. See (Legacy) Build and train your model.

Duplicating, exporting, and updating

After creating a model, you have options to use that model across other models and instances. With the NLU Workbench, you can perform the following actions with your models:

- (Legacy) Duplicate an NLU model: Copy a model to create a model with the same content.
- (Legacy) Export an NLU model: Export a model as a CSV file containing the associated utterances and intents. Share the model or use it to create one.
- (Legacy) Add an NLU model to an update set: Add a model and its artifacts to an update set to transfer the model across instances.

(Legacy) Create an NLU model from blank

Create a Natural Language Understanding (NLU) model from scratch. Start with an empty model to have full control over the model's content.

Before you begin

- Make sure that the NLU Workbench plugin, NLU Workbench - Core plugin, and Predictive Intelligence plugin are all installed and activated on your instance.
- You can create NLU models for Virtual Agent and AI Search.
- Role required: nlu_admin or admin

About this task

In this example procedure, you're building an NLU model to help Virtual Agent understand human-expressed intent regarding Human Resources.

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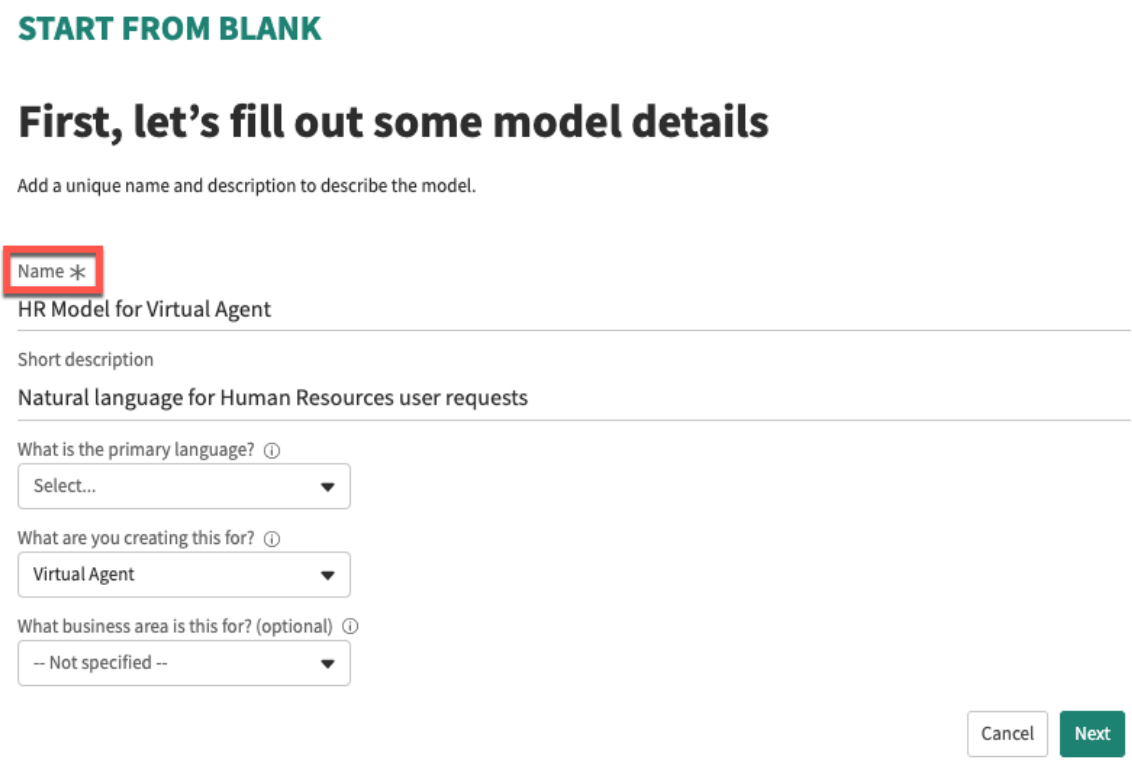
Procedure

1. Set your scope to the application scope you want for your model.
2. Navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default.
3. Select the tab for the type of model you want to create, such as AI Search.
4. Select the **Create new model** button.
5. In the **Add some details** window, select the **Start from blank** button.
6. In the define details page, enter a unique **Name** and **Short description**.



   In this example scenario, you enter `HR Model for Virtual Agent` for the name and `Natural language for Human Resources user requests` for the description.
7. Select the language and purpose from the drop-down lists.
   In this example scenario, select `English` and `Virtual Agent`.
8. **Optional:** Select a business area for your model.
9. Select **Next**.
   Your model starts building. When complete, select **View model** to open the **Model details** page for your new model.

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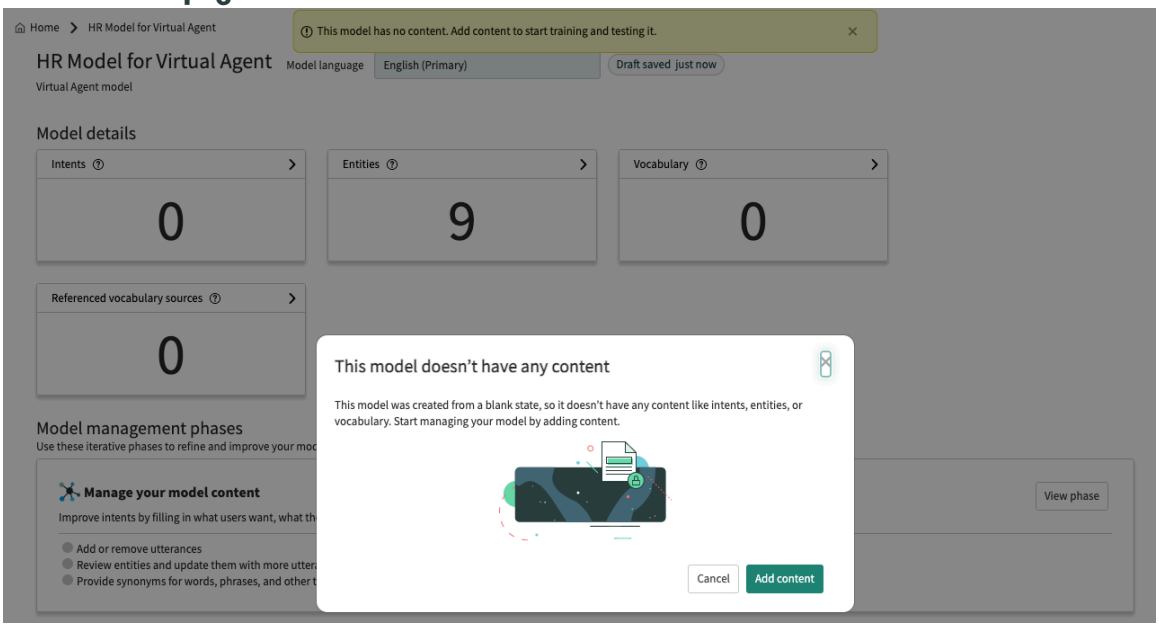
What to do next

Model details page



Your new model contains no content. Select **Add content** to begin adding intents, entities, and vocabulary. For more information, see (Legacy) Build and train your model.

Add test utterances and intents to build the model's default test set. For more information, see (Legacy) Test set creation and management.

(Legacy) Create an NLU model from a CSV file

Upload a CSV or XLSX (Excel Workbook) file containing utterances and their intents to create a Natural Language Understanding (NLU) model. Use this method to quickly create models from your data or other exported models.

Before you begin

- Make sure that the NLU Workbench plugin, NLU Workbench - Core plugin, and Predictive Intelligence plugin are all installed and activated on your instance.
- You can create NLU models for Virtual Agent and AI Search.
- Role required: admin or nlu_admin

About this task

In this example procedure, you're building an NLU model to help Virtual Agent understand user requests regarding calendars.

In a CSV file, you've listed the intents and utterances in two columns.

Sample CSV setup

Intent	Utterance
schedule	when is my next meeting
schedule	what time is my next meeting
schedule	schedule a meeting for 11am
schedule	cancel my 4:30 meeting

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Sample CSV setup (continued)

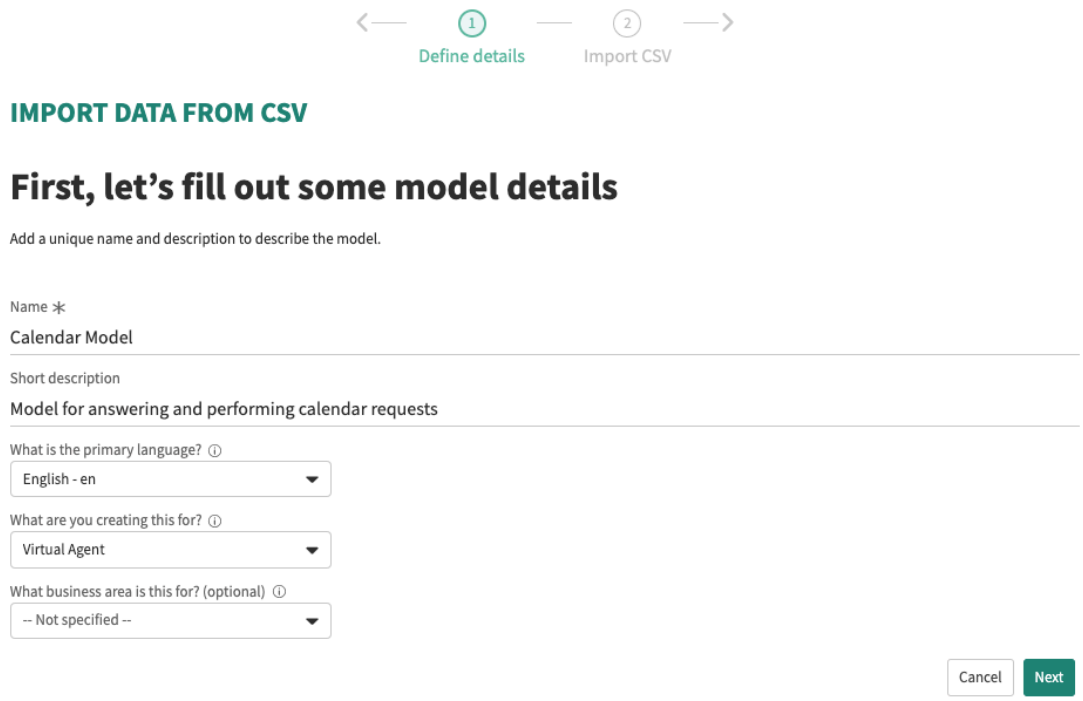
Intent	Utterance
holiday	when is the next holiday
holiday	do we get Black Friday off
timeoff	request friday off
timeoff	how many PTO days do i have

Note the following for creating NLU models by CSV import:

- A model needs at least 1 intent with a minimum of 5 training utterances in each intent. For optimum performance, aim to have 15 training utterances per intent.
- Utterances should not contain a comma.
- Importing with a CSV file does not preserve entities. Make sure to annotate utterances as needed after importing.

Procedure

1. Set your scope to the application scope you want for your new model.
2. Navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default.
3. Select the tab for the type of model you want to create, such as AI Search.
4. Select the **Create new model** button.
5. In the **How do you want to create your model?** window, select **Import data from a CSV**.
6. In the **Add some details** window, add the **Name** and **Short description** for the model.



In this example scenario, you enter `Calendar Model` for the name and `Model for answering and performing calendar requests` for the short description.

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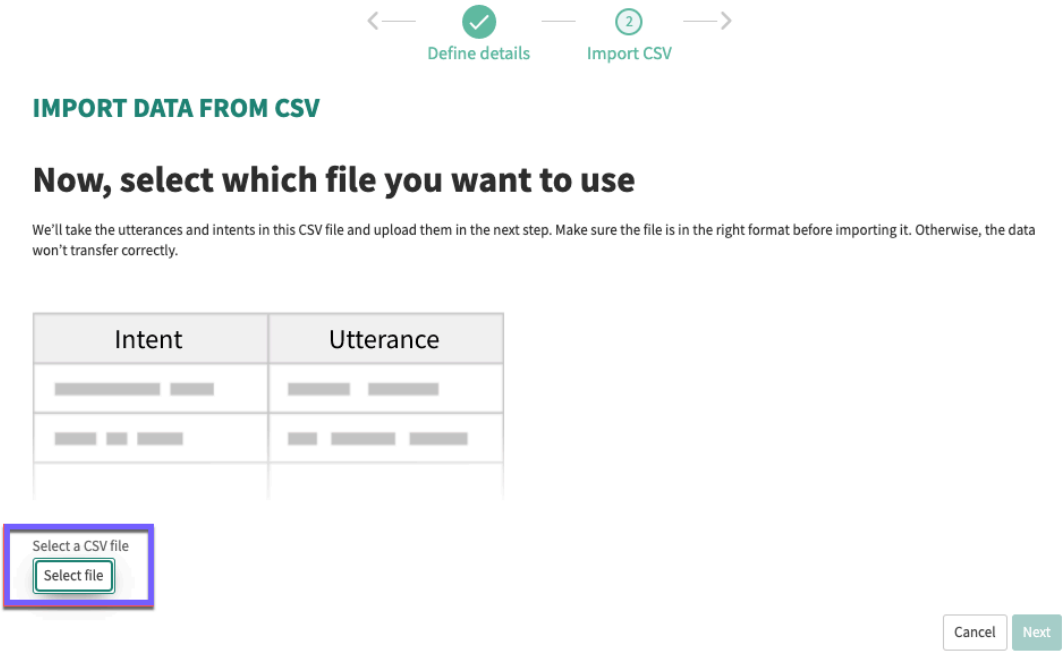
7. Select the language and purpose from the drop-down lists.
   In this example scenario, you select `English` and `Virtual Agent`.
8. Select **Next**.
9. On the **Import CSV screen**, select **Select file**.



10. Choose the CSV or XLSX (Excel Workbook) file from the pop-up.
11. Select **Next**.
    Your model starts building. After completion, select **View model** to open the model details page.

What to do next

Add intents and training utterances to continue building the model. Add entities and vocabulary to help the model understand inputs from your users. For more information, see (Legacy) Build and train your model.

Add test utterances and intents to build the model's default test set. For more information, see (Legacy) Test set creation and management.

(Legacy) Create an NLU model using a pre-built model

Use the prebuilt Natural Language Understanding (NLU) models in the NLU Workbench to create a new one.

Before you begin

- Make sure that the NLU Workbench plugin, NLU Workbench - Core plugin, and Predictive Intelligence plugin are all installed and activated on your instance.
- You can create NLU models for Virtual Agent and AI Search.
- Role required: nlu_admin or admin.

About this task

In this example procedure, you're building an NLU model based on the prebuilt HR NLU for VA model. You base your model on the prebuilt model, then edit or add to the model content to meet your business requirements.

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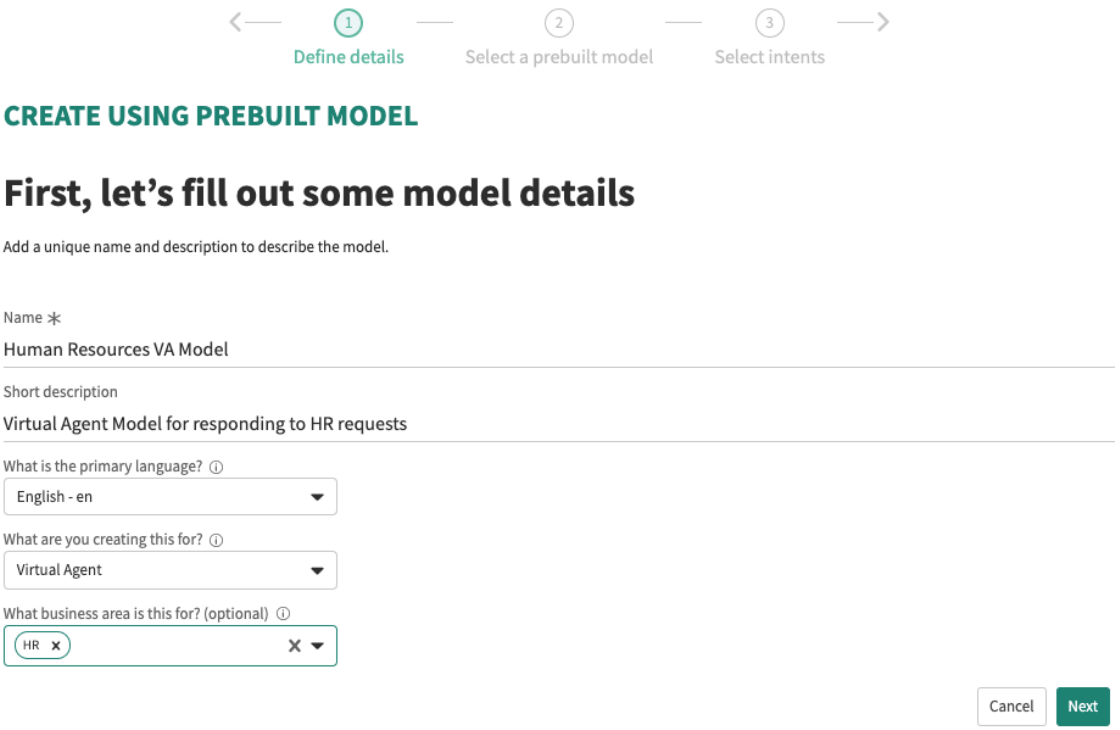
Your new model contains intents, entities, and vocabulary from the prebuilt model. The new model also contains an empty default test set, ready to be populated with test utterances.

Procedure

1. Set your scope to the application scope you want for your new model.
2. Navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default.
3. Select the tab for the type of model you want to create, such as AI Search.
4. Select the **Create new model** button.
5. In the **How do you want to create your model?** window, select **Use prebuilt model**.
6. On the **Add some details** window, fill in the **Name** and **Short description** for the model.



   In this example scenario, you enter `Human Resources VA Model` for the name and `Virtual Agent Model for responding to HR Requests` for the short description.

7. Select the language and purpose from the drop-down lists.
   In this example scenario, you select `English` and `Virtual Agent`.
8. **Optional:** Select the business area for the model.
   In this example scenario, you select HR.
9. Click **Next**.
10. Select the prebuilt model from the drop-down list.

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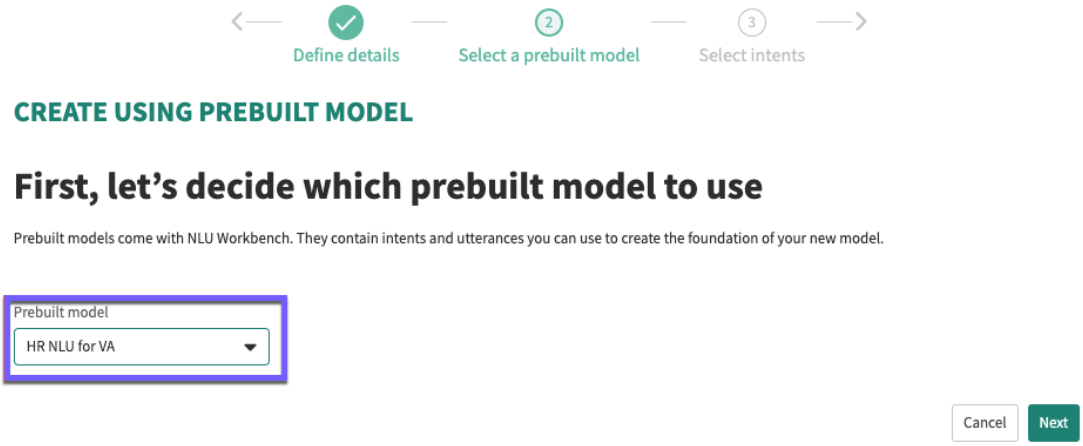
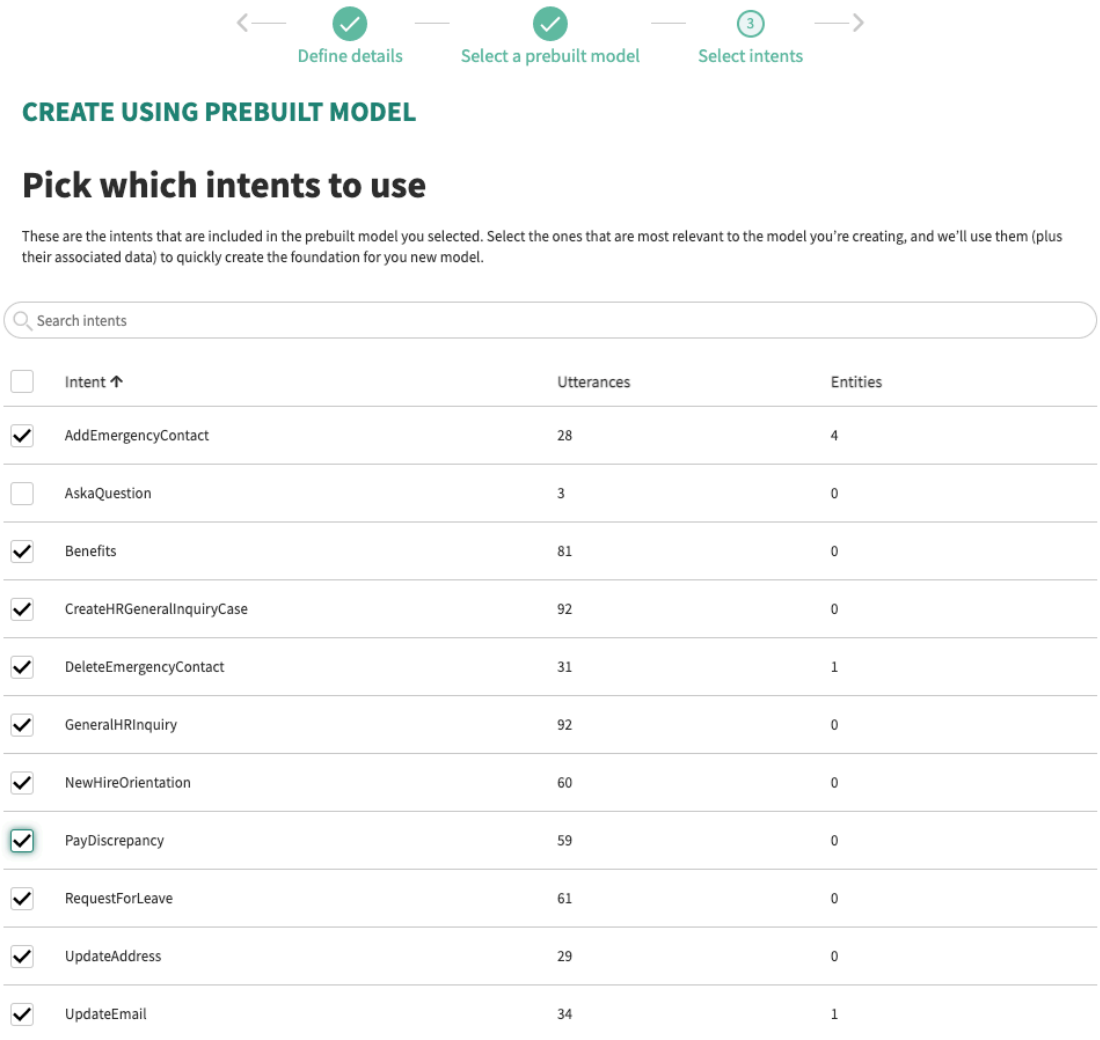


In this example scenario, you select HR `NLU for` VA.

11. Select **Next**.
12. On the **Select intents** screen, select the prebuilt intents to add to your model.



Intent	Utterances	Entities
AddEmergencyContact	28	4
AskaQuestion	3	0
Benefits	81	0
CreateHRGeneralInquiryCase	92	0
DeleteEmergencyContact	31	1
GeneralHRInquiry	92	0
NewHireOrientation	60	0
PayDiscrepancy	59	0
RequestForLeave	61	0
UpdateAddress	29	0
UpdateEmail	34	1

In this example scenario, you select 10 intents from the list.

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Note: You can select all the prebuilt intents by checking the **Intent** box at the top of the list.

13. Select **Next**.
    Your model starts building. After completion, select **View model** to open the **Model details** page for your new model.

What to do next

Add more intents and training utterances to continue building the model. Update entities and vocabulary to help the model understand inputs from your users. For more information, see (Legacy) Build and train your model.

Add test utterances and intents to build the model's default test set. For more information, see (Legacy) Test set creation and management.

(Legacy) Duplicate an NLU model

Duplicate an existing Natural Language Understanding (NLU) model to create a new one. Duplicating a model copies the settings and contents of the original model, including its default test set.

Before you begin

- Make sure that the NLU Workbench plugin, NLU Workbench - Core plugin, and Predictive Intelligence plugin are all installed and activated on your instance.
- Identify an existing NLU model to copy from. The source model should have the language and purpose you want for the new model. If a suitable model does not exist, create and train one.
- Role required: nlu_admin or admin.

About this task

In this example procedure, you've already created a model that's titled NLU for Access Requests. You want to customize it for another department. You duplicate the model to create a new, separate model. To customize the new model, you then add content related to the other department.

Procedure

1. Set your scope to the scope of the model you want to create.
   After creation, these model settings cannot be changed: language, purpose, scope.
2. Navigate to **All** > **NLU Workbench** > **Models**.
3. On the far right column of the model list, select the **More options** menu for the model you want to duplicate.

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4. Select **Duplicate this model**.
5. In the **Duplicate this Model** window, enter a name and description for the new model.

In this example scenario, you enter `NLU for Access Requests Copy1` for the description.

6. Click **Duplicate**.
The system duplicates the model. The **Model details** page loads for your new model.

What to do next

You can customize the new model by adding new content to it. Train, test, and publish the new model. For more information, see (Legacy) Build and train your model.

To duplicate an entire model group, or one of the models in a group, see (Legacy) Multilingual model management.

To transfer a model to a different instance, see (Legacy) Add an NLU model to an update set.

(Legacy) Export an NLU model

Export a Natural Language Understanding (NLU) model to create a CSV file of the intents and utterances. You can then use the CSV file to edit, share, and import.

Before you begin

- Make sure that the NLU Workbench plugin, NLU Workbench - Core plugin, and Predictive Intelligence plugin are all installed and activated on your instance.
- Role required: nlu_editor, nlu_admin, or admin

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About this task

Exporting an NLU model creates a CSV file. The file contains a table of the utterances from the model and the matched intents. The data comes from the **Utterances** tab for each intent in the model.

Note: The file doesn't contain the sources of the utterances. Also the file doesn't transfer entities or vocabulary associated with the model. To export all model data, see (Legacy) Add an NLU model to an update set.

Procedure

1. Navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default.
2. Select the tab for your model's application, and find your model in the list.
3. Scroll to the far right column of your model's row, and select the more options menu of the model you want to export.

4. In the more options menu, click **Export model as CSV**.
   The model CSV file downloads to your browser.

What to do next

You can use the CSV file to share the model or edit the utterances. You can also create a model by importing the CSV file. For more information, see (Legacy) Create an NLU model from a CSV file.

(Legacy) Add an NLU model to an update set

Use update sets to move your Natural Language Understanding (NLU) models from one instance to another. Update sets include all records needed for your model to function on the target instance.

Before you begin

- Make sure that the NLU Workbench plugin, NLU Workbench - Core plugin, and Predictive Intelligence plugin are all installed and activated on your instance.
- The following instructions apply to NLU models for Virtual Agent and AI Search.
- Role required: admin

About this task

Use update sets to transfer a model from a source instance to a target instance. The target instance must already have the same scope as the model's scope in the source instance.

Adding a model to an update set includes the following resources:

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- Model content (intents, utterances, entities, annotations, vocabulary, and the default test set)
- Associated vocabulary sources
- Corresponding latest active ML solution
- ML model artifacts
- ML solution and definition (last three runs, provided one of them was successful)

For more information on update sets, see System update sets.

If you want to add the model to a different update set, you must make that update set the current one. See Create and select an update set as the current set.

For optimum portability, add your NLU model to a new, dedicated update set rather than to a system Default update set. To do this, a new update set must be manually created in the model's scope. An error is displayed if the current update set is the scope's Default. This error contains a link for manually creating a new update set.

If the model contains records from multiple scopes, such as vocabulary tables, its update set must have a parent-child (batch) structure. Follow the procedure from step 5 to create a parent-child update set.

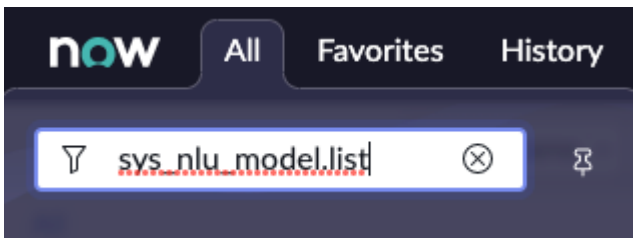
When models (either Global or scoped) are moved using update sets, their training and publishing state remains the same after transfer. So a model that is trained and published before it is added to an update set does not require retraining or republishing on the target instance.

For information about parent-child update sets, see Working with batched update sets. The following video provides a demonstration of this process.

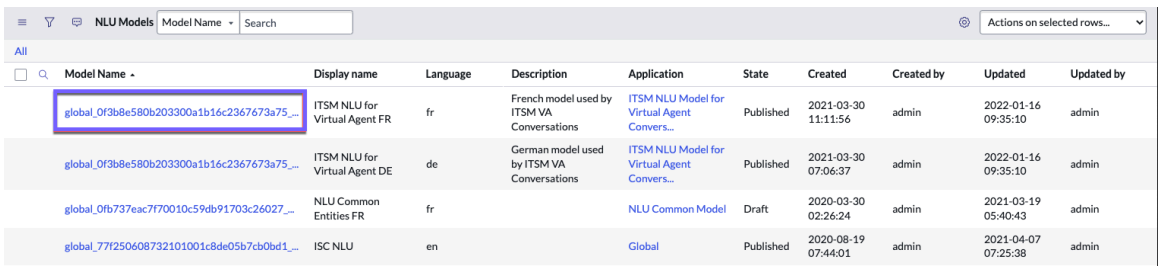
A video walkthrough of migrating NLU models by update sets in the Vancouver release.

Procedure

1. Select **All** and enter `sys_nlu_model.list` into the navigator.



2. Select the **Model Name** of the model.



   The **Display name** is the name you gave the model when creating it. The **Model name** is given to the model by the system.

3. **Optional:** If Global is your current application, follow the prompt at the top to edit the record.

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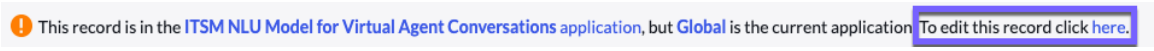
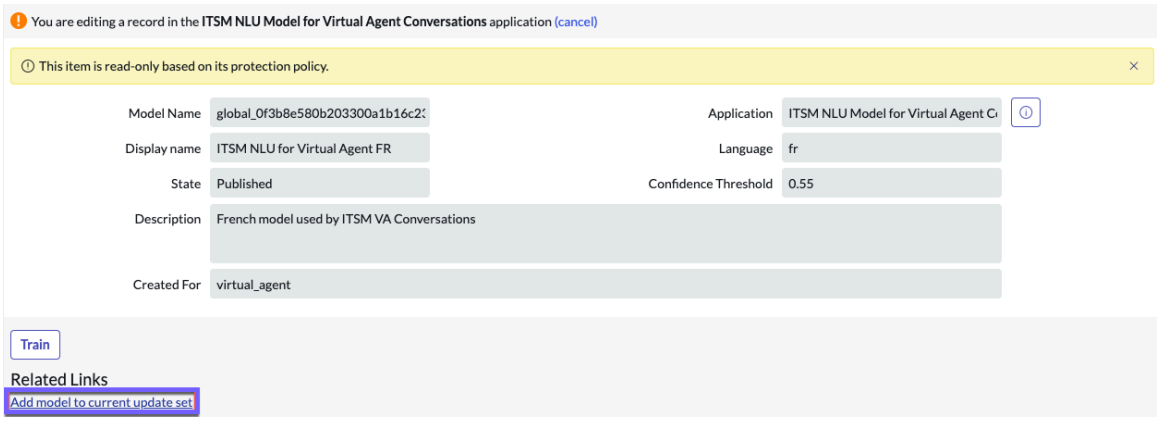
(Optional) 

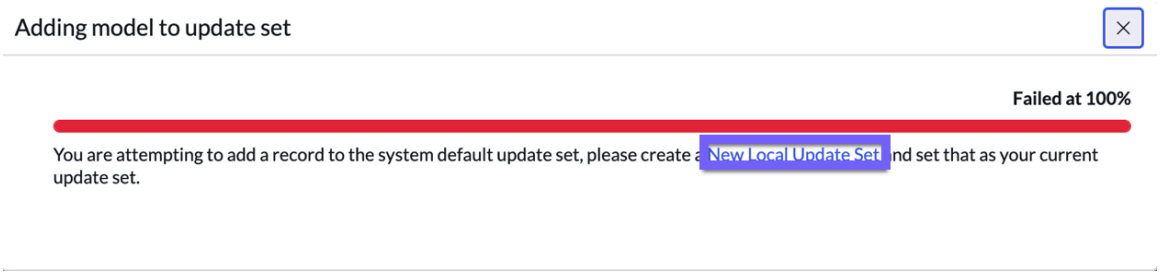
4. In the **Related Links** section, click **Add model to current update set.**



If the model's records are all in one scope, the system adds the model to the current update set. Once completed, the record can be found in the sys_update_set table.

However, the system displays an error if the designated scope is the Default scope. Continue with the following steps.

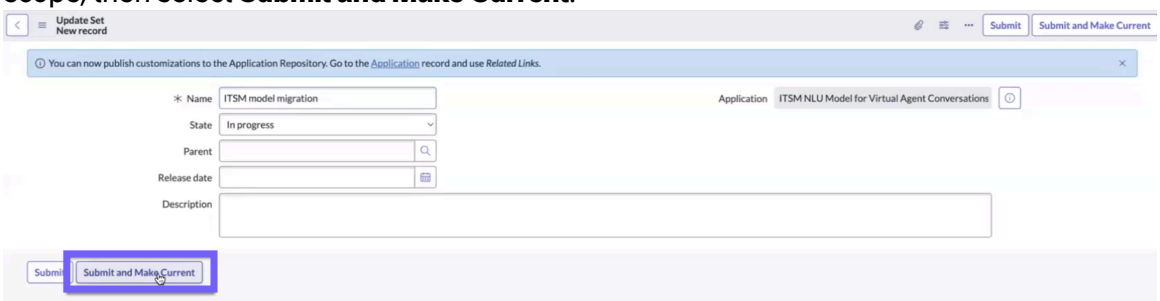
5. If the system displays the error **You are attempting to add a record to the system default update set**, continue with the remaining steps in this procedure.



In the error banner, select the **New Local Update Set** link to create a new update set which is not Default. In the case of a parent-child update set, the parent is first created in the model's scope. (Any child update sets are created in a later step).

New Local Update Set opens a new record in the sys_update_set table.

6. For the new update set record, provide a name, review other values including Application scope, then select **Submit and Make Current**.



A new update set is created, and the screen re-opens to the model's record in the sys_nlu_model table.

7. In the model's record in sys_nlu_model, select **Add model to current update set** under **Related Links**.

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When the model's records are in multiple scopes, this step creates child update sets that have Global scope.

> **Note:** If the model's records are all in one scope, the system adds the model to the current update set. Once completed, the record can be found in the sys_update_set table.

8. If the model is in a non-Global scope: In the Update Sets table sys_update_set, locate the parent update set and its child update sets (refresh the page if necessary).
   - The parent update set has the value **(empty)** in the Parent column.
   - Child update sets have the name of the parent in the Parent column, and **Global** in the Application column.
   - Both parent and child update sets contain the same value in the Batch Base column.
9. Open the parent's record in sys_update_set and set the **State** field to `Complete`.
   A Confirmation dialog box pops up. Select `Yes` to confirm. This sets the parent and all child update sets to Complete.
10. To migrate the update set file, select **Export Update Set Batch to XML** in the parent's record in sys_update_set.
    The parent and child update sets are packaged together and exported.

What to do next

In the target instance, navigate to **Retrieved Update Sets** and select **Import Update Sets from XML**. When unpackaged, the parent and all children will be listed in the Retrieved Update Sets table. Open the parent and select **Preview Update Set Batch**.

If a referenced record in the source instance is not present on the target instance, you may encounter errors while applying the update set. For example, the origin field on sys_nlu_intent could refer to an intent from a different model that doesn't exist on the target instance. You can select **Accept remote update** on the failed records to commit the update set anyway.

(Legacy) Delete an NLU model

Delete a Natural Language Understanding (NLU) model permanently.

Before you begin

Role required: admin or nlu_admin

About this task

Deleting an NLU model removes the model and its contents, including its default test set, from the system. You cannot delete a model if it meets any of the following criteria:

- The model is pre-built
- The model contains at least one intent that is mapped to a Virtual Agent topic

> **Warning:** Deleting a model cannot be undone.

Procedure

1. Set your scope to the scope of the model you want to delete.
2. Navigate to **All** > **NLU Workbench** > **Models**.
3. On the far right column of the model list, select the more the **More options** menu for the model you want to delete.

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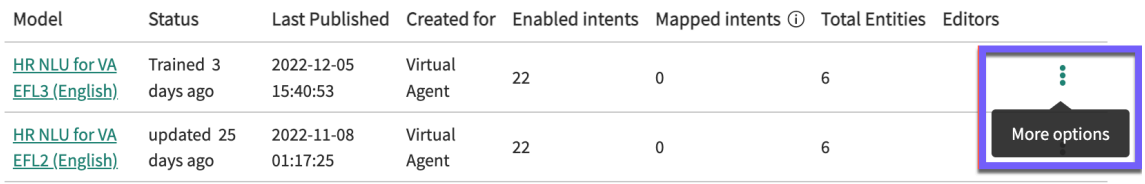
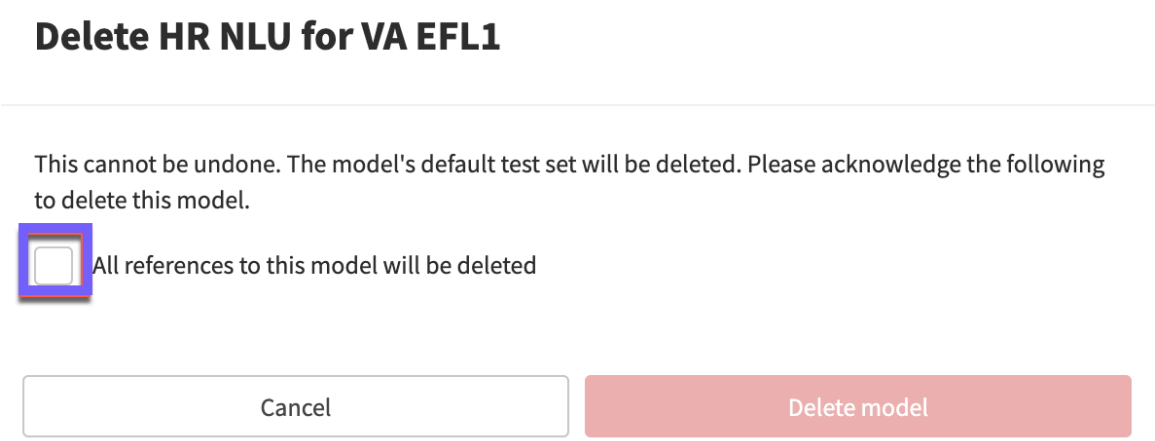


4. Select the option to **Delete this model**.
5. Select the check box to acknowledge that all references to this model will be deleted.



6. Select **Delete model**.
   The system deletes your model and reloads the page.

(Legacy) Build and train your model

After creating a model, build the model's content by adding intents, entities, vocabulary, and test set utterances. Your NLU model content determines how the model responds to user inputs.

Models are made up of the following content:

- Intents: An action the user wants to do or wants the application to do.
- Entities: Object or context for an action.
- Vocabulary: Add vocabulary to help your model understand the range of words in your users' utterances.
- Test set: To assess model performance, add test utterances and the intents that you expect to be predicted for those utterances.

To access the model content, navigate to **NLU Workbench** > **Models**. The Virtual Agent tab opens by default. Select the tab for your model's application and then select the name of the model to open the **Model details** page. In the **Build and train your model** card, select **View phase**.

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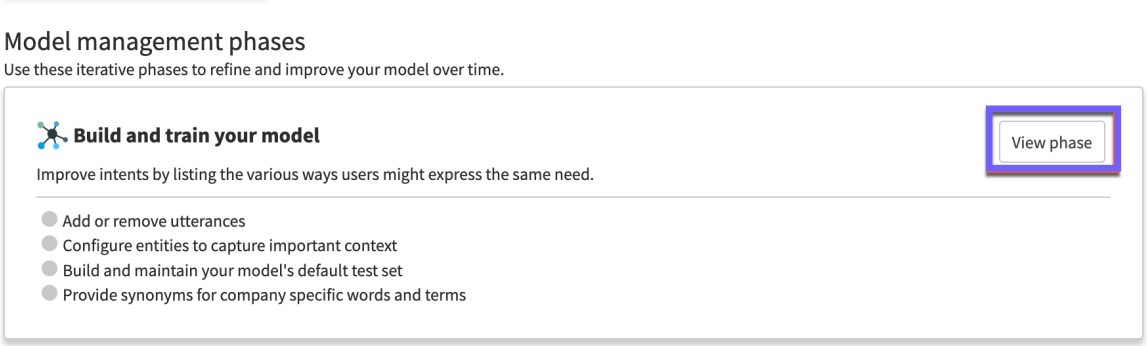

Intents

When your model receives user input, it uses an intent to perform a system action. For example, a user types in `I have a critical issue with a slow laptop`. The model matches the utterance input to the intent #TroubleshootSlowComputer. If the intent is linked to a Virtual Agent topic, it triggers further action.

Intents contain training utterances, or examples of user inputs that would trigger the system action. Provide realistic utterances that the model might encounter from your users. The quality of training utterances affects the accuracy of your model.

For more information, see (Legacy) NLU intents.

Entities

Your intents use entities to provide additional context for the model when receiving inputs. In the computer example, the laptop is the entity, or object of, the action.

NLU entities fall into two categories: system-defined and user-defined. System entities such as DATE, TIME, and LOCATION are available by default in your instance. You can create your own user-defined entities to provide additional associations and meaning for your business requirements.

All entities are reusable across other NLU models. However, you must add them to a training utterance for each model to use them.

For more information, see (Legacy) NLU entities.

Vocabulary

Your users' input may contain a wide variety of words and phrases. Also, your model may not understand some terms used in specialized domains or business areas.

To improve your model's ability to understand a wide range of user input, you can define synonyms by creating vocabulary items.

For example, your model includes an entity for the term computer. When a user types in `I need a new computer`, the model knows how to respond. However, if a user enters `laptop` or `workstation`, the model might fail to predict the intent. You can add vocabulary to the model to train it to understand synonyms and variations.

You can also use tables and lists as vocabulary sources. Your models can look up the vocabulary sources when predicting intents.

For more information, see (Legacy) NLU vocabulary.

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Test set

Your model contains a default test set that you can use to evaluate the model's performance. Initially the test set is empty, ready to be populated with your content. Add test utterances and their expected intents to build the test set.

For more information, see (Legacy) Test set creation and management.

Test panel

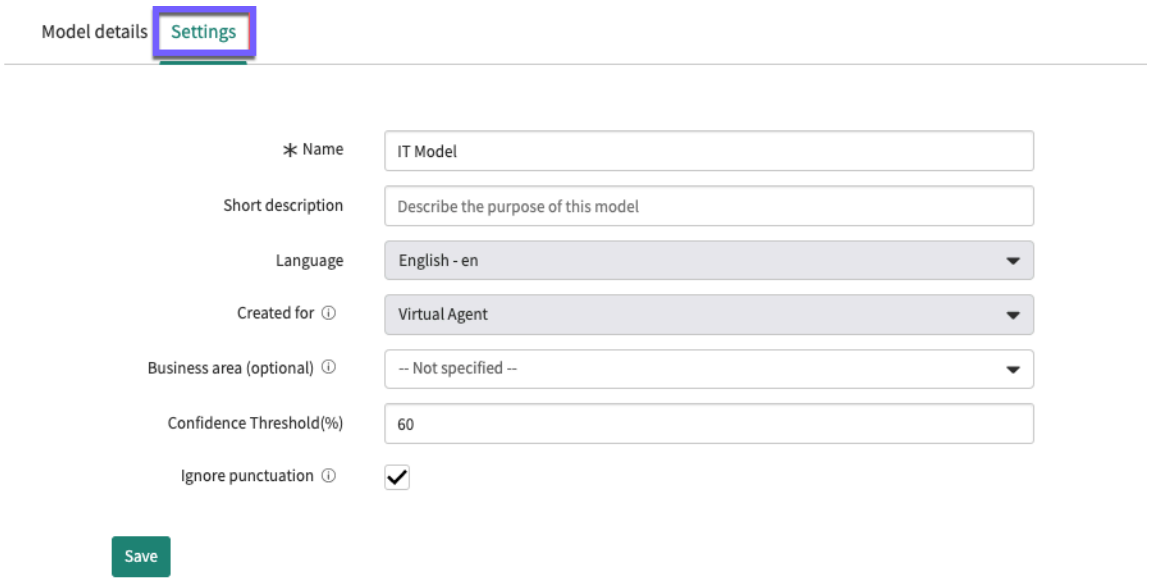
Access the test panel by clicking **Train model** or **Try model** in the **Build and train your model** phase. Training incorporates new content into your model. With **Try model**, you can manually enter individual utterances to test what intents the model predicts for them.

For more information, see (Legacy) Train and try your NLU model.

You can also use the test panel to provide feedback on your model's predictions. Your feedback helps improve intent prediction. See (Legacy) Test panel feedback.

Settings

Use the **Settings** tab to edit the name, short description, and confidence threshold of the model. You can't change the language or purpose of the model.



For more information on the confidence threshold, see (Legacy) Test and publish your model. For more information on Settings, see (Legacy) NLU model settings.

(Legacy) NLU intents

Intents drive your models' responses by matching a system action to user inputs. Models with good intents help Virtual Agent and Search respond to your users accurately.

Think of intents as the core that drives the comprehension of natural language. Intents help the models translate utterances from your users into actions that the system can perform. Intents perform best if your utterances, entities, and vocabulary work together to support your model. Using vocabulary and realistic utterance examples can help the system to be more accurate when predicting intents.

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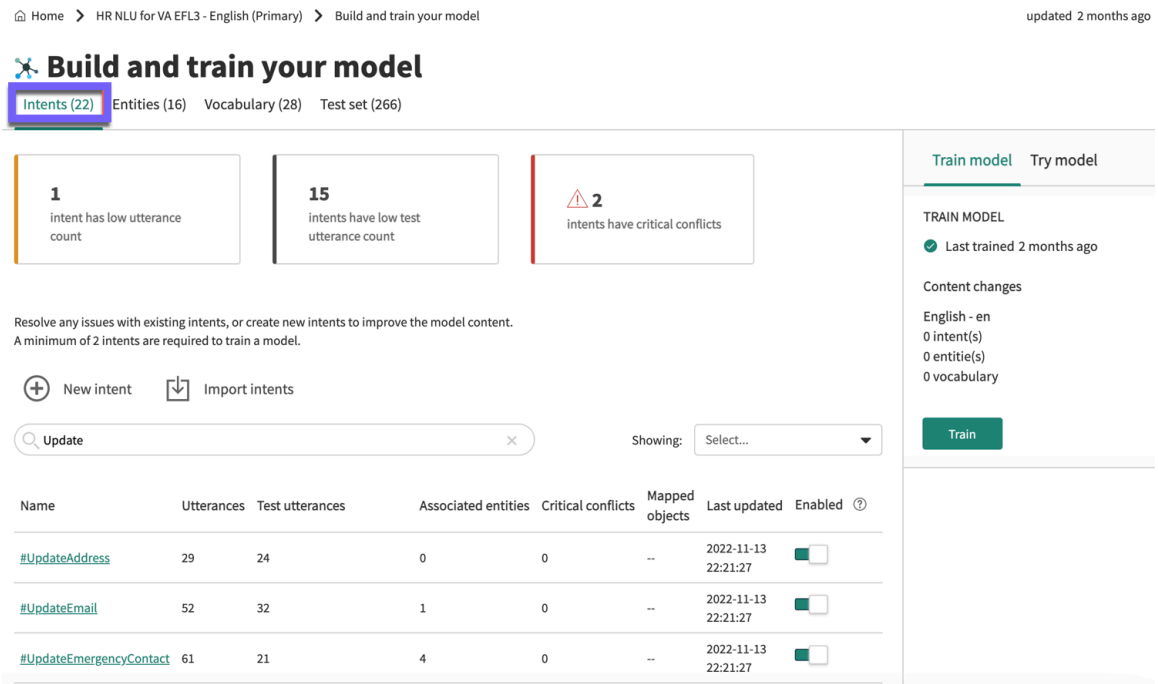
When creating your Natural Language Understanding (NLU) model, you add intents to match user inputs with system actions. The more intents that a model has, the more actions it can take when it receives utterances from your users. Model intents can perform various actions, from creating hardware service requests to adding users to groups.

To access your model's intents, navigate to a model's overview page. In the **Build and train your model** phase, select **View phase**. The **Intents** tab shows by default.



A model can contain up to 750 intents. However, models with over 300 intents or 4500 utterances, whichever comes first, take longer to train, test, and publish.

Note: As you create intents, keep in mind that they can sometimes impact each other. For example, you build and test an intent that works on one or two utterances. But when you test it in a larger intent environment, it might behave differently. To reduce the likelihood of such an event, you may want to create at least five intents in a model before you start proper testing.

To start adding content to your model, see (Legacy) Create an NLU intent.

The **Enabled** column shows whether or not the intent is active in predictions. An NLU admin can deactivate an individual intent but keep it in the model.

However, if an intent is mapped to a published Virtual Agent topic:

- You cannot deactivate the intent.
- You cannot delete the intent.

After changing the **Enabled** status of an intent, retrain the model.

Utterances

Intents contain training utterances, which are examples of inputs that the model may see from your users. Each intent in a model has its own utterances. When trained, the model learns to recognize similar utterances from your users and then respond with the matching intent.

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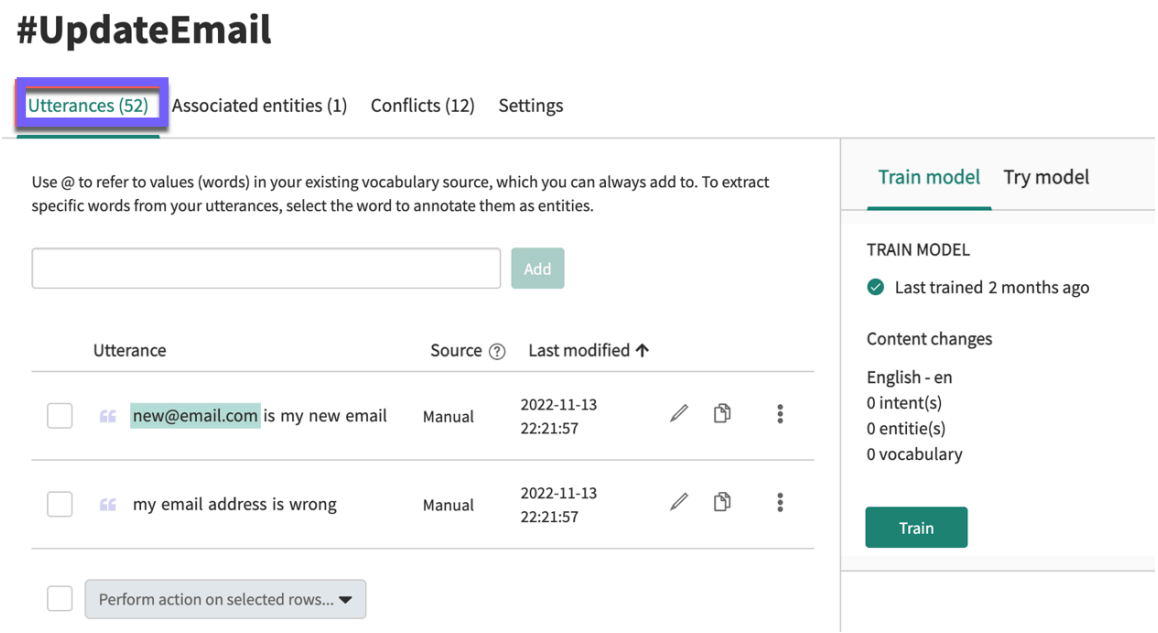
Select an intent to access the intent details page. The **Utterances** tab lists all the utterances currently in the intent.



After adding utterances, you can edit, copy, move, or delete the utterances using the icons in the right column. You can move or delete multiple utterances by selecting the box on the left first and using the **Perform action on selected rows** button.

Here are some things to consider when adding utterances to intents:

- A model must have at least 1 intent, with a minimum of 5 utterances in each intent.
- An intent needs at least 5 utterances to begin training.
- The system currently supports utterances up to 25 words or 200 characters. Utterances that exceed that limit fail to return an intent prediction.
- The system currently supports up to 20,000 utterances in a single model.
- Models with more than 4,500 utterances take longer to train, test, and publish.

Provide vocabulary for any words or phrases that are relevant to your organization or domain when adding utterances to your model. The vocabulary helps with intent prediction for words and phrases that your users are likely to use. You can use the @ symbol when adding an utterance to call on a vocabulary source. For more context and examples, see (Legacy) NLU vocabulary.

Associated entities

Your model uses entities to provide additional context and meaning when predicting user input. You add entities to the training utterances of your intent to provide the system with more information to perform the intended action.

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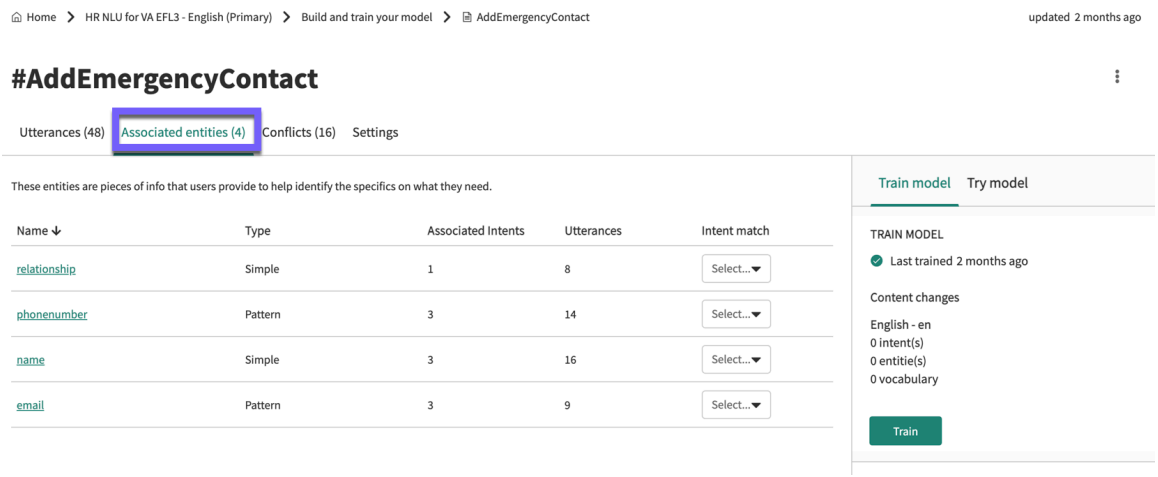
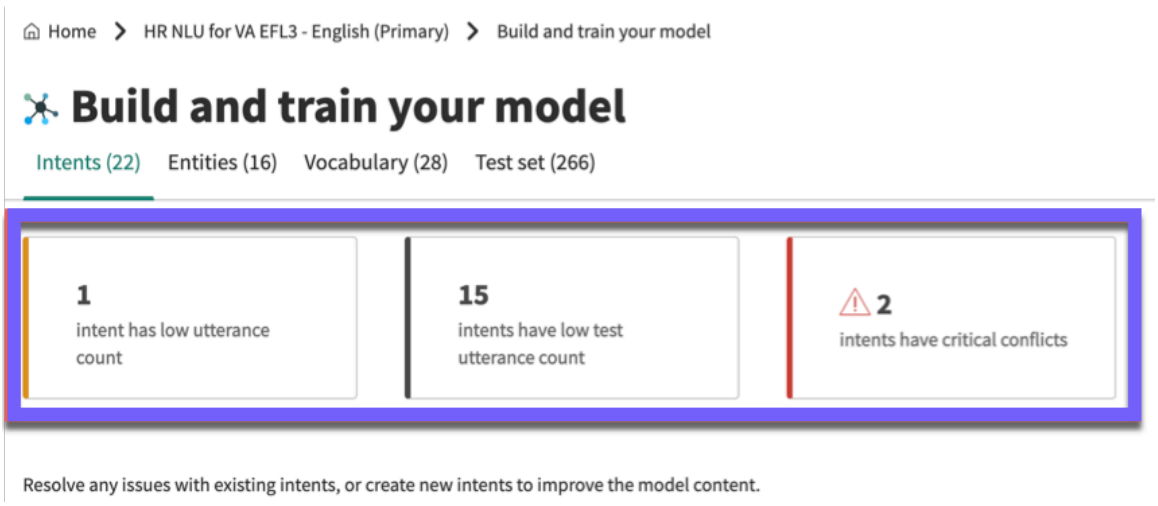


For more information, see (Legacy) NLU entities.

Intent issues

Building large models increases the chance that intents overlap, conflict, or fail to contain enough training utterances. For example, the utterance examples in one intent may end up identical to the examples in another intent. If your intents conflict, the model may not know which intent to predict when receiving user input.

If your model has issues or conflicts, the **Intents** page displays cards showing the number of intents affected.



Select a card to see a filtered list of intents with that issue. Resolving issues ensures that your intents meet the requirements and work as intended.

For more information, see (Legacy) Resolve intent issues.

(Legacy) Create an NLU intent

Create an intent for your Natural Language Understanding (NLU) model. Intents provide your model with a system action to perform when it receives user input.

Before you begin

- Make sure that the NLU Workbench plugin, NLU Workbench - Core plugin, NLU Workbench - Advanced Features plugin, NLU Common Model plugin, and Predictive Intelligence plugin are all installed and activated on your instance.
- Ensure that you are in the same application scope as your model.

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- You can create intents for Virtual Agent and AI Search models in NLU Workbench.
- Role required: admin or nlu_admin

About this task

This procedure shows you how to create an intent. To reuse intents from other models, see (Legacy) Reusing intents from prebuilt NLU models.

Here's an example of how intents can interact with the vocabulary in their training utterances.

- Intent: #AddMembersToDistributionList
- Utterance A: "Please add Carlos Santana to the uxinfodev list"
- Utterance B: "I'm mistakenly removed from the arlo-drury-directreports group"
- Result: The system doesn't recognize uxinfodev or arlo-drury-directreports and can't use these words to predict the intent.
- Solution: Add uxinfodev and arlo-drury-directreports as vocabulary items and add synonyms to them. The synonyms you provide help add more context to the utterance and the intent in which they reside. Your intent prediction confidence can be even higher if you also mark them as entities.

Note: Training utterances and utterances from your users have a limit of 25 words or 200 characters. Utterances that exceed that limit fail to return an intent prediction.

Do not include unrealistic terms such as "OrderLaptop" or "sfsdfasdfas" in training utterances. Utterances should be correct and natural examples in the model's language.

In the following example procedure, you're creating an intent and adding utterances that users might say when requesting information on payment. You've already created an NLU model that you've titled HR Model for Virtual Agent and you're creating an intent in that model.

Procedure

1. Set your application scope to your model's scope.
2. Navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default.
3. Select the tab corresponding to your model's application, then select the name of the model you want to add an intent to.
   In this model example, you select your HR Model for Virtual Agent model.
4. In the **Build and train your model** card, select **View phase**.
5. Select **Intents**.
6. Select **New Intent**.
7. In the **Create an intent** window, add a name and description for the intent.

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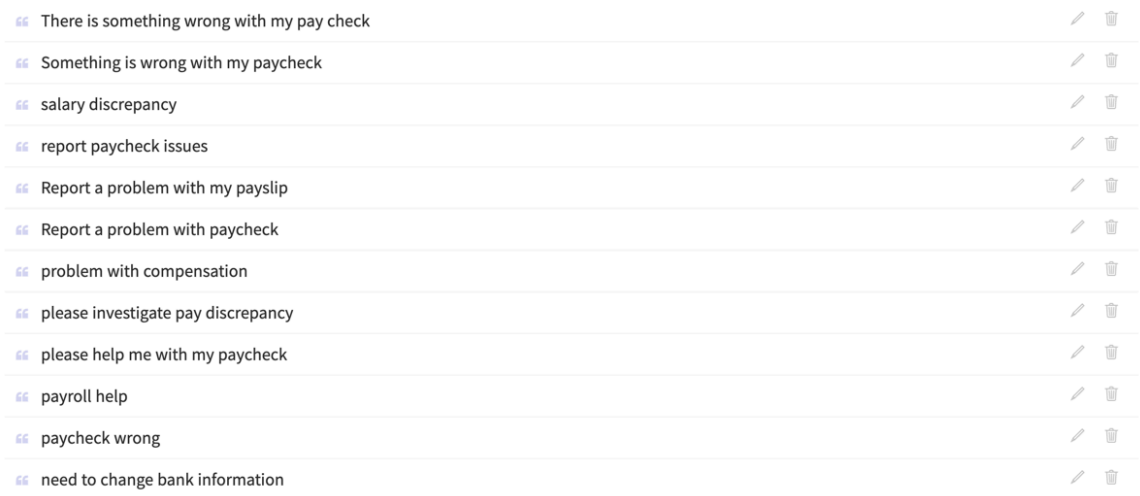
In this example scenario, you enter `PayDiscrepancy` for the name. You can also add a description.

Note: When you create an intent, the system adds a hashtag to the intent name.

8. Select **Add intent**.
   The #PayDiscrepancy intent screen appears, including sections for its utterances, associated entities, and settings. The intent draft status is also shown in the upper right corner of the Intent screen.
9. In the **Utterances** tab, enter training utterance examples that are relevant to the intent.

   Note: The utterance examples that you provide must be unique and contain fewer than 25 words or 200 characters. Aim to add at least 15 utterances with as much variety between them as possible. You must add at least 5 utterances to begin training the model.

   In this scenario, you add the following utterances into the field and select **Add**



As you build and retrain your model iteratively, you can check how your updated intent affects the model's predictions. See (Legacy) Train and try your NLU model.

What to do next

Train your model to save your updates. For issues with intents, see (Legacy) Resolve intent issues.

To improve your utterances, add entities to provide context. See (Legacy) NLU entities.

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The available (Legacy) Intent Discovery feature can help identify intents that would be possible to add, based on your historical data.

(Legacy) Reusing intents from prebuilt NLU models

Reuse Natural Language Understanding (NLU) intents by importing them from a prebuilt NLU model to other models. Reusing intents saves time when building your models.

Prebuilt Virtual Agent NLU models provide language understanding needed for chatbot conversation flows in ITSM, CSM, and HR topics. Each NLU intent in these models maps to a single Virtual Agent conversation topic created in Virtual Agent Designer accordingly.

The prebuilt models are read-only, but contain validated intents that you can reuse in your NLU models. For example, the prebuilt HR model for Virtual Agent contains several intents regarding HR requests. Adding the intents to one of your models makes that model ready to respond to user inputs regarding HR.

Prebuilt Virtual Agent model content

Each of the prebuilt Virtual Agent models uses language that's pertinent to their respective business unit (BU). The NLU that processes this language, built from a word corpus of 3 million words, is context-aware of general linguistic patterns and both ServiceNow and user-defined vocabularies.

The prebuilt models map to common conversation topics used by Virtual Agent chatbots across each of the three BUs. Those topics correspond with intents that perform BU-specific actions.

For more NLU and Virtual Agent context, refer to the following product documentation:

- For ITSM context, see ITSM Virtual Agent.
- For HR context, see Virtual Agent for HR Service Delivery.
- For CSM context, see Customer Service Virtual Agent conversations.

Virtual Agent and NLU plugins and roles

To access the prebuilt Virtual Agent models in the NLU Workbench, you must install and activate these plugins using the admin role.

Plugins	Descriptions
• CSM Virtual Agent conversations [com.sn_csm.virtualagent] • Human Resources Scoped App: Virtual Agent Conversations [com.sn_hr_virtual_agent] • ITSM Virtual Agent conversations [com.snc.itsm.virtualagent]	Enables Pre-built Virtual Agent topics, topic blocks, and ServiceNow NLU models for the Customer Service Management, HR Service Delivery, and IT Service Management applications. • Requires the Glide Virtual Agent (com.glide.cs.chatbot) plugin to be activated. • Automatically activates the NLU Workbench (com.snc.nlu_studio) plugin.

Creating NLU models that reuse predefined Virtual Agent intents

The prebuilt Virtual Agent models are set to read-only and can't be edited. However, the intents in these models can be imported into your new model, alongside any new intents you've created in

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your model. You can also copy the prebuilt model and use the intents as a foundation for a new model.

To reuse the intents from a prebuilt Virtual Agent model, choose the prebuilt model when importing intents. See (Legacy) Import an NLU intent.

NLU models and their intents and entities are associated to an application scope. The scope can't be changed later, so verify your target application scope before you begin.

(Legacy) Import an NLU intent

As you create intents for your Natural Language Understanding (NLU) model, you can also import and reuse intents from other models in the same application scope. Reusing intents saves time when building new models.

Before you begin

- Make sure that the NLU Workbench plugin, NLU Workbench - Core plugin, and Predictive Intelligence plugin are all installed and activated on your instance.
- You can import intents for Virtual Agent and AI Search models.
- Verify that the application scope of your source model and target model are the same.
- Role required: nlu_editor, nlu_admin, or admin

About this task

When you import an intent, the following associated items are also imported:

- training utterances, with their entity annotations
- entities

The following items are not included when importing an intent:

- test utterances in the default test set
- regular and pattern vocabulary

Note: You cannot import intents in the following situations:

- When the model already has an intent with the same name as the intent you are trying to import.
- When the model already has an entity with the same name but different attributes as what you are trying to import.

In this example scenario, you are building the content of your NLU model and you want to enhance the model by reusing intents from another model.

Procedure

1. Ensure that you are in the target application scope, and navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default.
2. Select the tab for your model's application, then select the name of the model you want to add an intent to.
3. In the model overview page, find the **Build and train your model** phase and select **View phase**.
4. In the **Intents** tab, select **Import intents**.

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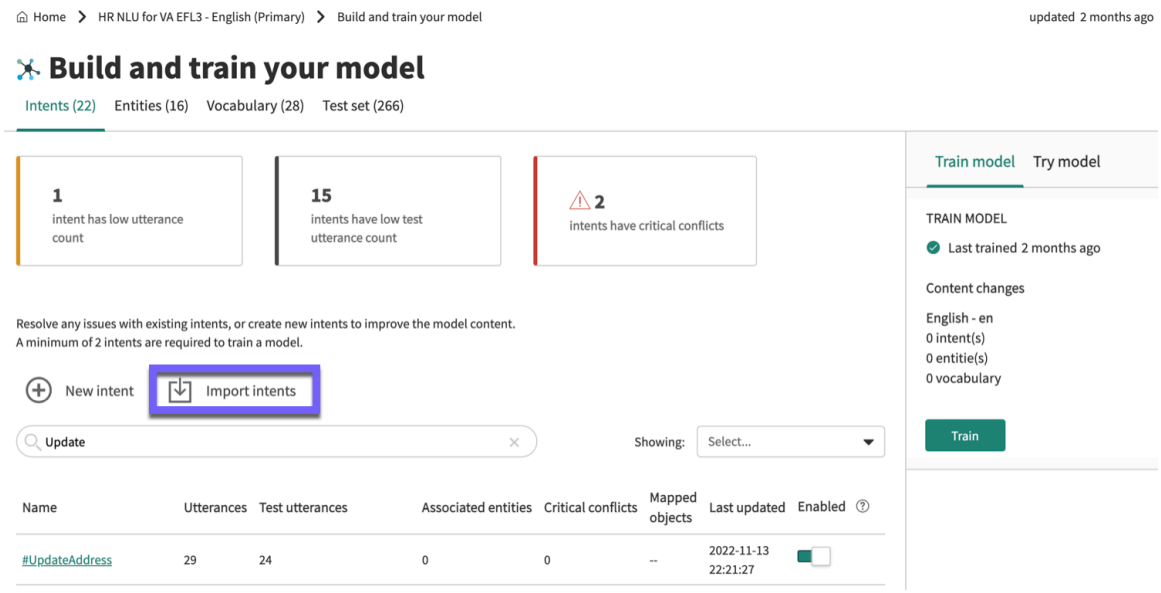
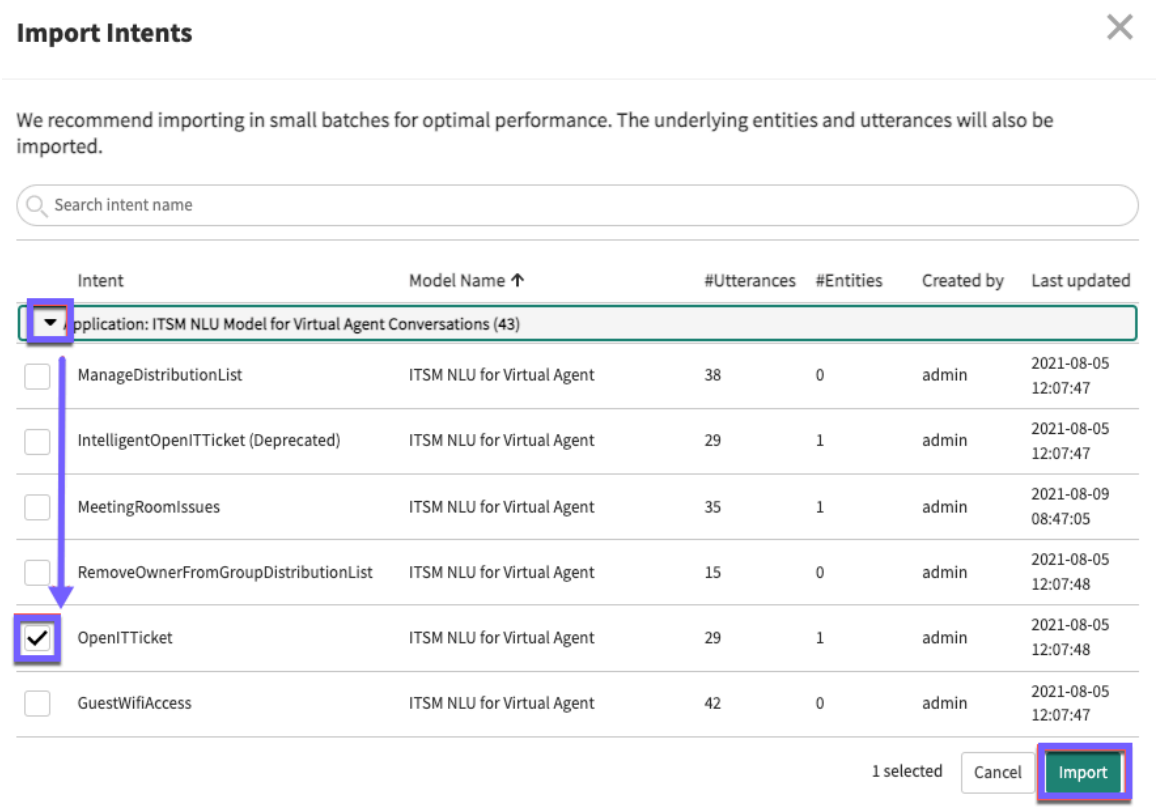


The **Import intents** screen appears, showing a list of NLU models from which you can select intents to import.

5. Locate the intents you want to import, and select their check boxes.



In this scenario, you select the **OpenITTicket** intent in the ITSM NLU Model for Virtual Agent Conversations model.

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6. Select **Import**.

   Result: The **#OpenITTicket** intent appears in the intents list of your target model. By importing this particular intent, you have added 29 additional training utterances to your model.

What to do next

Review the annotations of the newly imported training utterances. Add vocabulary annotation if needed.

Train your model to save your updates. For issues with intents, see (Legacy) Resolve intent issues.

If there are any secondary language models associated to your target model, consider importing and translating the new content. See (Legacy) Import primary model content to a secondary model.

For information about prebuilt Virtual Agent models that you can import from, see (Legacy) Reusing intents from prebuilt NLU models.

(Legacy) Resolve intent issues

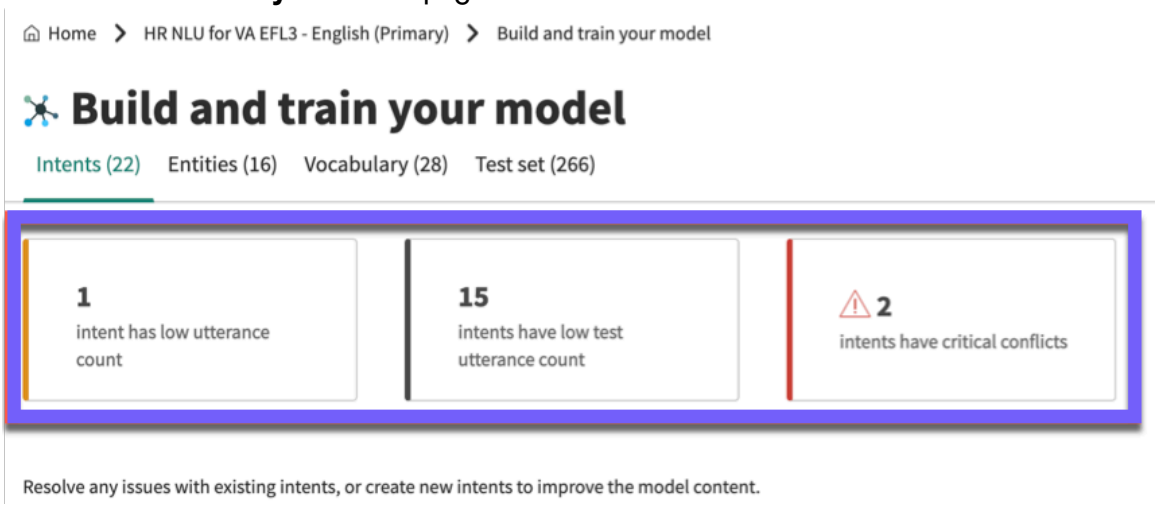
Use the issue cards to identify intents that have conflicts, need reviewing, or need more utterances. Resolving intent issues ensures the intents in your Natural Language Understanding (NLU) models work properly.

Before you begin

- Make sure that the NLU Workbench plugin, NLU Workbench - Core plugin, NLU Workbench - Advanced Features plugin, and Predictive Intelligence plugin are all installed and activated on your instance.
- You can resolve conflicts for Virtual Agent and AI Search models.
- Role required: nlu_admin or admin. When assigned to a model, the nlu_editor can resolve intent issues for that model.

About this task

When a trained model contains intents with issues, the issue cards are displayed on the intents tab of **Build and train your model** page. Select each card to filter the list of intents for that issue.



The cards display different issues:

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- **intents have low utterance count**: Intent doesn't contain the required minimum of 5 training utterances. This card also displays when the intent contains less than the recommended count of 15 utterances.
- **intents have low test utterance count**: The default test set does not have enough test utterances for the intent. This card displays when the count of test utterances for an intent is below the recommended 15.
- **intents have critical conflicts**: Intent contains training utterances that overlap with utterances in another intent.

  Note: Utterances which are marked as `Not relevant`may also conflict with utterances assigned to intents. For more information, see (Legacy) Irrelevance detection in NLU.

- **intents need review**: Intent was translated but must be reviewed by an nlu_admin or nlu_editor.

The issue cards are hidden under the following circumstances:

- The model is a pre-built model
- The model is in a draft state and not trained
- The model contains no conflicts
- A successful conflict report doesn't exist for the latest trained version
- The NLU Workbench - Advanced Features plugin isn't installed

Resolve issues in the following ways:

Issue	Resolution
intents have low utterance count	Add more training utterances to the intent. Intents need at least 5 utterances. The recommended count is at least 15 utterances.
intents have low test utterance count	Add more test utterances for the intent to the model's default test set. The recommended count is at least 15.
intents have critical conflicts	Remove or edit any utterances so that each utterance applies to only one intent.
intents need review	Have an nlu_admin or nlu_editor review the intent. For more information, see (Legacy) Enable or disable a secondary model intent.

In this example procedure, you are resolving critical conflicts in one of your intents. You built a Virtual Agent model for handling HR requests, but two of your intents, GeneralHRInquiry and CreateHRGeneralInquiryCase included similar utterances.

Procedure

1. Ensure that you are in the same application scope as your model, and navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default.
2. Select the tab corresponding to your model's application, then select the name of your model.
3. In the **Build and train your model** card, click **View phase**.
4. On the intents tab, click the **intents have critical conflicts** card.
   The intents list filters and shows the intents with critical conflicts.

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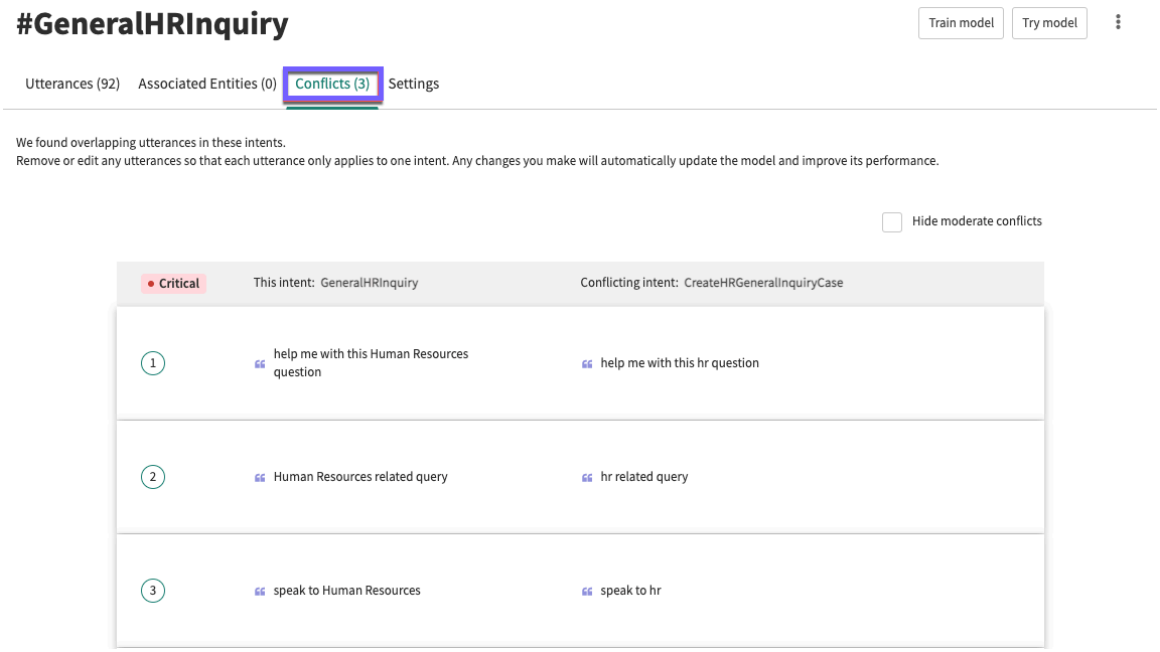
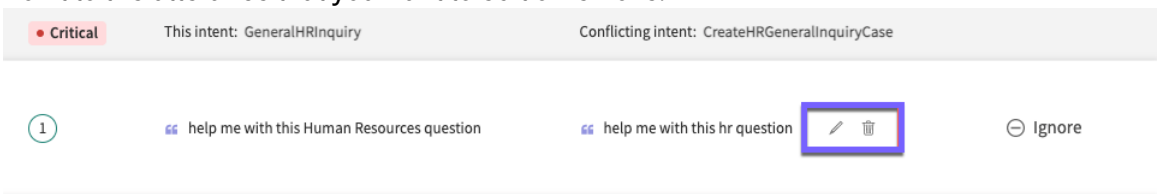
5. Click the intent name you want to resolve.
   In this example, you click the GeneralHRInquiry intent.
6. Click the **Conflicts** tab.

   The conflicts tab appears and lists the conflicting utterances. The utterances for the current intent show on the left. The conflicting utterances for the other intent appear on the right.

   Note: You can hide moderate conflicts to focus on the critical conflicts. You can also ignore conflicts. However, be sure to fix all conflicts for best performance.



7. Point to the utterance that you want to edit or remove.



   In this example procedure, click the trash icon to remove the utterance from the CreateHRGeneralInquiryCase intent.

   The utterance is removed from the intent.

   Note: Any changes you make automatically save.

What to do next

Utterances designated as `Irrelevant` or `Not relevant`may also conflict with training utterances. Irrelevant utterances are displayed as though they are in their own intent named **NO_INTENT**. However, these utterances cannot be edited or deleted in Conflicts. Copy the utterance to the Irrelevance Detection module to edit or delete. For more information, see (Legacy) Irrelevance detection in NLU.

Continue to resolve all conflicts. When finished, train your model to see a list of updated conflicts, if any. Resolve all intent issues prior to testing and publishing your model.

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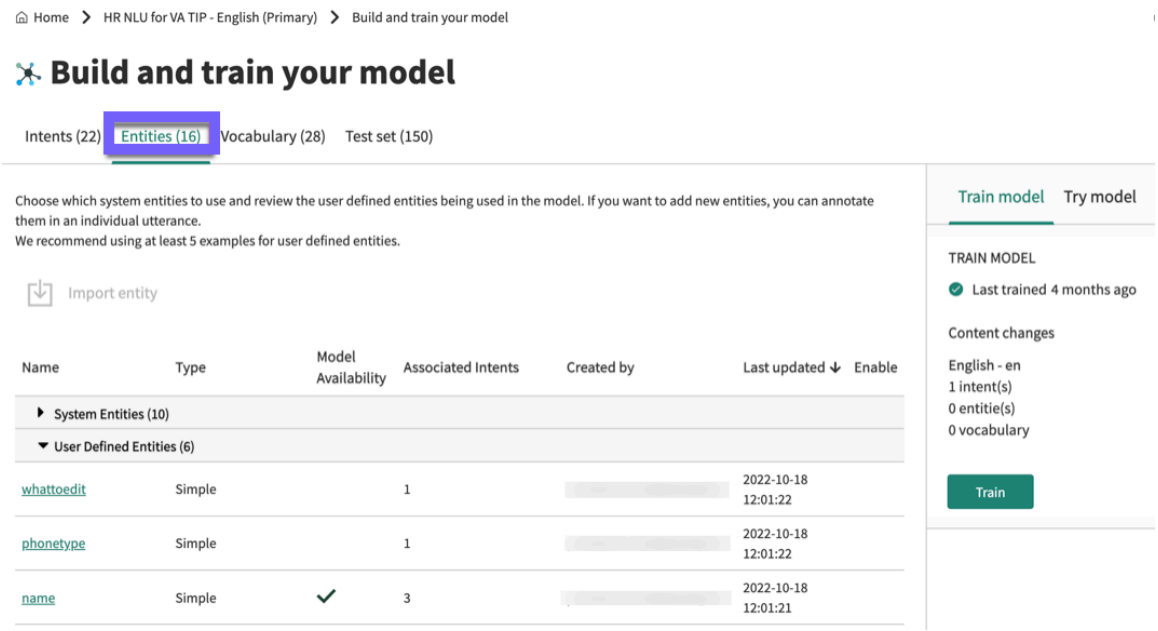
(Legacy) NLU entities

Entities provide your model with additional context when receiving user input. Add entities to your utterances and intents to improve the predictions of your Natural Language Understanding (NLU) model.

Think of entities as the object of the action that the user wants to perform. The model interprets the utterance by matching it with an intent, but also uses entities to gather more details on the request.

For example, if a user types in `I have a critical issue with a slow laptop`, the system predicts a match to the intent #TroubleshootSlowComputer. From this utterance, the model also identifies the following entities:

- HARDWARE (entity) - laptop (value)
- urgency (entity) - High (value)



NLU entities fall into two categories: system and user-defined. System entities such as DATE, TIME, and LOCATION are available by default in your instance. You can create your own user-defined entities to provide context relevant to your business.

There are five types of user-defined entities. Select one of the following links to learn more.

- (Legacy) Create a simple entity
- (Legacy) Create a mapped entity
- (Legacy) Create a pattern entity
- (Legacy) Create a system-derived entity
- (Legacy) Create an open-ended entity

When you create entities, annotate them on utterances to provide examples to help your model learn. By annotating entities, you provide your model with linguistic associations and meaningful context for the system vocabulary. Annotations strengthen the relevance of entities and help your model perform the correct action in response to your users' inputs.

You add entities to your utterances when you are creating the intents. The entities then become associated to that intent, giving you the **Associated Intents** number.

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Regular expressions

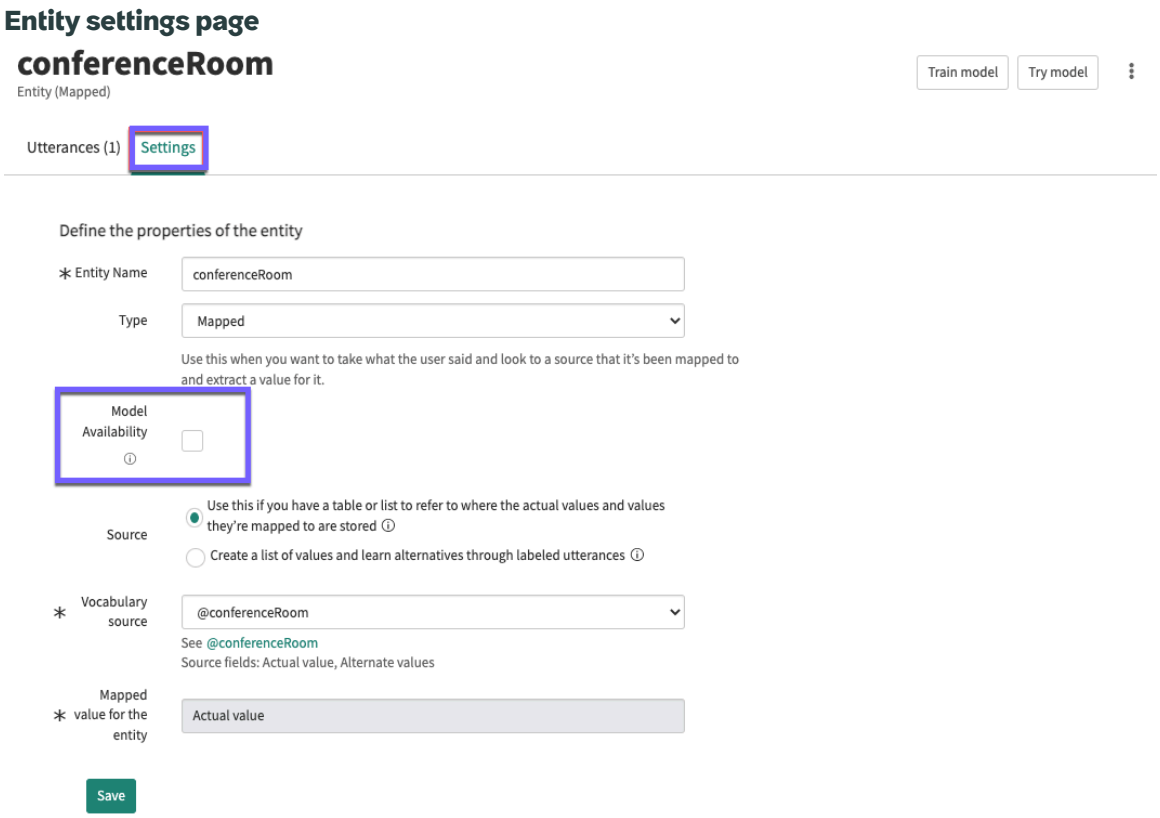
Regular expressions (regex) help your model establish patterns that improve that model's ability to locate, match, and manage text. Use regular expressions with pattern entities to help your model understand formats such as email addresses, phone numbers, and incident numbers.

To learn more, see (Legacy) Using regular expressions in entities.

Model availability

When you create an entity, you can choose to make the entity available for reuse by other intents in the model. If you didn't select the **Model availability** box when creating the entity, you can edit the entity afterwards.

On the Model details page, select **Entities**. Select the name of the entity to bring up the entity details page. Then, select the **Settings** tab.



(Legacy) Create a simple entity

Create one or more simple entities from words in your utterance examples. An entity is an object of, or context for, an action.

Before you begin

- Make sure that the NLU Workbench plugin, NLU Workbench - Core plugin, NLU Common Model plugin, and Predictive Intelligence plugin are all installed and activated on your instance.
- Create or use an existing NLU model for Virtual Agent or AI Search.
- Create or use an existing intent.
- Role required: nlu_editor, nlu_admin, or admin. The nlu_editor must be assigned to the model.

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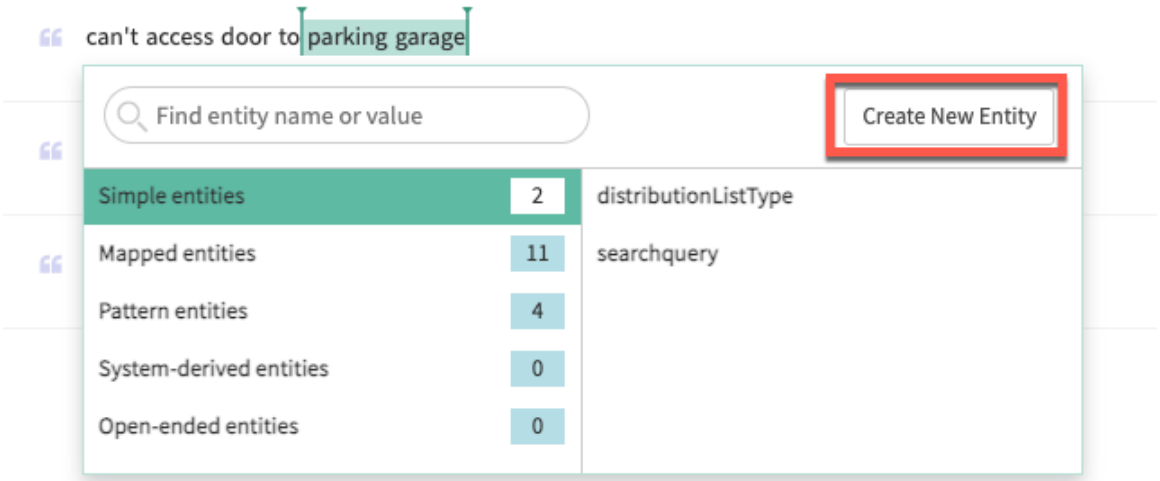
About this task

Simple entities are words or phrases whose value can be extracted by your model. Simple entities are identified based on the context in which the entity is used in an utterance.

For the following example procedure, you've already created an intent that's titled SubmitAccessRequest and you're creating a simple entity for the type of access the user is requesting.

Procedure

1. Navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default.
2. Select the tab corresponding to your model's application, then the name of the model you want to add an entity to.
   For this example, you choose the NLU for Access Requests model.
3. In the **Build and train your model** card, click **View phase**.
4. In the intents tab, click the name of the intent.
   For this example, you click SubmitAccessRequest.
5. Click a word in one of the utterances to bring up the entity window.
   For this example, click the word parking garage.



6. Click **Create New Entity**.
7. In the Create a new entity screen, enter a name and select the **Simple** entity type.
   For this example, you enter `buildingaccess` for the **Entity Name**.

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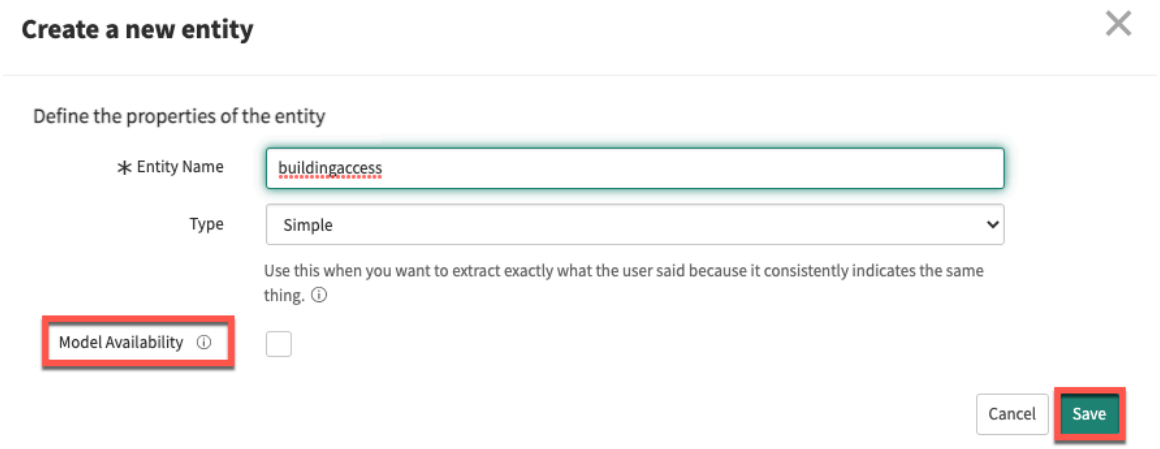
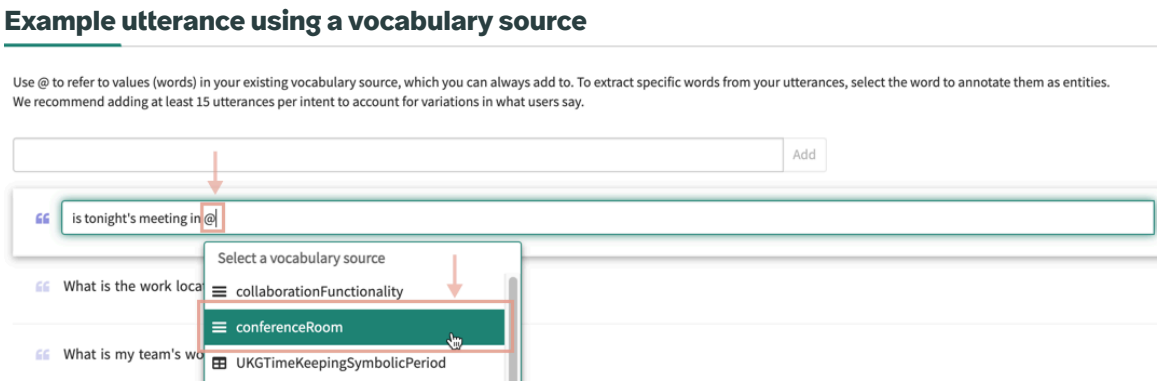


Note: Select **Model availability** to make the entity available to every intent in the model. If you check the box, the entity shows in the **Associated Entities** tab.

8. Click **Save**.
   The entity saves and the words in the utterance remain highlighted.

What to do next

Your utterances can reference a vocabulary source by using the @ handle. If you have a list of values that are defined in a vocabulary source, you can annotate the @ handle as a simple entity to extract it rather than repeating the utterance for all of the values. The referenced vocabulary source can be a table or a list. For example, the following image shows how you invoke a vocabulary source that lists various conference room names.



For more information, see (Legacy) NLU vocabulary.

(Legacy) Create a mapped entity

Create an entity mapped to a vocabulary source, or to a list of values you manually create for the entity. Mapped entities can help provide multiple values the model can use as context when interpreting utterances.

Before you begin

- Make sure that the NLU Workbench plugin, NLU Workbench - Core plugin, NLU Common Model plugin, and Predictive Intelligence plugin are all installed and activated on your instance.
- Create or use an existing NLU model for Virtual Agent or AI Search.
- Create or use an existing intent.
- Role required: nlu_editor, nlu_admin, or admin. The nlu_editor must be assigned to the model.

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About this task

Mapped entities take the words of the utterance and extract value based on a designated source. The model uses the source when predicting the intent.

When you create a mapped entity, you have the following three options for the source.

- Manual list of values: Use this option to manually enter a list of values for the entity. For example, you could create a mapped entity named priority and map it to the word urgent in an utterance, then manually build a list for it with values of High, Medium, and Low.
- Table vocabulary source: Use this option if you have a ServiceNow table that has the values you're looking for. Mapping an entity to a table vocabulary source enables the entity to reference multiple values from the table. For example, use a @Location vocabulary source, where @Location has values for cities and countries.
- List vocabulary source: Use this option if you don't have a ServiceNow table that has the values you're looking for. For example, use a @mouse vocabulary source, where @mouse has values for various models of hand-held computer devices.

In this example procedure, you create a mapped entity for urgency.

Procedure

1. Navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default.
2. Select the tab for your model's application, then the name of your model.
3. On the model details page, select the **Intents** tab.
4. In the Intents section of the model, select the name of an intent.
   For this example procedure, you select **#SubmitRequest**.
5. In the Utterances tab, select a word in an utterance

   In this scenario, you select the word urgent in the utterance I have an urgent request.
6. Select **Mapped entities**.
7. Select **Create New Entity.**

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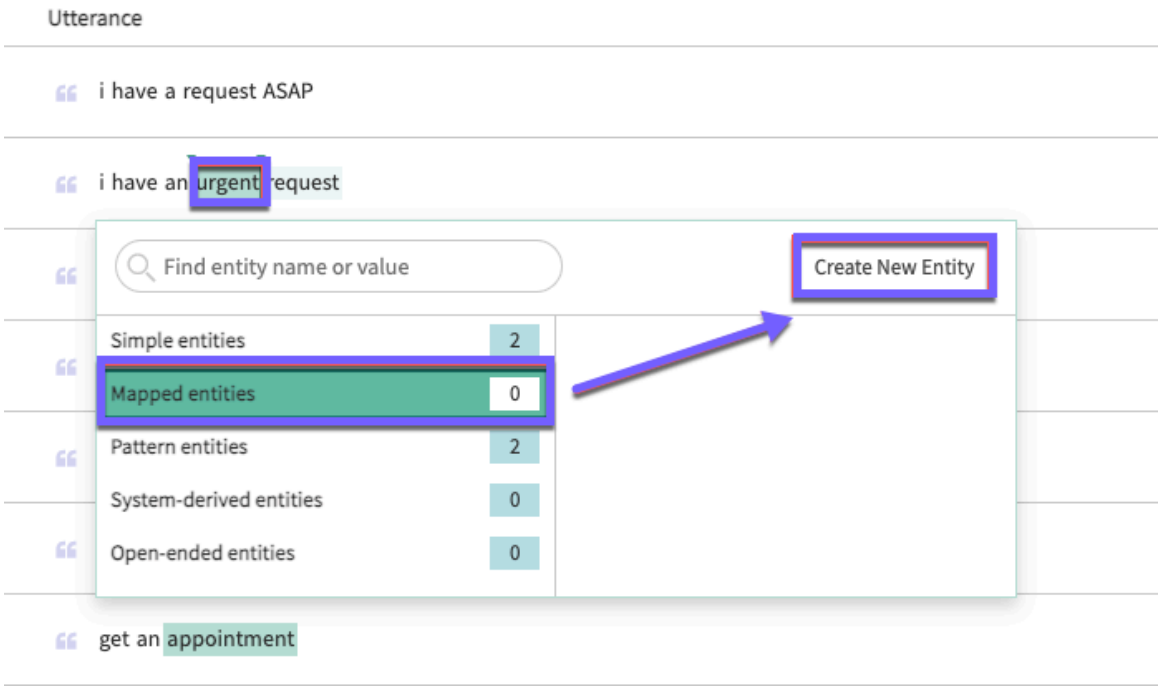

8. On the form, configure the fields.

Field	Description
Entity Name	Name for the entity.
Type	Type of entity.
Model availability	Select this option if you want this entity to be included in all intents in your model.
Source	Source of the entity values.
Provide values for this entity	Values used to provide context for the model.

For this example procedure, use the following configurations:

- **Entity Name**: `priority`
- **Type**: Mapped
- **Model availability**: Select the check box
- **Source: Use this if you have a table or list to refer to where the actual values and values they're mapped to are stored**
- **Mapped value for the entity**: `high, medium, low`.

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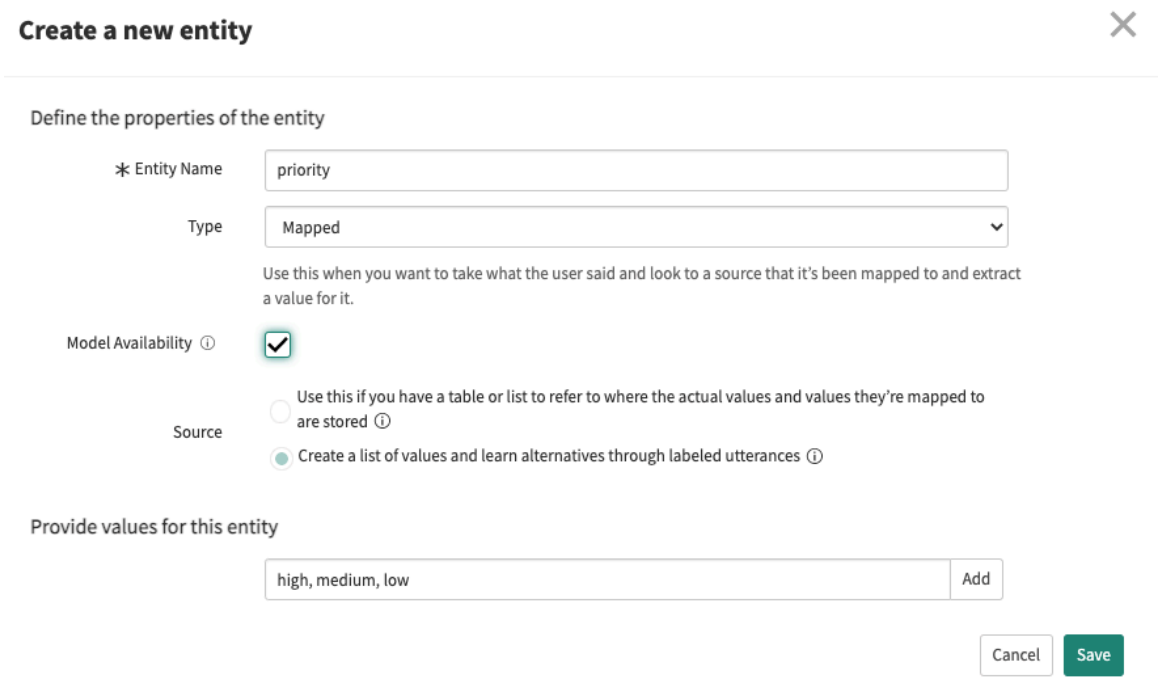

9. Click **Save**.

   Result: Your mapped entity saves. The entity appears on the **Associated entities** tab. Now the model can leverage machine learning and use the values provided to identify possible values.

What to do next

You can create a mapped entity using a vocabulary source to use the values in the source as the mapped entity.

Related topics

(Legacy) Create a table vocabulary source

(Legacy) Create a list vocabulary source

(Legacy) Create a pattern entity

Create a pattern entity from a word or phrase with repeatable patterns, such as email addresses and phone numbers. These patterns help the system to recognize similar utterances based on the patterns.

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Before you begin

- Make sure that the NLU Workbench plugin, NLU Workbench - Core plugin, NLU Common Model plugin, and Predictive Intelligence plugin are all installed and activated on your instance.
- Create or use an existing NLU model for Virtual Agent or AI Search.
- Create or use an existing intent.
- Role required: nlu_editor, nlu_admin, or admin. The nlu_editor must be assigned to the model.

About this task

Pattern entities help your model identify, contextualize, and govern similar types of content. Inputs such as phone numbers and email address follow the same pattern. By creating a pattern entity, you can train the model to recognize all variations of those inputs.

Note: Pattern entities use regular expressions (regex). The regex field value is a Java regular expression. For more information on how to use regex, see Using regular expressions in entities.

In this example scenario, you've created an intent that's titled #CheckITTicketStatus. In this example procedure, you're creating a pattern entity for incident record numbers.

Procedure

1. Navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default.
2. Select the tab for your model's application, then the name of the model.
3. On the model details page, select **Intents**.
4. Select the name of an intent.
   In this example scenario, you select **#CheckITTicketStatus**.
5. Select one of the words of an utterance.
   In this scenario, you click **INC1234567**.

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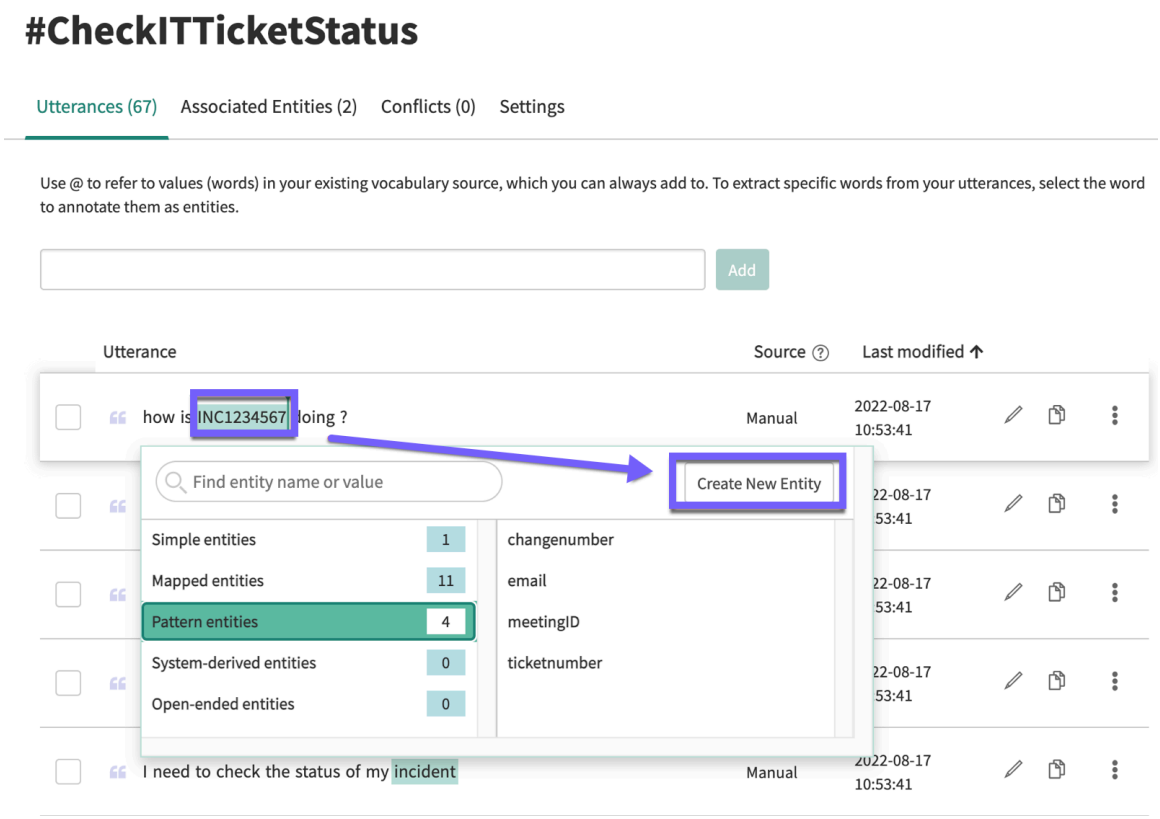
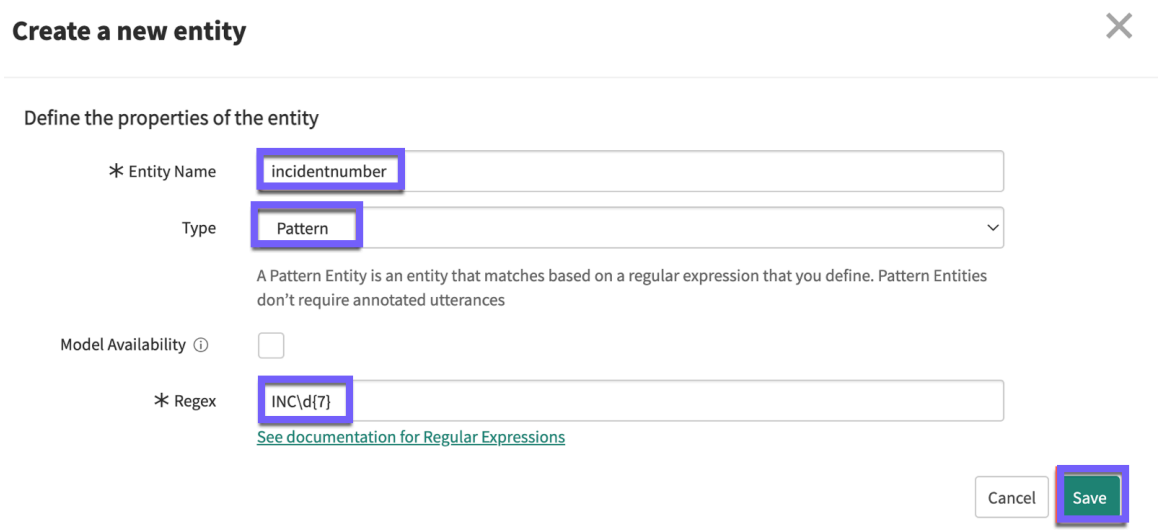


6. Select **Create New Entity**.
7. In the Create a new entity window, configure the fields.

   For this example procedure, use these configurations:

   - **Entity Name**: Enter `incidentnumber`
   - **Type**: Select **Pattern**
   - **Model Availability**: Select this box if you want this entity to be included in all intents in your model
   - **Regex**: Enter `INC\d{7}`



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8. Click **Save**.
   The pattern entity saves and appears in the **Associated Entities** tab. The model can use the pattern entity to interpret variations of the annotated utterance. For example, the model can match the #CheckITTicketStatus intent if a user enters any incident record number.

(Legacy) Create a system-derived entity

Create a custom entity that's derived from a default system entity such as date, time, duration, or location.

Before you begin

- Make sure that the NLU Workbench plugin, NLU Workbench - Core plugin, NLU Common Model plugin, and Predictive Intelligence plugin are all installed and activated on your instance.
- Create or use an existing NLU model for Virtual Agent or AI Search.
- Create or use an existing intent.
- Role required: nlu_editor, nlu_admin, or admin. The nlu_editor must be assigned to the model.

About this task

System entities are pre-built in your ServiceNow instance by default, and appear on the Entities section of the Model screen. These entities, such as DATE, TIME, and DATE_TIME, are enabled by default. You can disable and re-enable them if needed by clicking **Enable**.

System-derived entities extend your system entities, providing more context. For example, your model already understands date formats thanks to the system entity DATE. However, you can create system-derived entities, such as startdate and enddate, to extract more information from user utterances regarding dates.

For the following example scenario, you're creating a model for booking flights, cars, hotels, and events. You want your intent #FlightBooking to interpret utterances with your users flight requests. Your model contains the system entity LOCATION, but flight plans usually involve two locations.

In this example procedure, you create two system-derived entities to gather the departure and arrival locations of the flight.

Procedure

1. Navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default.
2. Select the tab for your model's application, then the name of your model.
3. In the model details page, select **Intents**.
4. Select the name of the intent.
   For this example, you select the **#FlightBooking** intent.
5. On the **Utterances** tab, select a word or phrase from one of the utterances.
   In this example scenario, you have an example utterances `book a flight from San Diego to San Francisco`. For this step, click **from San Diego**.

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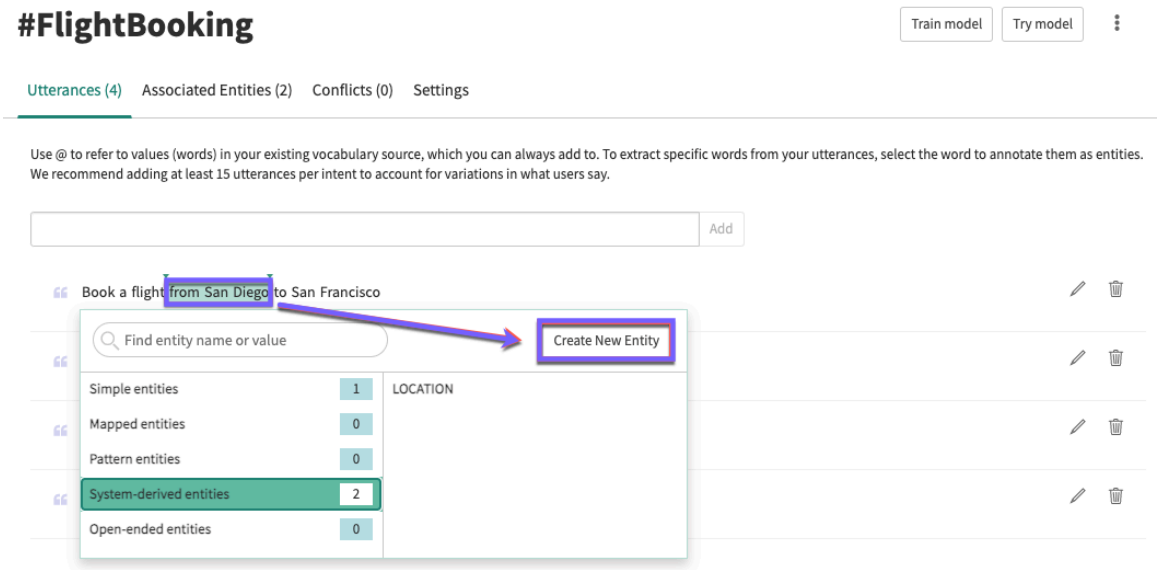
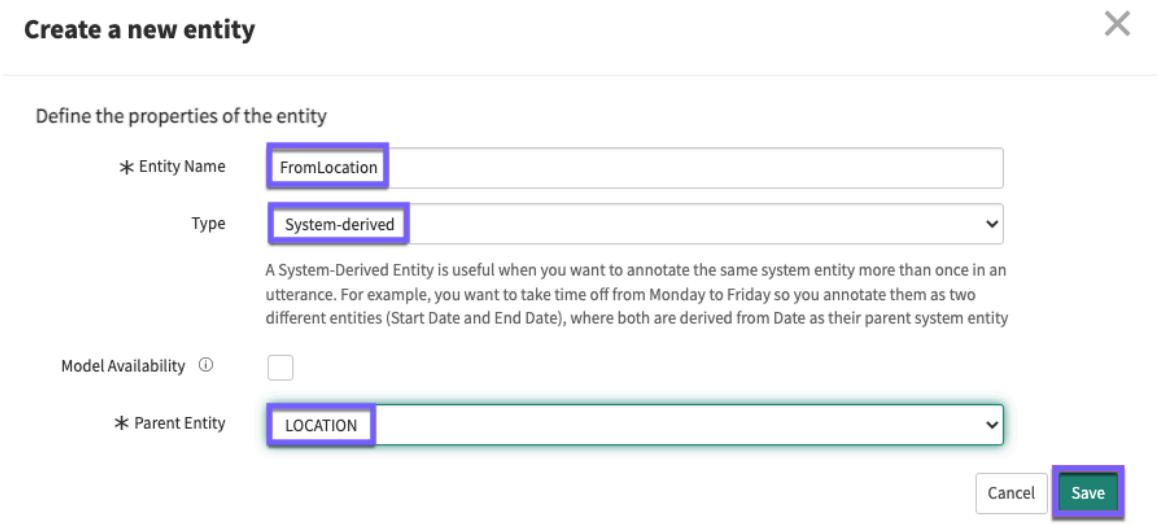


6. Select **Create New Entity**.
7. In the Create a new entity screen, configure the fields.

   For this example, use these configurations.

   - **Entity Name**: Enter `FromLocation`
   - **Type**: Select **System-derived**
   - **Model Availability**: Select this check box if you want this entity to be included in all intents in your model
   - Parent Entity: Select **LOCATION**



8. Select **Save**.
9. On the same utterance, select another word or phrase.
   In this example scenario, you click **to San Francisco**.

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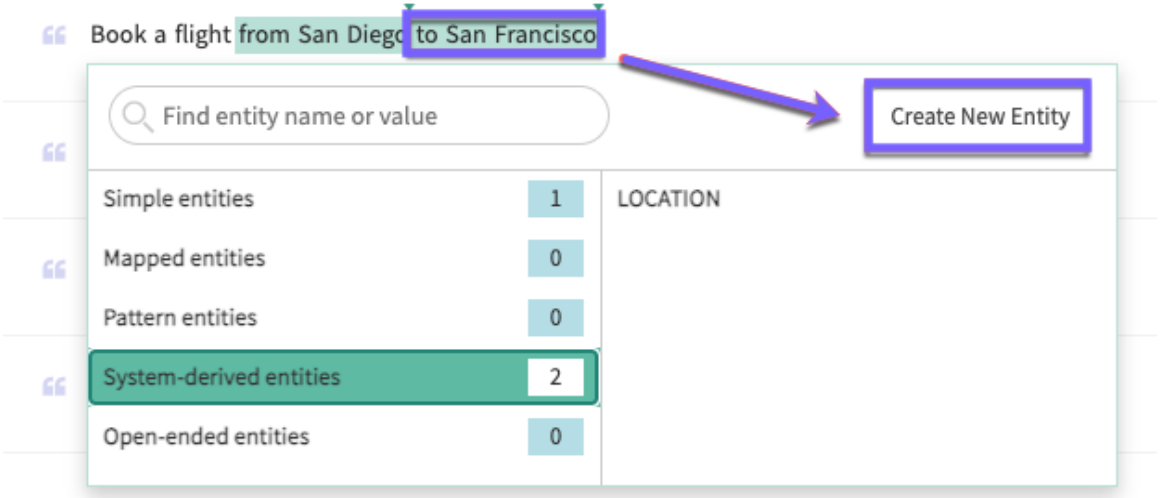
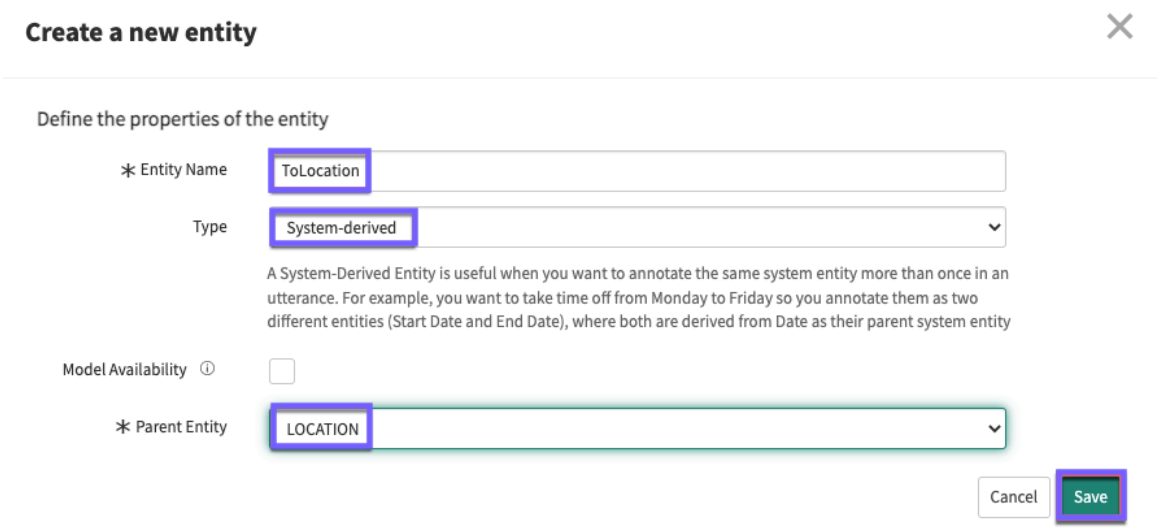


10. Select **Create New Entity**.

    For this example, use these configurations.

    - **Entity Name**: Enter `ToLocation`
    - **Type**: Select **System-derived**
    - **Model Availability**: Select this check box if you want this entity to be included in all intents in your model
    - **Parent Entity**: Select **LOCATION**



11. Select **Save**.

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Result: Your two system-derived entities appear in the entity window.

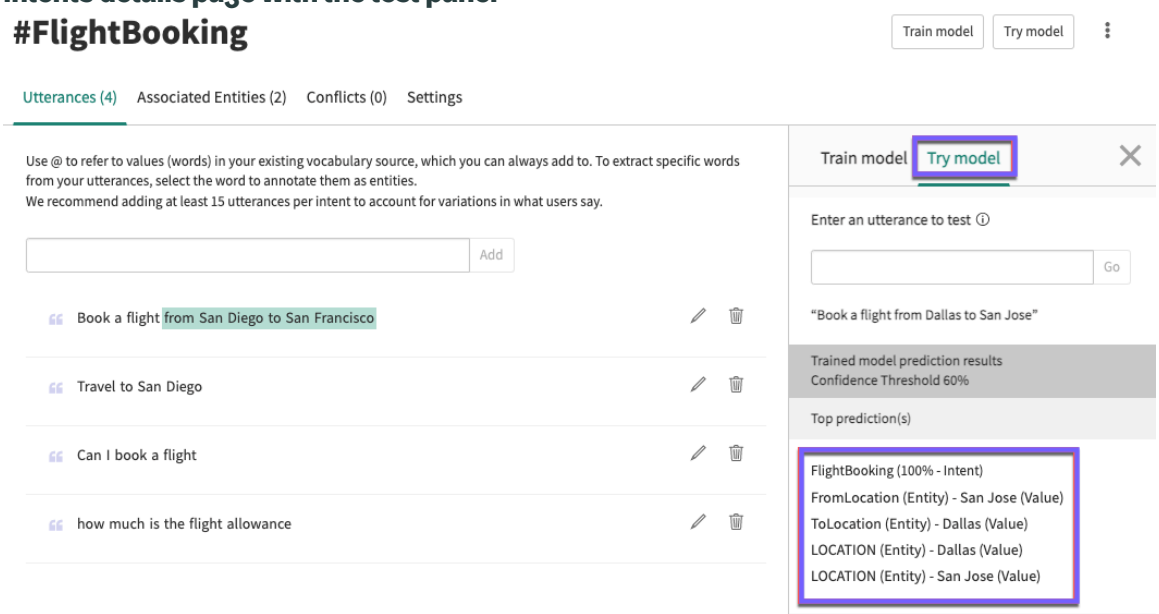
What to do next

Train your model to save the entities. You can try your model to see if it recognizes and interprets variations of the entities that you created.

For this example, you can test your model with a different departure and arrival location.

1. Select **Try model**.
2. Enter `book a flight from Dallas to San Jose`.
3. Select **Go**.

Intents details page with the test panel



The model predicts the intent, showing the entities it used to determine the values. Notice how it uses both the system entity and system-derived entity when predicting.

(Legacy) Create an open-ended entity

Use an open-ended entity when you want to improve intent prediction accuracy. Open-ended entities help your model focus on the context of the utterances.

Before you begin

- Make sure that the NLU Workbench plugin, NLU Workbench - Core plugin, NLU Common Model plugin, and Predictive Intelligence plugin are all installed and activated on your instance.
- Create or use an existing NLU model for Virtual Agent or AI Search.

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- Create or use an existing intent.
- Role required: nlu_editor, nlu_admin, or admin. The nlu_editor must be assigned to the model.

About this task

Open-ended entities tell the model to focus on the context of the entity rather than the entity itself. When you mark a word or phrase as open-ended, the system skips the entity and predicts the intent from the context that precedes or follows the entity in the utterance.

For example, in the utterance `I want to order an iPhone`, you annotate the words "an iPhone" as an open-ended entity. The model focuses on the context, predicting the user wants to order something. Since there are numerous things the user could want to order, naming all of them would be an unbearable task for the model author.

Using an open-ended entity instead of a simple entity helps the model focus on the rest of the utterance and not the entity. In the iPhone example, the entity itself is less relevant; so you want the system to ignore it.

In other scenarios you should use a simple entity, as there could be multiple intents where you shouldn't have the system ignore the entity.

Note: You can't annotate a vocabulary source (referenced by @vocab_source in an utterance) as an open ended entity. You can only annotate a vocabulary source as a simple entity or a mapped entity. For example, if the utterance is “I want to order a laptop”, then the word “laptop” can be annotated as an open ended entity. However, if the utterance is “I want to order @laptop” where @laptop refers to a table vocabulary source or a list vocabulary source, it can't be annotated as an open ended entity.

For this example scenario, you've created an NLU model with an intent for your users to order company merchandise.

In the following example procedure, you create an entity from one of your utterances so the system can recognize it as open-ended and reusable in other NLU models in your instance.

Note: You can use only one open-ended entity per intent.

Procedure

1. Navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default.
2. Select the tab for your model's application, then select the name of your model.
3. On the Model details page, click **Intents**.
4. Select the name of the intent you want to add the entity to.
   For this example, you select the #OrderMerch intent.
5. In the Utterances tab, select a word or phrase of one of the utterances to bring up the entities window.
   For this example, you select a hoodie.

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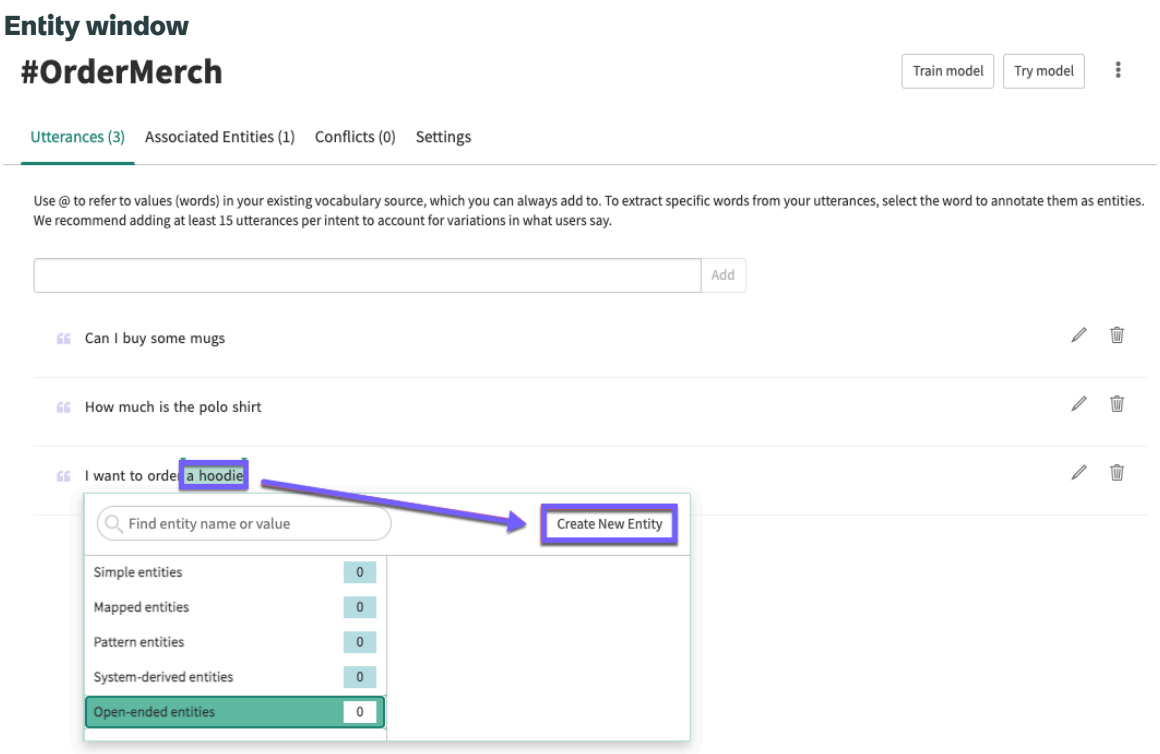
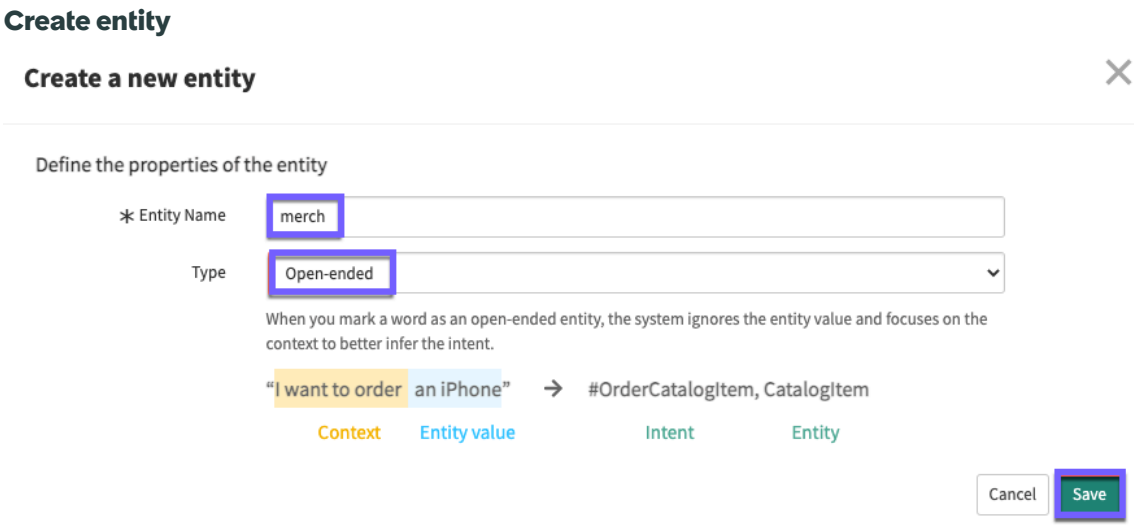


6. Select **Create New Entity**
7. On the Create a new entity screen, configure the fields.

   For this example, use the following configurations:

   - **Entity Name**: `merch`
   - **Type**: Select **Open-Ended**



8. Select **Save**.

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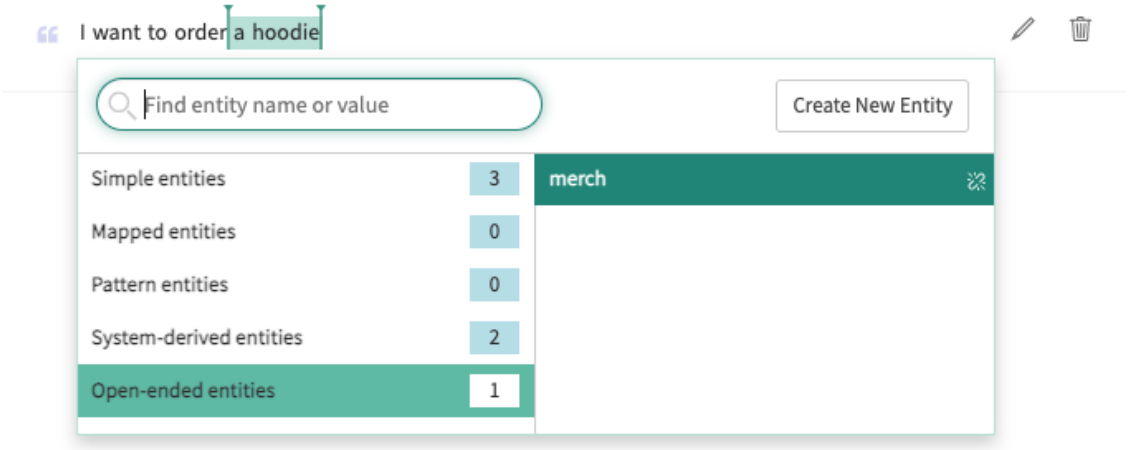
The merch open-ended entity is annotated in the Utterances section of your model's Intent screen. When you point to its name, you can see that it persists as a new entity in the annotation details. This entity is reusable in all other NLU models in your instance.

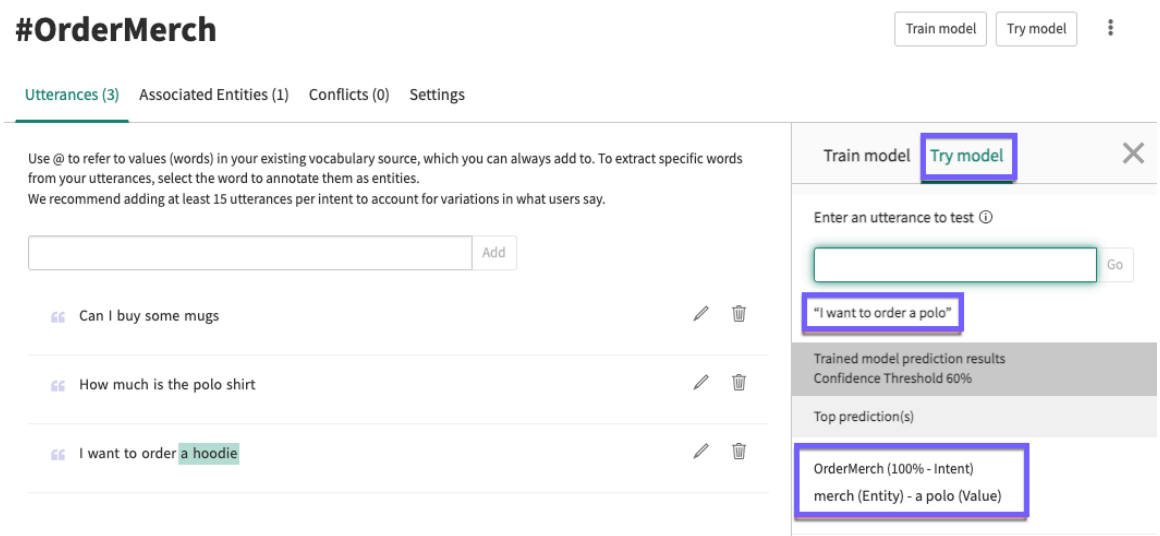


What to do next

Train your model to save the entities. You can try your model to see if it interprets the utterance based on the context of the entity, rather than the entity itself.

For this example, you can test your model with a different merchandise item.

1. Select **Try Model**.
2. Enter `I want to order a polo`.
3. Select **Go**.



The model predicts the intent and shows that it used the merch entity for the a polo value.

(Legacy) Import entities

Reuse entities that you have created across your other Natural Language Understanding (NLU) models. Importing entities saves time and helps improve the intents in your model.

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Before you begin

- Make sure that the NLU Workbench plugin, NLU Workbench - Core plugin, NLU Common Model plugin, and Predictive Intelligence plugin are all installed and activated on your instance.
- Create or use an existing NLU model.
- Create or use existing intents and entities.
- Role required: nlu_editor, nlu_admin, or admin. The nlu_editor must be assigned to the model.

About this task

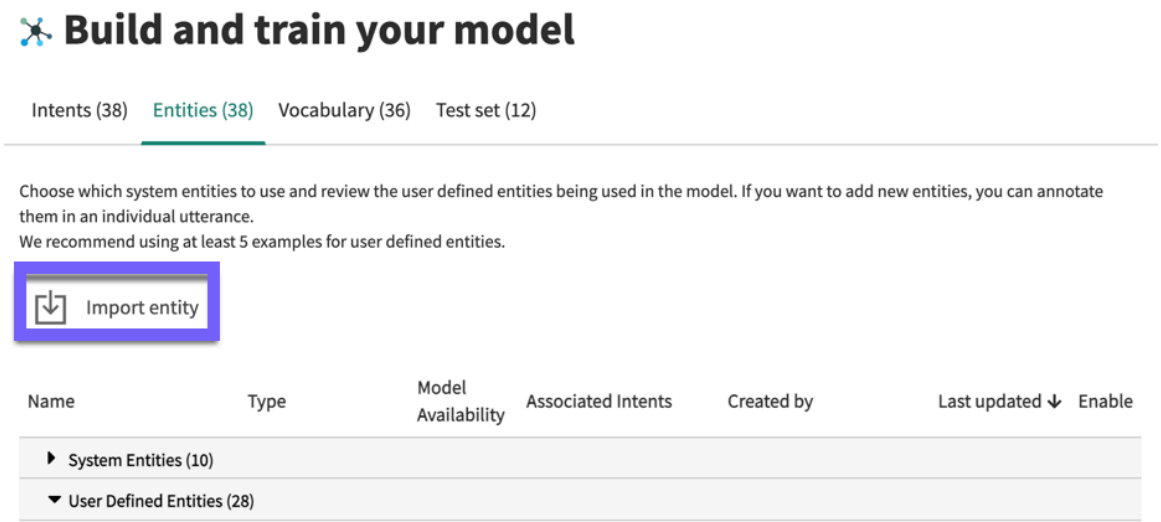
New entities are usually created inside an individual intent. To help save time and improve your intents, you can also reuse entities from your other models by importing them. After importing entities into a model, annotate the model's utterances using the new entities.

Note: All models include several system entities by default.

In this example procedure, you are importing several entities to a new model.

Procedure

1. Navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default.
2. Select the tab corresponding to your model's application, then select the name of the model you want to add entities to.
3. In the **Build and train your model** phase, select the **Entities** tab.
4. Select **Import entity**.



5. In the Import Entity window, select the entities you want to import.
   In this example, you click the drop-down arrow for Application: HR Service Delivery NLU Model for Virtual Agent Conversations. Select the four entities.

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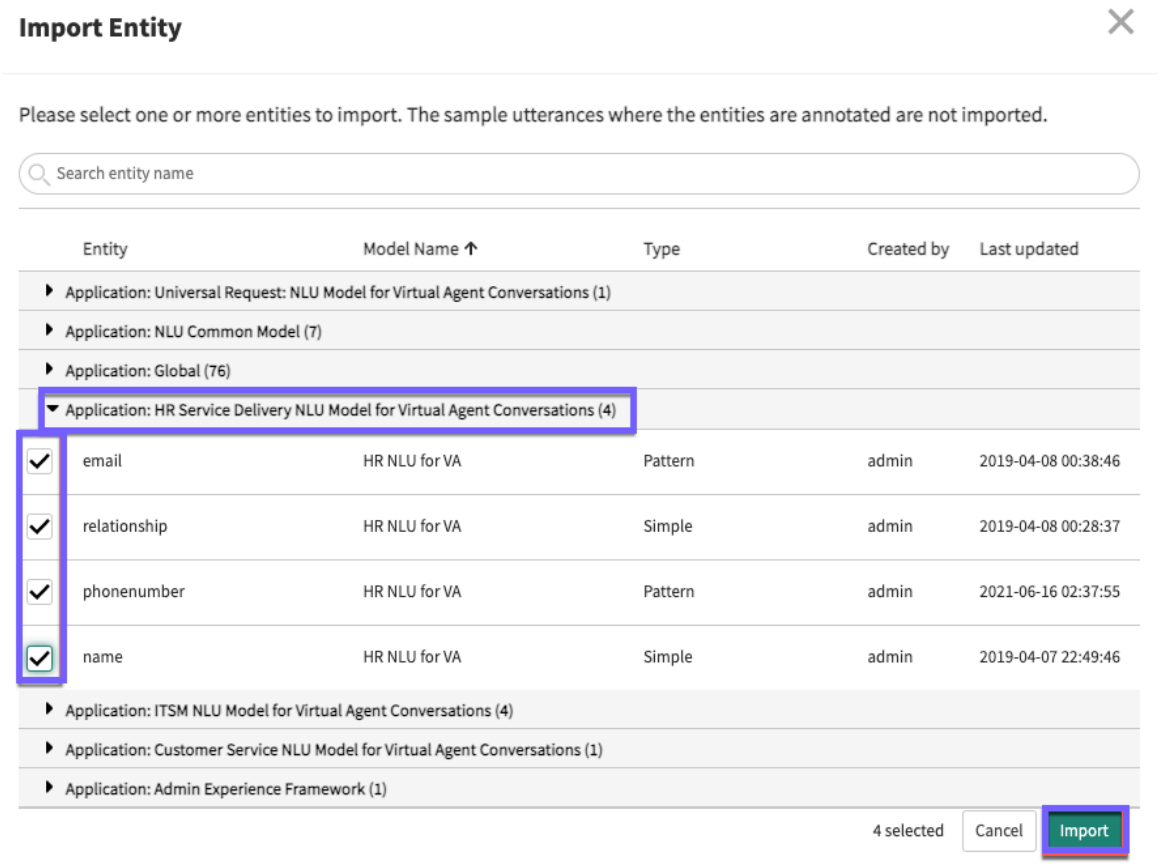
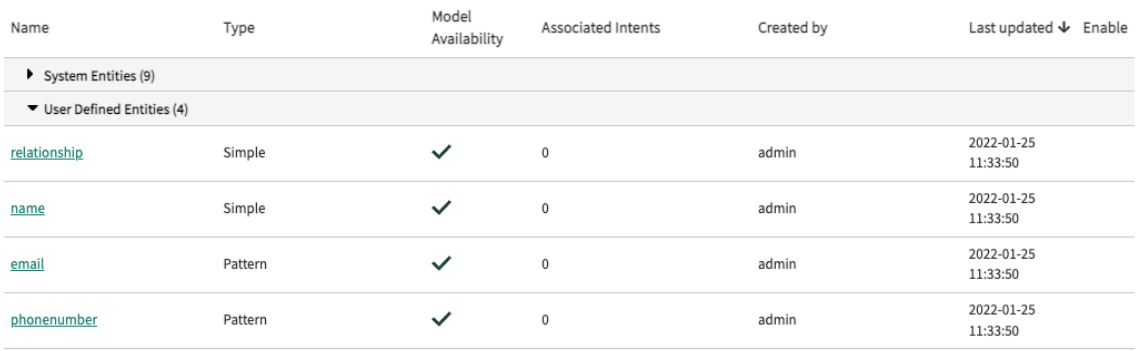


Note: Importing entities does not import any utterances that are annotated with those entities. You must annotate your current model's utterances using the new imported entities, then retrain the model.

6. Click **Import**.
   The selected entities import to the model. The entities appear under **User Defined Entities** in the Entities tab. By default, **Model Availability** will be enabled so that all intents in the model can use the entity.



What to do next

Use the imported entities to annotate the utterances of the model. Train your model to save your changes.

Related topics

(Legacy) Import an NLU intent

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(Legacy) Using regular expressions in entities

Learn how to use regular expressions in your NLU entities to establish patterns that help the system locate, match, and manage text.

Pattern entities use regular expressions (regex) to match any pattern of text, such as the format of an email address, a phone number, or an incident or case ID.

Note: ServiceNow uses and supports Java regex exclusively and not other vendor options, such as Perl regex.

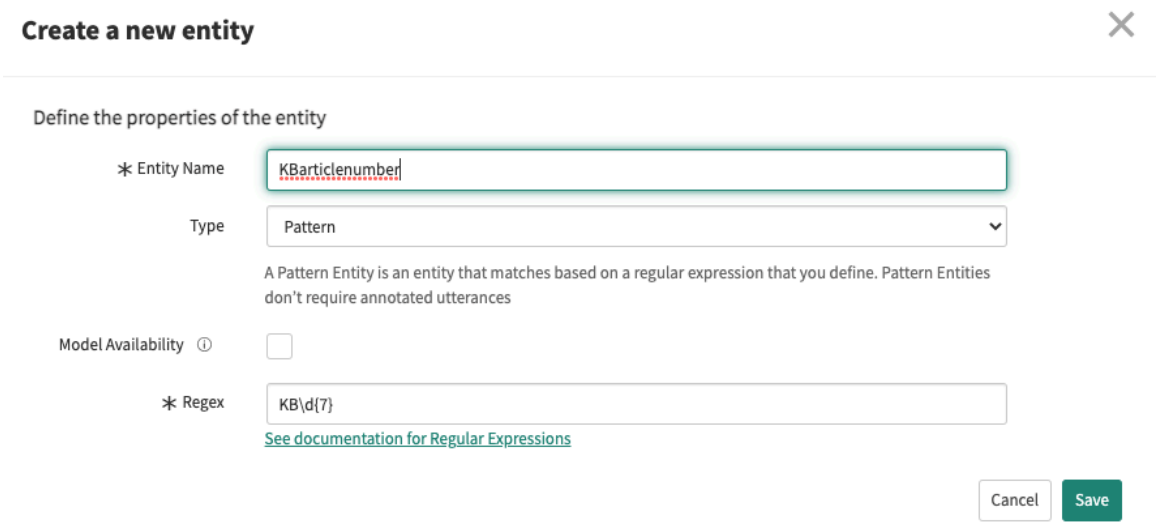
Regex examples

For a full example of regex code used in a pattern entity, see Create a pattern entity.

The following four examples provide the format and regex code for different pattern entities.

Knowledge base article

ServiceNow Knowledge Base (KB) articles use the format KB1234567. The regex code is KB\d{7}, where KB = knowledge base record and d{7} = 7 digits.



Case number

Case tasks use the format CS1234567. The regex code is CS\d{7} where CS = case record and d{7} = 7 digits.

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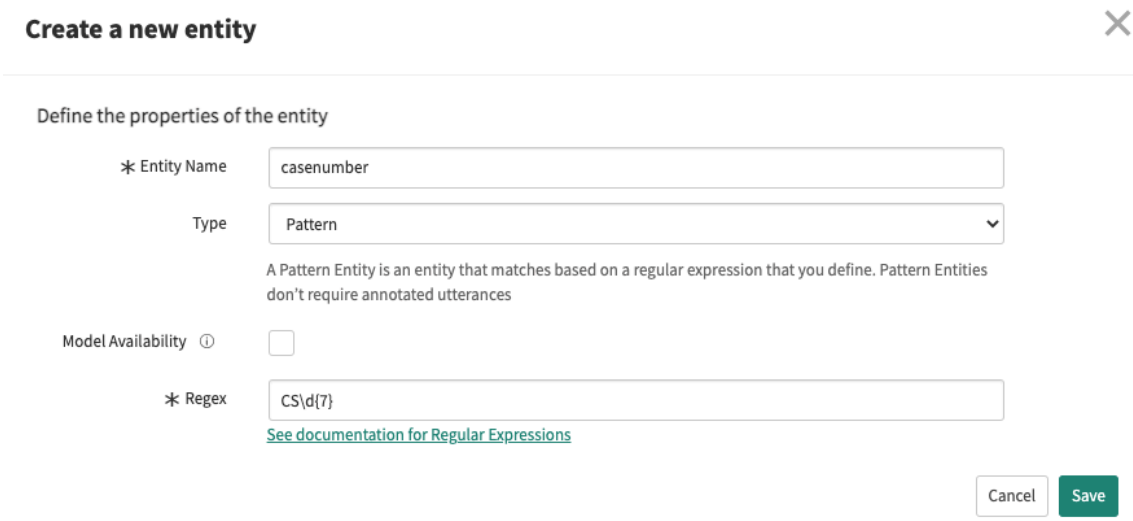

Email address

Email addresses use the format name@servicenow.com. The regex code is \b[a-zA-Z0-9&*/_.+-]+@[a-zA-Z0-9-]+\.[a-zA-Z0-9-.]+\b, which supports these formats: name@servicenow.com and name@servicenow.co.in.

Phone number

United States phone numbers use the format 555-123-4567. The regex code is \d{10}|(?:\d{3}-){2}\d{4}|\(\d{3}\)\d{3}-?\d{4}, which supports these formats: 5108882062,510-888-2062, and (510)888-2062.

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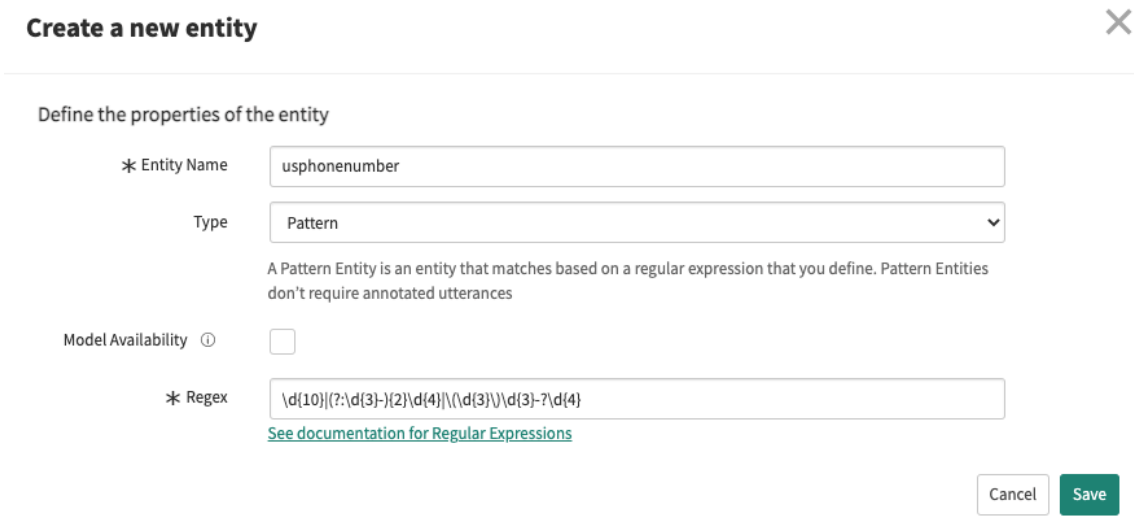

Regex resources

For further information on regular expressions, see the following external links.

- Java Regular Expressions
- Java Regular Expression Tester
- Pattern (Java Platform SE7)
- Java regex match abbreviations

(Legacy) NLU vocabulary

Use NLU vocabulary items to help the system recognize the various ways your users express their requests. Use vocabulary sources to help the system recognize objects in tables or lists, such as names of conference rooms or catalog items.

Vocabulary usage and context

Vocabulary helps your model with the various words and phrases that it may encounter from your users. Since humans are not computers, they may come up with different ways to say the same thing. For example, if one user inputs an acronym rather than the full phrase, the system might be able to predict the correct intent by using the context in the utterance. However, by defining the acronym with a vocabulary item, you raise the model's confidence level and capability to predict intents correctly.

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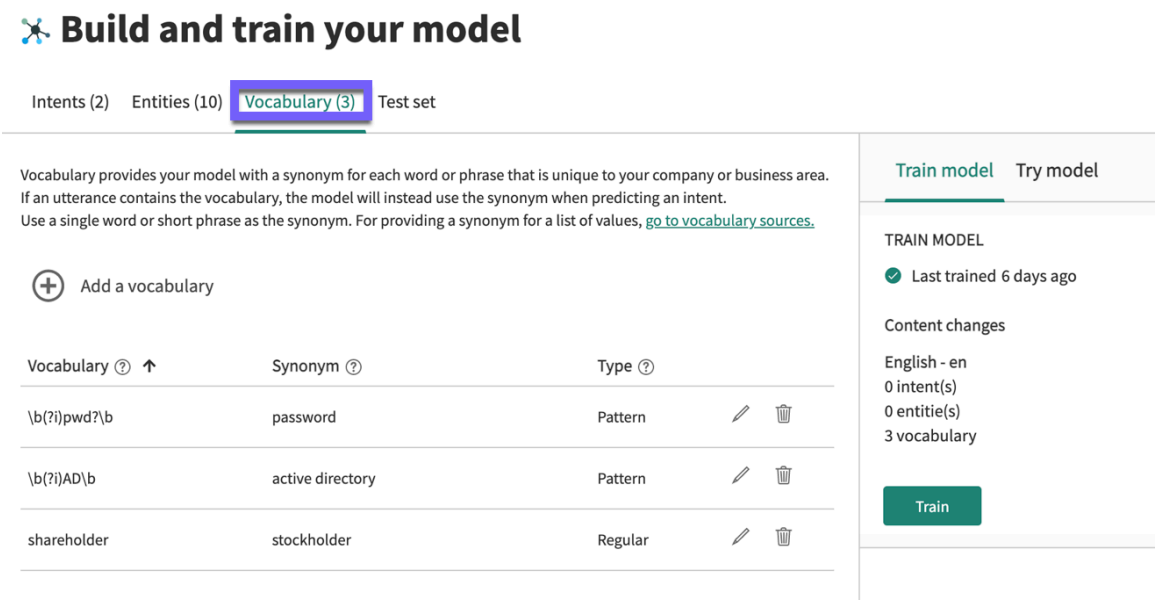

Vocabulary items cover the varying words or phrases that might appear in utterances. The vocabulary items are mapped to the synonyms that you provide, for intent prediction. This helps the system recognize the various ways your users express their requests, while at the same time ensuring the consistency, confidence, and accuracy of predictions.

Vocabulary item types

NLU provides the following vocabulary types that you can use to create and configure a vocabulary item.

Type	Definition
Regular	A word or phrase that is not commonly known, such as a business or industry specific term or acronym. Regular vocabulary is case insensitive, so all case variations will be captured by the vocabulary you create. See (Legacy) Create a regular vocabulary item.
Pattern	A regular expression (regex) that can capture specific formats such as email addresses and phone numbers. See (Legacy) Create a pattern vocabulary item.

Vocabulary sources

You can also use vocabulary sources to cover various objects that your users might request. Vocabulary items and vocabulary sources differ in their usage:

- Use a vocabulary item for an individual word, phrase, or pattern that can easily be mapped to a single synonym for the model to use.
- Use a vocabulary source to reference a ServiceNow table or list so that the values can all be replaced by the single synonym you define. Vocabulary sources can be reused across all your NLU models.

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Use vocabulary sources when your user utterances refer to objects in a set. The sources can be referenced from a list of values from a ServiceNow table or a static list that you define, such as a list of catalog items or conference rooms. Once you create and save these sources, you can use the @ symbol to specify them in training utterances. You can also use these sources as entity values.

For example, say you already have a list of all the conference rooms for your office. You can create a vocabulary source to reference that list rather than typing each conference room name into your intent's training utterances.

To create vocabulary sources, refer to (Legacy) Create a table vocabulary source and (Legacy) Create a list vocabulary source.

Vocabulary usage in relation to an intent

Here's an example of how an intent can interact with the vocabulary in its utterance examples.

Note: In NLU vocabulary, the synonym replaces the vocabulary that appears in the utterance.

Intent: OrderSoftware

Utterance	Issue and Solution
"I need to access sfcrm"	• Issue: the system doesn't recognize the acronym sfcrm, so can't accurately predict the intent. • Solution: Add sfcrm as a regular vocabulary item, and provide a synonym such as CRM software.
"I need to install Word"	• Issue: The term word is very common and does not necessarily indicate a software product. The term install may provide helpful context, but the confidence score may be too low to predict the OrderSoftware intent. • Solution: Create a pattern vocabulary item with a regex for capitalized Word, so that the system can recognize it as a software product. This added constraint makes it more likely that the OrderSoftware intent will be predicted. **Note:** To extract the specific software name to use in a Virtual Agent conversation topic, annotate it as an entity in the utterance.

Use a single word or short phrase as a synonym for best results. You can map multiple vocabulary items to one synonym. Do not map one vocabulary item to multiple synonyms.

For more context and examples, see (Legacy) Create an NLU intent.

A Regex example for a pattern vocabulary item

Let's say that you want to use a vocabulary item to identify the acronym IT, and map it to the synonym information technology.

Regular vocabulary items are case-insensitive by default. This means that a regular vocabulary item would match both the acronym IT and the common word it. So you decide to use a pattern vocabulary item.

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The regex pattern that you can use is `\bIT\b`. The `\b` is a word boundary marker. This ensures that the pattern would not match ITSM or JIT, for example. The default case sensitivity of pattern vocabulary items means that `\bIT\b` would not match the common word it.

Regex details: You can turn off case sensitivity in a pattern by using `(?i)`. You can end that mode by using a minus sign as in `(?-i)`. For example, `(?i)te(?-i)st` should match both test and TEst, but not teST or TEST.

For more information, see (Legacy) Using regular expressions in entities.

Related topics

(Legacy) Create an NLU intent

(Legacy) Create a regular vocabulary item

Add a word or phrase that your users might use, and match that vocabulary item to a synonym. Your model uses the synonym during intent prediction.

Before you begin

- Make sure that the NLU Workbench plugin, NLU Workbench - Core plugin, NLU Common Model plugin, and Predictive Intelligence plugin are all installed and activated on your instance.
- Create or use an existing NLU model for Virtual Agent or AI Search.
- Role required: nlu_editor, nlu_admin, or admin. The editor must be assigned to the model.

About this task

Regular vocabulary items provide the model with a synonym for words or phrases your users might use in an utterance. The model uses the synonym to replace the vocabulary when predicting the intent. Use a single word for the synonym when possible.

Regular vocabulary items are case-insensitive by default. If you need to create a case-sensitive vocabulary item, use a pattern vocabulary item. For more information, see (Legacy) Create a pattern vocabulary item.

Note: Choose a synonym that is a commonly-occurring word in the same language as your model.

In this example scenario, you are adding a vocabulary item for the word credentials. Say that your users may use credentials to refer to their password. By creating a vocabulary item, you can make sure that the system correctly predicts the intent for an utterance such as reset my credentials.

Procedure

1. Navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default.
2. Select the tab corresponding to your model's application, then select the name of your model.
3. On the Model details tab of the model overview, select the **Vocabulary** card.
4. In the Vocabulary tab, select **Add a vocabulary**.

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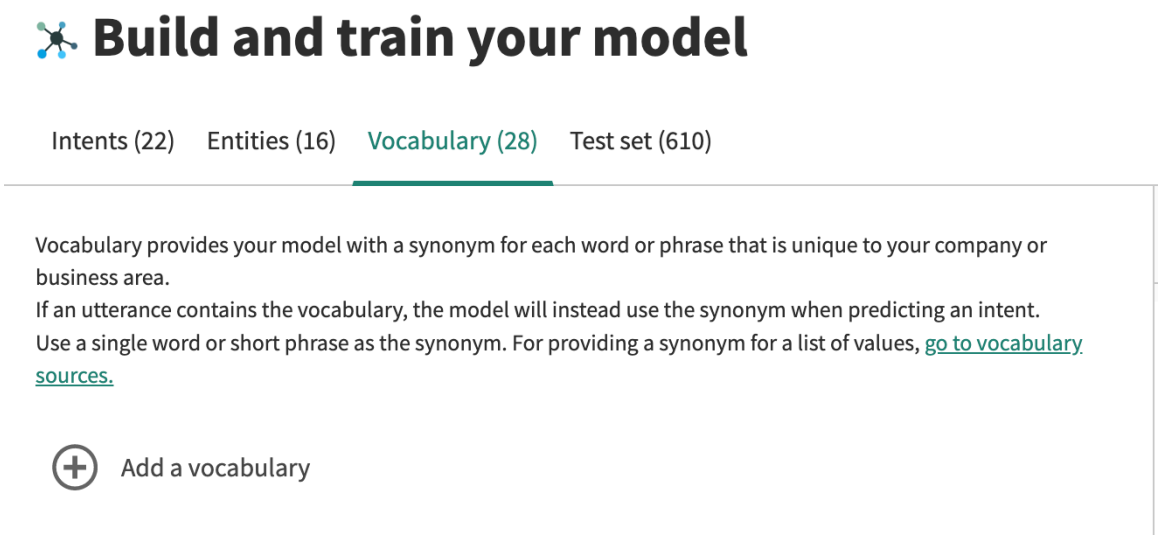
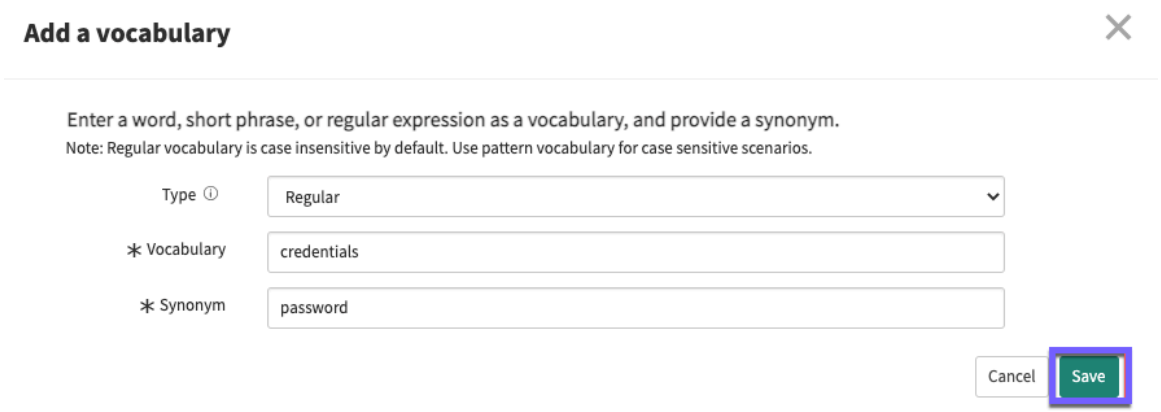


5. In the **Add a vocabulary** window, select **Regular** as the Type.
6. Add a vocabulary word or phrase that your users might use, and then add the synonym that the model should use for intent prediction.

   In this example procedure, add credentials as the vocabulary and password as the synonym.



7. Select **Save**.

What to do next

To deploy your new vocabulary item, train and publish your model again.

Add more vocabulary items to improve model coverage and accuracy.

(Legacy) Create a pattern vocabulary item

Use regular expression (regex) encoding to establish a pattern format for vocabulary items such as email addresses, phone numbers, and record naming conventions. You can create your own patterns for the vocabulary data in your instance.

Before you begin

- Make sure that the NLU Workbench plugin, NLU Workbench - Core plugin, NLU Common Model plugin, and Predictive Intelligence plugin are all installed and activated on your instance.
- Create or use an existing NLU model for Virtual Agent or AI Search.
- Role required: nlu_editor, nlu_admin, or admin. The editor must be assigned to the model.

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About this task

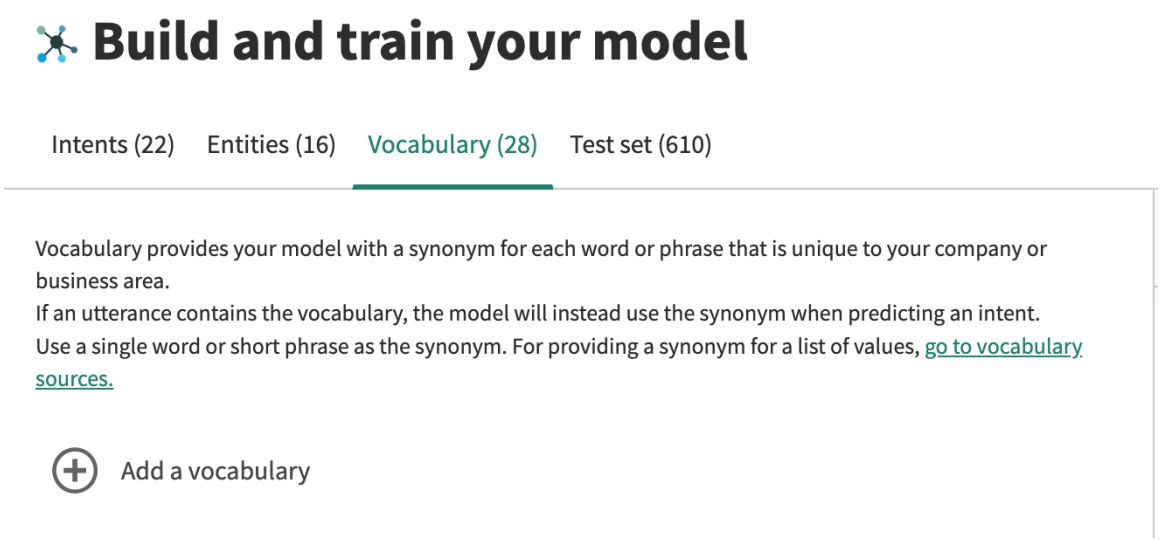
Pattern vocabulary items use regular expressions (regex) to find variations of words and phrases in your users' utterances. The pattern then maps these variations to the synonym you provide. The synonym is used during intent prediction.

In this example scenario, you've created an NLU Virtual Agent model for requests related to authentication. To refer to multi-factor authentication, your users often use "MFA", "mfa", or "mfa authentication". You can provide a pattern to cover these variations. They are replaced with the matching synonym multi-factor authentication when predicting an intent.

See (Legacy) Using regular expressions in entities for further details on regular expressions.

Procedure

1. Navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default.
2. Select the tab corresponding to your model's application, then select the name of your model.
3. On the Model details tab, select the **Vocabulary** card.
4. Click **Add a vocabulary**.



5. In the **Type** field of the **Add a vocabulary** window, select **Pattern**.
6. Add a regular expression that covers words or phrases in your users' utterances, and a synonym the model uses to predict the intent.
   In this example, the regular expression covers several variations of "mfa authentication".

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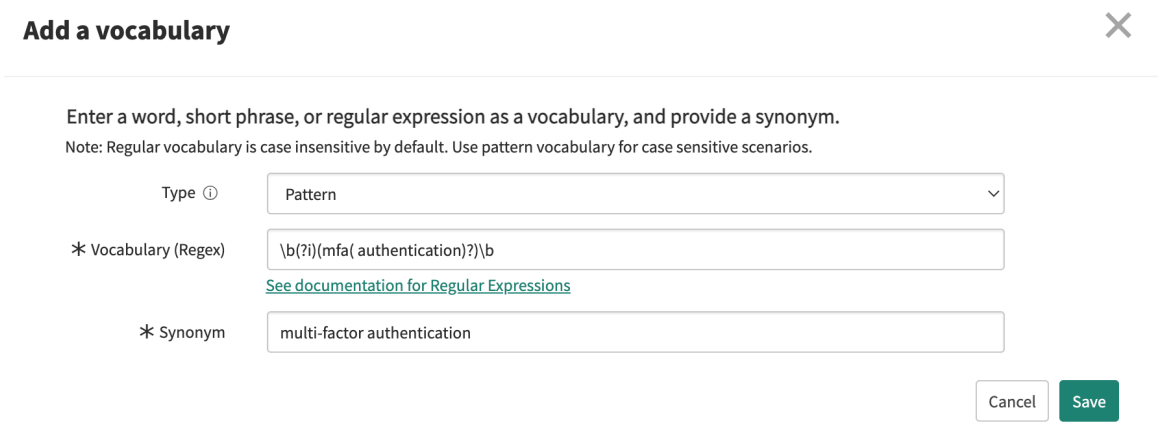

7. Click **Save**.

   Result: Your pattern vocabulary item appears in the Vocabulary section of your Model screen. Each time a user's utterance contains one of the spelling variations, the system recognizes the meaning as multi-factor authentication, in this example.

Related topics

(Legacy) NLU vocabulary

(Legacy) Using regular expressions in entities

(Legacy) Create a list vocabulary source

Create a list of words or phrases to act as a vocabulary source. The values in the list source are replaced by the synonym if they are detected in a user utterance.

Before you begin

- Make sure that the NLU Workbench plugin, NLU Workbench - Core plugin, NLU Common Model plugin, and Predictive Intelligence plugin are all installed and activated on your instance.
- Role required: admin, nlu_admin, or nlu_editor

About this task

Creating a list vocabulary source enables your models to interpret all the alternate and actual values of the list if they appear in a user utterance. The model interprets those values as the synonym you provide when predicting an intent.

Note: During intent prediction, the synonym you provide replaces the value. During entity prediction, the actual value is used as the entity if the actual value or one of the alternate values are detected in the utterance.

In this example procedure, you're creating a list vocabulary source for your company's meeting rooms. You add the names of the rooms and alternatives your users might call them. Once you create the list, you add it to an utterance in an intent for the model. The model interprets the intent (for example, #BookMeetingRoom) and uses the name the user entered as an entity (for example, Everest).

Procedure

1. Navigate to **All** > **NLU Workbench** > **Vocabulary Sources**.
2. Click the **My lists** tab.
3. Click **Create new list**.

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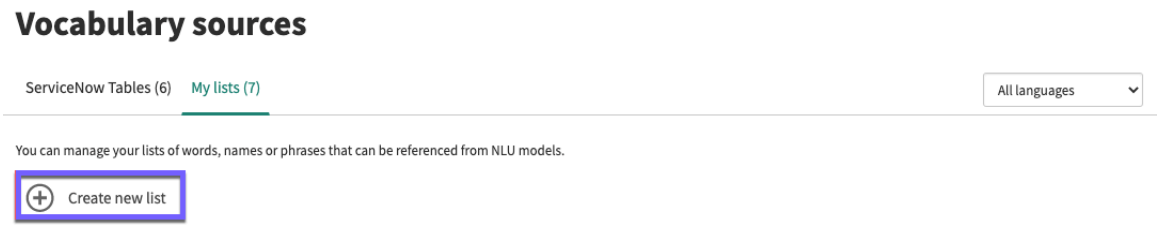
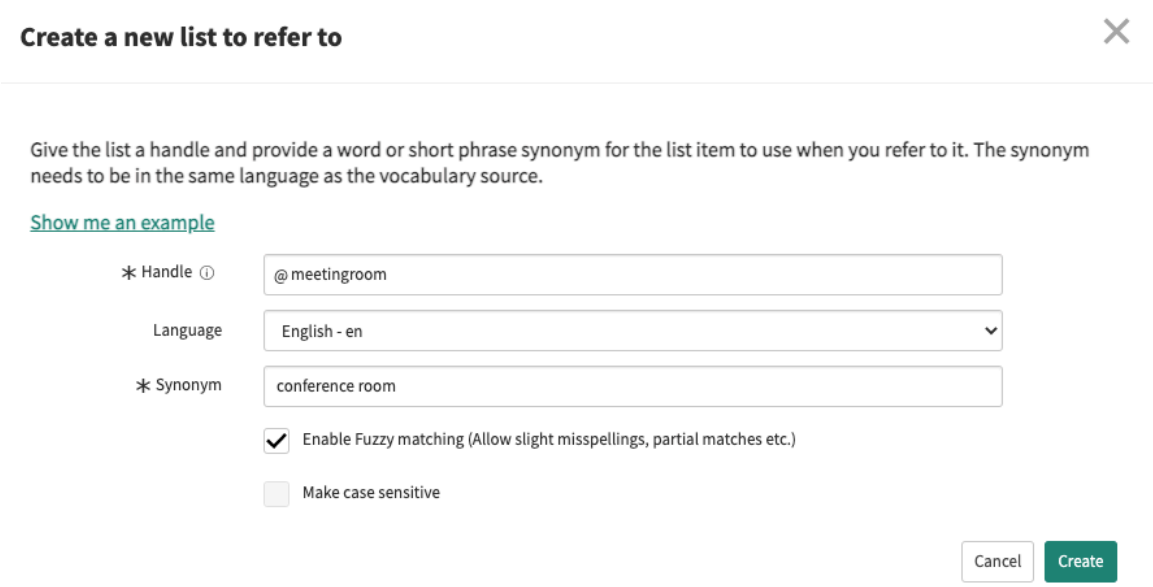


4. In the **Create a new list to refer to** window, configure the fields.

Field	Description
Handle	Name for the vocabulary source. Used to refer to in an utterance.
Language	Language of the vocabulary source. Synonym must be in the same language.
Synonym	Word or phrase the model uses during intent prediction. Choose a commonly-occurring word in the same language as your model.
Enable Fuzzy Matching	Check this box if you want the items on the list to match when a user utterance has slight misspellings.
Make case sensitive	Check this box to make the values in the list case sensitive. Utterances with wrong cases won't match.

For this example, use the following configurations:

- **Handle**: `@meetingroom`
- **Language**: `English - en`
- **Synonym**: `meeting room`
- **Enable Fuzzy Matching**: Select the box.
- **Make case sensitive**: Leave the box clear.



5. Click **Create**.
   Your list vocabulary source draft appears in the My lists section of the Vocabulary sources screen.

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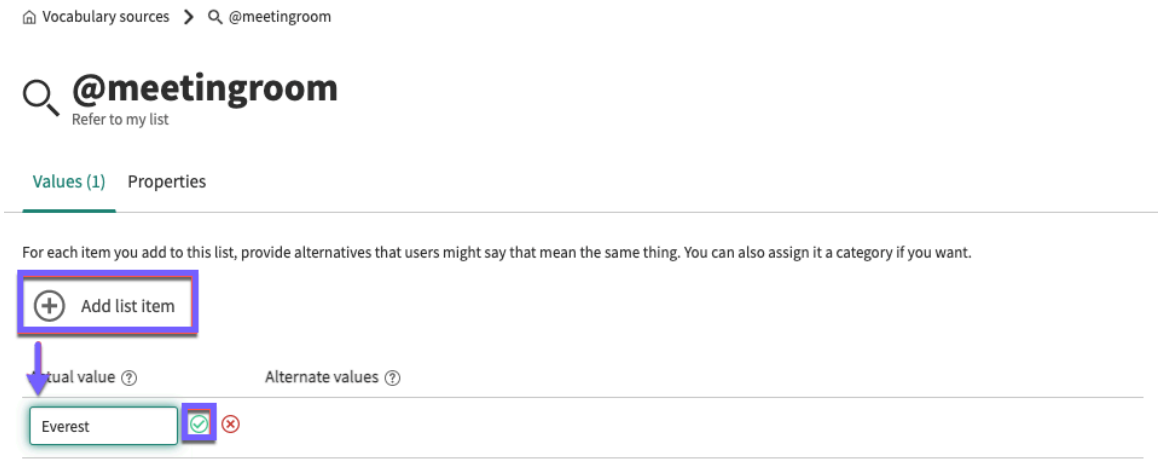
6. Click the name of the list vocabulary source.
7. Click **Add list item**.
8. Enter a value for the list and click the green check mark.



In this example, you enter `Everest`.

9. Double-click the area under **Alternate values** to add alternatives separated by a comma.

10. Train the model to make the list vocabulary source available.

What to do next

Add the rest of the break room names and alternatives.

You must retrain the model after updating a list vocabulary source. For more information, see (Legacy) Train and try your NLU model.

Then you can use the list vocabulary source when annotating a training utterance. Use the @ symbol with the handle to refer to this vocabulary source.

(Legacy) Create a table vocabulary source

Use the values from a ServiceNow table as a vocabulary source. Your Natural Language Understanding (NLU) models use your provided synonym to interpret utterances that contain values from the chosen source fields of the table.

Before you begin

- Make sure that the NLU Workbench plugin, NLU Workbench - Core plugin, NLU Common Model plugin, and Predictive Intelligence plugin are all installed and activated on your instance.
- Role required: admin or nlu_admin

About this task

Add a ServiceNow table to be used as a vocabulary source. Select one or more source fields of the table. Then, provide a synonym to be used by the model when interpreting utterances that contain values from the table. Note that the **Reference** field is not supported as a source field.

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When you create and sync a table vocabulary source, the values from the table in your instance are extracted, and a vocabulary source is created in the NLU Service. For more information on the NLU Service, see NLU Service Updates.

Note: You should not create multiple vocabulary sources that reference the same table and fields. Create only one vocabulary source (and provide a synonym) for the particular table and fields you want to reference in the model. Otherwise, it would cause confusion in the model and interfere with prediction quality.

In this example procedure, you want your models to be able to interpret utterances with locations. The ServiceNow location (cmn_location) table already contains information regarding important locations. You set up the location table to be used as a vocabulary source.

Procedure

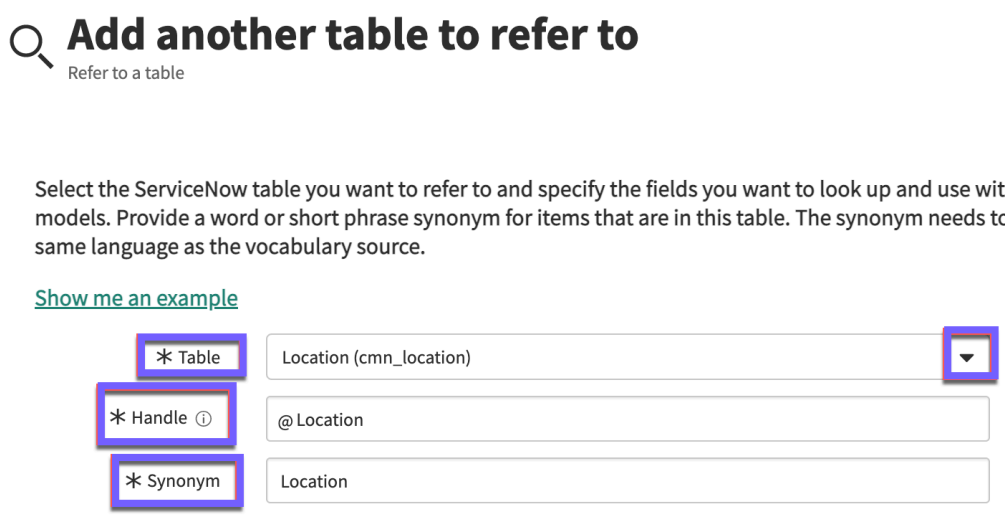
1. Navigate to **All** > **NLU Workbench** > **Vocabulary Sources**.
2. Click **ServiceNow Tables**.
3. Click **Add another table**.
4. On the Add another table to refer to page, configure the fields.

   a. Select the table, handle, and synonym for the table.

   In this example, use the following configurations:

   - **Table**: Select **Location (cmn_location)**.
   - **Handle**: Use the system-generated handle, @Location.
   - **Synonym**: Use the system-generated synonym, Location. You can update this value to ensure that it's a synonym for each individual item in the vocabulary source.

     Note: Choose a synonym that is a commonly-occurring word in the same language as your vocabulary source.



   b. Select the fields you want to refer to from the source table.

   Note: To add multiple fields, select the plus icon.

   In this example, use the following configurations:

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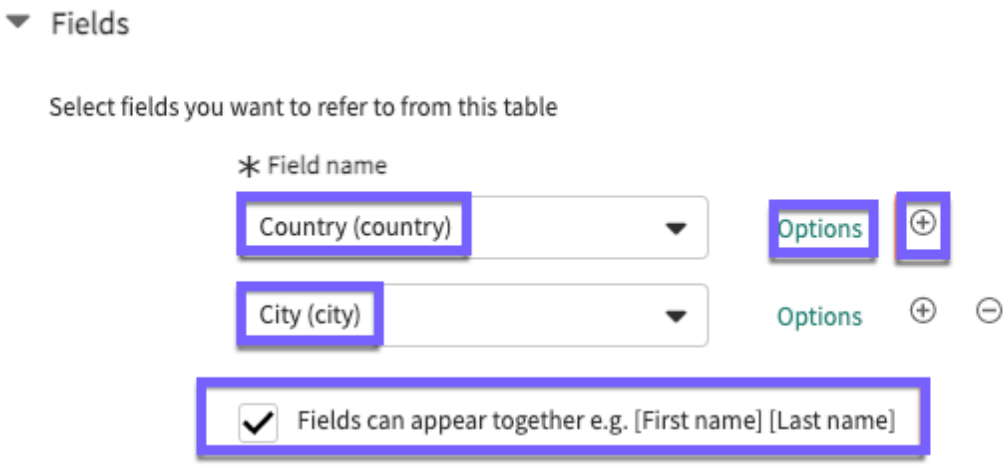
- **Field name**: Select the **Country (country)** and **City (city)** fields.
- **Options**: Click **Options**, then select the **Use this field to look up values** check box for both of the **Field name** values. Checking the box makes it so either a country name or a city name can be used in an utterance for finding a record in the vocabulary source. You can also use multiple comma-separate values in this field, for example, if your city column has multiple names, such as NYC, New York, and New York City.
- **Fields can appear together**: Leave the check box empty. This field is typically used in an NLU Search model, where users can enter words next to each other in an utterance to find a record. For example, you can enter `Pierre Development` while searching for an employee named Pierre who works in the Development team, where **Name** and **Team** are two fields in the table.



c. Configure the advanced options.

In this example, use the following configurations:

- **Language**: Select **English - en**.
- **Filter by**: You can use the condition builder to filter the values in the source table for the vocabulary source. Leave empty for this scenario.
- **Refresh**: Select **Every 7 days**. By selecting this, you set the system to get new values from the table every seven days. There are different refresh options you can choose based on how often the source table is updated.
- **Enable Fuzzy matching**: Checking this box make it so a record can be matched even if an utterance contains a slightly misspelled word or part of a word. For example, when searching for a city such as Kansas City, you might enter Kansas City or just Kansas, and the system will still be able to match with the correct location record. Fuzzy matching may

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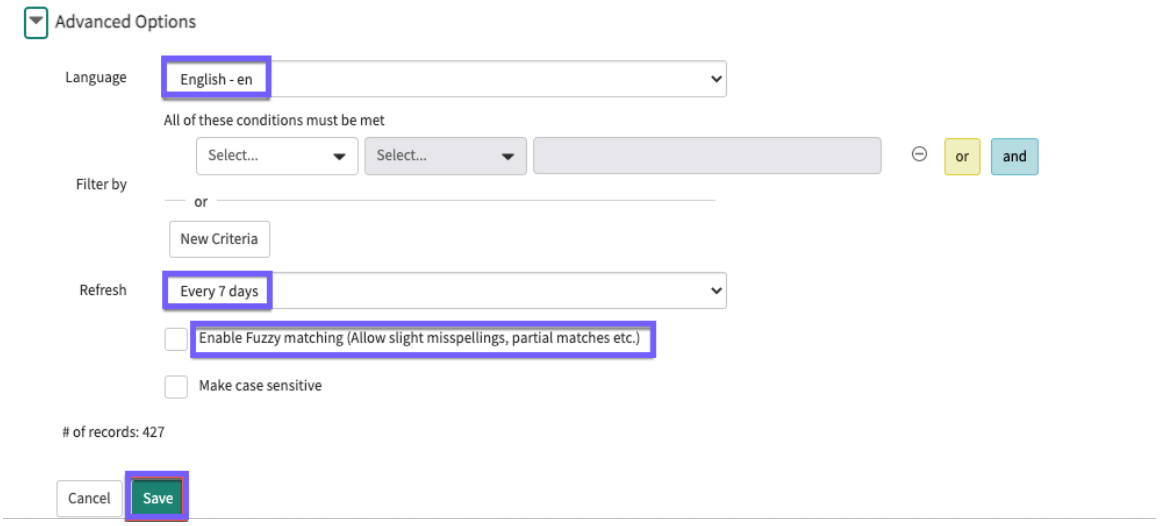
return false matches in some cases. Use fuzzy matching sparingly and test out your model before using it.

- **Make case sensitive**: If you don't enable fuzzy matching, you can check this box to make the values in the source table case sensitive. If an utterance doesn't use the correct cases, the model doesn't predict the intent.



5. Click **Save**.

   Result: Your **@Location** table vocabulary source appears on the Vocabulary sources screen, where it begins to sync with its source table.

6. If the sync doesn't start immediately, select the **Sync Lookup** icon on the far right to sync the source table data with the NLU Service.
   Result: When the sync completes, you can use the vocabulary source in your models. You don't need to retrain the model after updating a table vocabulary source.

What to do next

Add a vocabulary source to a model by annotating an utterance. Use the @ symbol when adding an example utterance to an intent.

(Legacy) Sync a table vocabulary source

Synchronize your table vocabulary sources to obtain the latest changes to the ServiceNow source table. Synchronizing your vocabulary sources ensures your NLU models have the latest values when predicting intents.

Before you begin

- Make sure that the NLU Workbench plugin, NLU Workbench - Core plugin, NLU Common Model plugin, and Predictive Intelligence plugin are all installed and activated on your instance.
- Role required: admin or nlu_admin

About this task

When you reference a vocabulary source in an utterance, it pulls the values at the time the model is trained. However, if the table values change over time, the model still references the values from the last training session.

You can select a schedule to automatically refresh the vocabulary values used by NLU. This schedule can be edited later. For more information, see (Legacy) Create a table vocabulary source.

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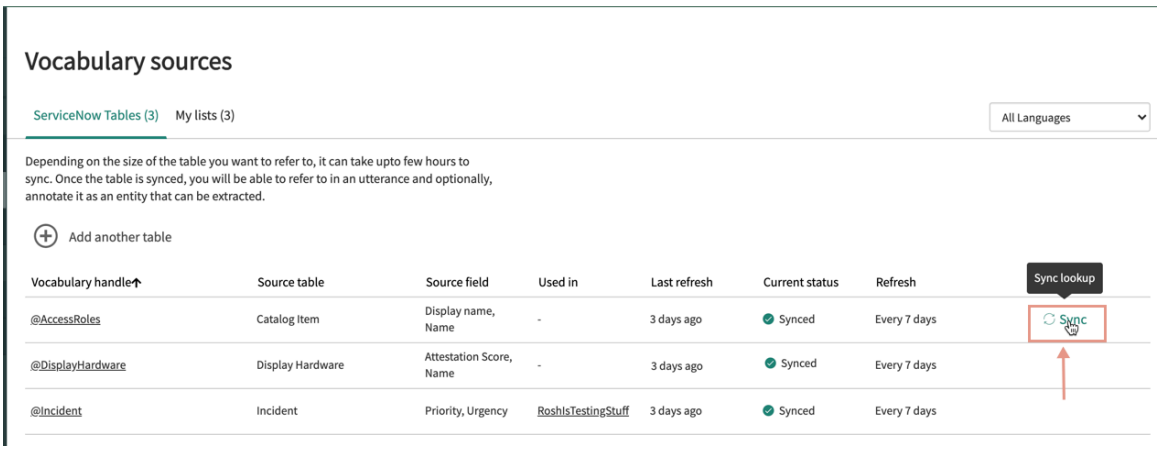
You can also manually sync a table vocabulary source, such as before model training.

Note: If an utterance references a table vocabulary source that has never been synchronized, the model fails to train. Check the vocabulary source's current status, and sync manually if **Never synced**.

In the following example scenario, you're manually syncing the @AccessRoles vocabulary source to the Catalog Item table.

Procedure

1. Navigate to **All** > **NLU Workbench** > **Vocabulary Sources**.
2. In the ServiceNow Tables tab, point just to the right of the **Refresh** column to invoke the **Sync lookup** icon.

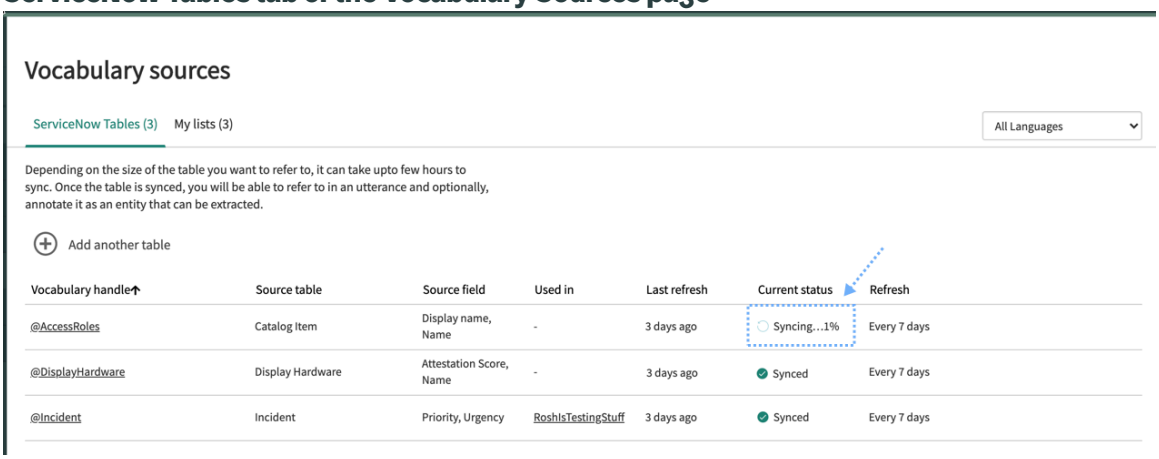


3. Select **Sync**.
   The vocabulary source starts synchronization.

What to do next

The syncing operation can take some time, depending on the source table size.

ServiceNow Tables tab of the Vocabulary Sources page



The values in the Last refresh and Current status columns reflect the current status of the vocabulary source.

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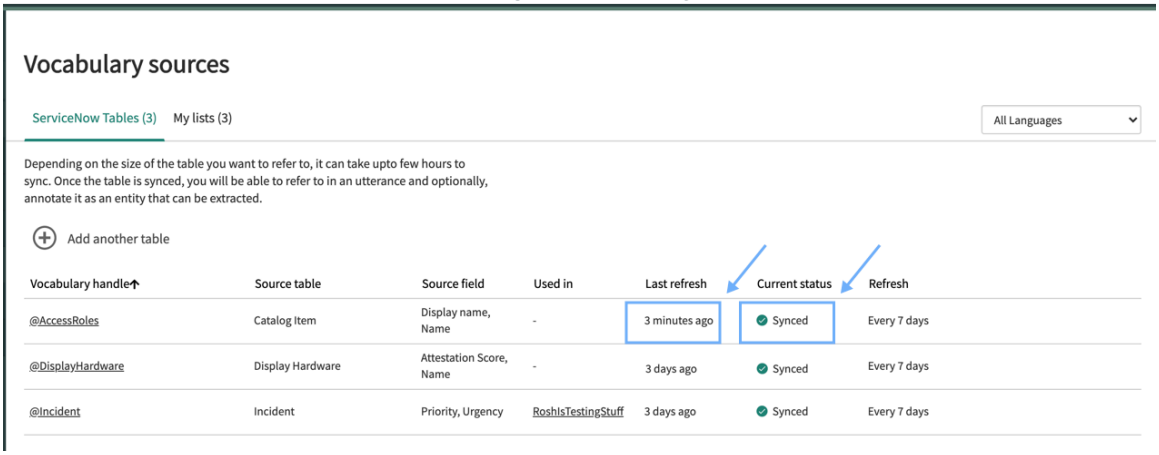
ServiceNow Tables tab of the Vocabulary Sources page



Proceed to train your model. For more information on model training, see (Legacy) Train and try your NLU model.

For information about errors when syncing a table vocabulary source, see article KB1588239 in the Now Support Knowledge Base.

Related topics

(Legacy) Create a table vocabulary source

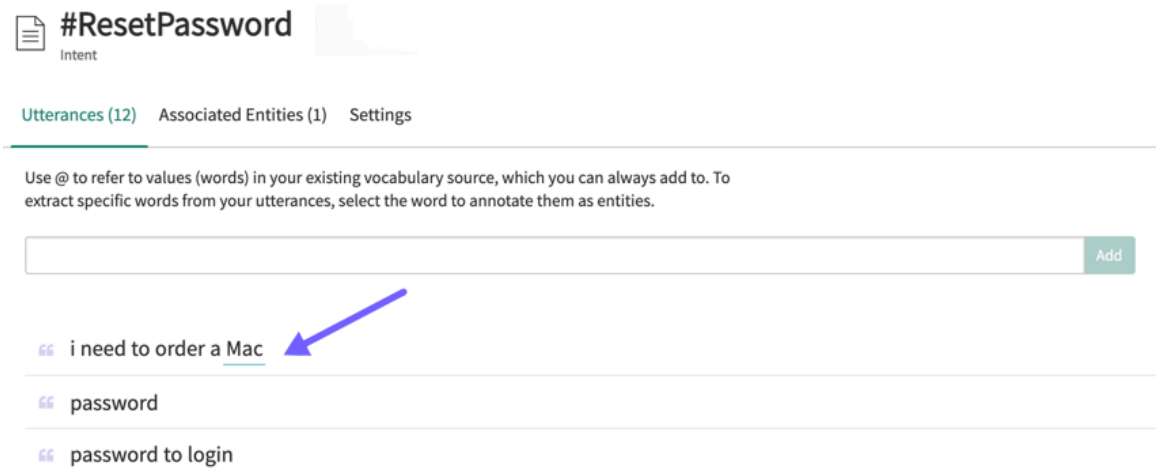
(Legacy) Pre-built vocabulary

Use ServiceNow® pre-built vocabulary for software and hardware terms so the system recognizes their multiple variations in utterances.

Your Natural Language Understanding models contain pre-built vocabulary settings you can use when adding an example utterance. The vocabulary provides definitions for software and hardware terms whether they're expressed in slang or professional usage. The vocabulary can also recognize product misspellings.

For example, for one of your example utterances, you enter `I need to order a Mac`. When the system recognizes a pre-built vocabulary item, the term has a blue line under it.

Utterance tab of the Intent details page



When you click the word, a window appears with two options to choose for the word:

- A pre-built suggested definition for the word
- An option to add a synonym

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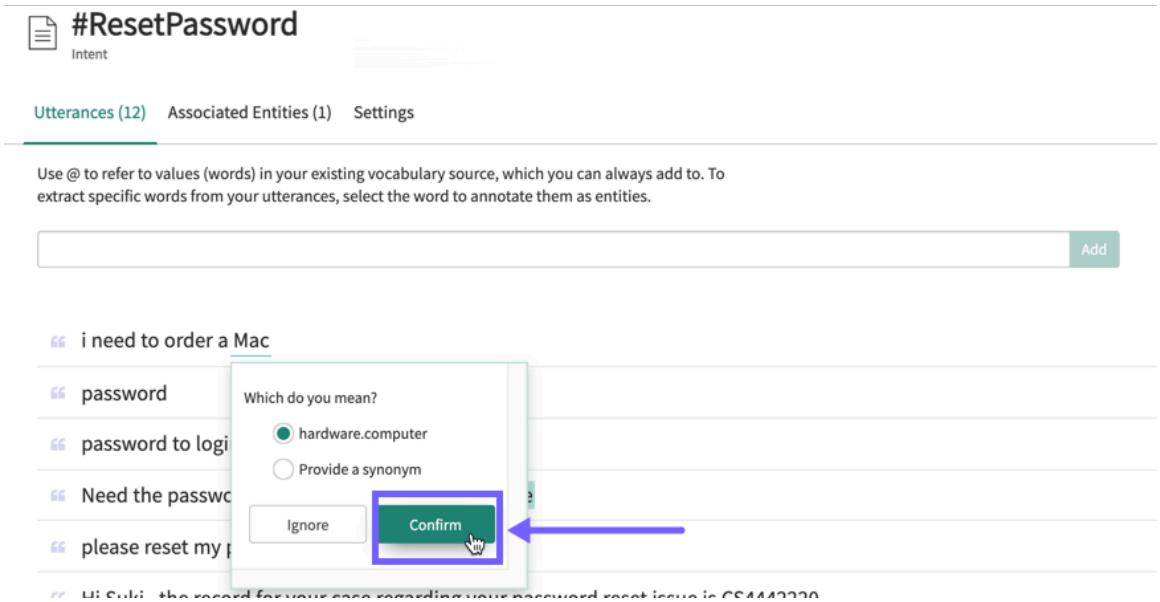

If you select the first option and click **Confirm**, the system uses the pre-built suggested definition and the blue line disappears.

If you select the second option, enter a synonym for the word, and click **Confirm**, the word and the synonym are added to the model vocabulary.

If you select either of the two options and click **Ignore**, the blue line disappears and the word remains as it was previously.

(Legacy) Test set creation and management

Use the default test set of your NLU model to test the model's performance and accuracy. Manage your test set over time by building or updating its content in the NLU Workbench.

Note: To test your model, install the ServiceNow® Store application NLU Workbench - Advanced Features. For more information, see (Legacy) Install NLU Workbench - Advanced Features.

When you create an NLU model for Virtual Agent or AI Search, a default test set is created and associated to the model. You can use the default test set to evaluate the model's performance. Initially the test set is empty, ready to be populated with your content.

Access your default test set

Access your default test set with one of the following methods.

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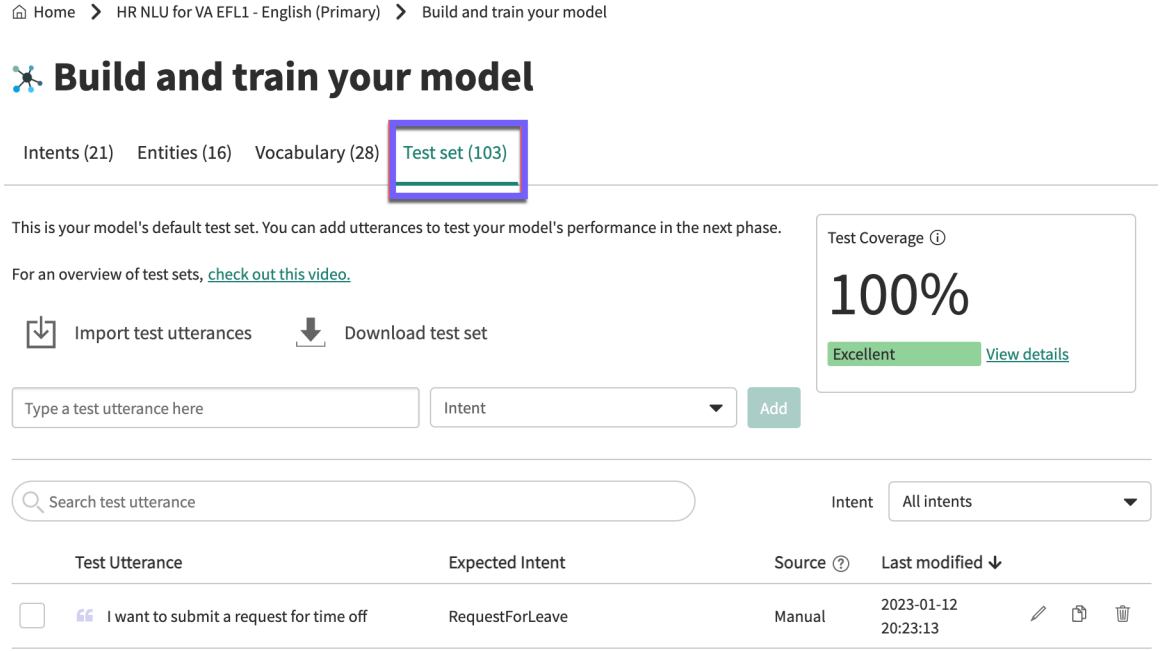
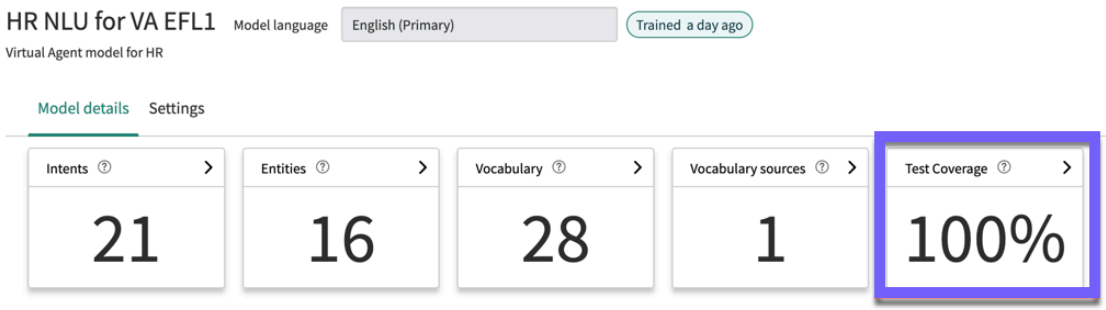
- Navigate to **All** > **NLU Workbench** > **Models**. Select the tab for your model's application, then the name of your model from the list. On the model's overview page, find the **Build and Train your model** card and select its **View phase** button. Then select the **Test set** tab.



- Navigate to **All** > **NLU Workbench** > **Models**. Select the tab for your model's application, then the name of your model from the list. On the model's overview page, select the **Test Coverage** tile.



- Navigate to **All** > **Multi-model Batch Testing** > **Test sets** tab. Find the name of your model. Default test sets are labeled as **Default**.

Add content to your default test set

Add utterances and their expected intents to build and manage your test set over time. You can add content to the default test set with the following methods:

- Add test utterances and their expected intents manually. From the model's overview page navigate to **Build and train your model** > **Test set** tab. Type your input into the Type a test utterance here field, select an appropriate intent, then select the **Add** button.

  These test utterances are assigned a source of Manual.

- Import test utterances and their expected intents from a CSV file or from other models. To import content to a default test set, from the model's overview page navigate to **Build and train your model** > **Test set** tab. Select **Import test utterances**.

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Imported test utterances are assigned a source of Manual.

- The Expert Feedback Loop feature lets you add actual user utterances from Virtual Agent chat logs to the test set.

  These test utterances are assigned a source of Expert Feedback. For more information, see (Legacy) NLU Expert Feedback Loop.

Test Coverage

The Test Coverage score is the percentage of a model's enabled intents that have test utterances in the default test set. Before testing your model, ensure that there is at least 60% coverage. The higher the Test Coverage score, the more accurate the performance testing results.

Your test coverage needs to be at least 60%, with at least 5 test utterances per intent, in order for the system to provide an optimal confidence threshold during batch testing. For more information about the confidence threshold, see (Legacy) NLU model settings.

Aim to have about 10 percent of a model's test utterances marked as "not relevant", meaning that there is no intent associated. This helps assess how the model handles irrelevant utterances which should not have any intent predicted. For more information about irrelevant utterances, see (Legacy) Irrelevance detection in NLU.

Use the test set

To use the default test set from the **Test and publish your model** phase, see (Legacy) Test and publish your model.

To use the test set in Multi-model Batch Testing, see (Legacy) Multi-model Batch Testing.

Characteristics of default test sets

When an instance is upgraded, default test sets are created for any existing models that don't already have them.

When you copy a model using **Duplicate this model**, the original's default test set is copied into the new model. For more information, see (Legacy) Duplicate an NLU model.

The utterances in the test set shouldn't be the same as the utterances in the training set.

Default test sets can't be deleted separately from their models.

Test set utterances should be in the same language as their model.

Test sets are available for Virtual Agent or AI Search models.

Downloading or moving default test sets

Default test sets can be downloaded or moved as follows.

- Default test sets can be separately downloaded in CSV format. To download the test set, from the model's overview page navigate to **Build and train your model** > **Test set** tab. Select **Download test set**.

  Note: Test sets that are downloaded from **Download test set** contain test utterances and their expected intents, but not the sources.

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- Default test sets can be moved with update sets. When you add an NLU model to an update set, its default test set is added, including test utterances, expected intents, and sources. For more information, see (Legacy) Add an NLU model to an update set.
- When using the **Export model as CSV** function in the **All existing models** table, the default test set is not included. For more information, see (Legacy) Export an NLU model.

(Legacy) Train and try your NLU model

Train and try your model iteratively so that its intents and entities are validated, compiled, and saved to your model.

Before you begin

- Make sure that the NLU Workbench - Core plugin, NLU Workbench plugin, and Predictive Intelligence plugin are all installed and activated.
- Create an NLU model. For more information, see (Legacy) Creating models.
- Create one or more NLU intents and their associated entities for your model. For more information, see (Legacy) NLU intents.
- If any utterance references a table vocabulary source, ensure that the source has been synchronized so that its values are available to your model. For more information see (Legacy) Sync a table vocabulary source.
- Role required: nlu_editor, nlu_admin, or admin. The NLU editor must be assigned to the model.

About this task

Training your model saves any changes you made to the content, and checks for conflicts or errors. Training also makes a model available for publishing.

After training, you can try your model by manually entering individual utterances to see what intents are predicted.

Note: To run a test of your model against a list of test utterances, see (Legacy) Test and publish your model.

The mid-conversation responses of Dialog Acts can't be tried or tested in NLU Workbench.

In this example scenario, you've already built sufficient model content by adding intents, utterances, entities, and their associated annotations. Following the example procedure, you first train your NLU model. Then you try your model by manually entering utterances so you can check the prediction results and confidence scores.

Procedure

1. Navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default.
2. Select the tab for your model's application, then select the name of your model.
3. In the **Model details** tab of the model overview, make sure there is enough content in Intents, Entities, and Vocabulary.
4. On the **Build and train your model** card on the model overview, select **View phase**.

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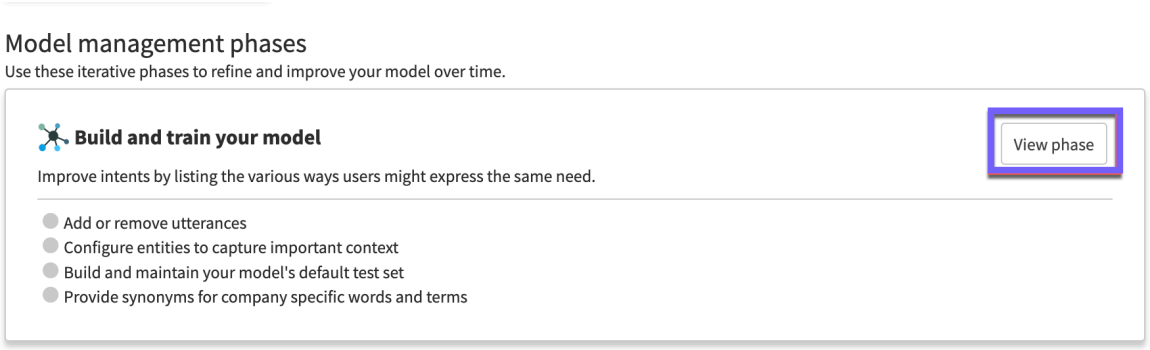
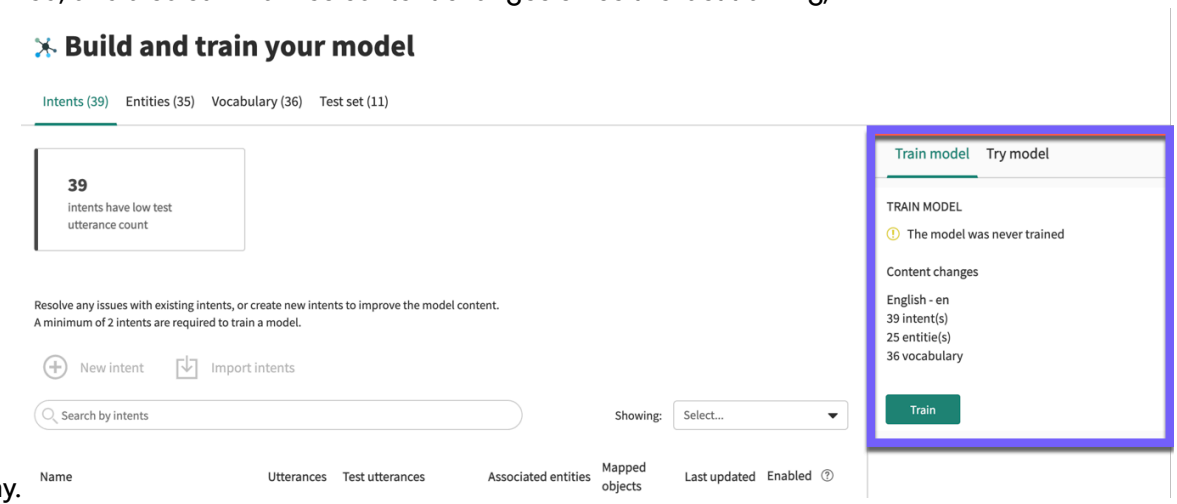


5. When the **Build and train your model** phase opens, ensure that the **Train model** tab is selected.
   Result: The **Train model** tab displays the last time the model was trained, and also summarizes content changes since the last training, if any.



6. Select the **Train** button.
   Result: The system displays a progress bar during training. When finished, the system displays one of two recommendations:

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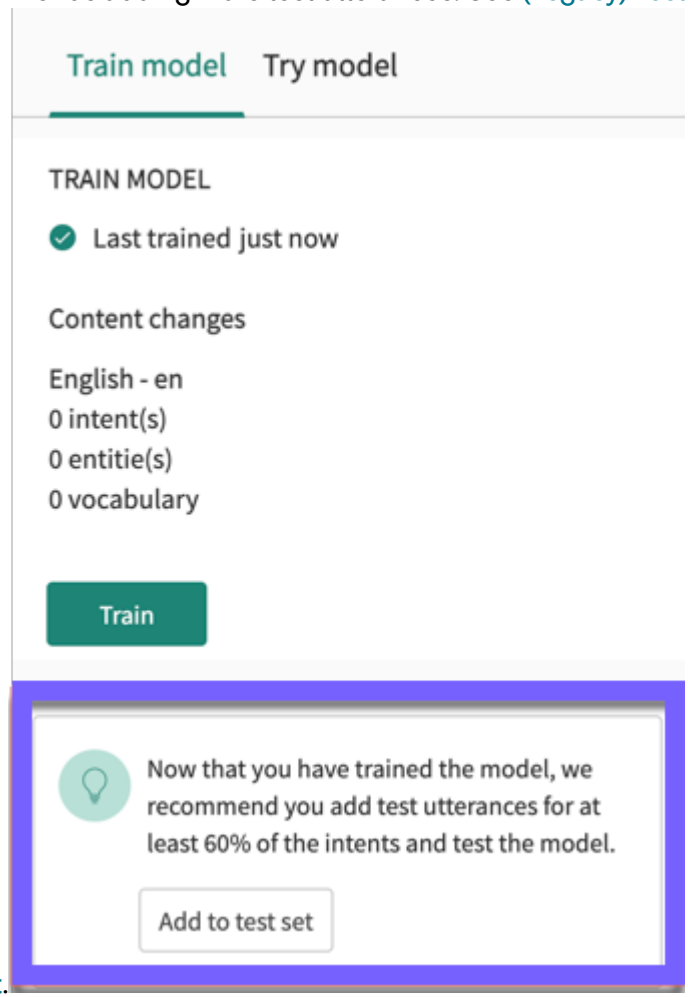
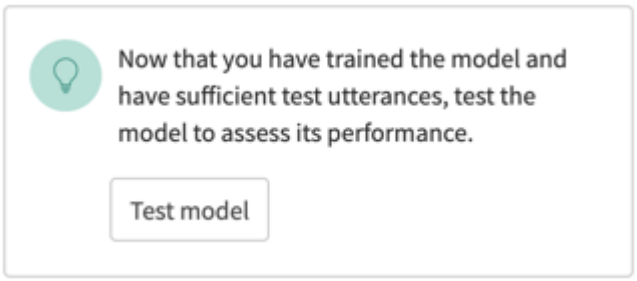
- When less than 60% of the model's intents are covered in the default test set, the system recommends adding more test utterances. See (Legacy) Test set creation and management.



- When over 60% of the model's intents are covered in the default test set, the system recommends proceeding to testing. See (Legacy) Test and publish your model.



7. To manually try individual utterances, select the **Try model** tab.

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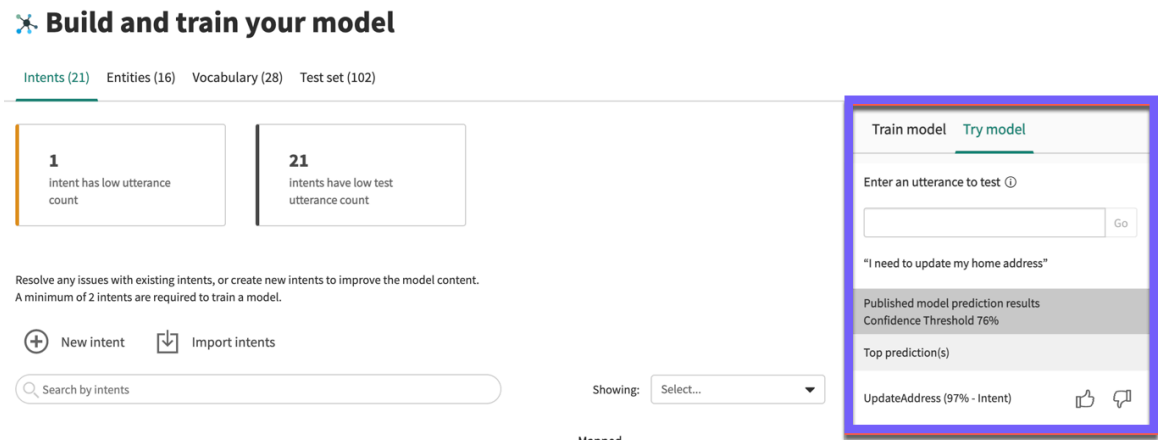
8. In the text field under **Enter an utterance to test**, type an utterance and select **Go**.



Result

In this example, you entered `I need to update my home address` as the utterance to try.

1. The system displays the model's confidence threshold, which is 76% in this example.
2. Under **Top prediction(s)**, the system displays all intents that were predicted with a confidence score greater than the threshold.
3. In the example, the intent UpdateAddress is predicted with a confidence score of 97%, which is greater than the threshold of 76%.

The **Try model** results also display thumbs-up and thumbs-down icons for you to provide feedback. For more information, see (Legacy) Test panel feedback.

What to do next

- Continue trying various utterances to check that your updates to model content are effective. See (Legacy) Compare draft and published versions of your NLU model.
- To test your model against a list of test utterances, use its default test set in the (Legacy) Test and publish your model phase, or navigate to (Legacy) Multi-model Batch Testing.
- To adjust the model's confidence threshold, use the **Settings** tab on the model's overview page. For more information, see (Legacy) NLU model settings.
- If you're satisfied with the results of your testing, Publish your NLU model.

(Legacy) Test panel feedback

When testing your NLU model on the Try model section of the test panel, use this feature to provide feedback on the model's intent predictions.

Summary context

When a model is trained and tested for an utterance and the model returns an intent prediction, you can provide a thumbs up or thumbs down rating on the predicted intent it returns. Marking a different intent prediction as correct adds the utterance to the corrected intent. All other feedback is captured for continual learning. The system then incorporates your feedback to optimize the model predictions. This feature requires the nlu_admin role to access and test the model. NLU editors can also access the test panel if an NLU admin assigns them to it.

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Providing prediction feedback

The ratings you provide help the system to match an intent to an utterance. These ratings are essential for the system to continuously learn, evolve, and improve the accuracy of the intent predictions based on user input. They also enable you to notify the system if the intent prediction is correct or not.

The following scenarios below show examples of how to interact with your model test panel and provide prediction feedback to the system. In all scenarios, you use these four steps:

1. In the **Build and train your model** phase of your model, select **Try model** to open the test panel.
2. In the test panel's **Enter an utterance to test** field, enter a brief utterance that's similar to a training utterance in one of the intents.
3. Click **GO**.

   Result: The system returns its predictions for your test utterance in the **Top Predictions(s)** section of the test panel.

4. Click the **Thumbs Up** icon or the **Thumbs Down** icon.

   If you want the system to know it has predicted the correct intent for your utterance, select the **Thumbs Up** icon.

   In all other cases, select the **Thumbs Down** icon, which opens the **Provide feedback to improve this prediction** section. Here you can choose an intent other than the top predicted intent.

Scenario 1: On the Try model section of the test panel, you enter `help with hr` as the utterance. When the top prediction results appear, you're confident that the predicted intent is the correct match to your utterance. So in this case, you click the **Thumbs Up** icon.

Results:

- The system predicted the correct intent, which in this case is **#CreateHRGeneralInquiryCase**.
- Your feedback notifies the system that it has matched the correct intent to your test utterance.

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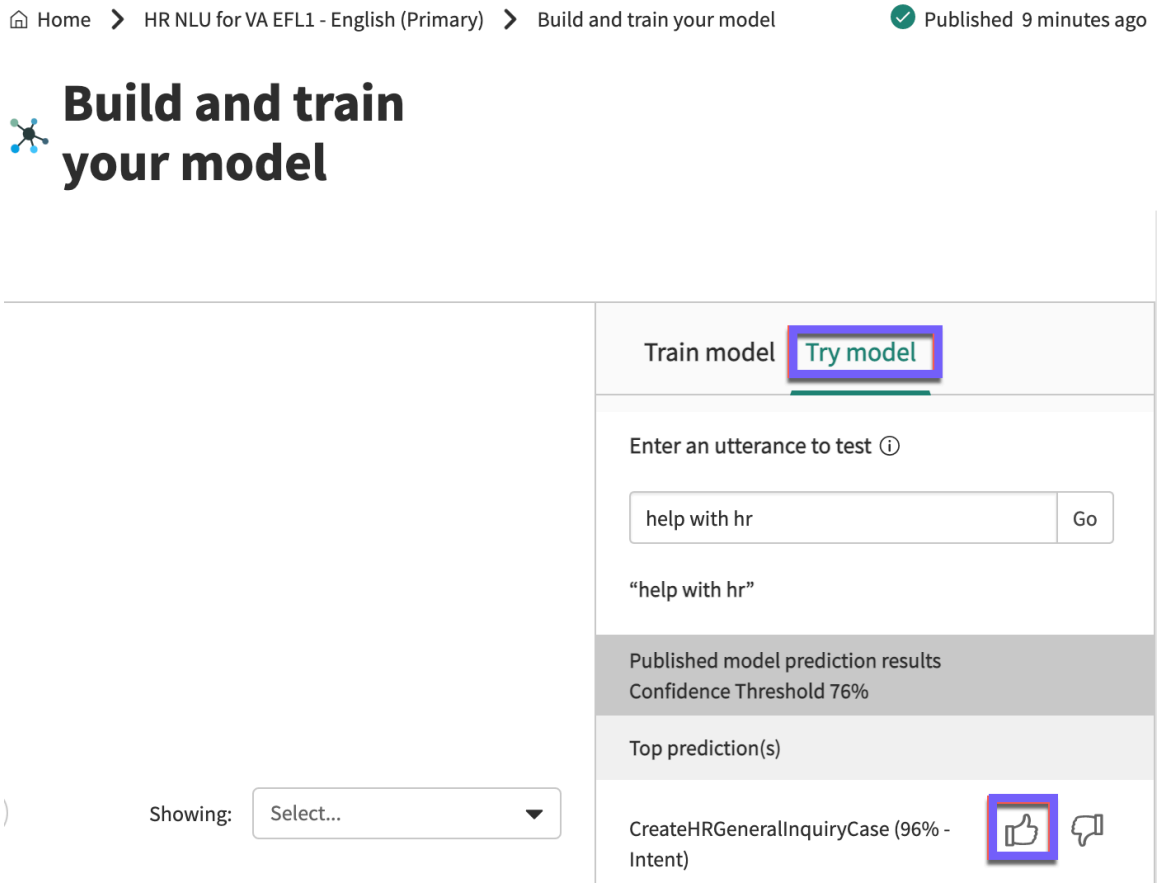

Scenario 2: In a separate model on a separate instance, a different user enters the same `help with hr` utterance. The system responds with the top prediction results for the intent, but the user isn't sure if it's the correct intent or not. So this user clicks the **Thumbs Down** icon, as shown in the image below.

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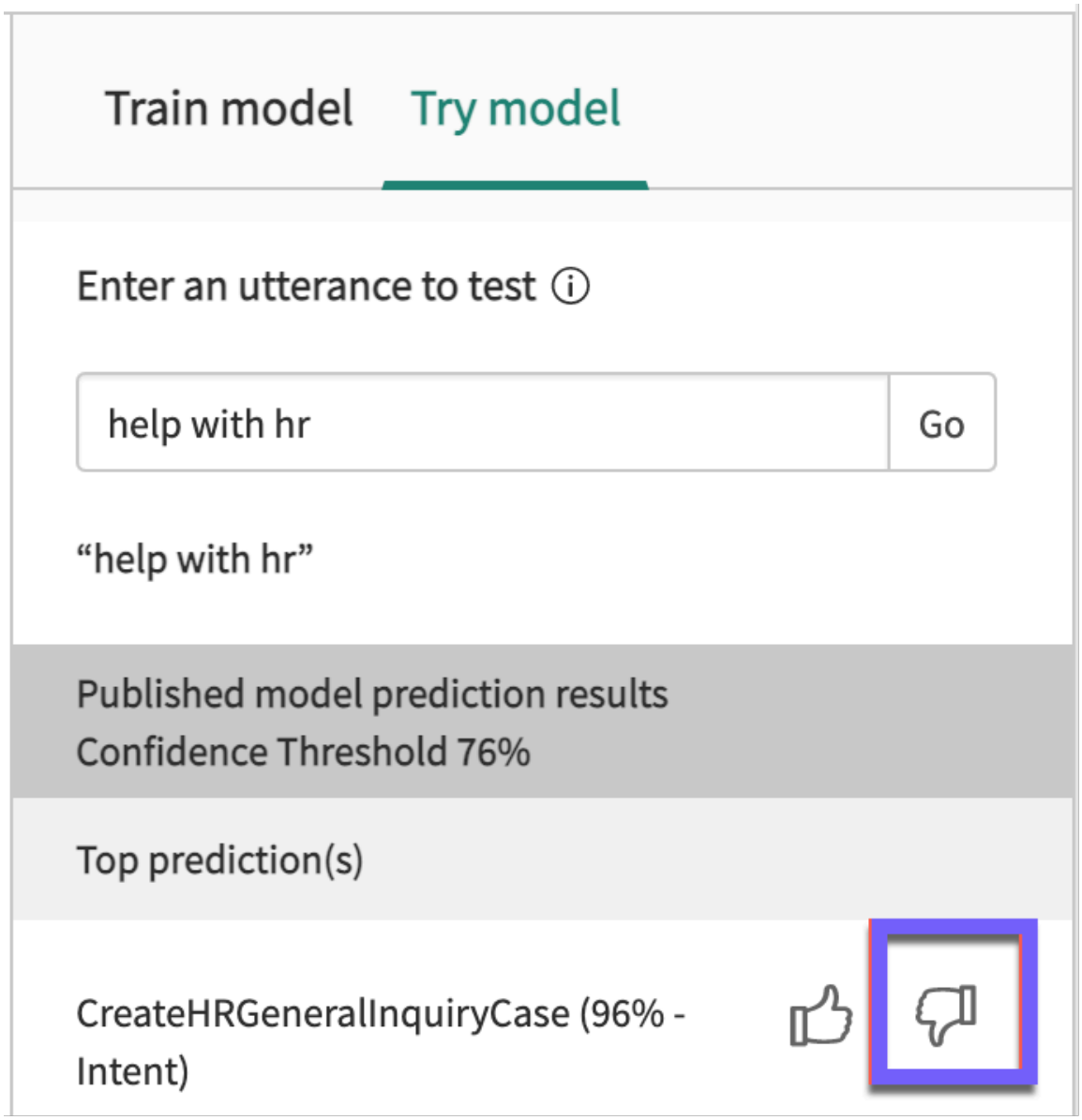

Result: The panel expands to show the **Provide feedback to improve this prediction** section where users can submit feedback that may help to improve the intent prediction.

There are two options here:

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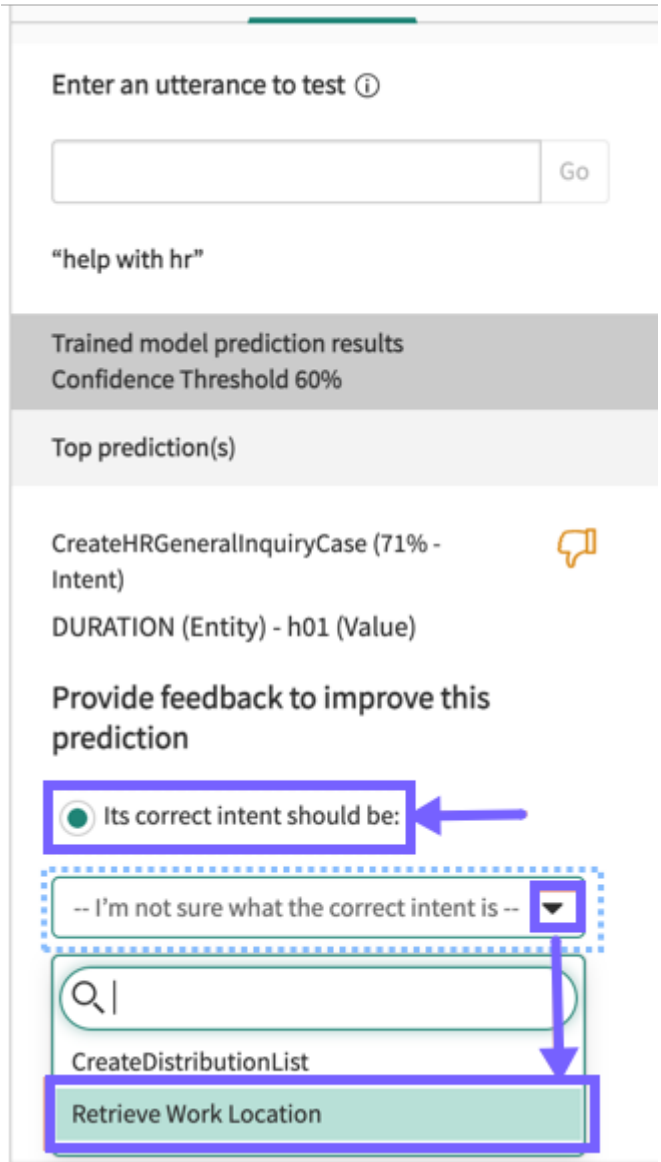
- If users click the **Its correct intent should be:** button, a list appears where they can choose a more appropriate intent for the test utterance. In this example scenario, a user selects the **Retrieve Work Location** intent, as shown in the image below.



- If you click the **I'm not sure what the correct intent is** prompt, instead of returning a top prediction, the system shows the next best intent predictions available.

Scenario 3: In a separate model on a separate instance, another user submits an utterance that uses gibberish, or uses a language that's different from the language the model uses. For example, a user mistakenly submits an utterance comprised of both non-English and English languages, as shown in the image below.

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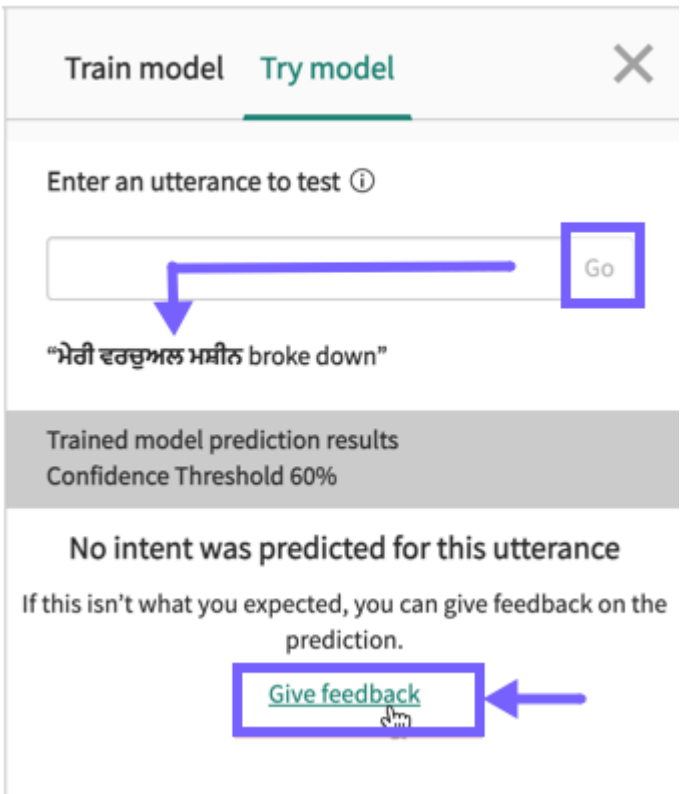

Result: The system doesn't return a prediction because the utterance uses two different languages together. Since no intent was predicted, the user clicks the **Give feedback** option which expands the Try model section to show other intent alternatives.

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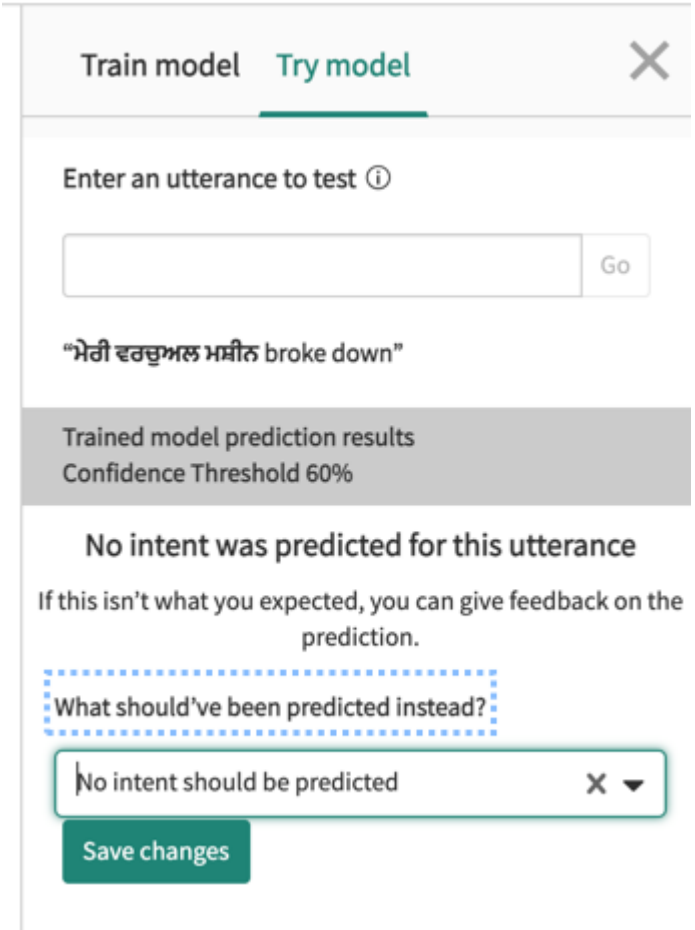

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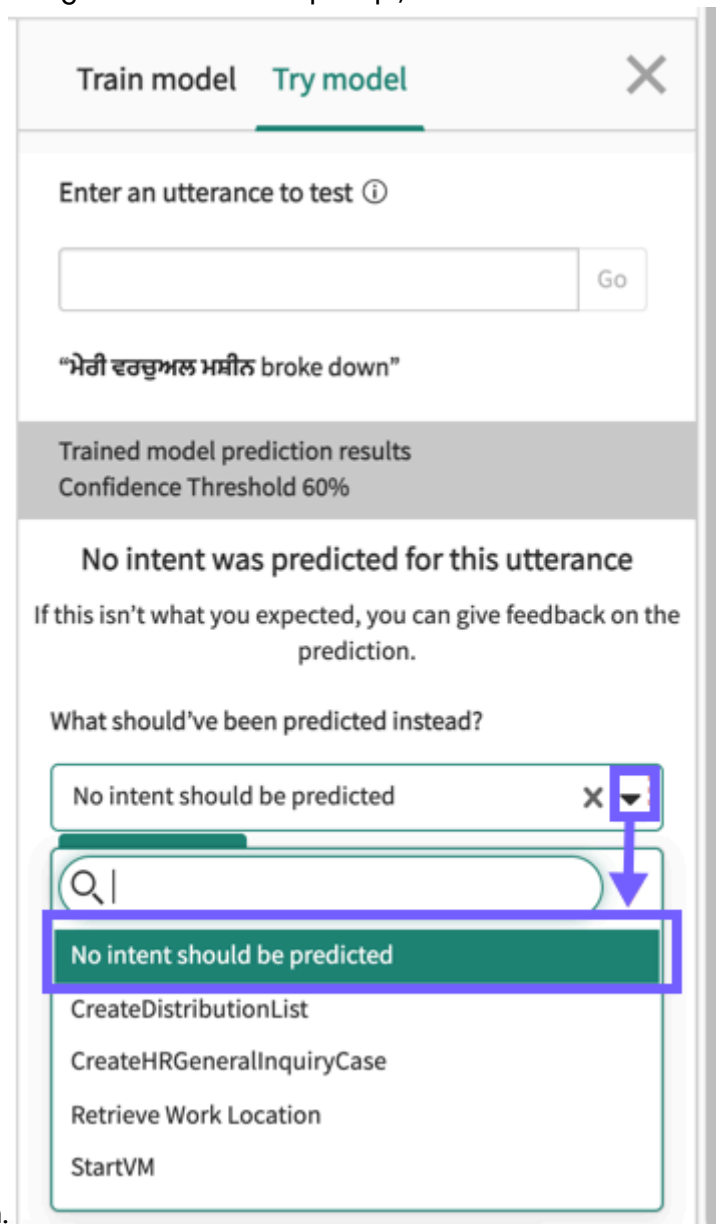
So instead of choosing an intent from the prompt, this user selects the **No intent should be predicted** option.



Note: When you choose and save **No intent should be predicted**, the utterance is removed from all intents which it is a part of.

Scenario 4: Along with choosing from a list of your model's intents for a prediction, you can also directly notify the system that the utterance is irrelevant to the model. To do this, you click the **Exclude this model's predictions for this utterance** button, then click **Save changes**.

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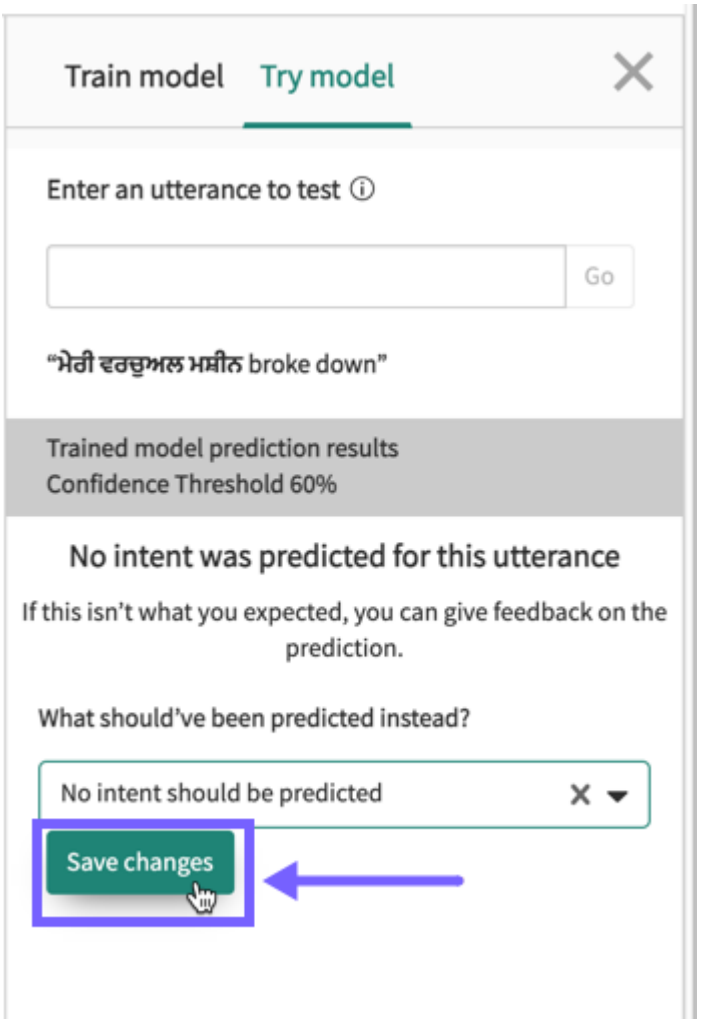
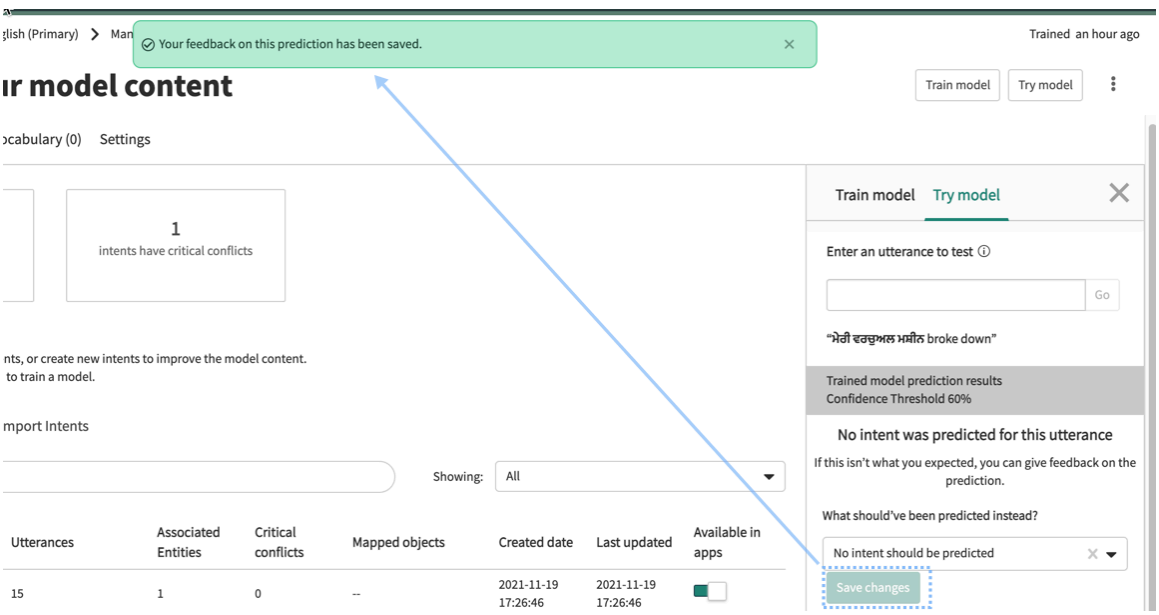


Result: A banner appears at the top of the screen confirming the user feedback for the prediction is saved, as shown in the image below.



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Accessing your feedback records

Your feedback data is stored in the **ml_labeled_data** table, which is also used by other ServiceNow products. This table can also house multiple sources, such as Virtual Agent chat logs that can be used for future predictions.

(Legacy) Test and publish your model

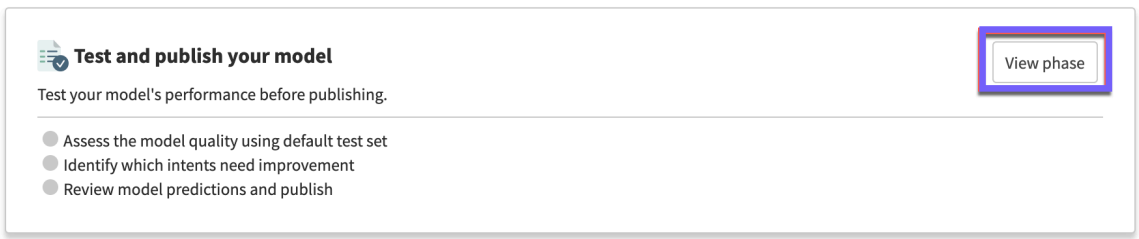
Assess the performance of your NLU model to identify areas for improvement. Then publish your model to make it available to other applications such as Virtual Agent.

Summary usage

Test your Virtual Agent or AI Search model against its default test set to see how the model responds. Test results provide information you can use to improve your model.

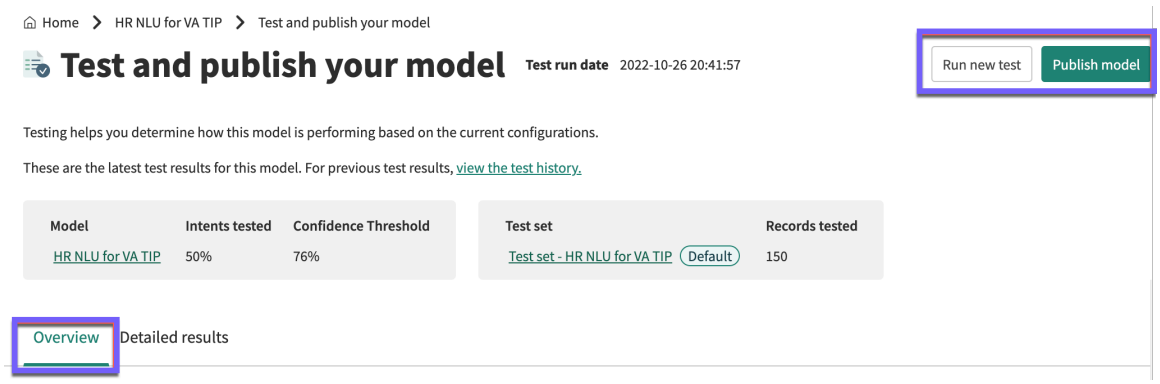
Note: Testing your model requires the Multi-model Batch Testing feature, available with the NLU Workbench - Advanced Features application from ServiceNow® Store. For more information, see (Legacy) Install NLU Workbench - Advanced Features.

To test your model, navigate to **NLU Workbench** > **Models**. Select the tab for your model's application, then select the name of the model. In the **Test and publish your model** card, select **View phase.**



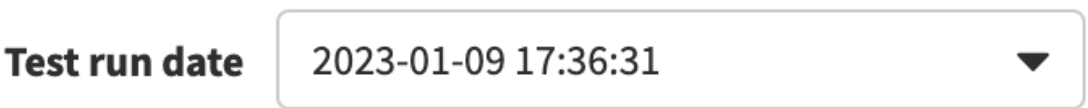
Overview of testing and publishing your model

The **Test and publish your model** phase opens in the **Overview** page by default. Buttons for **Run new test** and **Publish model** are located here.



Overview provides information about a previous test run, with bar charts summarizing the test results.

If you have earlier test runs, you can view those by selecting from the **Test run date** list.



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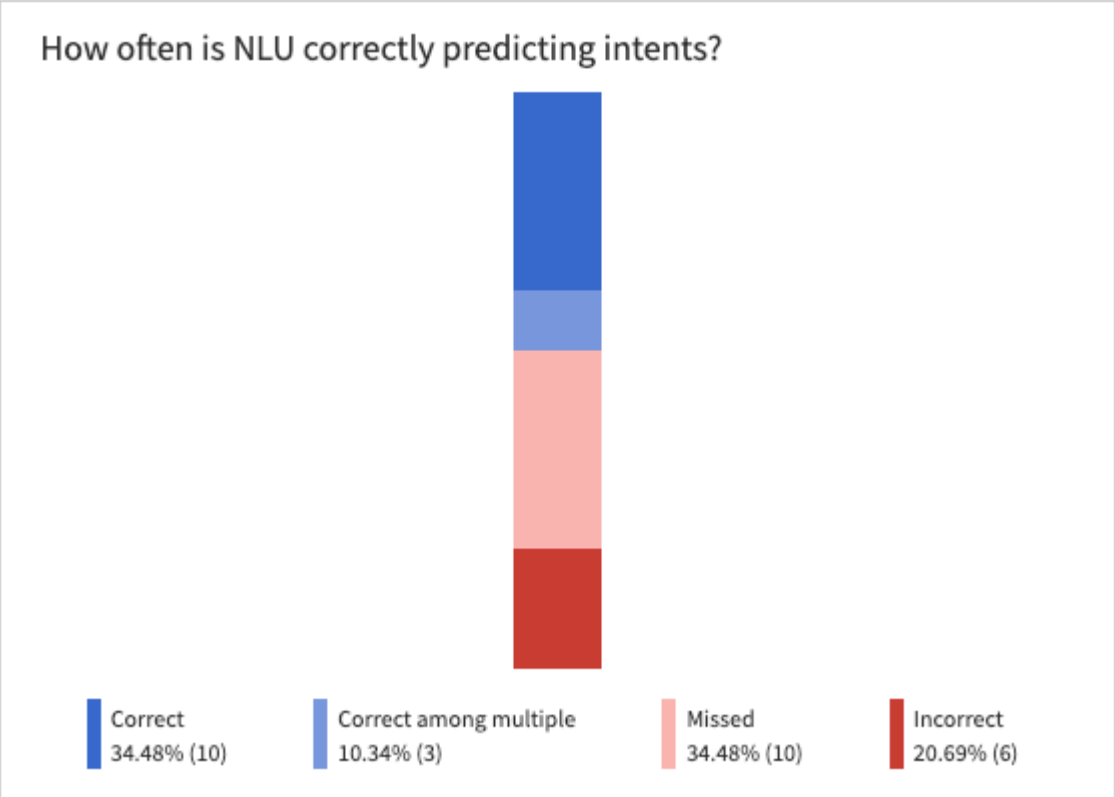
To drill down into the test results table, select the **Detailed results** tab. Each test utterance is listed in **Detailed results**, with its prediction.

Understanding test results

The test results show how your model responded to the utterances in the test set.



The bar chart shows the prediction percentages for correct, correct among multiple, missed, and incorrect:

Percentage	Description
Correct	The percentage of utterances for which your model correctly predicted the intent. When the model predicts no intent for utterances marked as `Not relevant`, that result is counted as Correct.
Correct among multiple	For utterances that had more than one intent predicted. The percentage of utterances for which the model correctly predicted the intent or intents, but also predicted intents that did not belong to the utterance.
Missed	The percentage of utterances for which your model did not predict an intent, even though there was an expected intent.
Incorrect	The percentage of utterances for which your model predicted an intent that was not correct.

Testing can affect the model's confidence threshold. The confidence threshold determines how confident a model must be to predict an intent for an utterance. For more information on confidence thresholds, see (Legacy) NLU model settings.

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For information about utterances which should not have any intent predicted, see (Legacy) Irrelevance detection in NLU.

Publish model

The **Publish model** button makes the current version of the model available to other applications such as Virtual Agent.

> **Note:** If the model has not been trained, the **Publish model** button is unavailable. Return to the **Build and train your model** phase to train the model before publishing.

For more information on publishing your model, see (Legacy) Publish your NLU model.

Multi-model Batch Testing

In the **Test and publish your model** phase, you test your model against its default test set. With Multi-model Batch Testing, you can test against other test sets, test multiple models at once, and see your test results. To use Multi-model Batch Testing, navigate to **NLU Workbench** > **NLU Advanced Features** > **Multi-model Batch Testing**.

For more information, see (Legacy) Multi-model Batch Testing.

For more information about test sets, see:

- (Legacy) Create a test set
- (Legacy) Test set creation and management

For information about the process of testing, see (Legacy) Test your model.

(Legacy) Test your model

Test your Natural Language Understanding (NLU) model against its default test set. Testing helps determine how your model is performing with the current content.

Before you begin

- Make sure that the NLU Model Builder - Core plugin, NLU Model Builder plugin, NLU Workbench - Advanced Features plugin and Predictive Intelligence plugin are all installed and activated.
- Have a trained model for Virtual Agent or AI Search. For more information, see (Legacy) Build and train your model.
- Have a test set for testing models. For more information, see (Legacy) Test set creation and management.
- Role required: nlu_editor, nlu_admin, or admin. The editor must be assigned to the model.

About this task

Run a test of your model using its default test set, which contains test utterances and their expected intents.

- If an expected intent in your test set does not correspond to any intent in the model, the utterances with those intents are not used for testing. They are not included in the test results.
- The mid-conversation responses of Dialog Acts can't be tried or tested in NLU Workbench.
- When the model returns no prediction for utterances which are marked as `Not relevant`, that result will be counted as **Correct**.
- If your test set does not cover at least 60% of intents in the model, the system will not recommend a confidence threshold. However, you can still run the test.

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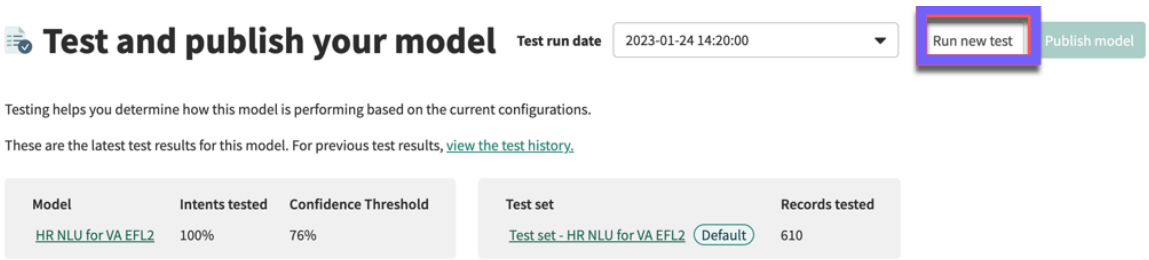
In this example scenario, you've trained your model and want to assess the performance.

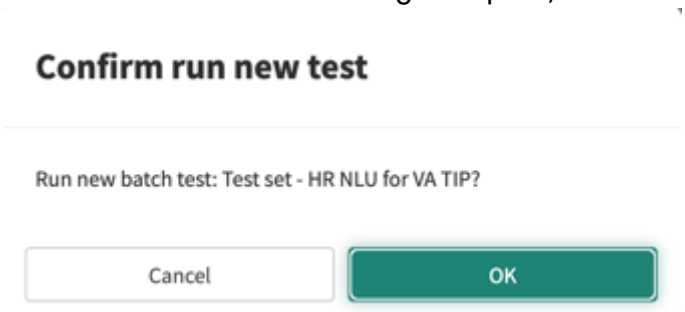
Procedure

1. Navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default.
2. Select the tab for your model's application, then the name of the model you want to test.
3. On the model overview's **Model details** tab, locate the card for the **Test and publish your model** phase, then click **View phase**.
4. Select **Run new test**.

   Note: Other phases are unavailable during a test.



5. The **Confirm run new test** dialog box opens, so select **OK**.



The test begins and the **Testing is in progress...** page loads.

Result

When the test is finished, the **Test and publish your model** page reloads. The **Test run date** field reflects the date and time of this test.

The **Overview** tab displays a chart of the test results. It also displays a list of the top 5 incorrect intents and the top 5 missed intents.

The **Detailed results** tab lists all of the test utterances and their prediction outcomes.

You can see previous test results by clicking **view the test history** on **Test and publish your model**, or by navigating to **Batch Testing** > **Test results**.

What to do next

Use the results to edit and improve your model's content. When you are satisfied with the results, publish your model to make it available to consuming applications such as Virtual Agent.

(Legacy) Publish your NLU model

Publish your Natural Language Understanding (NLU) model to activate it and make it available for use in other applications that consume NLU.

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Before you begin

- Make sure that the - NLU Workbench - Core plugin, NLU Workbench plugin, and Predictive Intelligence plugin are all installed and activated.
- Have a trained and tested NLU model.
- Role required: admin or nlu_admin

About this task

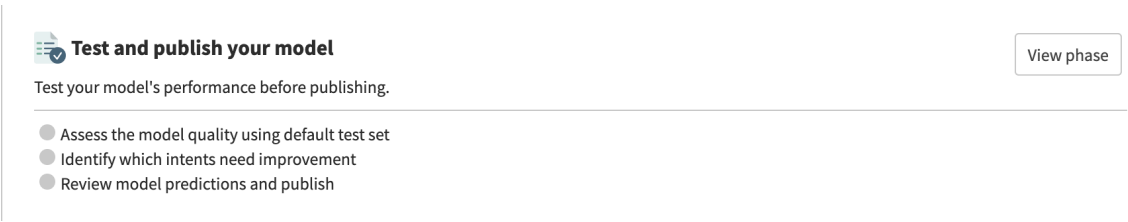
For this procedure, you've already trained, tested, and refined your NLU model and are satisfied with the results.

If your model is already published, you can publish it again. However, you must train the model again before republishing.

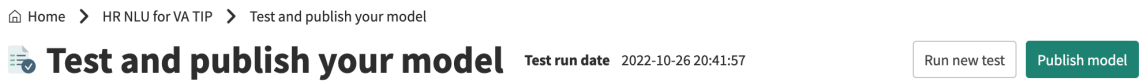
Procedure

1. Navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default.
2. Select the tab corresponding to your model's application, then select the name of your model.
3. On the Model overview page, locate **Test and publish your model**, then select **View phase**.

   Note: If the model hasn't been built or trained yet, the **Test and publish your model** phase is not available.



4. On the **Test and publish your model** screen, select **Run new test** to assess the model using its default test set.
   Testing can be skipped, but model performance may not be optimal. If testing is skipped, a confirmation message displays, asking if you want to continue without testing. For more information on testing, see (Legacy) Test and publish your model.
5. Click **Publish model**.



   Note: If the model hasn't been tested yet, the **Publish model** button is white. If the model has already been tested, the button is green. If the last trained model is already published, the **Publish model** button is unavailable. Return to **Build and train your model** to train again.

Result: The most recent version of your NLU model is published. The model is active and available for use in other ServiceNow applications, such as Virtual Agent. Publishing also replaces any older versions of the model that are currently in use by those applications.

(Legacy) Compare draft and published versions of your NLU model

Compare a draft trained Natural Language Understanding (NLU) model to its most recent published version. Test and review the changes to make sure that your draft model will have increased performance.

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Before you begin

- Make sure that the NLU Workbench plugin, NLU Workbench - Core plugin, NLU Workbench - Advanced Features plugin and Predictive Intelligence plugin are installed and activated.
- Role required: nlu_editor, nlu_admin, or admin. The editor must be assigned to the model.

About this task

In this example scenario, you're training and trying a published NLU model in the NLU Workbench iteratively with the goal of improving its prediction confidence scores.

When you try an utterance against an NLU model:

- If the model is trained and never published, the Test Model panel shows only trained model results.
- If the model is trained and published, the Test Model panel shows only published model results.
- If you've made changes to a published model and trained it, the Test Model panel shows both the trained model results and the published model results for comparison.

In this example procedure, you've cloned the model from a pre-built read-only HR model. You've cloned the model to create your own business-specific version of it while leveraging the existing intents from the pre-built model.

Procedure

1. Navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default.
2. Select the tab corresponding to your model's application, then select the name of your published model.
3. From the model's overview page, locate the **Build and train your model** card and click its **View phase**.
4. Make a change to the intents, utterances, entities, or vocabulary.
   In this example scenario, you add a few more training utterances to the #UpdateEmail intent.
5. Train and try the changed model so you can see its prediction scores compared to the published version's scores.
   a. On the **Train model** tab, click the **Train** button.
   b. When training is finished, the system displays The model has been successfully trained.
   c. In the **Try model** tab, enter this utterance: `wrong email address`.
   d. Click **Go**.

   The panel displays predictions results for both the published model and the trained model. Compare the results of the two versions of the model, before and after your changes. In this

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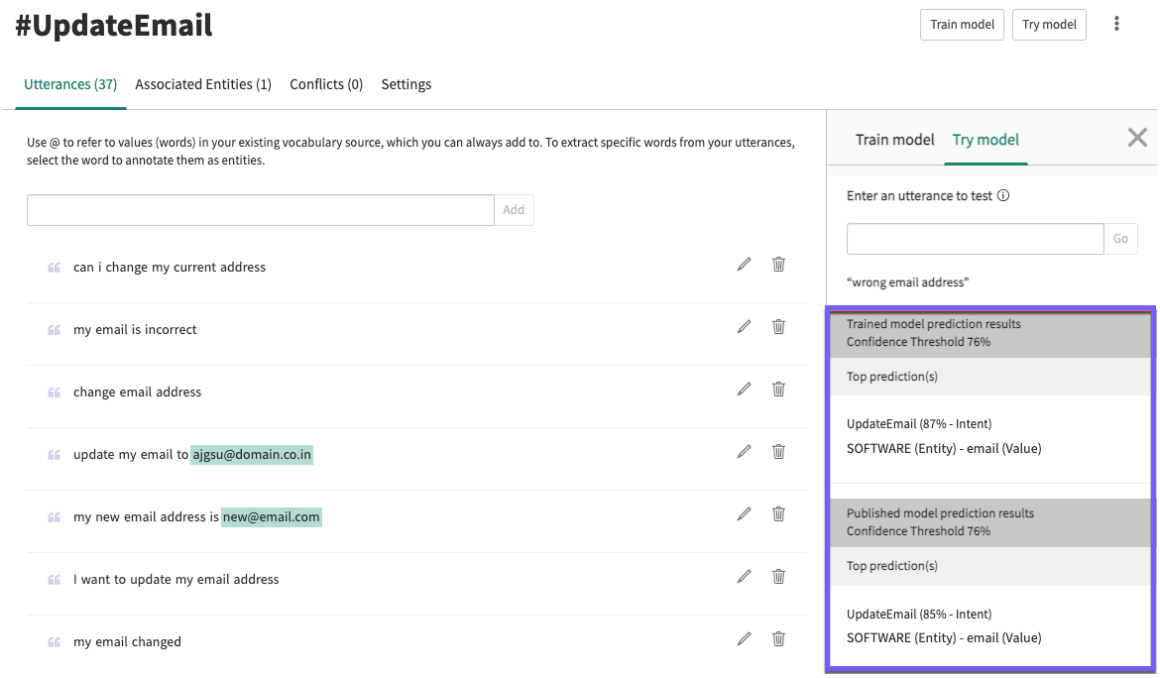
example, the confidence score increased by a small margin. By making significant changes to the model content, the confidence score or even the intent predictions may change.



What to do next

Use the information in the test panel to see if the changes you make will improve the model's performance. Once you are satisfied with your changes, test your model before publishing. Then, publish your model to replace the current published version.

(Legacy) Irrelevance detection in NLU

Keep Virtual Agent chats focused with Irrelevance detection. Use the Irrelevance detection feature to train your NLU model to avoid making predictions for utterances that are not relevant.

Summary information

The Irrelevance detection feature improves the prediction accuracy of NLU models by training them to ignore certain utterances. These utterances from your users may not apply to any intent, so should not get any prediction.

To ensure that models do not predict an intent when they are not supposed to, you can mark utterances as `Not relevant`. These marked utterances are included as part of model training. When the published model encounters similar utterances from your users, no intent is matched or predicted.

The Irrelevance detection table is where you can manage utterances marked as `Not relevant`.

Roles, Usage, and Navigation

Use the nlu_admin or admin role to access Irrelevance Detection. The nlu_editor role is also able to access Irrelevance Detection, but must be assigned to a model to edit that model's contents.

Irrelevance Detection is available for Virtual Agent models only.

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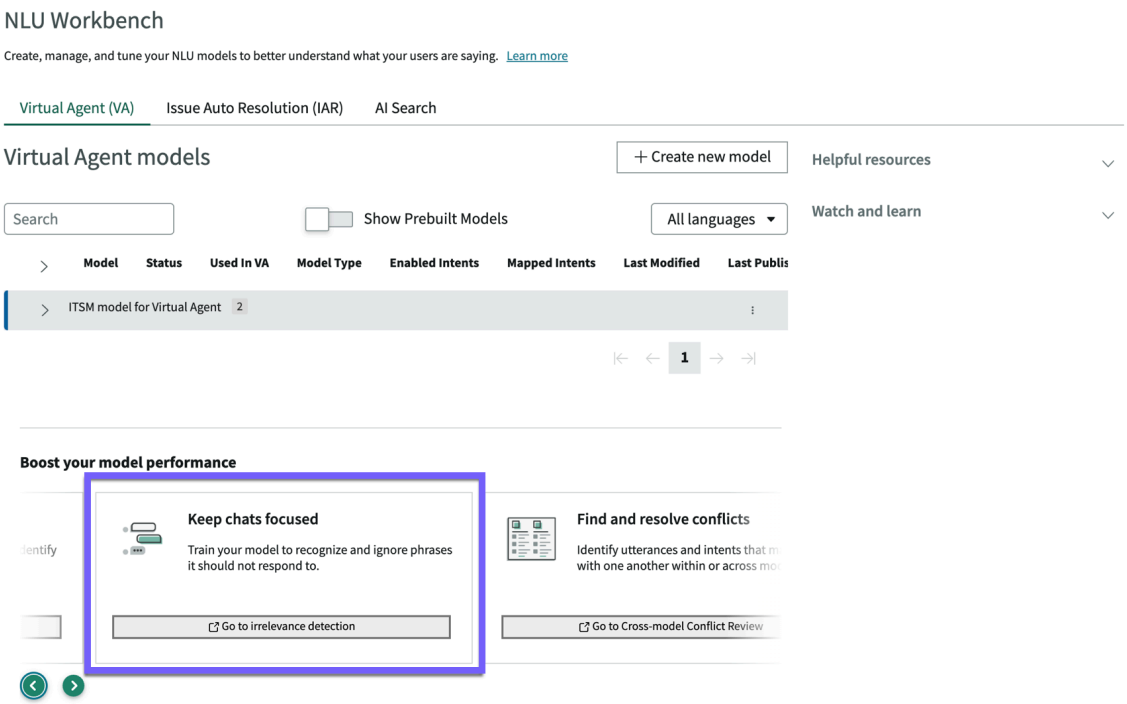
1. Navigate to **All** > **NLU Workbench** > **Models**. The Virtual Agent tab opens by default.
2. Scroll down the list of Virtual Agent models to the **Boost your model performance** section.
3. Scroll horizontally to locate the card **Keep chats focused**, and select its button **Go to irrelevance detection**.



Note: The instance URL for this feature is <instance-name>.servicenow.com/now/nlu-workbench/irrelevant-utterances.

Adding utterances to Irrelevance detection

There are several methods for adding utterances to **Irrelevance detection**:

- The Virtual Agent chat log: In the Expert Feedback Loop in NLU Workbench, when you review an utterance collected from the Virtual Agent chat log, you can mark it as `Not relevant`. The system will ask whether it should be irrelevant to a particular model, or to all models. After adding, these utterances may display as **NO_INTENT** in Expert Feedback Loop.

  For more information on Expert Feedback Loop in NLU, see (Legacy) NLU Expert Feedback Loop.

  These utterances have a Source of **VA Chat Logs** in the Irrelevance detection table.

- Manual input: In Irrelevance detection, type your utterance in the **Type utterances here** field, then select **Add**. The system will ask whether it should be irrelevant to a particular model, or to all models.

  These utterances have a Source of **Manual** in the Irrelevance detection table.

- Importing: When you use a CSV or XLSX (Excel Workbook) file to import training utterances and their intents, you can indicate irrelevant utterances by leaving the Intent column empty. These utterances may display as **NO_INTENT** in areas such as Expert Feedback Loop and Conflict Review.

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For more information on importing utterances and intents, see (Legacy) Create an NLU model from a CSV file.

These utterances have a Source of **Manual** in the Irrelevance detection table.

Behavior of irrelevant utterances

There are two types of irrelevant utterances: those associated to one specific model, or those irrelevant to any model. A model can have a maximum of 200 irrelevant utterances associated to it.

Following are details of how these two types and the 200-count maximum interact.

When a model is submitted for training, at most 200 irrelevant utterances are submitted with it. First, irrelevant utterances directly associated to that model are submitted. Then, utterances which are designated as not relevant to any model are submitted. The total of these types does not exceed 200.

If a model has 200 irrelevant utterances associated to it, and a new irrelevant utterance is added, then the model's oldest utterance is dropped. The new irrelevant utterance could be of either type (not relevant to the specific model, or not relevant to any model).

A model cannot have more irrelevant utterances than normal training utterances.

Conflict review

If an utterance is marked as irrelevant, and there is a similar utterance in an intent, the model does not make a prediction for that utterance. In other words, irrelevant utterances take precedence over training utterances.

Because irrelevant utterances impact the model's predictions, they are displayed as conflicts when they overlap with training utterances.

There are two locations where conflicts with irrelevant utterances are highlighted:

- The Cross-model Conflict Review module. For more information about this module, see (Legacy) Cross-model Conflict Review.

  Note: The Cross-model Conflict Review module is available with the NLU Workbench - Advanced Features application from ServiceNow® Store. For more information, see (Legacy) NLU Workbench - Advanced Features.

- The Conflicts tab of an intent. For more information on conflicts in an intent, see (Legacy) Resolve intent issues.

For the purpose of reviewing conflicts, irrelevant utterances are displayed as though they are in their own intent, named **NO_INTENT**.

Note that irrelevant utterances cannot be edited or deleted on the conflict page. Copy the irrelevant utterance from the conflict page to the Irrelevance detection page to modify or delete the utterance.

More information

- In test sets, aim to include about 10% of test utterances as irrelevant. This helps to assess how your model handles utterances that should not have an intent predicted. When you import training or test utterances from a CSV or XLSX (Excel Workbook) file, you can indicate that an utterance is irrelevant by leaving the Intent column empty.

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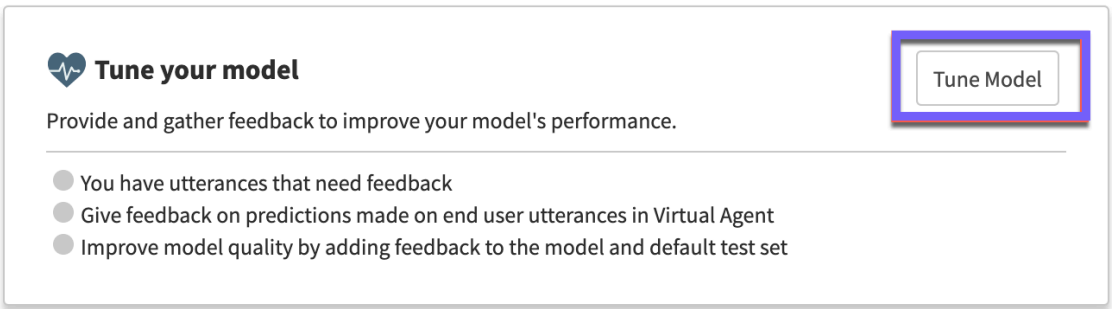
- When testing models against test sets, results are considered Correct if no intent is predicted for an irrelevant utterance.
- Utterances that were marked as `Not relevant` can be re-assigned later. For example, if a new intent is created, existing irrelevant utterances can be manually assigned to the new intent. They then become part of the normal training utterances.

  To re-assign an utterance in Irrelevance detection, expand the list in the **Corrected intent** column and select the appropriate intent. Be sure to select the **Save feedback** button after re-assignment. Also be sure to retrain the model to incorporate these updates into the model.
- Irrelevant utterances are not associated to particular intents within a model. They are either associated to one model, or marked as not relevant to any model.
- The utterances which are marked as not relevant to any model are submitted as part of the training data for each model. In other words, these apply to all models.
- Model training is necessary to incorporate `Not relevant`utterances. Training any model adds newly marked utterances to all models.
- Utterances can be deleted or edited in the Irrelevance detection table.
- Irrelevant utterances should have content that is different from utterances associated to an intent.

(Legacy) Tune your model

On your model's overview in NLU Workbench, open the **Tune your model** phase to review and incorporate user utterances from the Expert Feedback Loop.



Summary usage

The **Tune your model** phase on your model's overview takes you to the NLU Expert Feedback Loop feature, which collects data from Virtual Agent chat logs and provides it to you for feedback.

Note: The ServiceNow® Store application NLU Workbench - Advanced Features must be installed to view **Tune your model**. The Virtual Agent plugin is also required.

When the Expert Feedback Loop has feedback waiting for your review, **You have utterances that need feedback** is highlighted on the card.

For more information, see (Legacy) NLU Expert Feedback Loop

(Legacy) NLU model settings

Change your NLU model's name, description, or confidence threshold on the **Settings** page of the model overview.

Access the model's settings by navigating to **All** > **NLU Workbench** > **Models**. Select the tab for your model's application, then your

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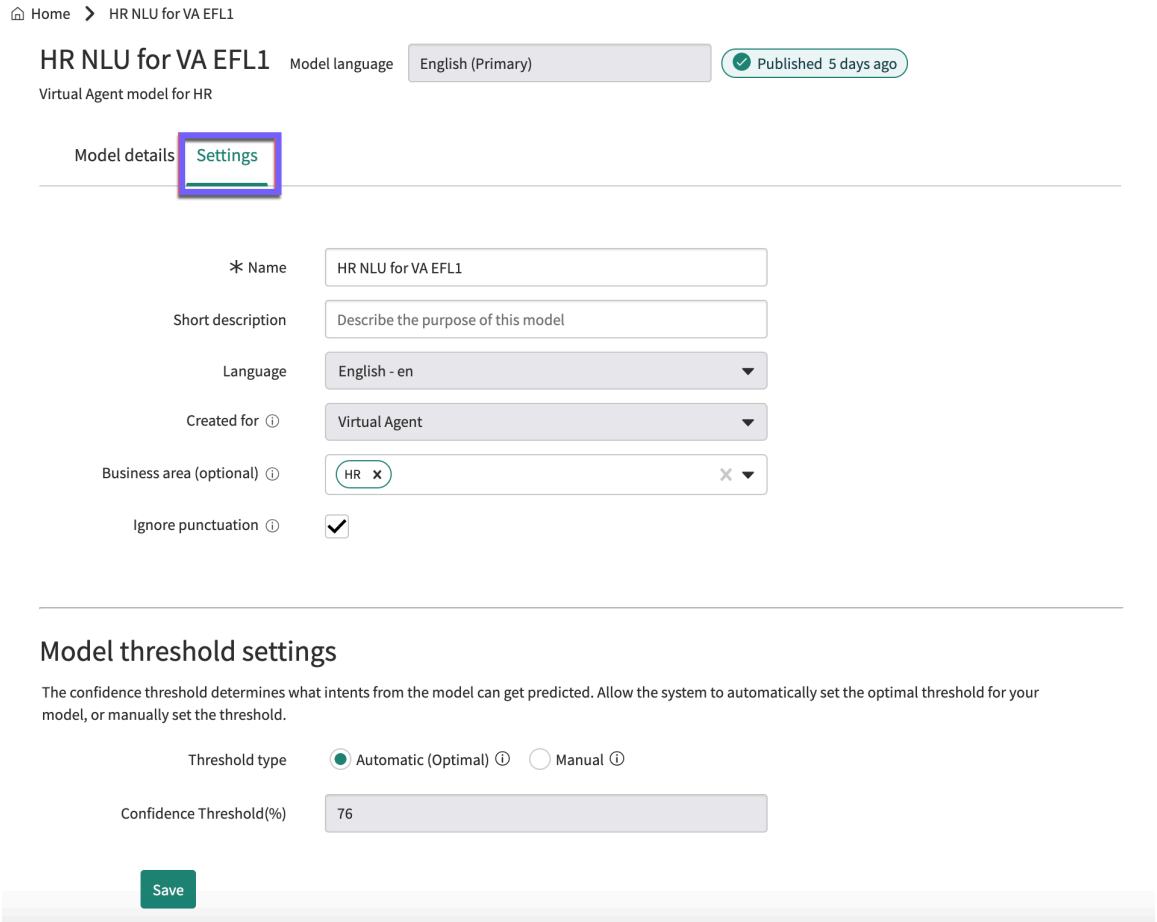
model's name. On the model's overview, select the **Model settings** tab.



Model settings

In the upper section of the model settings page, you can change the model's name, short description, and business area. You cannot change the model's language, purpose, or scope. To make a model with a different language, purpose, or scope, see (Legacy) Creating models.

By default, the **Ignore punctuation** check box is active. Ignoring punctuation makes it so that there is less variance between predicted intents and confidence scores for utterances with slightly different punctuation. For best results, keep the check box active.

Model threshold settings

Here you can adjust how the confidence threshold works in your model.

A threshold is a confidence score represented by a percentage. The confidence threshold of a model determines what intents from that model will be predicted for a given utterance. For example, if the model threshold is 65%, then an intent will be predicted for an utterance only when the intent has a confidence score that is at least 65%. Setting a threshold that is too low may increase the false positives by predicting intents that should not be a match for an utterance. On the other hand, a model threshold that is too high may filter out intents that you do want to get predicted. Finding the ideal threshold improves your model's ability to predict intents correctly.

There are two types of model threshold settings:

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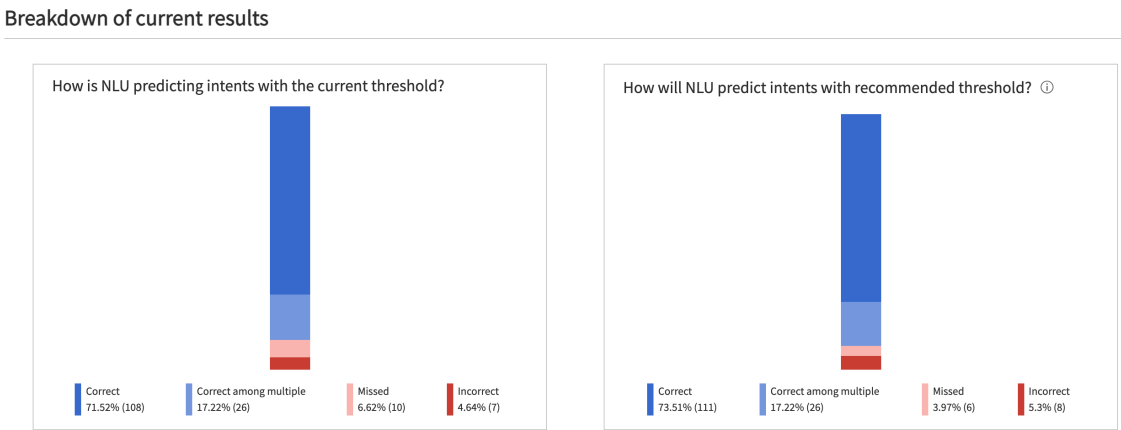
- **Automatic** - Allow the system to choose the optimal confidence threshold for your model. The value is updated dynamically based on test results. This happens in the **Test and publish your model** phase, where your model's default test set is used.
- **Manual** - You can manually set the confidence threshold. The system may also recommend a better threshold for the model during testing. You can choose to accept recommendations.

Prebuilt models come with a tuned threshold. The confidence threshold on prebuilt models was chosen specifically for that model.

Test results include a model threshold recommendation only if they meet the following requirements:

- The test set has a Test Coverage score of at least 60%, with at least 5 test utterances per intent. For more information, see (Legacy) Test set creation and management.
- The test set has at least 100 utterances.
- The model is not a prebuilt model.
- The recommended threshold would have better results than the current threshold.



Test results with a recommended threshold contain a second graphic. The second graphic shows the prediction percentages with the recommended thresholds applied.

Applying the threshold recommendation may improve the prediction percentages of your model. Select **Apply recommendations** to change the threshold. The system automatically retrains the model, and the test results show the prediction percentages with the new threshold.

(Legacy) Multilingual model management

Use multilingual Natural Language Understanding (NLU) models for the system to understand user input in several languages. The NLU Workbench helps you manage and maintain a consistent structure for content across languages to provide a unified experience.

Primary and secondary languages

A primary language is the source language you choose when creating a model. These models are considered primary models. Primary models can then be translated into different languages. Those translated models are referred to as secondary models. The languages in which they are translated are referred to as secondary languages.

The NLU Workbench home displays primary and secondary language models nested under the model name. Select the arrow to the left of the model name to expand the language group.

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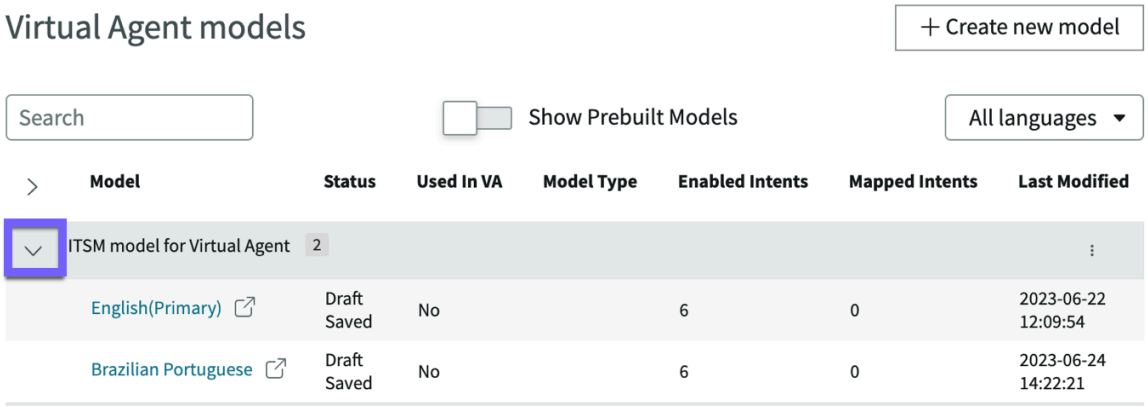

Multilingual model management provides a way for you to group, oversee, and update your NLU models. The designation for the model language works as follows:

- Primary models have a language you assign to them during model creation and listed as English (Primary). The language of the primary model is the source language for the translations that follow later in the secondary models.
- Secondary models are translated copies of the primary model. Each secondary model uses a different language, such as Brazilian Portuguese, Polish, or Finnish.
- Any supported language can be the primary language for a primary model or the secondary language for a secondary model.
- Within a model group, you can't have two secondary models that use the same language.

For more information on the languages available in NLU, see (Legacy) NLU language support.

Implementing language grouping

Grouping languages is optional but helps with organizing various language versions of models. There are two methods for ensuring that model languages are grouped:

- You can add a language to a primary model in the model's More options menu, which automatically creates a secondary language model with translation options. For more information on adding and translating a language, see (Legacy) Translate a multilingual model.
- You can access the instance model migration page directly by visiting `<instance_name>.service-now.com/$nlu-studio.do#/model-migration`. For more information on language grouping using this method, see (Legacy) Model language grouping.

Primary and secondary model interactions

To ensure consistency within a model group, the names of intents and entities in all secondary models are the same as the content in the primary model. New intents can only be created in a primary model. Creating an intent in a primary model adds the intent to all the secondary models within the model group, but without any utterances in them. New intents are inactive by default. New entities can also be created in secondary models for languages that support entities. Adding an entity in a primary model creates it across all secondary models within the model group, if valid.

When you add an intent to a primary model, the intent is added to all of its secondary models. Every intent in a secondary model is mapped to its corresponding intent in the primary model. The mapping of intents ensures that any application that uses these intents can access all the secondary intents through their corresponding primary intents.

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When you delete an intent or entity in a primary model, its corresponding intents and entities are also deleted in its secondary models. Therefore, the secondary models follow the status of the primary model content. Although you can't delete intents in secondary models, you can deactivate them.

For more information on intent interactions, see (Legacy) Import primary model content to a secondary model.

You can't delete an entity created in a secondary model if it's a copy of a corresponding entity created in the primary model. However, you can add or delete an entity in a secondary model if it doesn't have a corresponding entity in the primary model.

Whenever you translate a model or add intents and entities to secondary models, the model must be reviewed. Secondary models marked with **Needs review** must be manually reviewed before publishing.

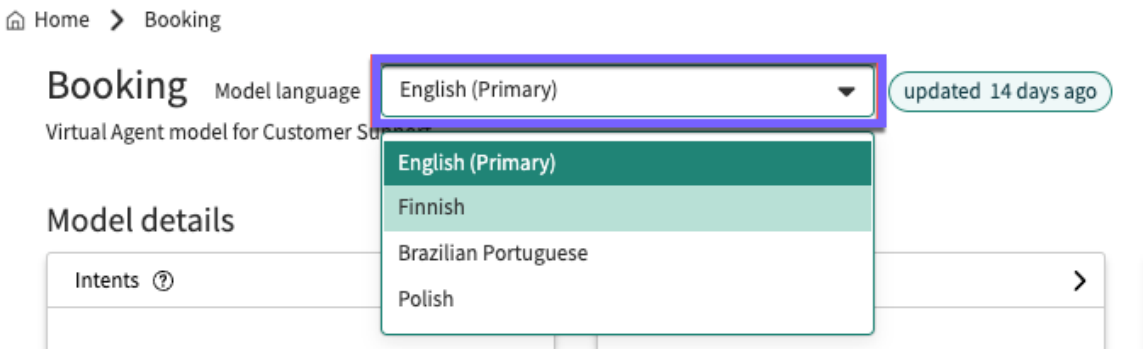
Viewing secondary models that need reviewing

If every intent in a secondary model is deactivated, then the **Train** and **Try** buttons are also deactivated in the model. However, even if only one intent is enabled in the model, then you can train and test the model. Ensure that some intents are enabled in your secondary models to translate them.

Note: When training and testing, prediction scores for similar utterances across primary and secondary models can be different. The context comes across differently among languages due to inherent structural variations.

When looking at a model, you can navigate between languages in the model group. On a Model details page, use the **Model language** drop-down list to navigate to other models.

Viewing model languages list



Duplicating grouped models and model groups

Using the nlu_admin role, you can duplicate primary models, secondary models, and entire model groups. You can duplicate just the primary model or a set of secondary models from among the model group.

Following is a list of system behaviors you may encounter when you duplicate these models.

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- If you duplicate a secondary model that's in a model group, the duplicated version becomes a separate primary model that is outside that model group.
- All intents are duplicated. The duplicated intent maintains the same **Enabled** status as the original intent.
- When duplicating a primary model, you can duplicate a set of secondary models, or all of the secondary models along with it. This action creates a model group comprised of duplicated versions with the respective original models marked as the source models.
- When duplicating a model group, you can choose an existing secondary model to be the primary model for the duplicated group.
- If you select a secondary model in an existing model group as a new primary model while duplicating the group, all the deactivated entities are enabled for the duplicated version of the secondary model. The secondary model becomes the primary model in the new duplicated model group.
- If you duplicate a primary model without any secondary model, the duplicated version becomes a separate primary model.

For more information, see (Legacy) Duplicate an NLU model.

(Legacy) Model language grouping

Language grouping makes it easier to manage your multilingual Natural Language Understanding (NLU) models. You can review existing language groups and designate new language groups.

Language grouping

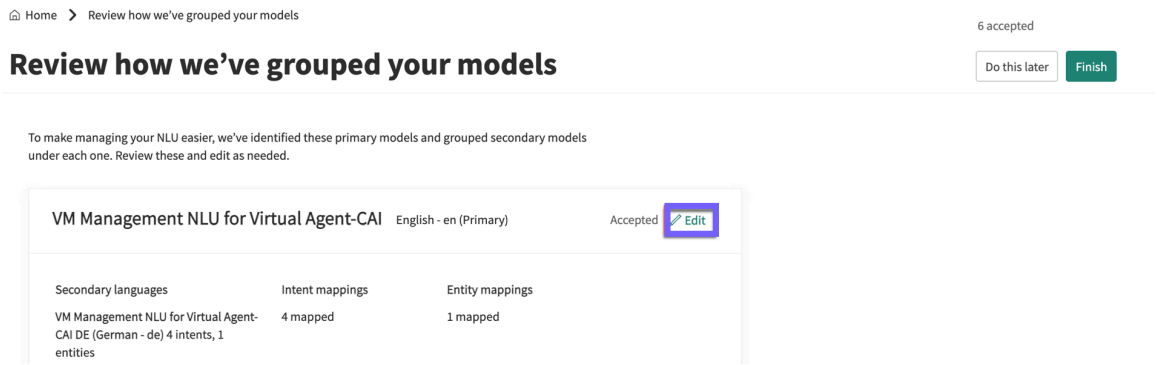
Language grouping organizes your NLU models into primary and secondary models, and indicates the primary language and primary model for the group.

If you have added a new language to a model, a language group is created automatically, so you may already have existing language groups. For more information on adding and translating a new language model, see (Legacy) Translate a multilingual model.

To view current language groups and inspect possible new language groups, navigate to:

`<instance_name>.service-now.com/$nlu-studio.do#/model-migration`.

The page titled **Review how we've grouped your models** opens.



Reviewing your grouped models

There are two things you can do on the **Review how we've grouped your model** screen when using the nlu_admin role.

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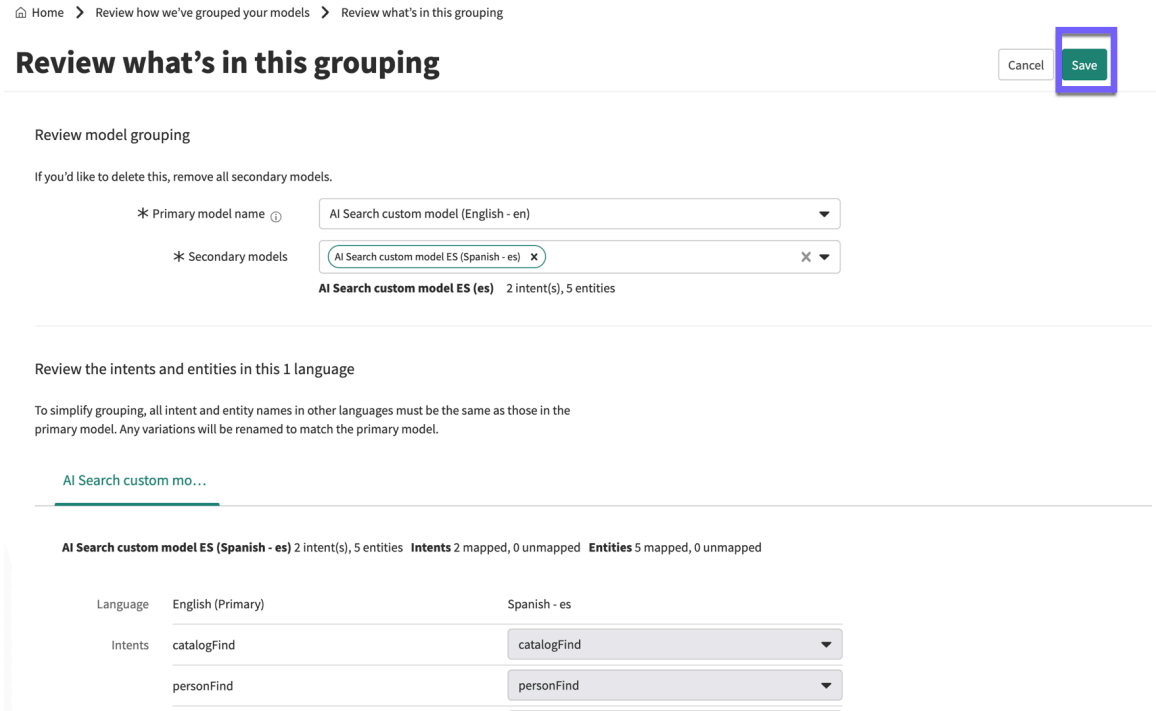
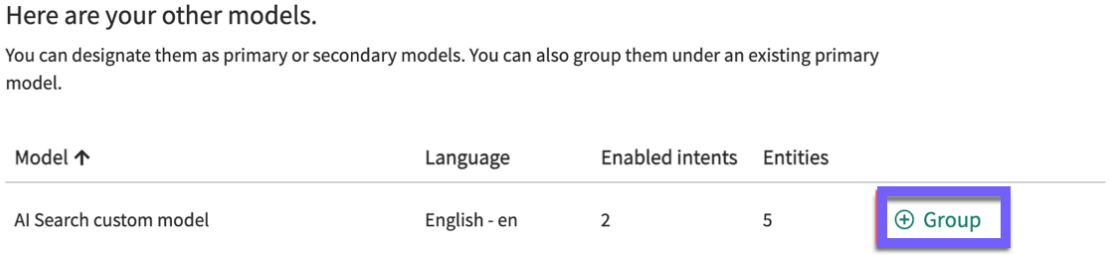
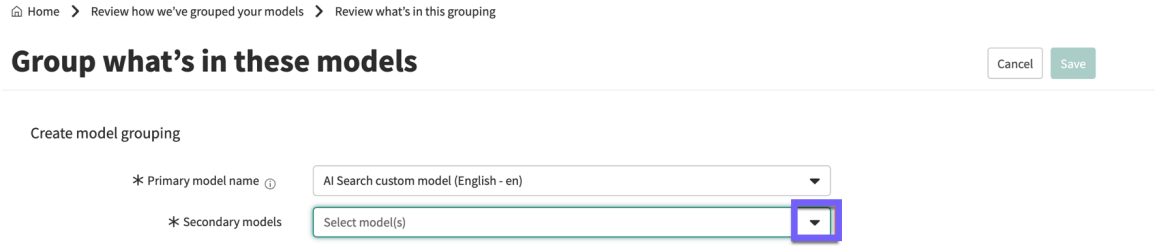
- You can review and edit current model language groups in the upper section. For existing language groups, any intent and entity mappings from Virtual Agent (VA) are displayed. To update VA mappings or to make one of the secondary languages the primary language in the group, select the **Edit** button. The page titled **Review what's in this grouping** opens. When you complete your edits, select the **Save** button.



- You can manually group models in the **Here are your other models** section of the screen. Scroll down the page to view this section, if necessary. To set up a language grouping for a model, expand its **Group** button.



The **Group** function opens the page titled **Group what's in these models**. You can expand the list of possible Secondary models, and then select the **Save** button. Any new groups are displayed in the upper section of **Review how we've grouped your models**, after refreshing the page.



Note: The time it takes the system to group your models depends on the number and size of your models.

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(Legacy) Translate a multilingual model

Add a language to an existing NLU model by translating it. Use one of several translation options to add a secondary model in a supported language.

Before you begin

- Activate the Localization Framework (com.glide.localization_framework.installer) plugin. See Localization Framework.
- In your target application scope, create a primary language model, or use an existing primary model.
- Multilingualism is available for Virtual Agent and AI Search models.
- Role required: nlu_admin or admin.

Note: The nlu_editor role cannot initiate a model translation, because the nlu_editor does not have permission to create a new model. See (Legacy) Assign an NLU editor to a model.

About this task

Translating a model creates a secondary model of the language you choose, in the same application scope as the primary model.

The secondary model contains the same content as the primary. However, the intents of the secondary model are disabled and must be reviewed prior to publishing the secondary model.

To translate a primary model and create a secondary model, you must choose a translation mode. The modes appear in the user interface as individual cards that you use in Step 4 of this procedure. Activated cards appear surrounded by a thin green border. Only activated cards can be selected as your translation mode. For the Use AI and Use a third party modes, selecting the **Add** button on an activated card starts the translation.

The No translation mode is active by default and available for all languages. However, the Use AI and Use a third party modes are activated only when the localization framework (LF) settings for the secondary language are in place.

Note: Before you add a new model in a secondary language, you must ensure that the Localization Framework (LF) settings for the secondary language are completed.

Translation mode	Description
Use AI	Translate using machine-intelligence providers such as Google. Selecting the card creates a translated secondary model. Machine translations may be incorrect or too literal, so review the translated content for accuracy. For more information, see Dynamic Translation. To activate the Use AI mode, Localization Framework must be configured and activated.
Use a third party	Request translation by a professional translation team. When you select this mode, an LF task is created per the LF language group settings for the secondary language. When the translations are completed, the translated model is created and ready for review. For more information, see Localization Framework and Translation modes.

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Translation mode	Description
No translation	Default. Manually translate your primary language into a secondary language. Selecting this mode creates a draft secondary model with the intent names the same as that of the primary model. These intents are disabled by default, and you must enter your utterances manually. Names of intents and names of entities imported from the primary model aren't editable. Names of entities that you create directly in the secondary model are editable. This mode is also helpful if you want to draft and save the primary model first, and then translate your utterances later.

Multilingual models are supported in 17 languages.

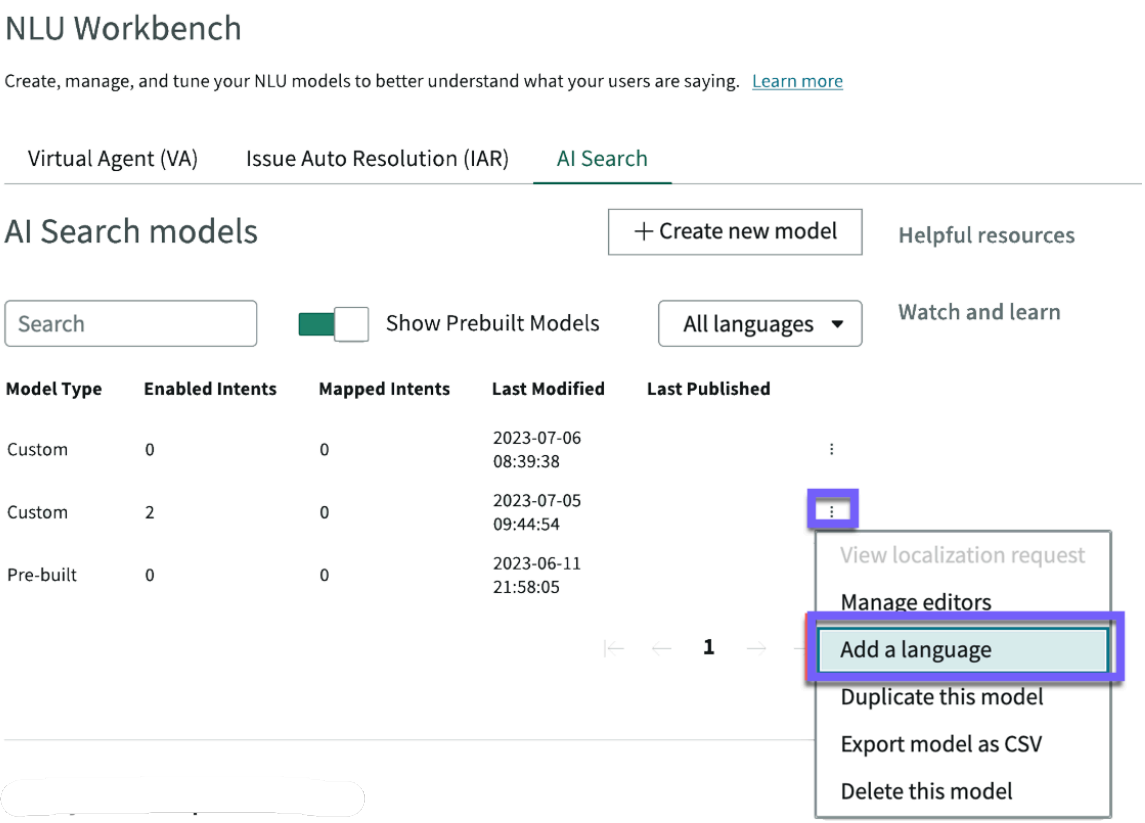
Note: Some of these languages support only intents, not entities. If the language is intent-only, your primary model entities will not be translated or copied. For more information, see (Legacy) NLU language support.

In this example scenario, your primary model uses the English language and you're adding a version in the French language, without translating utterances.

Procedure

1. Navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default. If appropriate, select the AI Search tab.
2. Identify a primary model to which you want to assign a secondary language.
3. In the row of the primary model, select the more options menu, then select **Add a language**.

   Note: You may need to scroll to the right to find the more options menu.



4. In the **Add a language to this model** window, choose the desired language for the secondary model and the translation method.

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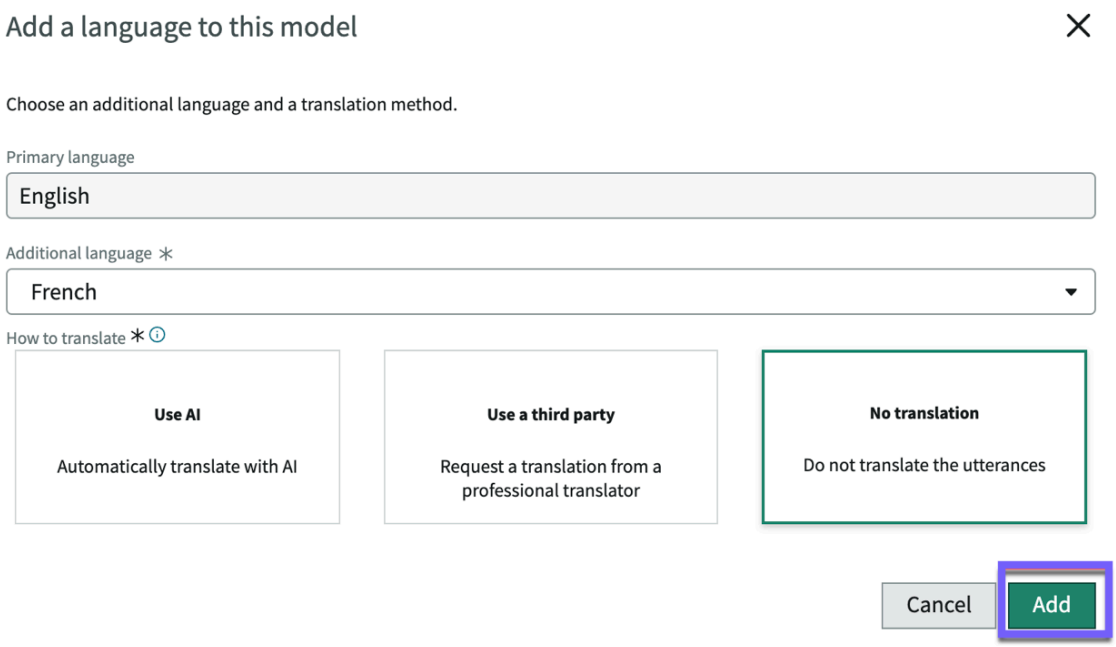

5. Select the **Add** button.
   The secondary model is created and the **Build and train your model** phase of the secondary model loads.

What to do next

If you chose to enable the model without translation, you must manually enter training utterances for each intent. If you choose to use software or a third-party translator, you must review the translations before you can continue working on the model.

Entering training utterances and reviewing secondary models can be delegated to users who have the nlu_editor role. For more information, see (Legacy) Assign an NLU editor to a model and (Legacy) Resolve intent issues.

(Legacy) Enable or disable a secondary model intent

Enable and disable intents in your Natural Language Understanding (NLU) models to make them active or inactive. Disable intents while editors or admins edit, review, or update its content and translations.

Before you begin

Role required: nlu_admin or nlu_editor

About this task

NLU admins and NLU editors can enable or disable intents in secondary models. If an intent is disabled, the model doesn't use it to make predictions. However, it also can't be accessed by any ServiceNow application using the model, such as Virtual Agent or Search.

An intent's state is represented in the **Enabled** column.

Enabling of intents works in the following ways:

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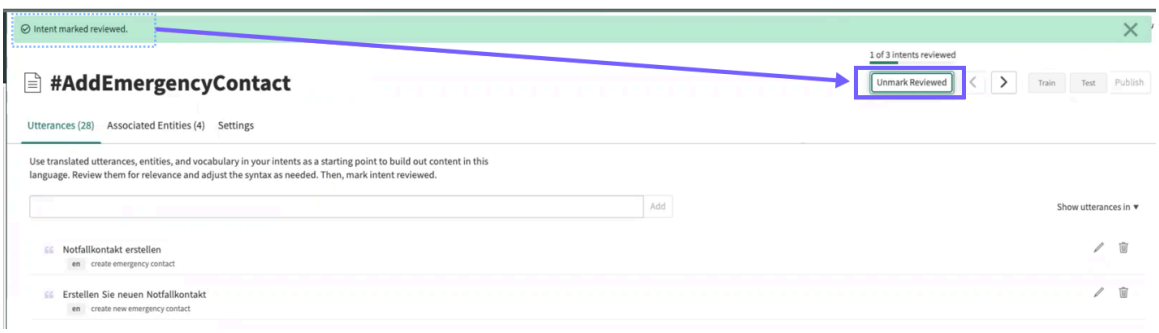
- Intents created in primary models are active by default.
- Intents from primary models are automatically created, but not enabled, in their secondary models (pending import).
- Disabling an intent in the primary model disables the corresponding intent in all secondary models.
- If an intent is disabled in the primary model, the intent can't be re-enabled in a secondary model.
- Enabling a disabled intent in the primary model does not enable the corresponding intents in the secondary models.
- Disabling intents in secondary models has no effect on the primary model or other secondary models.
- Secondary model intents that are marked with Needs review are disabled by default.
- If you disable a primary model intent that is mapped to a Virtual Agent (VA) topic, a confirmation message appears.
- If you disable a secondary model intent that is mapped to a VA topic, a confirmation message appears.
- NLU admins can enable and disable intents in any model.
- NLU editors can enable and disable intents only for models they are assigned to.

Disabling intents gives editors time to review the intent translations and update them if needed. When you're satisfied with the content, enable the intent to make it accessible to other NLU models and ServiceNow applications.

In this review example, you have a list of disabled intents in the Needs review state. The goal of this task is to review the translated content for a secondary model. When you complete your review, or if the content is fine as it is, you click Mark as reviewed. This moves the intent into the Reviewed state. You can also undo the Mark as reviewed state for an intent by clicking the **Unmark Reviewed** button, but only if you remain on the Intent screen. If you leave the screen prematurely, the **Unmark Reviewed** button disappears, and you won't be able to retrieve it.

Switch between the Reviewed and Unmark Reviewed states for an intent



The editorial review also includes the Vocabulary section on the Model screen, where vocabulary that has been translated from the primary model to the secondary model is marked with an orange dot and the Needs review state. You can edit or delete the vocabulary items, even if they are in review. After you review the vocabulary and update the translations if needed, you can mark all of them at once by clicking the Mark all reviewed button. This action makes the orange dot disappear from the Vocabulary section of the Model screen.

Note: The **Train** and **Try** buttons on the Model screen are disabled until the vocabulary is reviewed, and the intents in the Needs review state are either reviewed or disabled.

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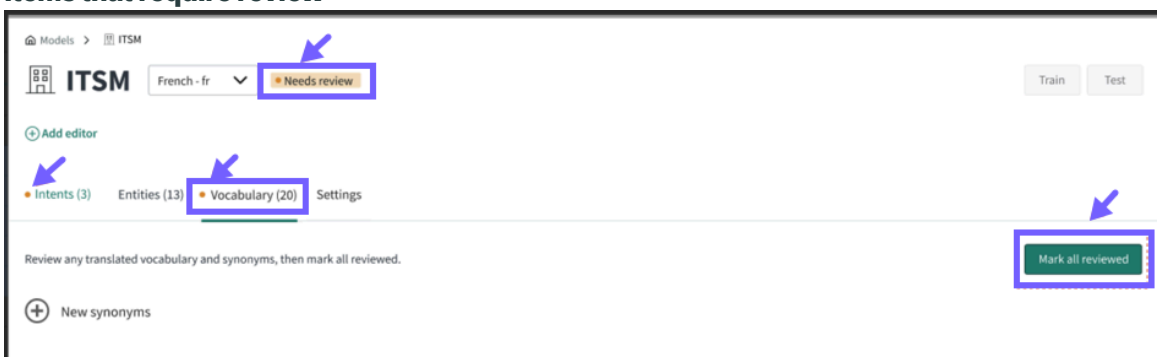
Items that require review



In this example scenario, you have applied the Use Software translation mode to translate a secondary model into the Japanese language. Because the translation hasn't been reviewed yet, the system marks the intents and the model with the Needs review state. When a model is in the Needs review state, it can't be trained, tested, or published. When it moves out of the Needs review state, you can then train and test the model.

Note: An NLU editor can't create or publish a model. Only the NLU admin has permission to do this.

In this example procedure, you're reviewing the intents in a model one at a time.

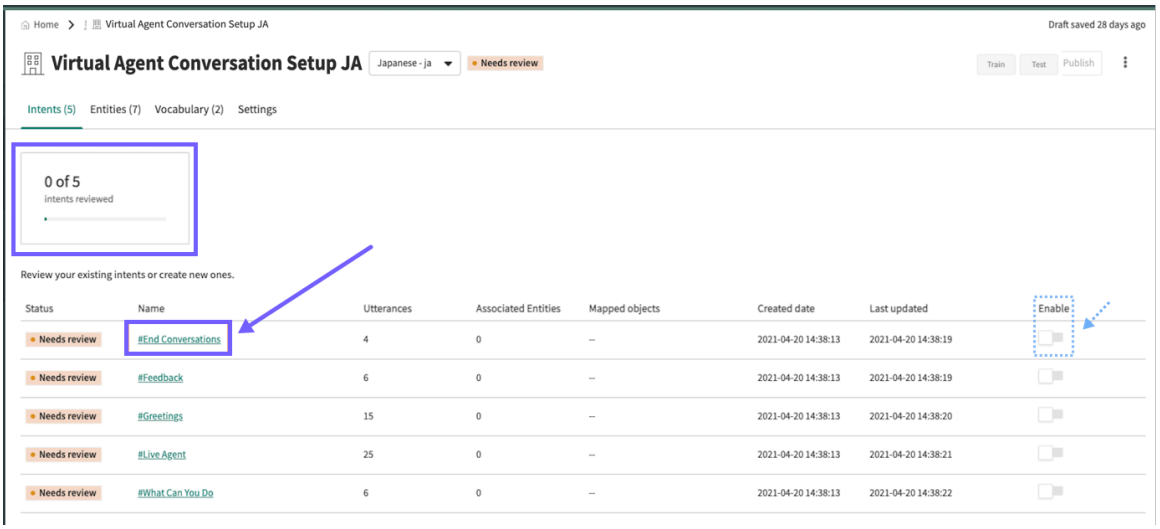
Procedure

1. Navigate to **All** > **NLU Workbench** > **Models**.
2. Locate one of your secondary models that has already been translated.

   In this example scenario, you locate the Virtual Agent Conversation Setup JA model, as shown in the image below.

   In the Intents section of the model, there's a list of five intents that are marked with the Needs review state. Above the list of intents, there's also a box that shows a running count of the intents that need review.

The needs review state



3. Click an intent Name so you can access the intent content.
   In this scenario, you click the **#End Conversations** intent name.

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4. Review the secondary language translations of the model utterances, entities, and vocabulary, then update the content as needed.
   When you finish your review of the intent, the Mark as reviewed button appears.
5. Click **Mark as reviewed**.
   Result: The system updates the **#End Conversations** intent from the Mark as reviewed state to the Reviewed state. In addition, the reviewed intents box changes its running count from 0 of 5 to 1 of 5.
6. If you're satisfied with your intent review, click the **Enable** button so the intent is available and can be accessed by any application, such as Virtual Agent (VA) or Search.

What to do next

Repeat Steps 1 through 6 for the four remaining intents in the list. As each intent review completes and is marked with the Reviewed state, the running count in the intents reviewed box increases toward 5 of 5.

(Legacy) Assign an NLU editor to a model

Assign an editor to review your Natural Language Understanding (NLU) model translations and edit model content. Delegate the maintenance, testing, and optimization of model content to an editor.

Before you begin

- Create a model, or use an existing one. For translation review, create both primary and secondary (translated) models. For more information on multilingual model groups, see (Legacy) Multilingual model management.
- Assign the nlu_editor role to users. See Assign a role to a user.
- Role required: nlu_admin. The nlu_editor can't assign another editor to models.

About this task

The nlu_admin can delegate model content work to an nlu_editor. Assign language specialists as editors to review the consistency between primary and secondary (translated) models, or further localize the translation by editing intents and utterances. Delegate the maintenance of an existing model's content, without affecting the model's published status.

The nlu_editor can do the following, when assigned to a model:

- Train and test the model.
- (Legacy) Export an NLU model as CSV.
- When a model or intent is in the **Needs review** state, the editor can mark it as **Reviewed**.
- Modify the model's confidence threshold.
- Edit the model name and description in **Settings**.
- Review, edit, and approve translated utterances.
- Add, edit, and delete training utterances.
- Annotate training utterances (add references to (Legacy) NLU vocabulary and (Legacy) NLU entities).
- Update entity properties (except the entity name in a secondary model).
- Add, edit, or delete the model's vocabulary.
- View the **Vocabulary sources** module (read only).
- Add, activate, and de-activate (Legacy) NLU intents in primary and secondary models.
- Resolve conflicting intents; also access the (Legacy) Cross-model Conflict Review module.

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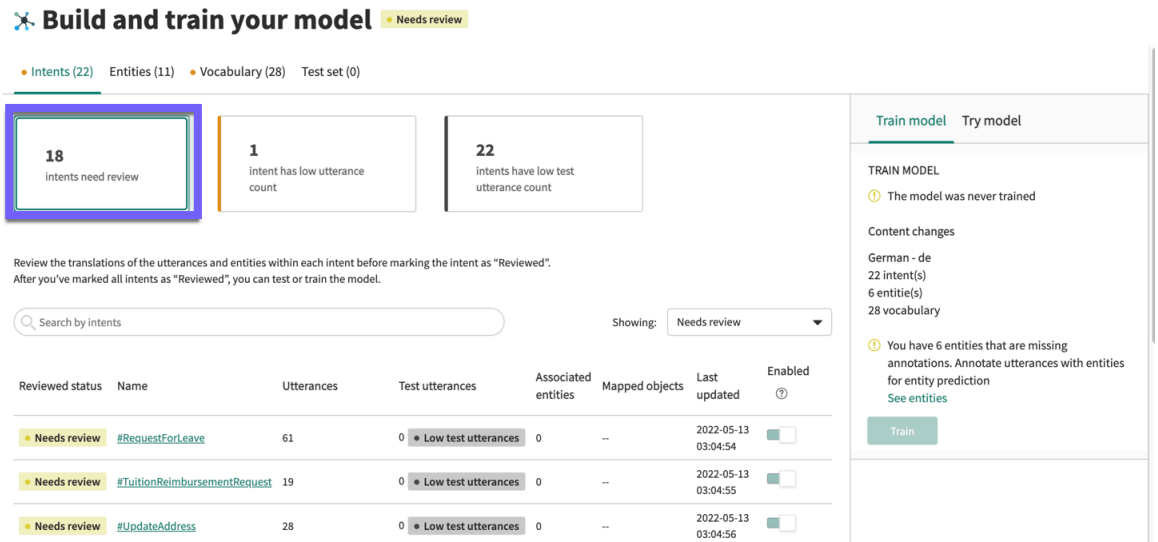
- View the (Legacy) Irrelevance detection in NLU module.
- Add, edit, or delete a test utterance in a test set; also access the (Legacy) Multi-model Batch Testing module.

Note: The editor must be assigned to a model and in the model's application scope to take these actions, unless otherwise indicated.

The nlu_editor can't do the following:

- Create, add, publish, or delete a model.
- Duplicate a model.
- Translate a model (initiate a translated secondary model).
- Import primary model content to a secondary (translated) model.
- Sync or edit vocabulary sources.
- View model performance.
- Provide feedback in (Legacy) NLU Expert Feedback Loop.
- Manage other editors, such as assigning an editor to a model or removing an editor from a model.



First, an admin assigns the nlu_editor role to a user. Next, the NLU admin assigns the editor to a model.

When you assign an editor to a model, you must do so at the individual model level. You can't assign an editor at the model group level.

The following models can't be assigned to an editor:

- Prebuilt models
- Models that have a translation in progress

In this example procedure, you add an NLU editor to a secondary model that needs reviewing.

Procedure

1. Navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default. Select the appropriate tab for your model.

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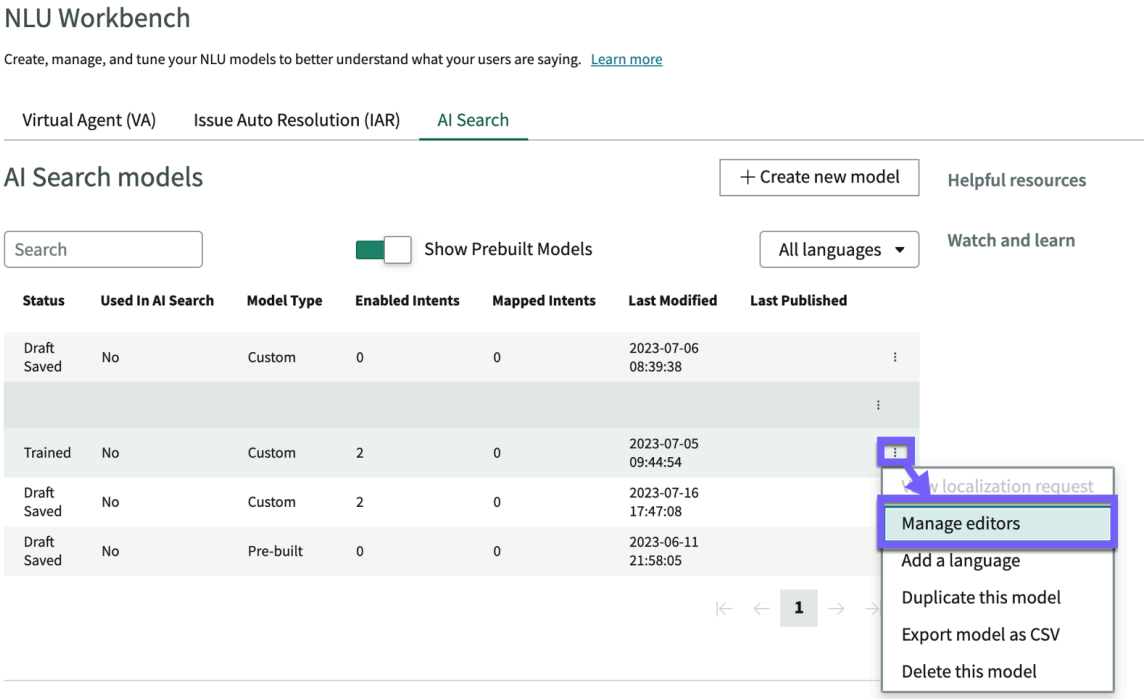
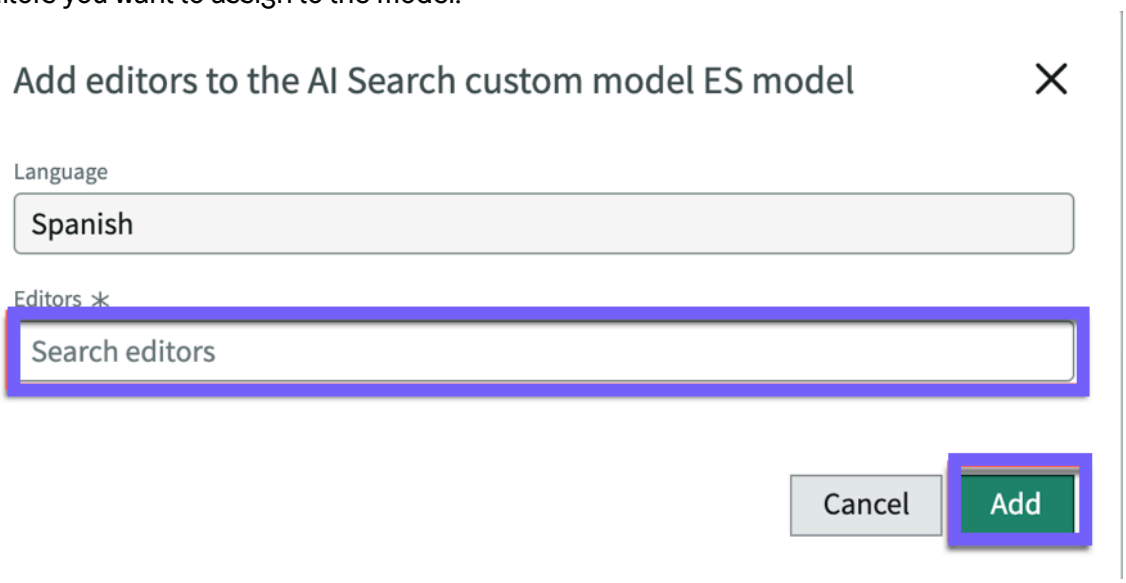
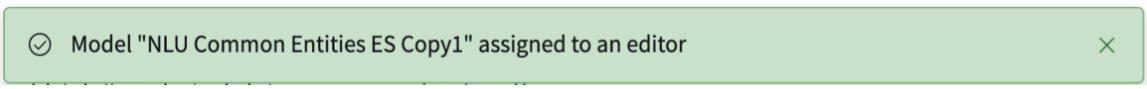
2. Locate the name of your NLU model and scroll to the right end of its row.
   If your model is in a multilingual group, expand the group to find the individual model. Editors cannot be assigned to groups.
3. Select the model's **More options** menu, then select **Manage editors** in the list.



4. In the **Add editors** window, use the drop-down list and search bar to add the names of the editors you want to assign to the model.



5. Select **Add**.
   The editor is assigned to the model. A banner acknowledgement displays at the top of the screen. To add more editors, or remove editors, repeat this procedure.



What to do next

Assign more editors to the model, if necessary. You can assign up to four editors to a model at one time. To add more editors, or remove editors, repeat the above procedure.

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As an NLU admin, ensure that your editors have what they need to properly review and edit models.

(Legacy) Import primary model content to a secondary model

When content in your primary NLU model is updated, you can import the updates directly to secondary models.

Before you begin

- Activate the Localization Framework (com.glide.localization_framework.installer) plugin. See Localization Framework.
- For Virtual Agent or AI Search models, create or use an existing primary model that has at least one secondary model.
- Role required: nlu_admin or admin.

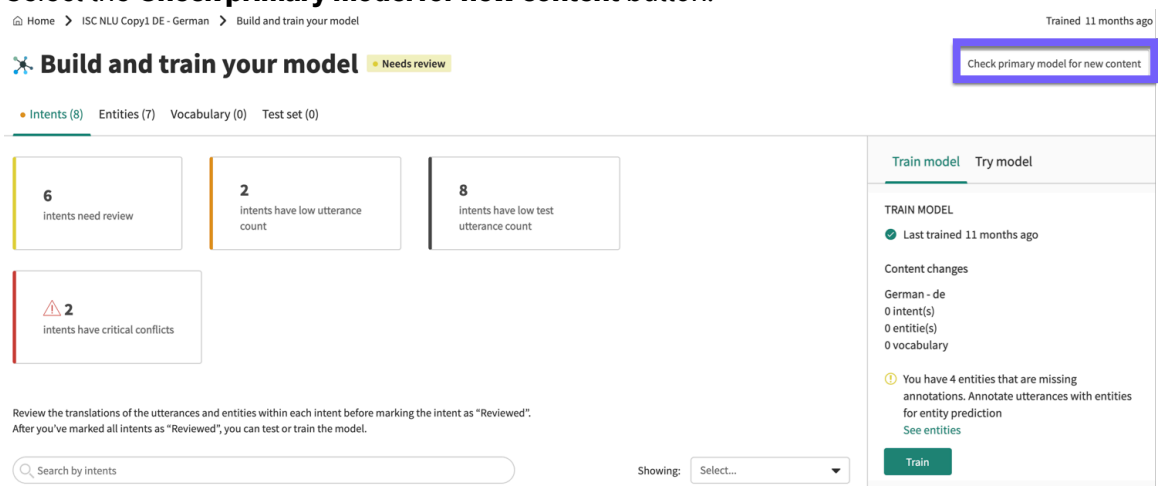
About this task

You can import content from a primary model to a secondary model after the initial translation. If you modify the primary model, those changes can be imported to your secondary models without the need to translate the entire primary model once again.

You can import primary model content to only one secondary model at a time.

Procedure

1. Navigate to **All** > **NLU Workbench** > **Models**.
   The Virtual Agent tab opens by default. Select the appropriate tab for your model.
2. Access a secondary model that has been translated under the primary model, and on **Build and train your model**, select **View phase**.
   By default you are taken to the **Intents** tab.
3. Select the **Check primary model for new content** button.



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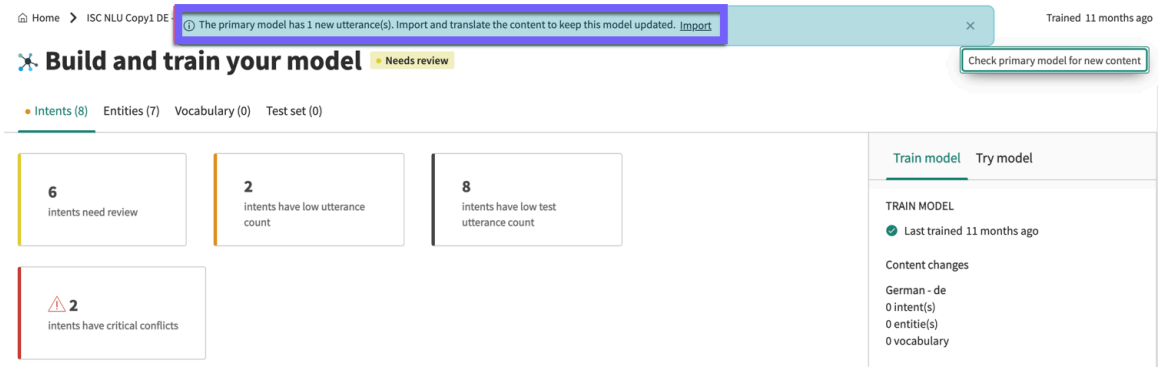
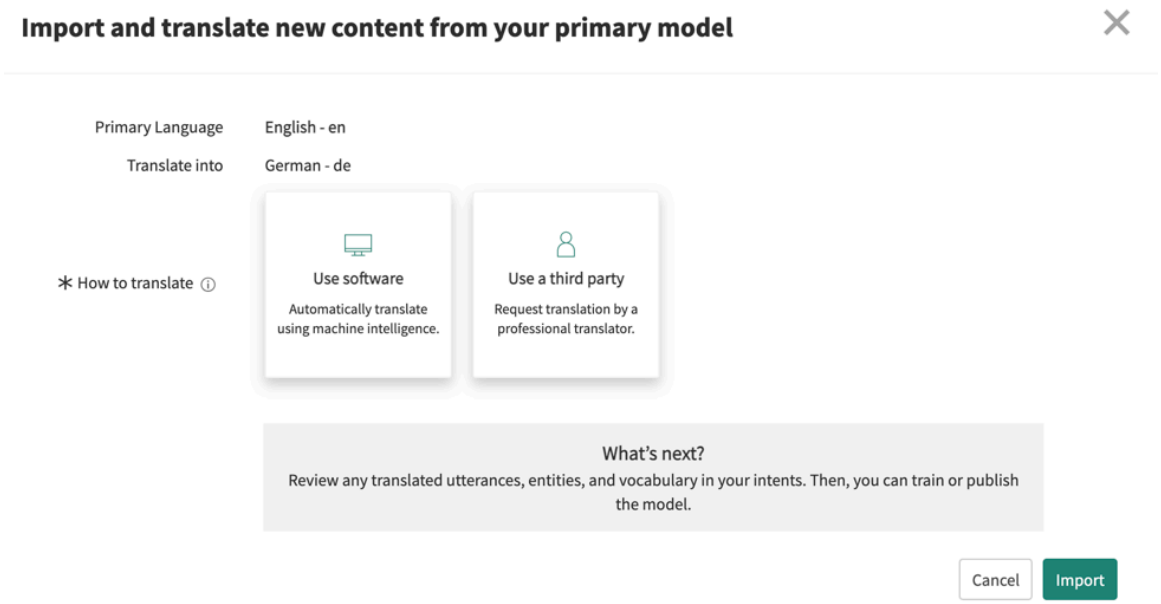
The banner Import and translate the content to keep this model updated appears at the top of the screen, along with a summary of the updates in the primary model.



Note: By default, newly imported intents are disabled in secondary models. Activate any imported intents manually.

4. In the banner, select **Import**.
5. In the **Import and translate new content from your primary model** window, choose a translation method and select **Import**.



The new content begins translating. When finished, the translated content must be reviewed.

What to do next

Make sure that each of your secondary models receive the new content from the primary model. Review all the new, translated content before publishing the secondary models.

(Legacy) Virtual Agent and NLU Workbench integration

Virtual Agent administrators can access and update their NLU models from within the Virtual Agent Designer user interface.

Starting with the Brazil release, Natural Language Understanding is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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Note: If you have Now Assist in Virtual Agent, you can continue to use your existing NLU topics and migrate them into new LLM topics using the topic migration feature within Virtual Agent Designer. For more information on topic migration, see Migrate NLU topics to LLM topics.

Integration setup tasks, roles, and details

As Virtual Agent administrators create and configure their conversation topics, they must first create their NLU model and its associated intents in the NLU Workbench. This action requires they use the NLU Workbench and the admin or nlu_admin role.

In addition, they must also complete the following tasks in Virtual Agent **General Settings**.

- Enable NLU.
- Select the NLU service provider.
- If using language-specific NLU models, enable the languages for those models.

Virtual Agent administrators must also apply their NLU model to a conversation topic by completing the following tasks in Virtual Agent Designer:

- In **Topic Properties**, select the NLU model, the NLU intent, and the topic switching behavior.
- For input controls used in the topic flow, set the NLU properties for entity extraction.

Optionally, admins can activate Dialog Acts to enable Virtual Agent to respond flexibly when users make a modification in mid-conversation. Currently available response types are Modify, Affirm, and Negate, based on the last 5 exchanges in the conversation. Dialog Acts can be configured for English only, in Topic Properties. For more information see (Legacy) Dialog Acts for Virtual Agent.

After the NLU model is complete and associated with a Virtual Agent conversation topic, administrators with the virtual_agent_admin or admin role can do the following from within the Virtual Agent Designer user interface.

- Update NLU intent utterances.
- Train, test, and publish the NLU model.

For more information, see Natural Language Understanding (NLU) topic discovery in Virtual Agent.

Publishing topics from Virtual Agent

When your model is published in the NLU Workbench, it's ready to use in Virtual Agent Designer. When editing a topic, click the **Properties** tab to select a model and intent to map to that topic.

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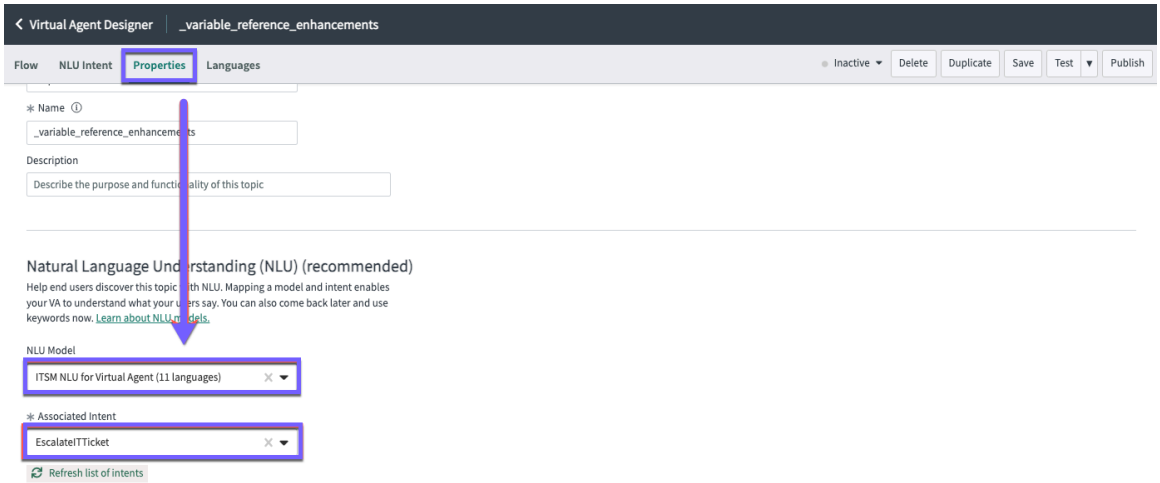

When you click **Publish**, the model and intent are mapped to that topic and published seamlessly.

Publishing a topic with a mapped intent fails for the following reasons:

- Model isn't trained, or training is in progress.
- The last trained model is already published with a VA topic.
- The intent is not enabled in the model.

(Legacy) NLU Workbench - Advanced Features

NLU Workbench - Advanced Features expands the functionality of NLU Workbench to help you manage and improve your models.

Summary usage

Starting with the Brazil release, Natural Language Understanding is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

The NLU Workbench - Advanced Features application includes the following features:

- (Legacy) Multi-model Batch Testing: Test large groups of utterances against your NLU models to see how the model predicts intents.
- (Legacy) Cross-model Conflict Review: Identify conflicting intents within or across models to improve model performance.
- (Legacy) NLU Model Performance: Use NLU Model Performance to see how well your models predicted intents in Virtual Agent based on end-user confirmation.
- (Legacy) NLU Expert Feedback Loop for VA: Provide feedback on Virtual Agent chat log utterances to help the system continuously learn and to better predict user input.
- (Legacy) Irrelevance detection in NLU: train your Virtual Agent models to ignore utterances that are not relevant.
- (Legacy) Issue Auto Resolution Tuning in NLU (Expert Feedback Loop for IAR): provide feedback to your ITSM Issue Auto Resolution model to improve its predictions.

After the application is installed and activated, Model Performance, Expert Feedback Loop for VA, and Expert Feedback Loop for IAR appear under **All** > **NLU Workbench**. Multi-model Batch

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Testing and Cross-model Conflict Review appear under **All** > **NLU Workbench** > **NLU Advanced Features**.

Installation

NLU Workbench - Advanced Features is available from the ServiceNow Store. For instructions on how to purchase and download, see (Legacy) Install NLU Workbench - Advanced Features.

Note: The available (Legacy) Intent Discovery ServiceNow Store application is installed separately from NLU Workbench - Advanced Features.

Related features

(Legacy) Install NLU Workbench - Advanced Features

You can install the NLU Workbench - Advanced Features application (com.snc.nlu.workbench.advanced) if you have the admin role.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the NLU Workbench - Advanced Features application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- NLU Workbench - Advanced Features requires the following plugins. Ensure that these plugins are activated before you install NLU Workbench - Advanced Features.

  Required ServiceNow plugins

  Predictive Intelligence (com.glide.platform_ml)

  Enables various Predictive Intelligence and Machine Learning capabilities for training models. See Predictive Intelligence.

  NLU Workbench - Core (com.glide.nlu)

  Adds NLU Model capabilities. See (Legacy) Activate the NLU Workbench

  NLU Workbench (com.snc.nlu_studio)

  Create and train NLU models. See (Legacy) Activate the NLU Workbench.

Role required: admin

About this task

Starting with the Brazil release, Natural Language Understanding is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Tables are installed with NLU Workbench - Advanced Features.

For more information, see (Legacy) Components installed with NLU Workbench - Advanced Features.

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the NLU Workbench - Advanced Features application (com.snc.nlu.workbench.advanced) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If any plugins or applications need to be installed, you must install them before you can install NLU Workbench - Advanced Features.
4. Select **Install**.

What to do next

The following available ServiceNow Store application is installed separately from NLU Workbench - Advanced Features:

Intent Discovery

Discover user intents from requests, incidents, or cases to help maximize deflection with Virtual Agent and NLU. For more information, see (Legacy) Install Intent Discovery.

(Legacy) Components installed with NLU Workbench - Advanced Features

Several types of components are installed with activation of the com.snc.nlu.workbench.advanced plugin, including tables.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Tables installed

Table	Description
NLU Performance Ignored Clusters [nlu_performance_ignored_clusters]	Contains information on the ignored cluster. Filled when user clicks **Ignore**.
NLU Batch Test Result [nlu_batch_test_result]	Contains the parsed results of a batch test including each utterance and predicted intent.
NLU Conflict Execution [nlu_conflict_execution]	Stores the information related to each execution of a conflict analysis run for a given definition.
NLU Batch Test Run Definition	Contains base information related to the batch test execution.

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Table	Description
[nlu_batch_test_run_definition]	
NLU Batch Test Run Execution [nlu_batch_test_run_execution]	Contains information related to each execution of the batch test.
NLU Conflict Result [nlu_conflict_result]	Stores the complete results of a conflict analysis execution.
NLU Batch Test Utterance [nlu_batch_test_utterance]	Contains the utterances used for a test set. Populated by the import set.
NLU Batch Test Set [nlu_batch_test_set]	Includes the information for the batch test. Referenced by the utterance record and run definition.
NLU Performance Utterance Trace [nlu_performance_utterance_trace]	Contains the information on the utterances added to an intent.
NLU Conflict Definition [nlu_conflict_definition]	Contains the details of the NLU model or pair of models used for the conflict.
NLU Model Analysis Definition [nlu_analysis_definition]	Supports IAR model tuning in NLU Workbench.
NLU Model Analysis Execution [nlu_analysis_execution]	Stores records for each instance of IAR model tuning in NLU Workbench.
ML Label User Feedback [ml_label_user_feedback]	Stores utterances that are marked Needs review.

Role installed

NLU Workbench - Advanced Features

Role	Description
NLU Feedback Admin [nlu_feedback_admin]	Data labelling (NLU feedback) Admin role - to manage data labelling across models also ability to optimize models

(Legacy) Multi-model Batch Testing

Test multiple Natural Language Understanding (NLU) models against a large set of utterances to evaluate the performance of the models. Add test sets, test multiple models, and see test results.

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Summary usage

Use Multi-model Batch Testing to create and upload test sets comprised of utterances and their expected intents. You can then run tests against your NLU models.

Multi-model Batch Testing works with models for all supported NLU languages. See (Legacy) NLU language support.

Installation

Multi-model Batch Testing is part of the NLU Workbench - Advanced Features app available on the ServiceNow® Store.

To use Multi-model Batch Testing, ensure that the NLU Workbench - Advanced Features (com.snc.nlu.workbench.advanced) plugin is active on your instance. For more information, see (Legacy) Install NLU Workbench - Advanced Features and Activate the NLU Workbench.

Test sets

Test sets are lists of utterances and matched intents. Create a test set by using a table in a CSV or XLSX (Excel workbook) file. The table should contain two columns: one for utterances, and one for the expected intent. Your test set can include up to 10,000 rows.

To get the most out of testing your NLU models, your test sets should include utterances that the model is likely to encounter from your users. Test utterances should be in the same language as the model to be tested. The test set should also include utterances with no expected intents. Including utterances with no expected intent helps assess your model's ability to detect utterances which are irrelevant and shouldn't have any intent predicted.

By including these types of utterances, the test better assesses the model's ability to perceive intents and respond to your users. If your test set does not cover at least 60% of the intents of the models, you can still run the test but the recommended threshold may not be optimal.

Note: Certain test utterances are skipped during the test if their expected intent does not match any intents in the models.

To create a test set, see (Legacy) Create a test set.

After you have a test set, you can test trained NLU models. To begin testing, see (Legacy) Run a multi-model batch test.

After running a test, your results appear on the **Test results** page.

Test results

The **Test results** page lists your completed and in-progress tests. At a glance, the results page shows the models tested against, the number of utterances, and prediction percentages.

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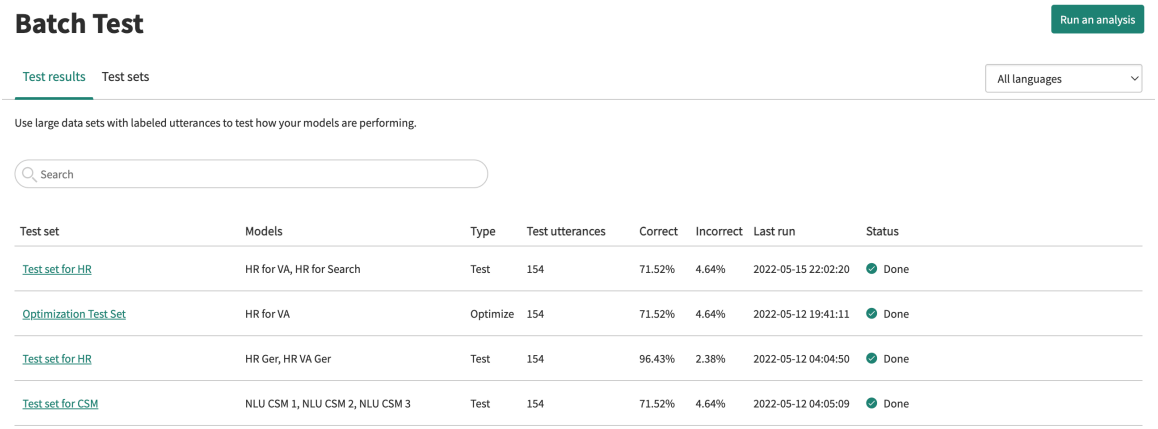

To see the details of a test result, click the name of the test set.

The **Overview** page shows summary information about the results and includes a graphic with a breakdown of predictions.

The **Intents that need attention (Current model)** shows the top 5 missed and incorrect intents. Click the intent name to drill down into the test utterances that were predicted incorrectly. Use this information to improve the model.

The **Detailed results** tab lists information about each utterance that was tested. From here, you can see the prediction outcome and confidence per model for each utterance. Filter the results by using the search bar or interacting with the filter tools and column headers.

You can also export the test results to a CSV file by clicking **Export**. The file includes the same columns as the detailed results page.

For more information on understanding your test results, see (Legacy) Test and publish your model.

(Legacy) Create a test set

To create or add to an NLU test set, you can upload a file of test utterances matched with correct intents. Use the test set to assess the performance of your model.

Before you begin

- Ensure that the NLU Workbench - Core plugin, NLU Workbench plugin, NLU Workbench - Advanced Features plugin and Predictive Intelligence plugin are all installed and activated
- You can use test sets with NLU models for Virtual Agent and AI Search.
- Role required: nlu_editor, nlu_admin, or admin. The editor must be assigned to the model.

About this task

Your CSV or XLSX (Excel Workbook) file should contain a table that pairs your test utterances with the intents that you expect for them. Your file can contain up to 10,000 utterances. Ensure that the file has columns titled "Utterance" and "Expected intent".

Note: For test sets in languages other than English, you must add the glide.import.csv.charset system property with the value UTF-8. See Import sets properties.

For the most accurate test results, include utterances that the model is likely to encounter from your users. Ensure that you have test utterances covering all the intents in your model.

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Aim to include about 10% of test utterances with no expected intents. Including utterances with no expected intent helps assess your model's ability to detect irrelevant utterances that should not have any intent predicted.

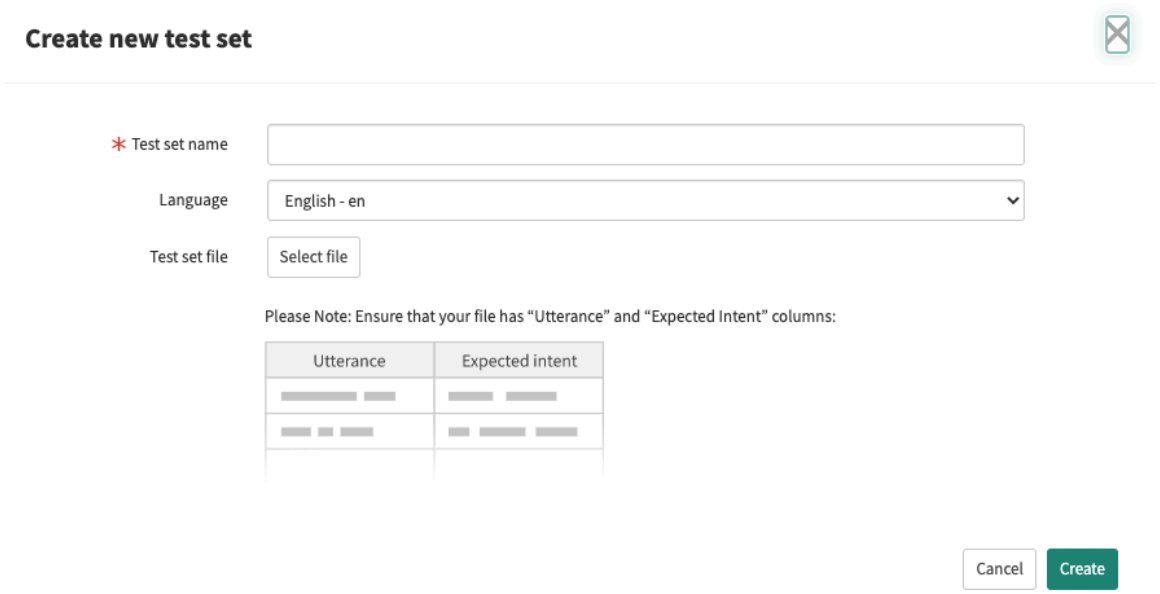
Note: To indicate that a test utterance in your file has no expected intent, the value for "Expected intent" should be empty.

Example test set table

Utterance	Expected intent
Let me have a burger	Order
I want to pay	Payment
Get me something sweet	Order
Is the restaurant open	
Something wrong with my payment	Order, Payment
Total cost	Payment

Procedure

1. Navigate to **All** > **NLU Workbench** > **NLU Advanced Features** > **Multi-model Batch Testing**.
2. Click **Test sets**
3. Click **Create test set**.



4. Choose a name for the test set.
5. Choose a language.
6. Click **Select file** and choose a CSV or XLSX (Excel Workbook) file.
7. Click **Create**.
   Your test set appears in the list.

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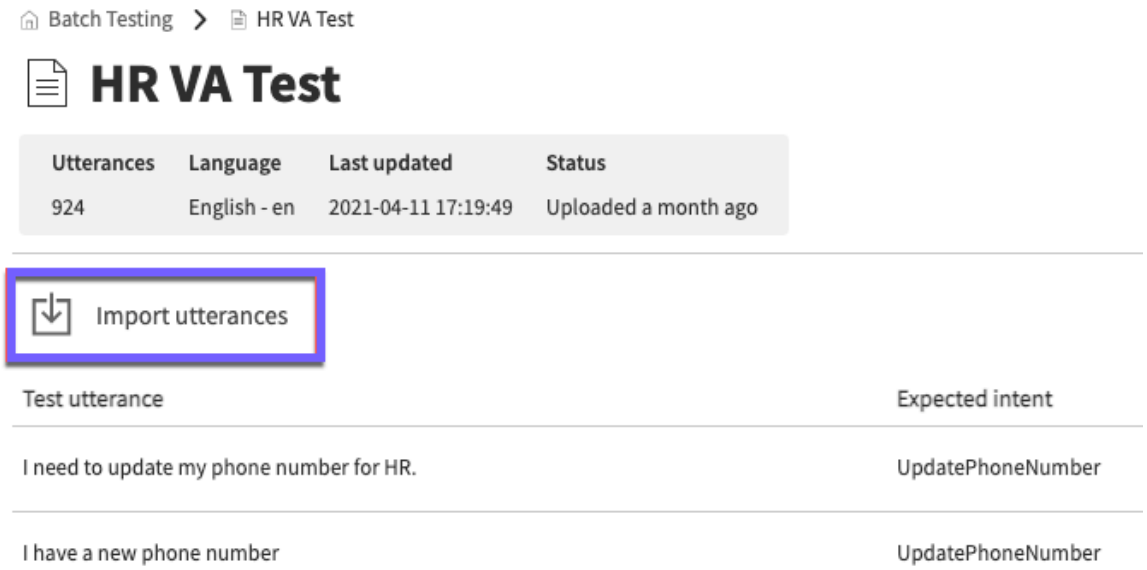
What to do next

Use the test set to run a test on your models. To learn how, see (Legacy) Test your model or (Legacy) Run a multi-model batch test.

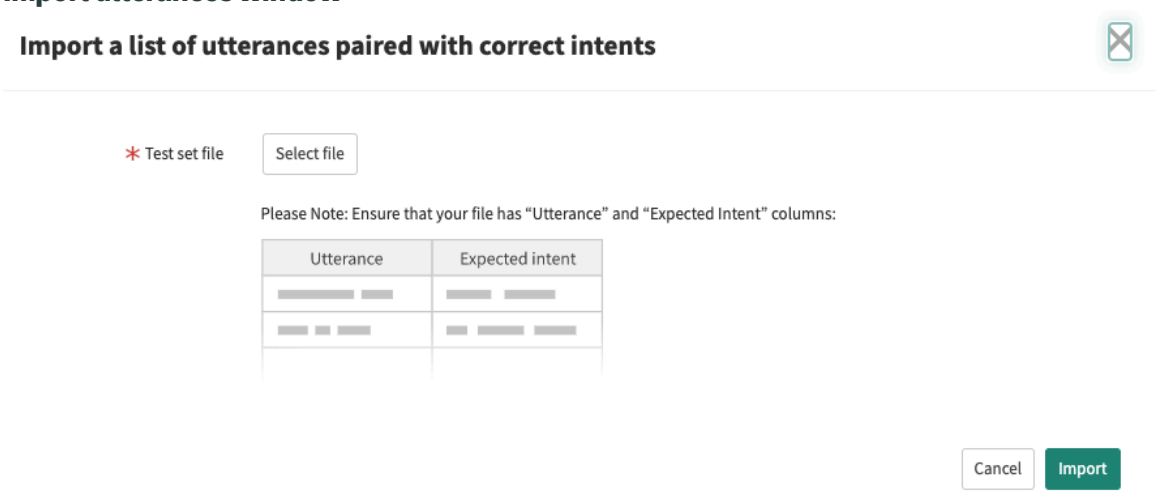
After you have created a test set, you can add more utterances to it. When viewing a test set, click **Import utterances**.

Test set page with import utterances button



Select a CSV or XLSX (Excel Workbook) file with your additional utterances to import.

Import utterances window



Click **Import**. The system adds your utterances to the test set. After importing, rerun any tests that use the test set.

(Legacy) Run a multi-model batch test

Test multiple Natural Language Understanding (NLU) models against a test set. Evaluate the quality of your models and refine them to improve intent prediction.

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Before you begin

- Make sure that the NLU Workbench - Core plugin, NLU Workbench plugin, NLU Workbench - Advanced Features plugin and Predictive Intelligence plugin are all installed and activated.
- Have one or more trained models for Virtual Agent or AI Search.
- Have a test set containing test utterances with expected intents. See (Legacy) Create a test set or (Legacy) Test set creation and management.
- Role required: nlu_admin or admin. When assigned to a model, the nlu_editor role can run tests and modify test utterances for that model.

About this task

In **Multi-model Batch Testing**, you can use a test set that is not the model's default test set.

Also, you can test up to ten models at one time using **Multi-model Batch Testing**. However, tests with fewer models run more quickly.

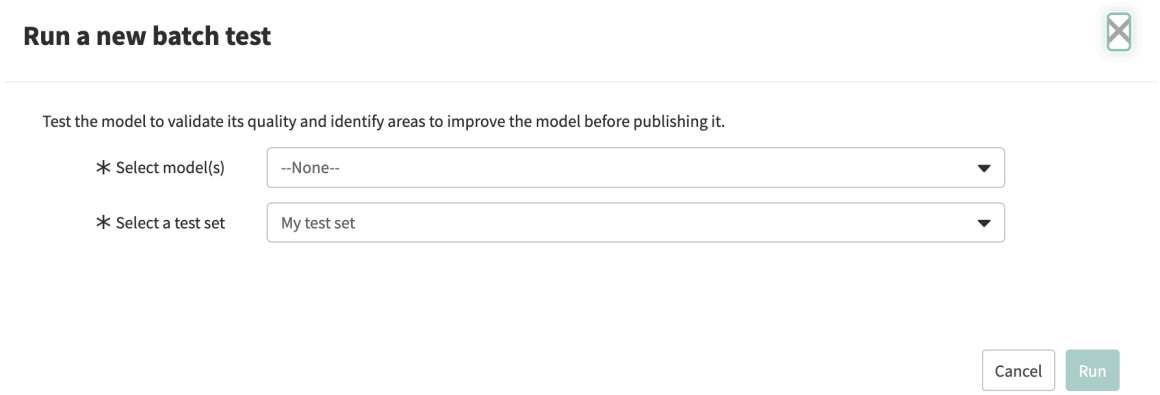
When testing multiple models, your test set must cover at least 25% of the total intents of all the models. Use test sets that contain utterances the models are likely to encounter in Virtual Agent or AI Search.

Note: If an expected intent in your test set doesn't match any intent in your models, that expected intent and its test utterances are skipped. They aren't counted or displayed in test results.

To test a single model against its default test set, use the **Test and publish your model** phase on the model's overview page. For more information, see (Legacy) Test and publish your model.

Procedure

1. Navigate to **All** > **NLU Workbench** > **NLU Advanced Features** > **Multi-model Batch Testing**.
2. Click **Run a test**.
3. In the **Run new batch test** window, select your models from the list.



4. Select a test set from the list.
5. Click **Run**.

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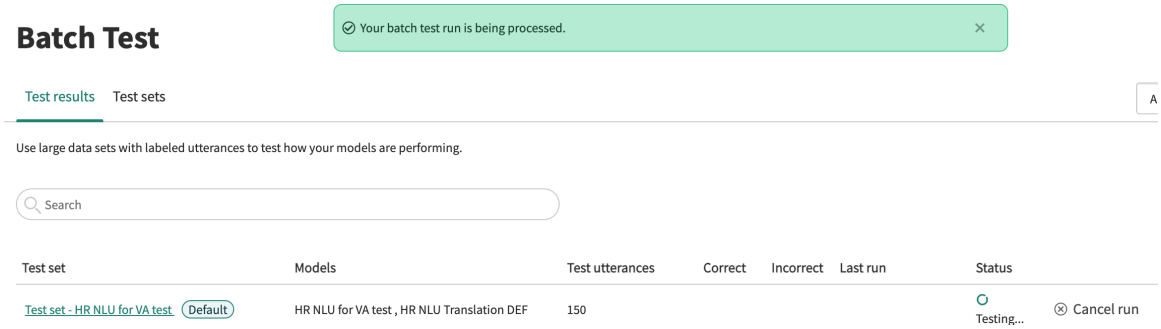

Your new test shows in the **Test results** list with a **Testing...** Status.

What to do next

When the batch test is finished, its Status changes to **Done**. You can click the name of the test set to view the test results.

Use the results to adjust and improve your models. Then, run the test again to assess the performance.

Batch testing may affect confidence threshold recommendations. For more information, see (Legacy) NLU model settings.

(Legacy) Cross-model Conflict Review

Identify conflicting intents within or across models so you can take corrective actions, resolve such conflicts, and improve your NLU model performance.

Summary usage

As the number of intents within a model increases, two intents may overlap in scope. This may occur when training utterances in one intent are almost identical to utterances in another intent. There may also be conflicting intents across models and even applications.

Utterances may also be marked as `Not relevant`, meaning that no intent should be predicted. When these irrelevant utterances are too similar to utterances assigned to an intent, they are displayed in Conflict Review. For more information, see (Legacy) Irrelevance detection in NLU.

To address and fix these issues, Cross-model Conflict Review runs an analysis on your models. Use the analysis to identify and resolve these issues prior to model publication and deployment.

Installation

Cross-model Conflict Review is part of the NLU Workbench - Advanced Features app available on the ServiceNow® Store.

To use Cross-model Conflict Review, ensure that the NLU Workbench - Advanced Features (com.snc.nlu.workbench.advanced) plugin is active on your instance. For more information, see (Legacy) Install NLU Workbench - Advanced Features and Activate the NLU Workbench.

Roles

To access Cross-model Conflict Review, use the nlu_admin or admin role. When assigned to a model, the nlu_editor can resolve conflicts in that model.

Running the analysis

The Conflict Review screen shows a list view of all conflict reviews created in your instance. When a review is completed, it's added to a running list of reviews. In this example scenario,

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you're creating the first review in your instance, so when it's completed, it's shown in the count as 1 of 1 reviews. As more conflicts arise over time, you will see multiple reviews in the list.

Conflict reviews are analyzed on either one or two NLU models. When you run an analysis on a single model, the system shows intents and utterances that are only in that model. When you run an analysis on 2 models, the system shows intents and utterances that are in both models.

Conflict reviews always run on the last trained version of the model(s) they analyze.

Conflict reviews have two types: Critical and Moderate. The standard approach is to begin with the critical ones.

When a conflict is detected, you can use one of following actions to resolve the conflict:

- Ignore the conflict
- Delete an identical or nearly identical utterance from one of the intents
- Edit the utterances to make them more distinct from each other

In this example scenario, you're resolving a conflict where two different intents contain the exact same utterance.

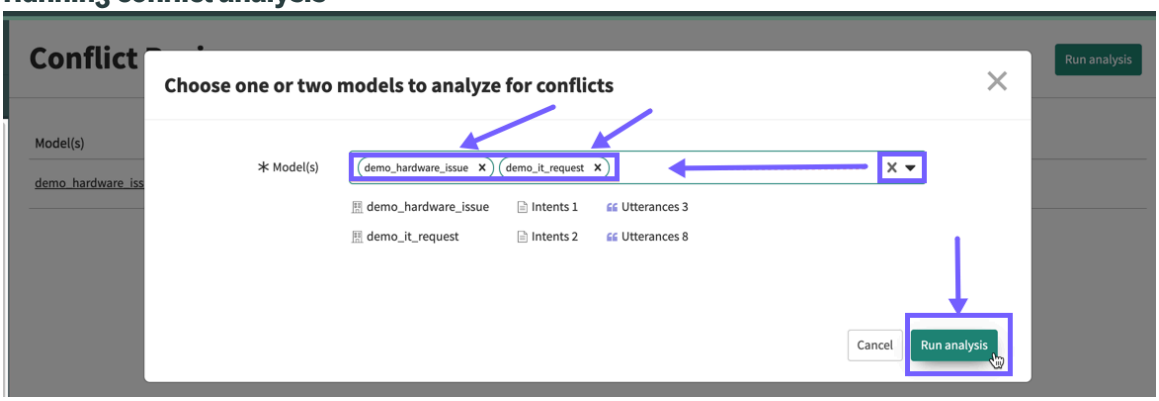
1. Navigate to **All** > **NLU Workbench** > **NLU Advanced Features** > **Cross-model Conflict Review**.

2. Select **Run analysis**.

3. In the **Model(s)** field on the Choose one or two models to analyze for conflicts screen, select two NLU models for the analysis. In this example scenario, you choose the demo_hardware_issue and demo_it_request models.

4. Select **Run Analysis**.

Running conflict analysis



The Conflict Review screen refreshes to show the analysis, including the two models you selected for analysis, the counts of Critical and Moderate conflicts under review, the number of reviews that have been completed, and the run date for the analysis. If you point to the far right column on the screen you will see options to rerun the analysis, or delete it and start all over.

5. In the **Model(s)** column, select your two paired models so you can drill down into the review.

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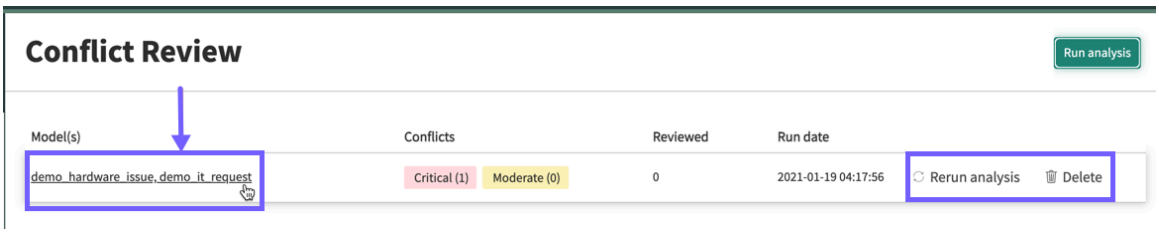
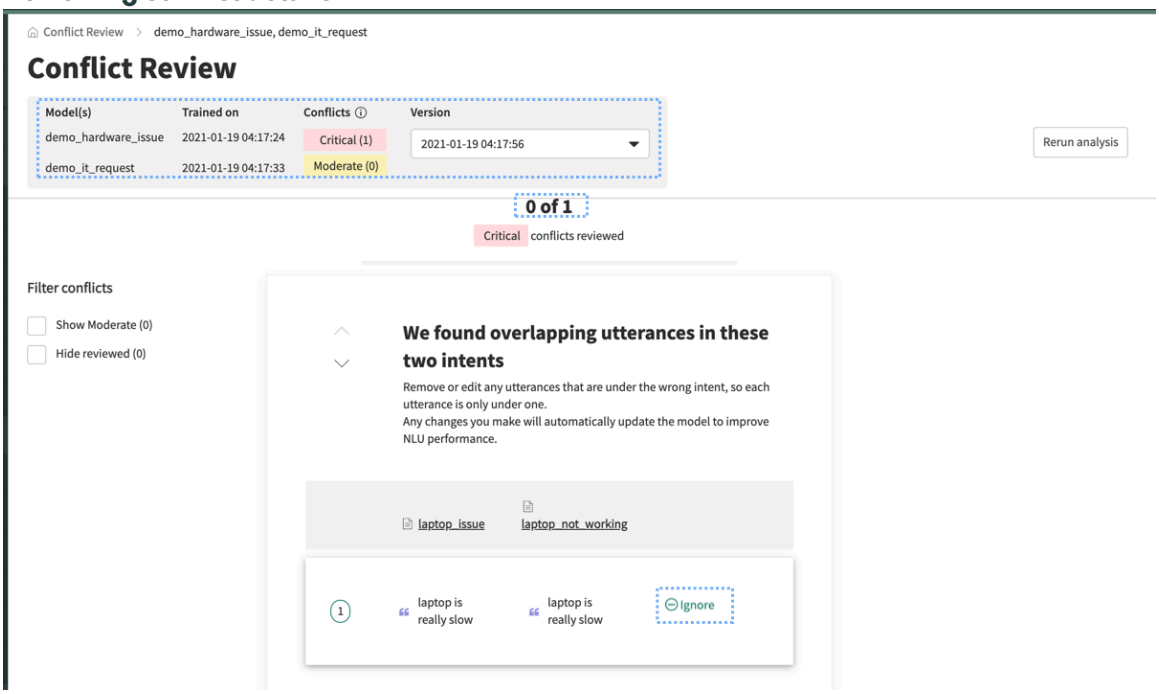
Conflict review



The screen refreshes to show the details of the conflict review. Note the summary of the two models you chose for the analysis, their latest training dates, the types of conflicts they hold, and the version time stamp of the analysis. Note also the 0 of 1 count, which indicates that this is the first conflict review created in this instance. As the system detects more conflicts over time, and those conflicts are reviewed, the count increases.

If you were to determine the utterances in the image below are fine as they are, then you should click **Ignore**. Clicking Ignore tells the system you've completed your review, so it marks it as reviewed and moves on to the next conflict review. However, in this scenario, you don't ignore the conflict, because intents that share the same utterance are a conflict worthy of review.

Reviewing conflict details



To determine how you will resolve this conflict, consider the 2 intent names and the identical utterances they share. Consider which intent is more likely to use the laptop is really slow utterance. If you compare the 2 intent names closely, you might realize that a laptop that's really slow isn't the same as a laptop that doesn't work. However, a laptop that's really slow is indeed a laptop issue. So in this example scenario, you decide to dig deeper into the intents to scan the context of their other utterances.

Note also that when an intent uses unique utterances, it helps the system to more accurately predict which utterances belong to it. Hence, you will need to edit or delete the utterance from 1 of the 2 intents. In this example scenario, you decide to dig into the #laptop_not_working intent.

6. Select **laptop_not_working**.

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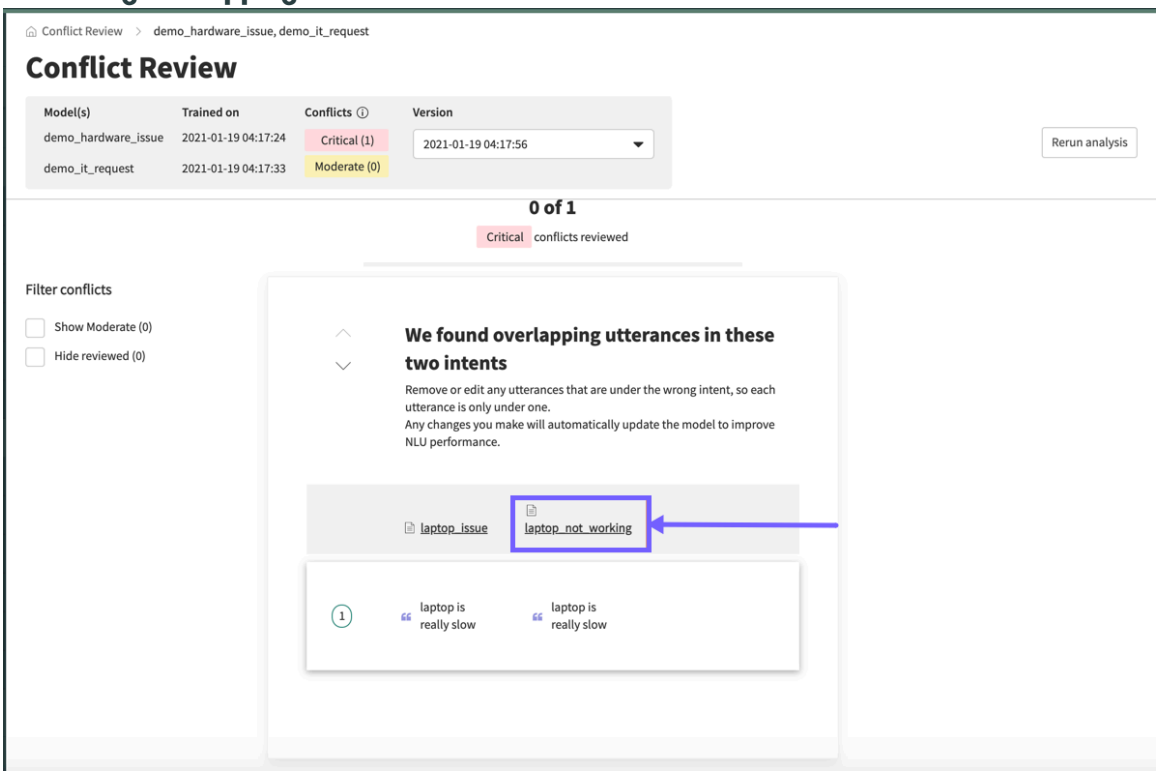
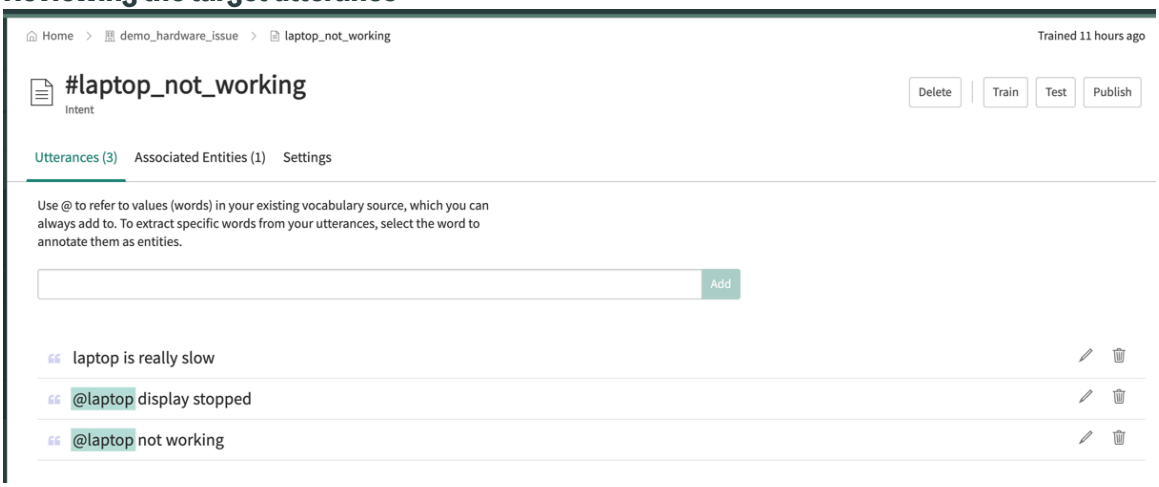
Reviewing overlapping utterances



The #laptop_not_working Intent screen appears, showing its current 3 utterances. You make the decision to delete the laptop is really slow utterance from the #laptop_not_working intent.

Reviewing the target utterance



7. Click the **Delete this utterance** trash can icon.

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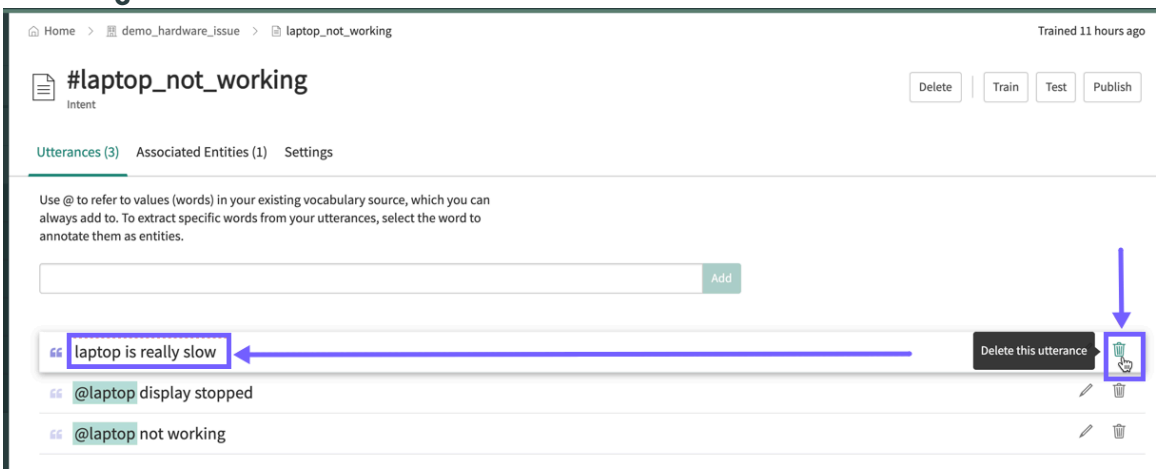
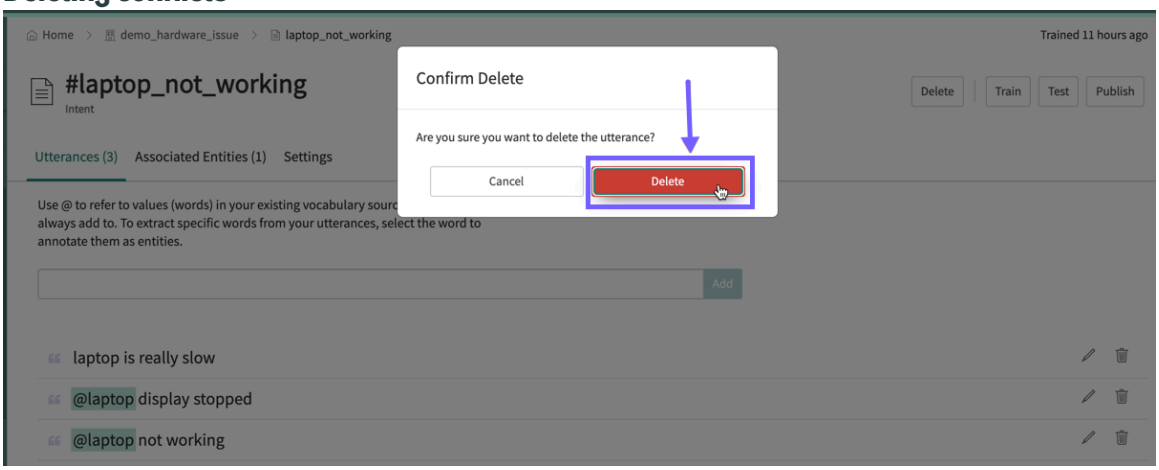
Resolving conflicts



The Confirm Delete screen appears.

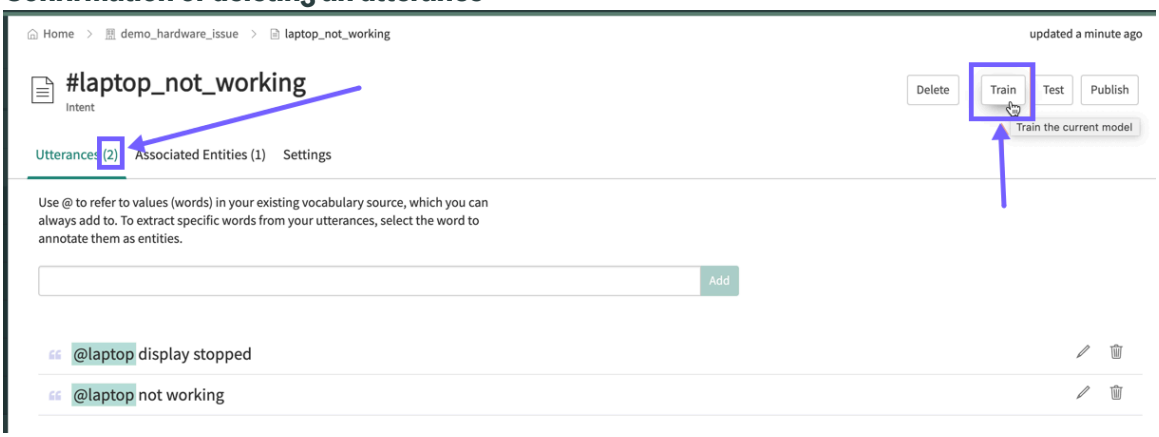
8. Select **Delete**.

Deleting conflicts



The Confirm Delete screen disappears, and the Utterances count drops from 3 to 2 because you've deleted the laptop is really slow utterance from the intent.

Confirmation of deleting an utterance



9. Select **Train**.

A banner appears on the Intent screen, confirming the model is successfully trained.

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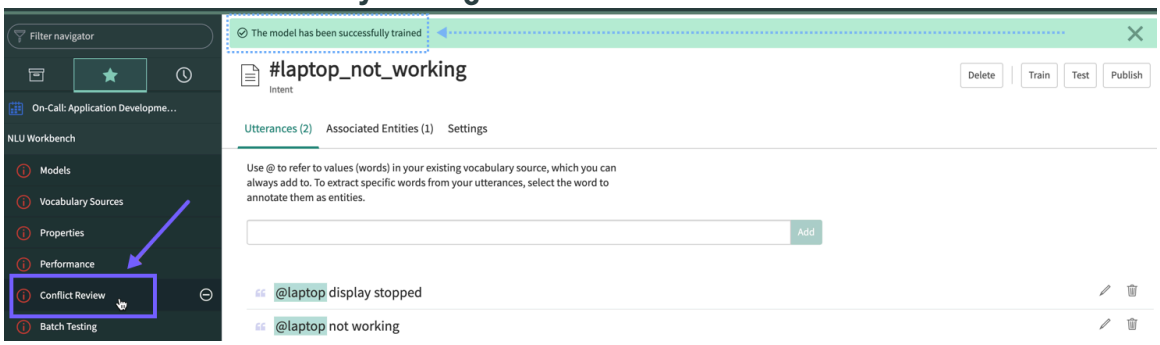
10. Select **Conflict Review** in the navigator.

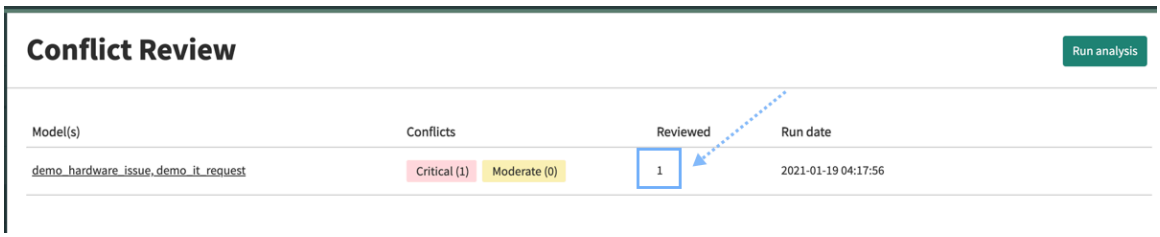
Confirmation of successfully training a model



Result:

The Conflict Review list screen appears, showing your conflict review analysis is complete, and that it's been reviewed.

Confirmation that a conflict has been reviewed



(Legacy) NLU Model Performance

Use NLU Model Performance to see how well your models predicted intents in Virtual Agent (VA) based on end-user confirmation.

Summary usage

The NLU Model Performance application provides an analysis and report of how well your NLU models predict VA users' intents from their utterances. As NLU models for VA are updated, published, and deployed, you can use NLU Model Performance to review the efficacy of the intent predictions they make. If these predictions are skipped, it's because they're unable to predict an intent with a high enough confidence score for the model. To improve VA topic prediction, the system groups unsupported VA utterances into clusters for an analysis and then generates a report that identifies the outcome of the analysis.

To access this application, use the nlu_admin or admin role and navigate to **All** > **NLU Workbench** > **Performance**.

Note: To use NLU Model Performance, you must first have at least 5,000 VA utterances in your instance. With the nlu_admin role, you can modify this limit by resetting the *sn_nlu_workbench.glide.nlu.performance.min_clustering_records* property.

Installation

NLU Model Performance is an application available on the ServiceNow® Store. To use this application, ensure that the NLU Workbench - Advanced Features (sn_nlu_workbench) plugin is active on your instance. For more information, see (Legacy) Install NLU Workbench - Advanced Features and Activate the NLU Workbench. Because NLU Model Performance relies on data

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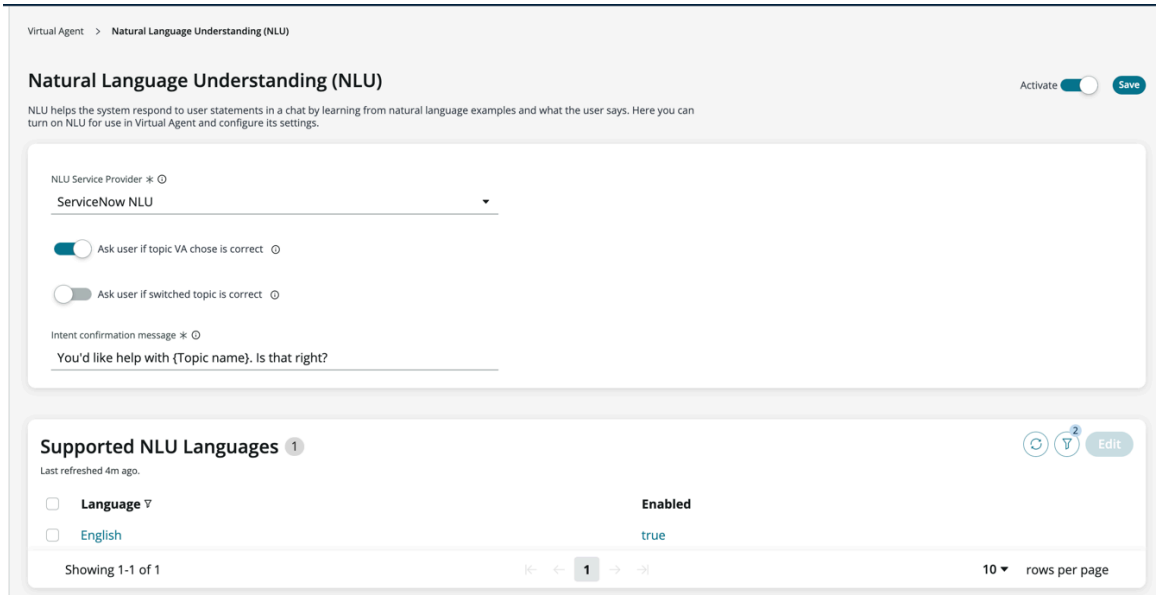
coming in from VA, ensure that the Glide Virtual Agent (com.glide.cs.chatbot) plugin is also active. See Activate Virtual Agent.

Configuring Conversational Interfaces settings for ServiceNow NLU

To help with tracking NLU performance, you must first configure the Conversational Interfaces (CI) settings in Virtual Agent. To access these settings, navigate to the top of the **NLU Model Performance for Virtual Agent** landing page and click **Conversational Interfaces Settings**. This action takes you to the CI settings page in Virtual Agent, as shown in the image below.



To configure the settings, you need to use the virtual_agent_admin or admin role. For configuration guidance, see Implement NLU in Virtual Agent and Enable NLU languages in Virtual Agent settings.

Reviewing the user interface (UI)

The NLU Model Performance UI is comprised of the listed parts below, which are highlighted in the following image that shows the NLU Model Performance default landing page.

- The **Performance** tab and its colored chart which shows data describing scenarios that occur when users interact with VA. This chart is segmented in shades of three colors, each representing a user scenario. The rows in the chart that have text and percentages are referred to as the legend. The three scenarios in the first row of the legend have two outcome scenarios beneath them in the second row. The bars underneath the legend correspond to the colors of the scenarios above them. These bars range in size based on the percentage value for each scenario.
  - For example, the dark blue bar shows you that 10% of this batch of VA users confirmed that the system presented them the correct topic to use for their VA chatbot conversation, and that 58 % of the users (represented by the dark red bar) confirmed that the topic presented to them was incorrect. Residing between these two scenarios is a scenario showing that 32% of the users (represented by the dark brown bar) didn't make any confirmation at all.
  - It's a good idea to toggle the **Show all bars** filter back and forth at any time to see or hide the colored bars and their associated scenarios in the chart. Note also that when you first access NLU Model Performance, the default view of the chart shows only the first row of scenarios and the first row of bars.
  - There are also other views you can see depending on which scenario you're viewing. For example, when you first access NLU Model Performance and you click a scenario in the first

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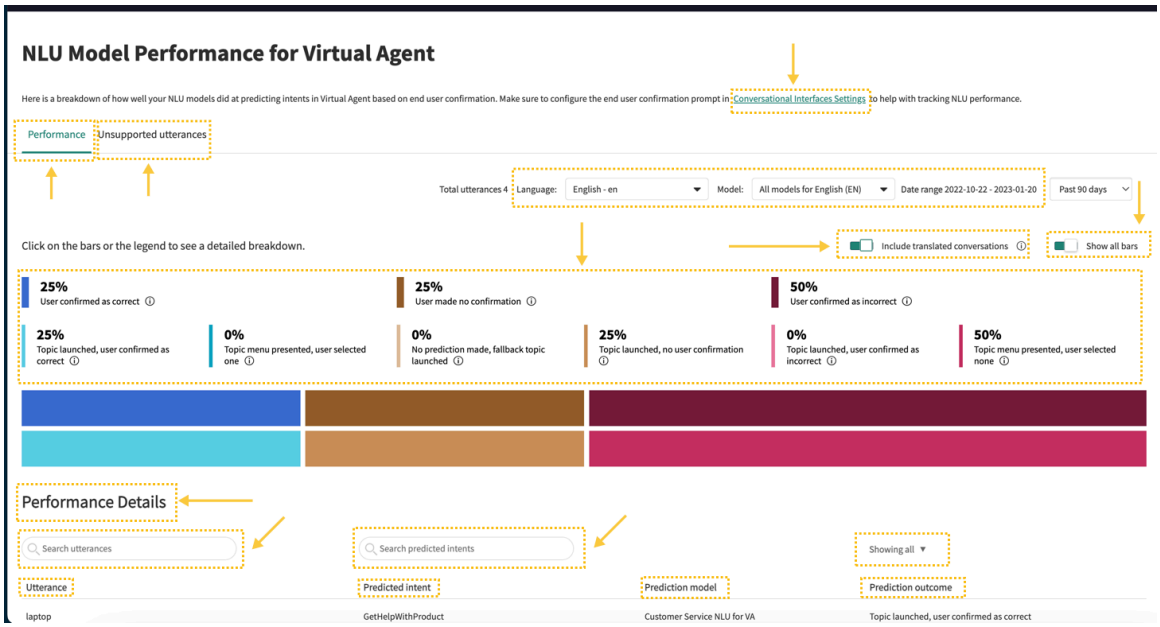
row of the legend, the system hides the bars of the other two scenarios. This helps to keep the UI less cluttered because it partially isolates the scenario you're focusing on from the rest of the scenarios. These actions don't change any data, they simply show you different views of the legend and bars within the chart.

- The **Unsupported utterances** tab, which shows utterances that are grouped into clusters for use in the performance analysis. This section of the UI is where you can navigate to and return from the Expert Feedback Loop application, and also where you can run the analysis.

  Unsupported utterances are different from irrelevant utterances. For more information, see (Legacy) Irrelevance detection in NLU.

- The **Performance Details** section located underneath the bar chart. This section has these four columns: **Utterance**, **Predicted intent**, **Prediction model**, and **Prediction outcome**. The details shown in this section interact with the legend data and bar data above them.



Reviewing the VA user scenarios

In the legend section of the UI, the text and percentages are accompanied by Information icons. Point to an icon to invoke the definition for its user scenario. Refer to the table below to see the definitions.

Scenario Definitions

Scenario	Definition
User confirmed as correct	The correct topic was presented to the end user and the end user has confirmed it is correct.
Topic launched, user confirmed as correct	The topic was launched and the user confirmed it is the topic they needed.
Topic menu presented, user selected one	Multiple topics were shown as a menu to the user and the user chose one of the topics to address their need.
User made no confirmation	The topic was launched but the user did not confirm whether or not it met their need.

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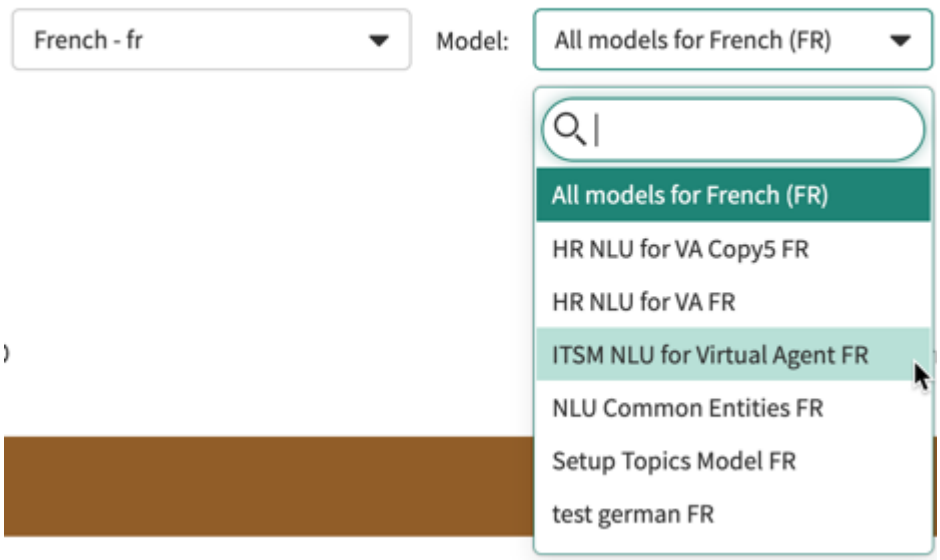
Scenario Definitions (continued)

Scenario	Definition
No prediction made, fallback topic launched	No predictions were made and the fallback topic was launched.
Topic launched, no user confirmation	The topic was launched but the user did not confirm whether it was correct.
User confirmed as incorrect	The topic(s) presented did not address the end user's needs, and the user has confirmed it is not correct.
Topic launched, user confirmed as incorrect	The topic was launched and the user confirmed it was not correct.
Topic menu presented, user selected none	Multiple topics were shown as a menu to the user and the user decided none of the topics were relevant and did not choose any topic.

Using the Language and Model filters

On the Performance tab, you can see the Language and Model filters. Next to them, you can also see the most recent Date range values you set above the legend and bars of the chart. Click the **Language** filter to see all languages that are available in NLU. Click the **Model** filter to see all prediction models that are available in your instance. The default setting for the **Language** filter is **All languages**, and the default setting for the **Model** filter is **All models**.

The Language and Model filters interact with each other. For example, if you choose `French - fr` in the **Language** filter, the **Model** filter automatically shows all prediction models in your instance that use the French language, as shown in the following image.



There are other interactions. For example, from the default view of the NLU Model Performance landing page:

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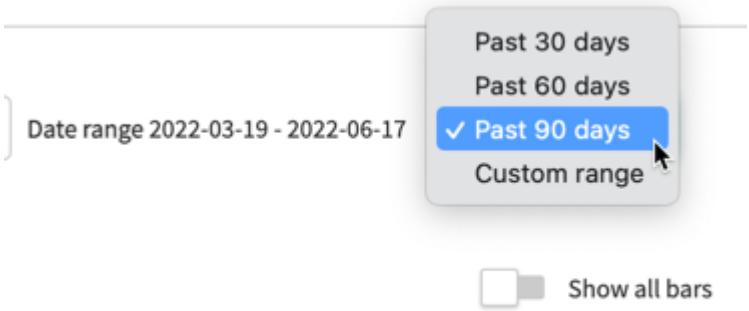
- If you select a specific model from the **Model** filter, the **Language** filter value is updated to display the language of the selected model.
- If you select a specific language from the **Language** filter, the **Model** filter only displays models of that selected language.

Underneath the Language and Model filters, you can see the **Include translated conversations** switch. To include the performance of VA conversations that were translated to your primary language using dynamic language translation, toggle the switch to the right so it changes color from grey to green. When you do this, the bars in the charts legend may also change position and colors. You can manage dynamic language translation in the **Conversational Interfaces Settings**.

Setting the Date range

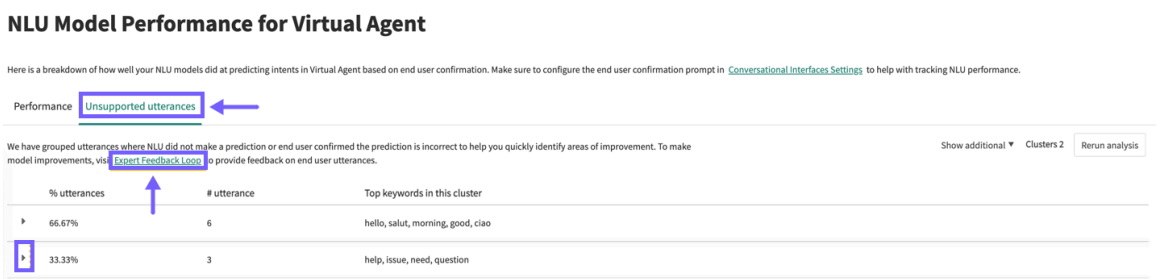
On the Performance tab, use the **Date range** to define how far back you want the system to pull VA data from. Choose **Past 30 days**, **Past 60 days**, **Past 90 days**, or **Custom range**. The further back you go in the date range, the more data you will have in your analysis.



Running an analysis

To run a performance analysis, click the **Unsupported utterances** tab. This section of the UI shows rows of expandable clusters containing VA utterances where NLU didn't make a topic prediction, or where the VA end-user confirmed that the predicted topic was incorrect. The next thing you want to do is to click **Expert Feedback Loop**. This action takes you to the NLU Expert Feedback Loop application where you review and provide feedback on the utterances that were pulled in from VA.

Reviewing unsupported utterances



When you leave the Expert Feedback Loop application and return to NLU Model Performance, click the **caret** icon in any cluster to open it. Within the cluster you can then see the top most representative VA utterances, as shown in the following image.

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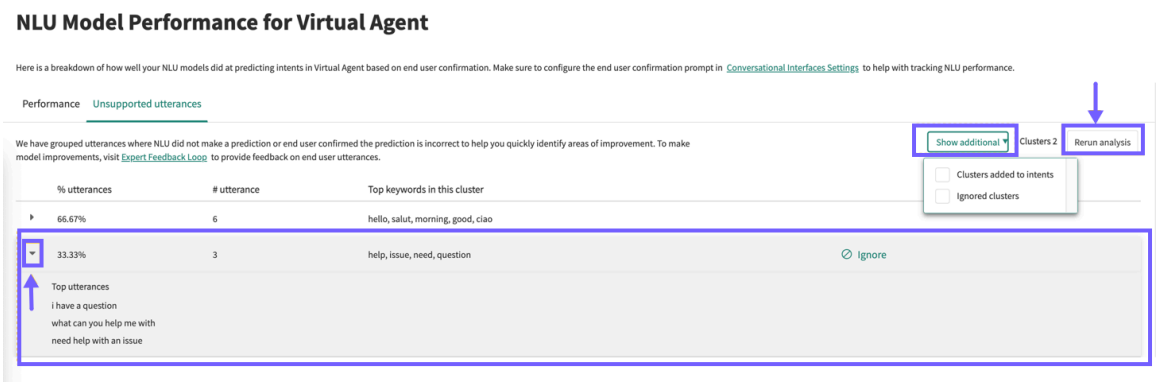
Reviewing the top representative utterances in a cluster



Click **Run analysis** or **Rerun analysis**, whichever is available. Each time you run an analysis, the system pulls the most recent VA utterances into the analysis.

Related topics

Virtual Agent

Natural Language Understanding in Virtual Agent

(Legacy) NLU Expert Feedback Loop

Provide feedback on Virtual Agent chat log utterances to help the system continuously learn and to better predict user input.

Summary usage

The Expert Feedback Loop takes data from your instance and provides it to you for feedback. This data comes from your users' Virtual Agent (VA) chat logs and includes utterances from those logs. Using the nlu_admin role, navigate to **All** > **NLU Workbench** > **Expert Feedback Loop** and mark each utterance in a model by confirming whether the utterance is correct (match) or incorrect (mismatch) to an intent. This feedback helps the model to continuously improve the model performance.

Installation

Expert Feedback Loop is part of the NLU Workbench - Advanced Features app available on the ServiceNow® Store.

To use Expert Feedback Loop, ensure that the NLU Workbench - Advanced Features (sn_nlu_workbench) plugin is active on your instance. For more information, see (Legacy) Install NLU Workbench - Advanced Features and Activate the NLU Workbench.

Because Expert Feedback Loop relies on the data from VA chat logs, make sure that the Glide Virtual Agent (com.glide.cs.chatbot) plugin is also active. See Activate Virtual Agent.

Importing expert feedback loop data between instances

Before you start an import, make sure you have access to the data in your instance and have enough data to proceed with your feedback.

If you're working in a non-production instance, you must import the feedback data from the **open_nlu_predict_intent_feedback** table in your production instance to your non-production instance. For guidance on how to import, see Importing from another ServiceNow instance.

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Here are a few data scenarios regarding the system behavior for the NLU models that house the feedback loop utterances.

- If you move a model to a different instance, the feedback data persists.
- If you upgrade the instance, the feedback data persists.
- If you clone an instance, the data does not persist, so import the data onto the cloned instance.

Feedback context and access

The Expert Feedback Loop provides a mechanism for you to improve NLU models deployed to VA through feedback that you provide on a select subset of utterances. For each utterance, you are asked to confirm the predicted intent or to provide the correct intent that the utterance belongs to. After this feedback is complete, the data is used to tune the model performance, resulting in an improved model that can now be redeployed to gather more end user data. This is an iterative cycle that allows the system to continuously collect data, learn from the feedback you provide, and use that feedback to further improve your NLU models.

Once every 30 days, the system pulls up to 300 utterance samples from VA chat logs to the Expert Feedback Loop. The utterances are selected for feedback based on how well they represent all the utterances in the logs. Every utterance sampled from VA chat logs has a predicted intent picked by the system.

You can also set the number of utterances you want to be pulled from VA chat logs by adjusting the setting for the *glide.mlpredictor.option.nlu.activeLearning.label_candidate_table.max_respons* system property.

Further information on the process of pulling utterances from VA chat logs can be found in the sections Procuring additional VA feedback data on demand and Using the Active Learning job, below.

As you review the utterances, decide whether each utterance belongs to its predicted intent or should be moved to a different intent. If you aren't sure about the correct intent, the utterance can be marked to revisit for further review. After you have marked at least 100 utterances with your feedback, the system uses all the marked utterances to tune and improve the model.

Reviewing your VA chat log utterances

Now that you're in the loop, you can see in the following image a list of NLU utterances that support the intents in the VA models. Each page of the list shows approximately 20 utterances per page. Your goal is to review each utterance and mark its relationship status to a given VA intent. You mark each utterance with either the **NLU_Match**, **Mismatch**, or **Unsure** value.

Marking an utterance as **NLU_Match** means that you agree with the NLU prediction for that utterance. Marking an utterance as **Mismatch** means that the utterance belongs to a different intent, and if you select **Mismatch**, a dropdown of intents appears so you can select the correct intent. If you aren't sure which intent is correct, you can mark it as **Unsure**.

Utterances that are marked and saved with the **NLU_Match** value or the **Mismatch** value are moved to the **Completed reviews** section. Utterances that are marked and saved with the **Unsure** value are moved to the **Needs further review** section.

Here's a scenario for the basic steps you use to complete your utterance reviews:

1. At the top of the Export Feedback Loop screen, select a model you want to review in the **Expert Feedback Loop for** prompt. Within this feature, in some ways it doesn't matter which model you choose because these models serve mainly to house the utterances you are marking in

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your reviews. So in this example scenario, you decide to select the **IT Model** model, which has five intents and many utterances within each of those intents. The number of utterances you need to review are shown next to the name of the predicted intent, as shown in the following image. The intents in these models are listed in the **Predicted intents** column on your screen. Although you can review and mark utterances in any of the predicted intents, it's a better idea to complete the reviews consecutively in the order the intents first appear. For example, begin with the **ad_password_change** intent and then onward to other predicted intents.

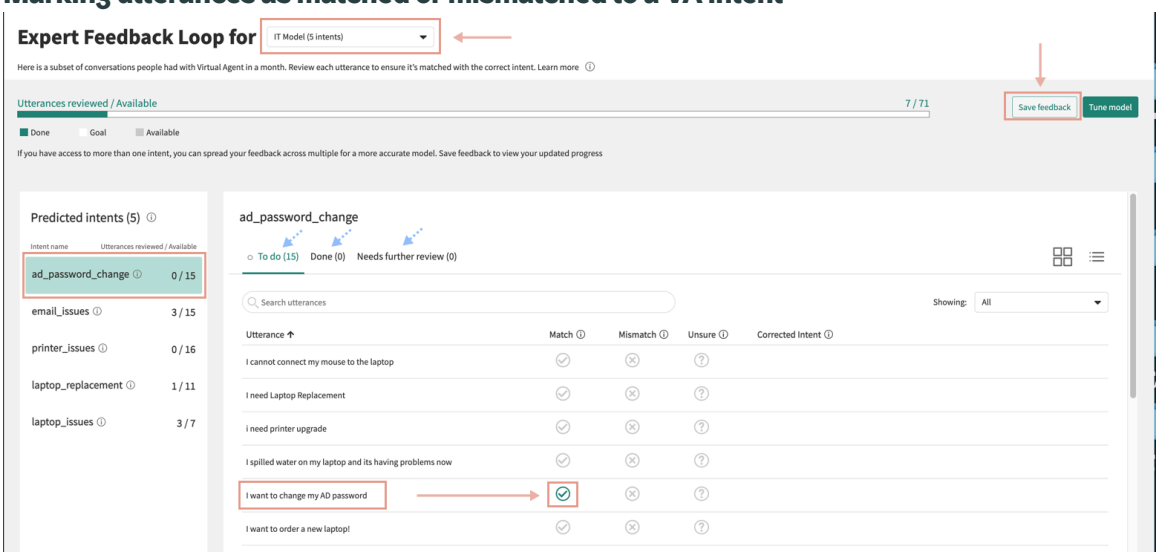
2. Click the **ad_password_change** intent so it loads its utterances into the **To do** section for your review.
3. Review the 15 utterances in the intent. In this scenario, you've started by correctly marking the I want to change my AD password utterance as a match to the **ad_password_change** intent.
4. Click **Save feedback**.

   Result: The system moves the utterance you marked over to the **Done** section of the screen. At the same time, the count of **To do** utterances drops from 15 to 14, while the count on the **Done** section rises from 0 to 1. If you had also marked another utterance with the **Unsure** value and saved that change, the count of utterances in the **Needs further review** section would also rise from 0 to 1.

   Note: If you don't know which intent best matches the utterance, mark it with the **Unsure** value. This action moves the utterance over to the **Needs further review** section, giving you time to mark other utterances in the **To do** section that may be easier to match or mismatch to an intent. You can return to the **Needs further review** section to mark utterances that are more difficult to pin down to a specific intent.

5. Repeat steps 1 through 4 as you move through the remaining intents in the **Predicted intents** column.

Marking utterances as matched or mismatched to a VA intent



The utterances in the **ad_password_change** intent are easy to mark as a match to its predicted intent because there's at least one utterance within the intent that has the word password in it.

When you have finished reviewing the utterances in the predicted intent and you select **Save feedback**, the screen refreshes to highlight the next predicted intent in the model.

If you want to see your utterances grouped by their value, click the **Showing** filter and select one of the options in its prompt. The values are **All**, **NLU_Match**, and **Unsure**.

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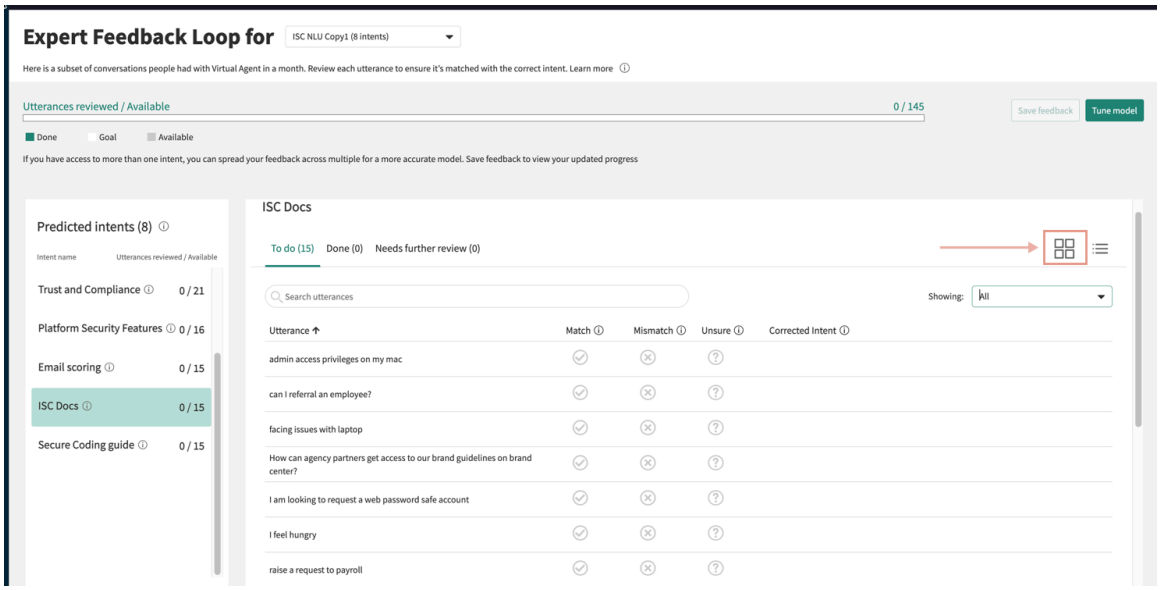
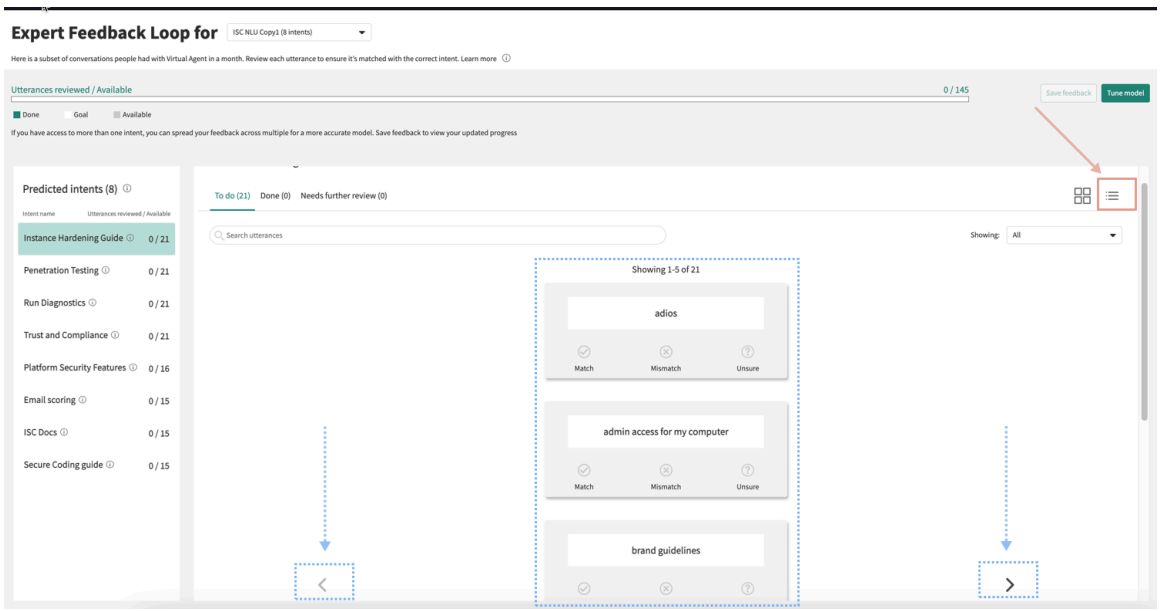
Using the card view option to review your utterances

Your Expert Feedback Loop utterances appear on the **To do** section in a list view by default, as shown in many of the images you've seen so far above. However, you can also choose a different view that shows each utterance framed within a card. If you choose this option, each utterance appears on the page in groups of five. While still within the list view, select the **card** icon.



Result: The card view replaces the list view. Note the left and right arrows on either side of the page of utterance cards. When you click the right arrow, it turns the page to the next set of five cards. When you click the left arrow, it turns the page to the previous set of five cards. If you want to switch back to the list view instead of the card view, click the **list** icon as shown in the upper right hand corner of the image below.



Changing an utterance value

If you mark an utterance but then change your mind on the value you chose, you can resolve the issue by clicking on **MisMatch** and selecting another intent. Select **Save feedback** to save the change.

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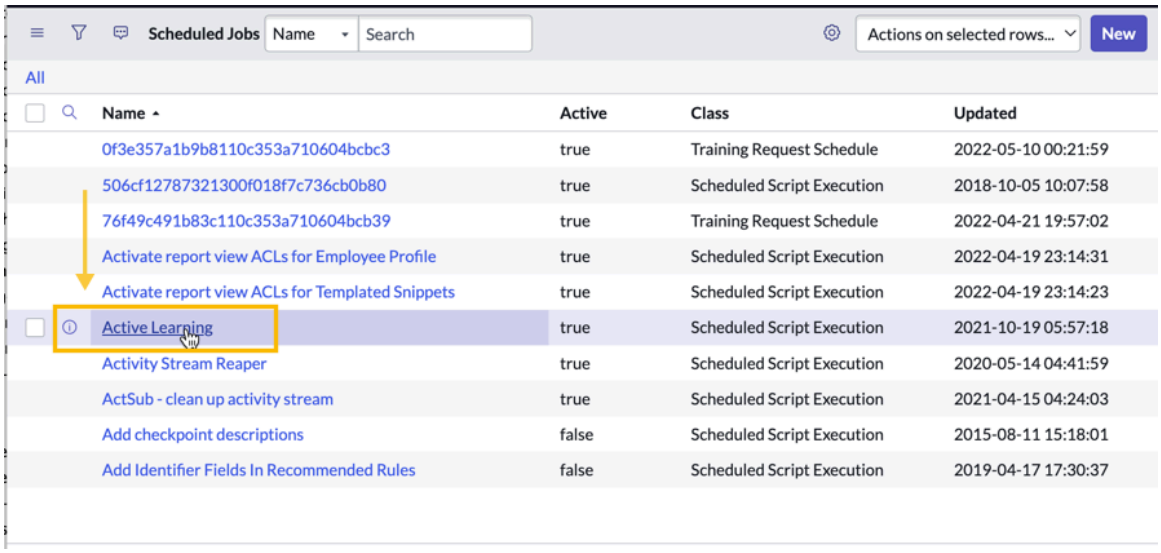
Unsaved feedback

If you finish and log out of a session of marking your utterances, but forget to save your changes, select **Unsaved changes** from the **Showing** prompt. This action displays all the utterances you have given feedback for but haven't saved yet.

Procuring additional VA feedback data on demand

To get more data from the VA chat logs to use in the Expert Feedback Loop, take the following steps.

1. Use the nlu_admin role and navigate to **All** > **System Definition** > **Scheduled Jobs** > **Active Learning**.
2. Click **Active Learning**.



3. Select **Execute Now**.

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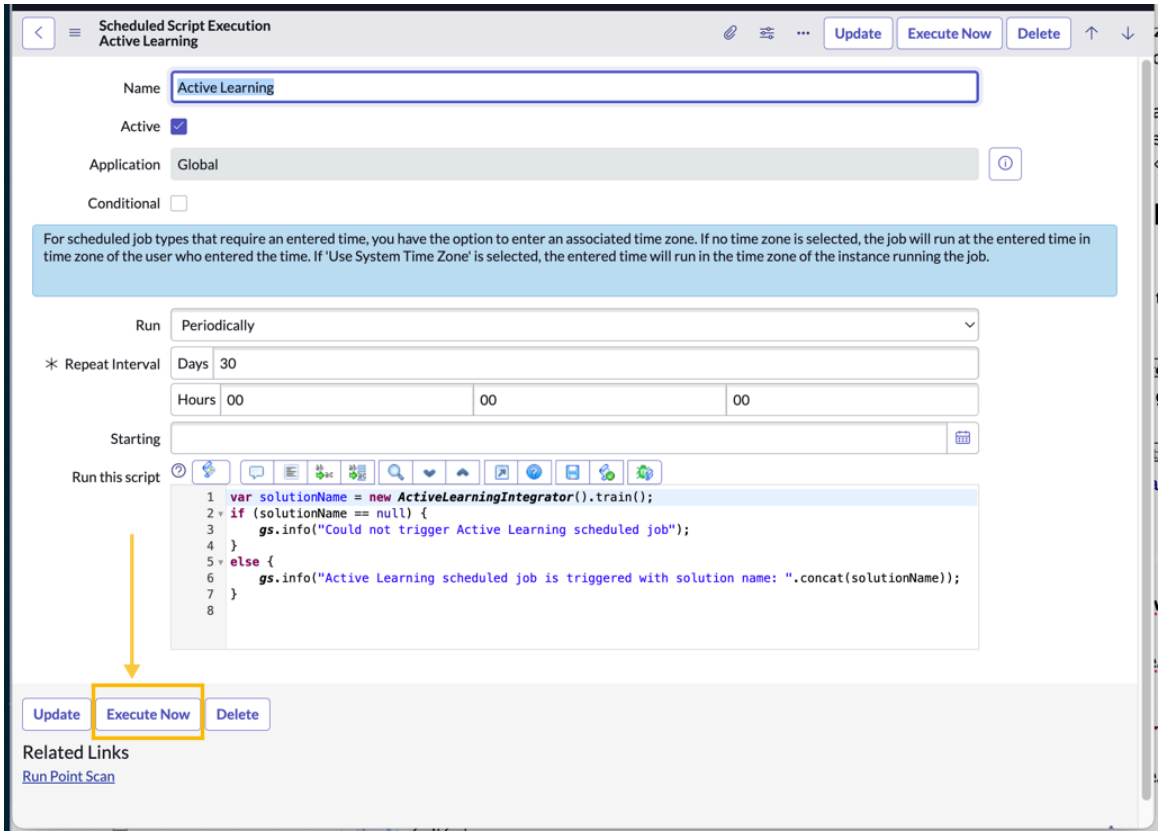

4. Increase or set the values in the following four NLU system properties.

- *glide.mlpredictor.option.nlu.activeLearning.va_chat_logs.max_row_limit - 3000*
- *glide.mlpredictor.option.nlu.activeLearning.label_candidate_table.max_data_ - 10000*
- *glide.mlpredictor.option.nlu.activeLearning.label_table.max_data_size - 10000*
- *glide.mlpredictor.option.nlu.activeLearning.label_candidate_table.max_respo*

To see how these properties work within the context of other NLU properties, see (Legacy) NLU Workbench properties.

Reviewing uncategorized utterances

As part of the feed from VA chat logs to the Expert Feedback Loop, the system collects and displays in a list any utterances in your instance that aren't part of a VA intent. You access these utterances by selecting **Uncategorized** in the **Expert Feedback Loop for** prompt at the top of your screen.

When the screen refreshes, these utterances are shown in the **Utterance** column of the **Uncategorized utterances** section of your screen.

Important: It is extremely important to provide feedback on this set of utterances because the system is suggesting there is no associated intent for these utterances. By confirming this lack of association or by associating these utterances with an existing intent, you are helping the model to learn correctly.

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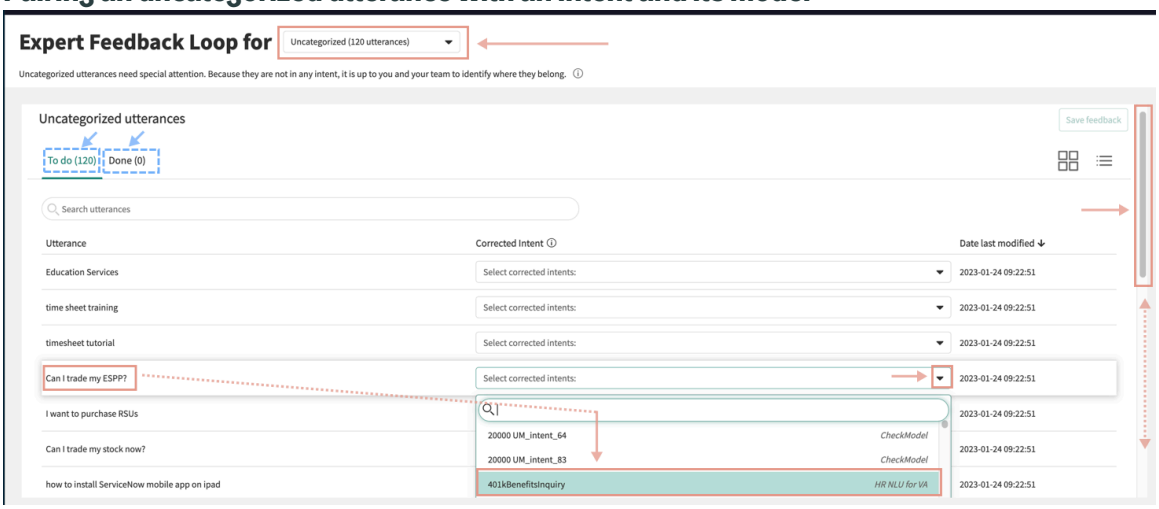
Here are the steps you use to connect an uncategorized utterance to an intent:

1. In the **Utterance** column, select an utterance from the list.
2. In the **Corrected Intent** column, search and select an intent and its model from the prompt that you think is the best match for the utterance.

For example, a good pairing for this connection is the Can I trade my ESPP? utterance from the **Utterance** column and the 401kBenefitsInquiry intent from the **Corrected Intent** column, as shown in the image below.

Note: The **Corrected Intent** column enables you to search for and use all intents across all models in your instance.

Pairing an uncategorized utterance with an intent and its model



Regarding the image above, let's cover a few items that help describe how the uncategorized utterances page works, as follows. The **To do** section collects utterances that must be connected to an intent. On this particular day we see there are 120 such utterances. Note that the **Done** section on the screen has no utterances because you've not taken any action yet.

Note also that there's a vertical bar to the far right of the screen where you can scroll up and down to navigate the list of utterances. At the bottom of this scrolling screen, there are arrows that point left and right so you can to turn to the next or previous page of the full utterance list for the day.

Note also that when you do take action to make a connection, the **Save feedback** button, normally active by default, deactivates because the system recognizes your action and automatically saves your change.

Expert Feedback Loop data in the Tune Model phase

The **Tune model** button in the Expert Feedback Loop is always enabled and supports the experience of moving utterances from the Expert Feedback Loop **Done** tab to the model and its test set. Use the nlu_admin role to select this button any time you need to tune or retune your model.

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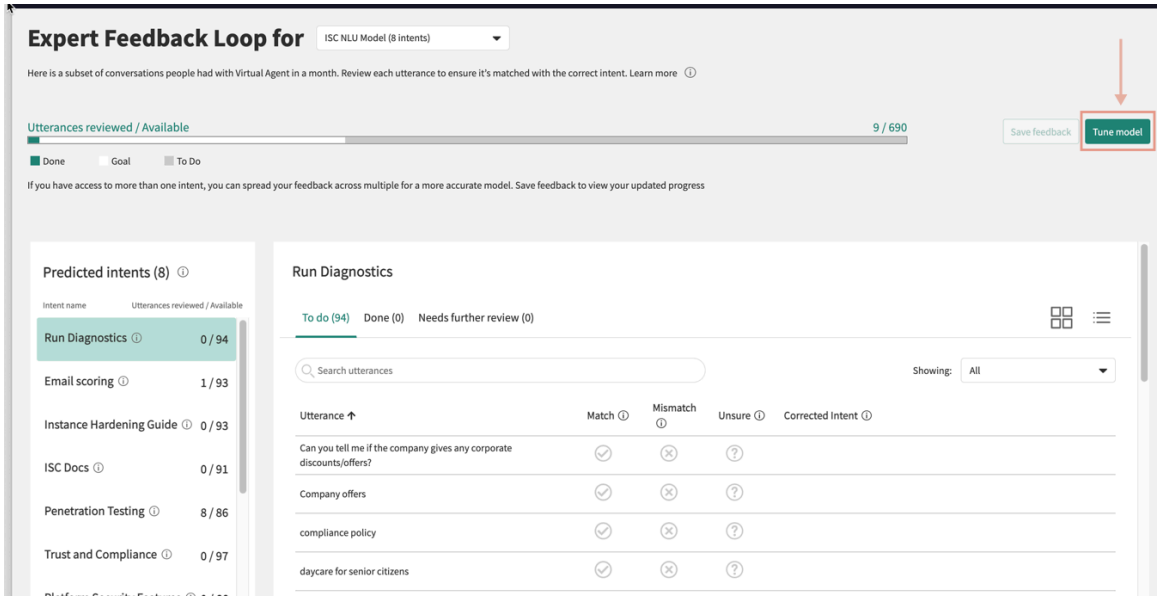
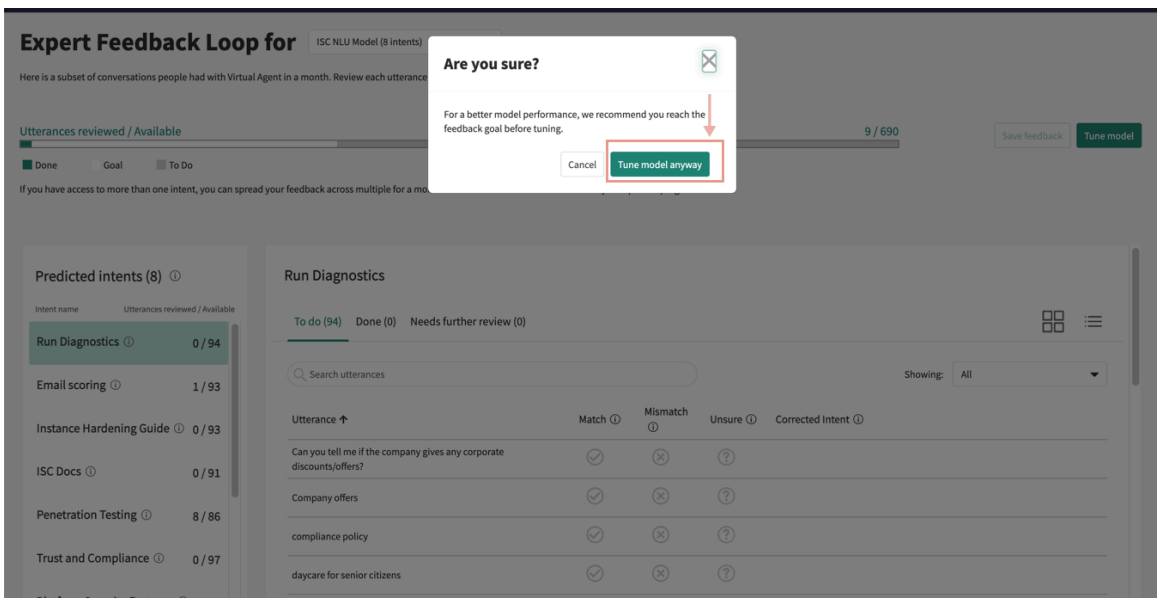


After reviewing utterances in the Expert Feedback Loop, you can push a portion of the feedback data to the default test set of your model. These utterances are then directly added to the **Test utterances** tab of your model. This helps you to continuously maintain and update your test set with real end user utterances. The system tracks the source of the test utterances for visibility into whether they came from the Expert Feedback Loop or from another source.

If you select the **Tune model** button before you have marked and saved at least 100 utterances, the screen refreshes to remind you that your model performance increases in quality when you have passed the 100 utterance feedback goal, as referenced in the text in the image below.



As you keep marking and saving your feedback data, you can see the ratio of reviewed utterances (in green), and those that are still available for review (in white) on the progress bar image below.

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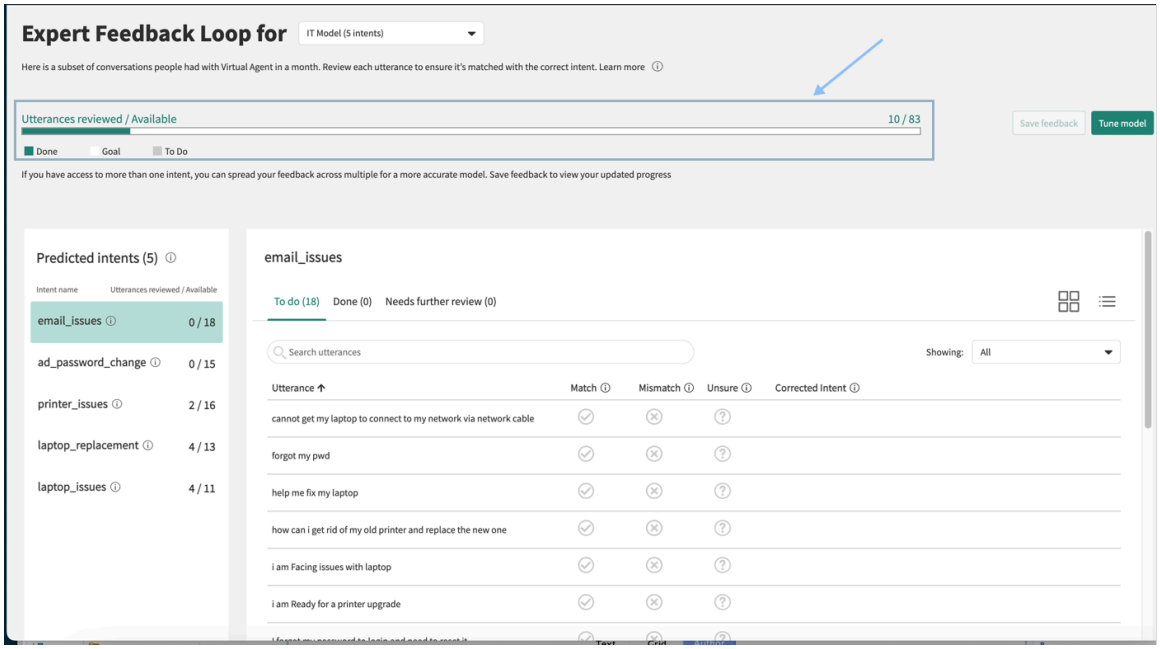
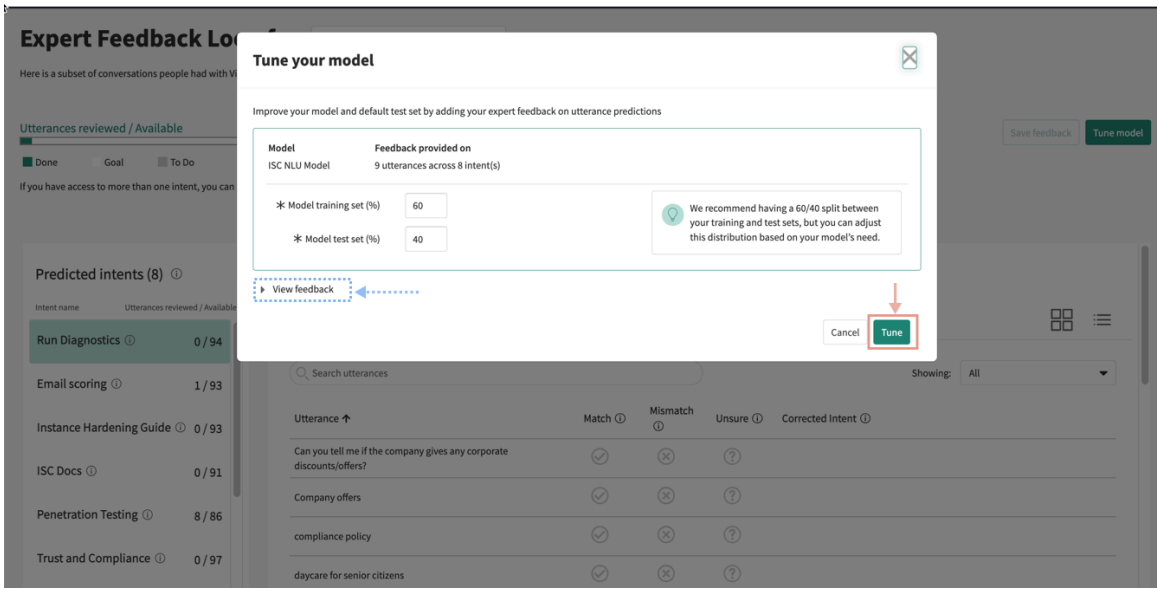


On the **Tune your model** image below, you can see the default 60/40 percentage split for your model training set and your model test set. You can adjust these default values if needed by selecting your own chosen numbers in each of the two **(%)** boxes. Once you're satisfied with your percentage split, select the **Tune** button to tune your model based on the percentage values you chose.

Note: If you select the **View feedback** caret, it takes you to an Expert Feedback Loop screen where you can continue reviewing, marking, and saving your feedback utterances.



Using the Active Learning job

Scheduled jobs, also known as batch jobs or batch scheduling, are automated pieces of work that are performed at a specific time or on a recurring schedule. Many jobs run on schedules but we're focusing now on the Active Learning job as an example.

Here are three things you can do when using the Active Learning job.

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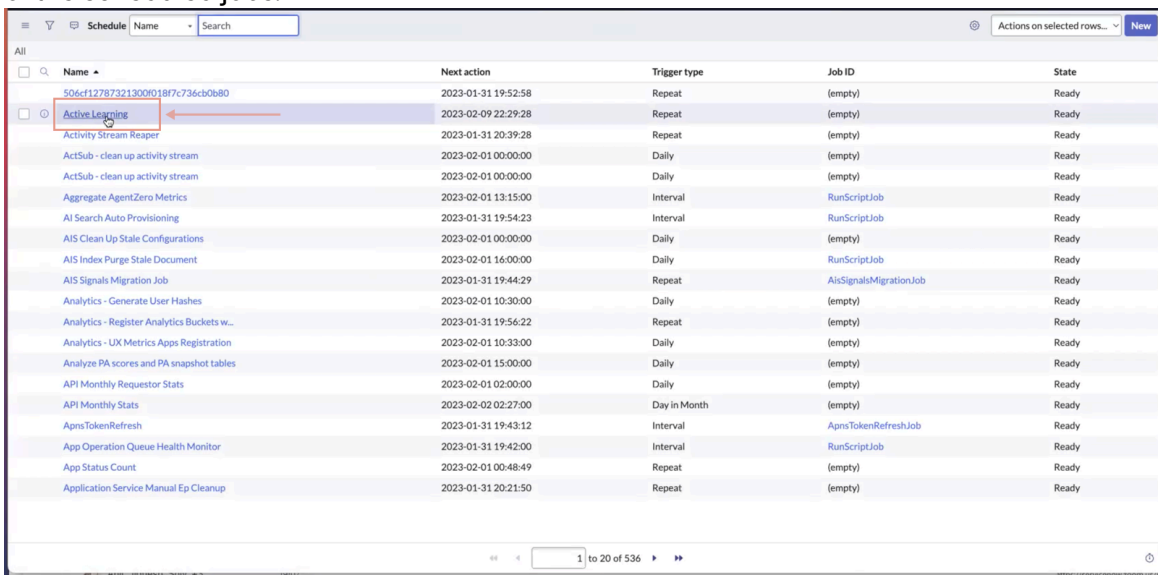
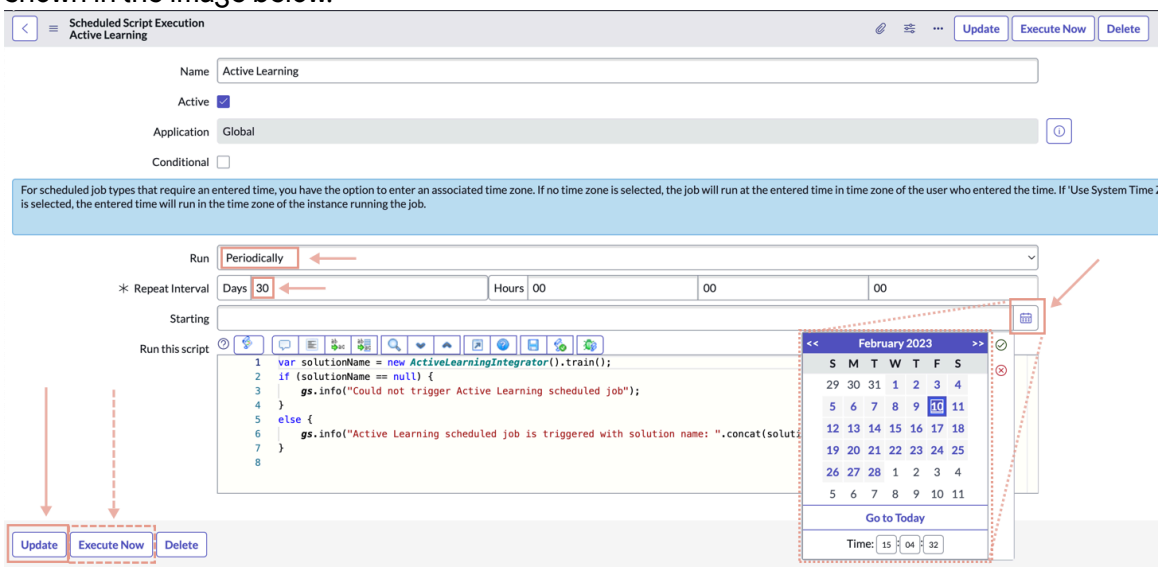
- Change the repeat frequency interval with which the Active Learning job will be set to run.
- Check when the next scheduled run is set for the Active Learning job.
- Execute the Active Learning job whenever you want (on demand).

Here are some steps to use to get started.

1. Using the nlu_admin role, navigate to the **All** field and type **sysauto_script.list**, then press the **return** key on your keyboard. The screen refreshes to show the Schedule page, which lists all of the scheduled jobs.



2. On the Schedule page, click **Active Learning**. A record for the Active Learning job appears, as shown in the image below.



3. On the Active Learning record, configure the following fields.
   - In the **Run** field, select one of the eight Repeat Interval options for the job. The options are: Daily, Weekly, Monthly, Periodically, One, On Demand, Business Calendar:Entry Start, and Business Calendar:Entry End.
   - In the **Repeat Interval** field, enter the number of days you want between now and the next repeat interval for the Active Learning job.

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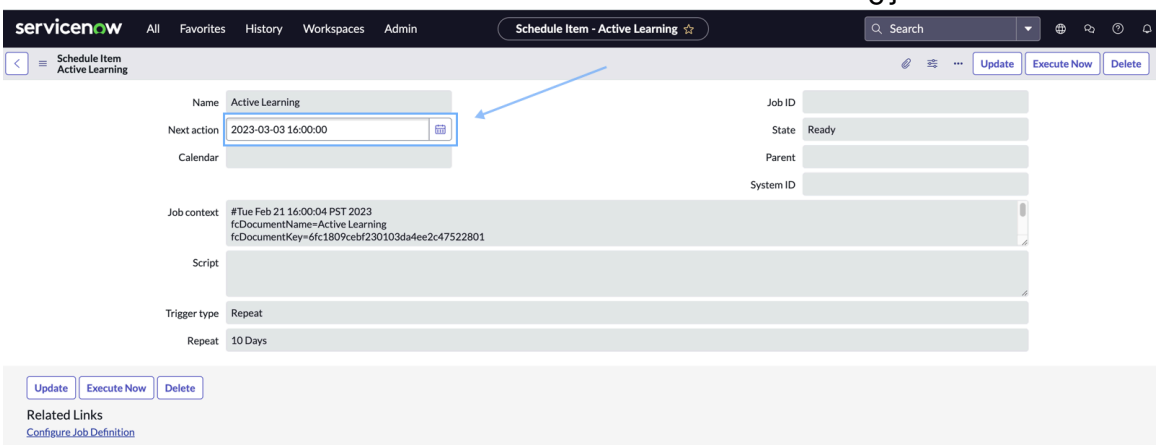
- In the **Starting** field, click the Calendar icon and choose the day and time for the next Active Learning job interval.
- Select the **Update** button to save your configurations or select the **Execute Now** button to start the Active Learning job run.
- To verify when the next Active Learning job runs, navigate to the **All** field and type **sys_trigger.list**, then press the **return** key on your keyboard. The Schedule page appears. Click **Active Learning**. The Schedule Item/Active Learning record appears and populates the **Next action** field with the date and time for the next Active Learning job run.



Detailed information about NLU's Active Learning job can be found in this KB article on the Support portal: KB1633901.

(Legacy) Issue Auto Resolution Tuning in NLU

Use the NLU Workbench homepage to support Issue Auto Resolution (IAR) tuning in NLU.

Summary usage and roles

Use the nlu_admin or admin role to access IAR Tuning in the NLU Workbench. Accessing IAR Tuning in the NLU Workbench requires at least the nlu_feedback_admin role (the nlu_admin role contains the nlu_feedback_admin role). Also, the virtual_agent_admin role contains the nlu_admin role.

Selecting a IAR model name in the list takes you to tuning. For Issue Auto Resolution, you are not taken to a model overview page, so this behavior differs from Virtual Agent or AI Search models in the NLU Workbench.

The IAR Tuning workflow

IAR admins begin their model tuning journey in the IAR Admin Console, and then land in the NLU Workbench to tune their ITSM model. If they haven't trained the ITSM model in the console yet, the workflow sends them to the Expert Feedback Loop documentation under the **Boost your model performance** section of the NLU Workbench.

How IAR models differ from NLU models

Unlike the Virtual Agent and AI Search tabs, the IAR tab doesn't use a **Create new** model button. The IAR-ITSM model that IAR admins use is a prebuilt model. IAR models can't be moved using update sets.

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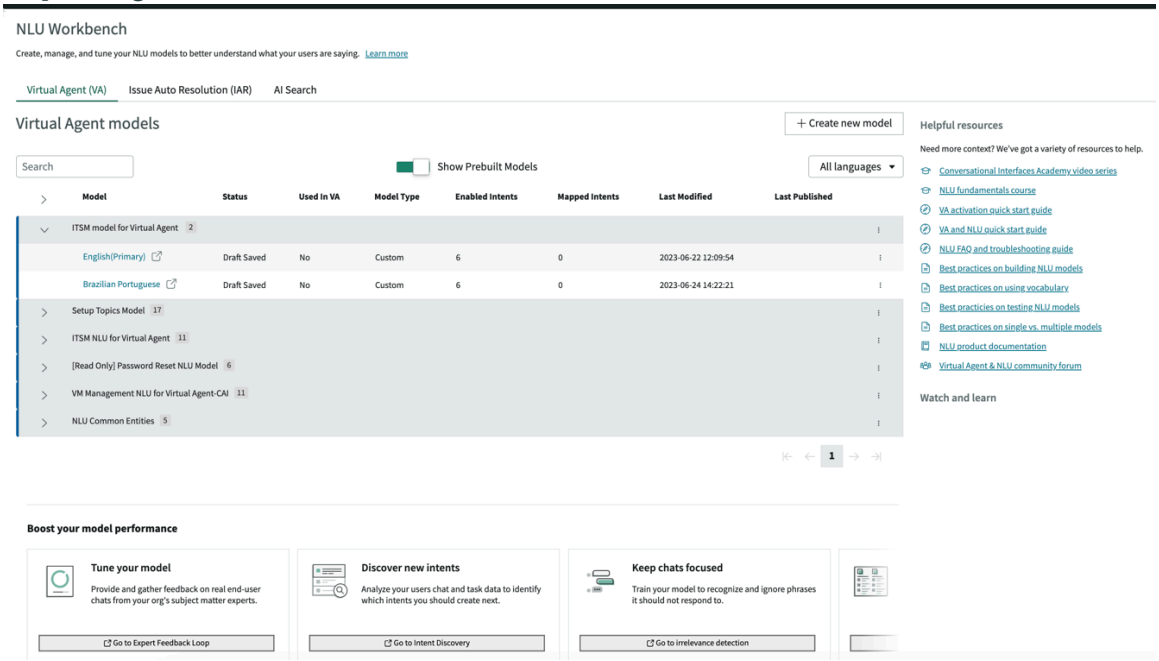
Exploring the NLU Workbench



At the top of the NLU Workbench page are three tabs that group Virtual Agent, Issue Auto Resolution, and AI Search models separately. Below those tabs are a list of models colored gray. In the Model column of the list, when you select the caret to the left of the model name, the model changes color from gray to white and opens to show the model's languages; status; usage; model type; number of enabled intents and mapped intents and the date when the model was last modified or last published.

(Legacy) Issue Auto Resolution tuning options

When you are tuning your Issue Auto Resolution model in NLU Workbench, you can adjust the output for several goals: precision, automation, or a balance of the two. Compare how your choice of tuning options affect match rate and coverage, before committing.

Summary usage

By default, Issue Auto Resolution tuning in NLU Workbench optimizes for precision. Depending on your business requirements, you can also tune the model for other objectives. In the **Analyze** step of Issue Auto Resolution tuning, the tuning goals list enables you to adjust for **Precision**, **Automation**, or **Balance**. As you select one of these options, the projected Match rate and IAR coverage percentages change accordingly, so you can compare possible outcomes.

To access the **Analyze** step of IAR tuning, use the nlu_admin role and navigate as follows.

1. Navigate to **All** > **NLU Workbench** > **Models**.
2. Select the Issue Auto Resolution tab, then select the model name. The tuning experience opens to step 1 (Feedback) initially.
3. Provide feedback, then select the **Analyze** button. Step 2 (Analyze) opens.
4. In the section **Here are your tuning options and projected results**, using the list **You can tune for precision, automation, or balance**, select options to see projected scenarios. You can also select the link **Learn about tuning goals** to open the following window.

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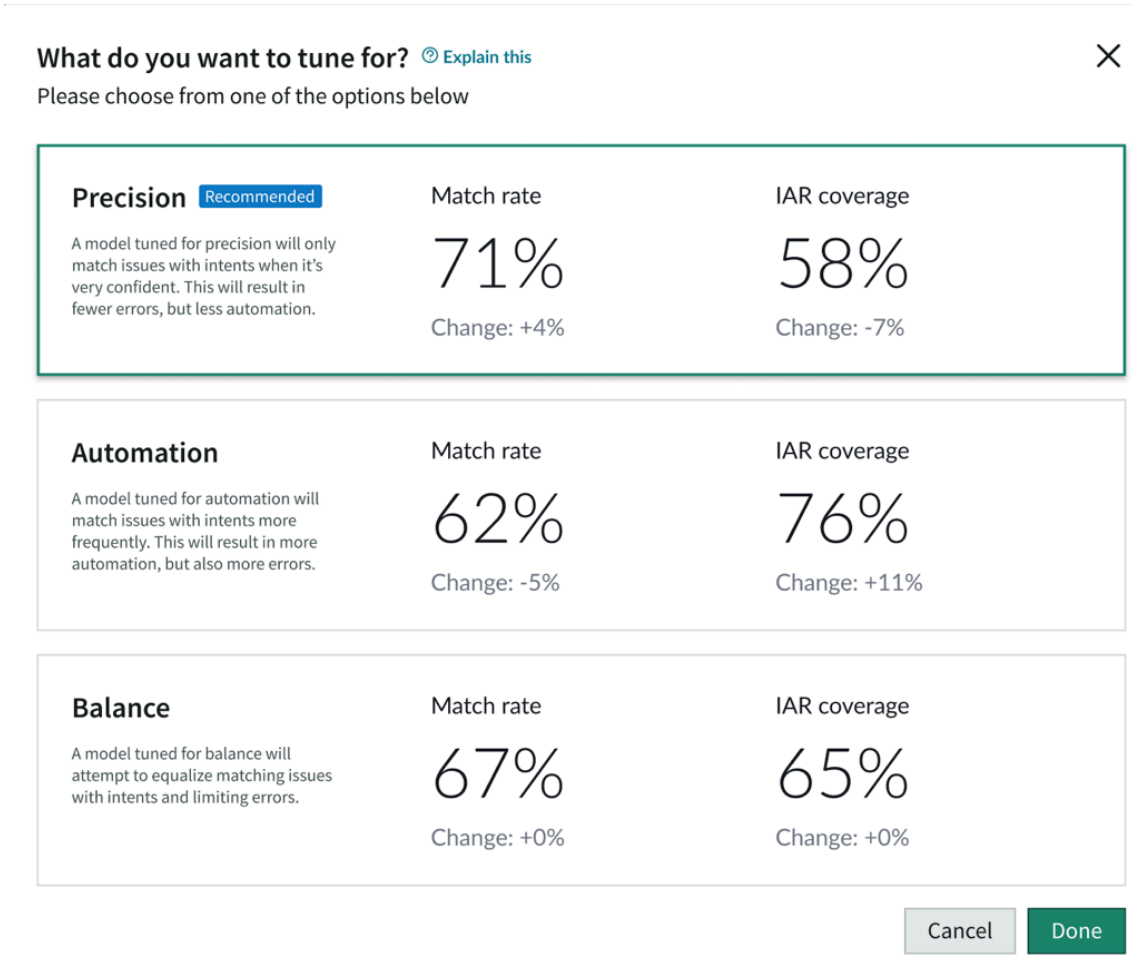

Precision

When tuned for precision, the IAR model makes predictions only when its confidence is relatively high. This results in lower error rates, but also in fewer incidents resolved.

Precision is the recommended tuning option for the IAR ITSM model, so this option is selected by default.

Automation

When tuned for automation, the IAR model makes predictions at a lower confidence threshold. This results in more predictions, so more incidents are resolved. However, higher error rates are possible.

Balance

When tuned for balance, the IAR model attempts to strike a balance between precision and automation.

Match rate

The match rate is defined as the number of Incidents where the intent was predicted correctly, divided by the number of predictions for that intent. This ratio is averaged across all intents except for **NO_INTENT**.

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IAR Coverage

Coverage is defined as the percentage of Incidents that would be resolved because the model was able to make predictions above its confidence threshold. The predictions may contain some errors.

Using tuning options

Select several different tuning options to compare projected results. Depending on the option you select, the system presents scenarios for projected Match rates and IAR coverage rates. Also the system displays how much these rates change according to your selection.

Review further information in the **Here's a detailed breakdown** section of Analyze. Here you can drill down into results that are specific for each intent in the model.

Note that the intents are grouped into mapped and unmapped intents, depending on whether they have been mapped to Virtual Agent topics. After providing feedback in IAR Tuning, you may wish to activate some intent-to-topic mappings. To do so, expand **See unmapped intents**, then select the **Map more intents** button. This opens the IAR Admin Console.

When you have decided the optimum tuning option for your requirements, select the **Save choice** button in the **Learn about tuning goals** window. Then, select the **Tune and publish model** button to advance to the next step.

(Legacy) Intent Discovery

Use the Intent Discovery application to help identify opportunities for incident deflection. For example, you can use it to identify which Virtual Agent conversations to activate next.

Summary usage

For applications that consume NLU, such as Virtual Agent and AI Search, Intent Discovery helps you to better understand which prebuilt intents you can benefit from, and which custom intents would be useful to create.

Intent Discovery provides an analysis that you run on historic incident data or other task data. You can also group the run's remaining records into different clusters so you can manually add utterances to NLU intents. In addition, you can use specific clusters to create new intents in a model.

In this example scenario, you're using Intent Discovery to identify the top intents in your instance, and how much coverage they can provide across your historic incident records.

Installation

Intent Discovery is available from the ServiceNow Store. For more information, see (Legacy) Install Intent Discovery.

After Intent Discovery is installed and activated, it appears under **All** > **NLU Workbench** > **NLU Advanced Features**.

Note: Although organized under NLU Advanced Features in the navigation pane, Intent Discovery is a separate application that is not included when installing NLU Workbench - Advanced Features.

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Intent Discovery report details

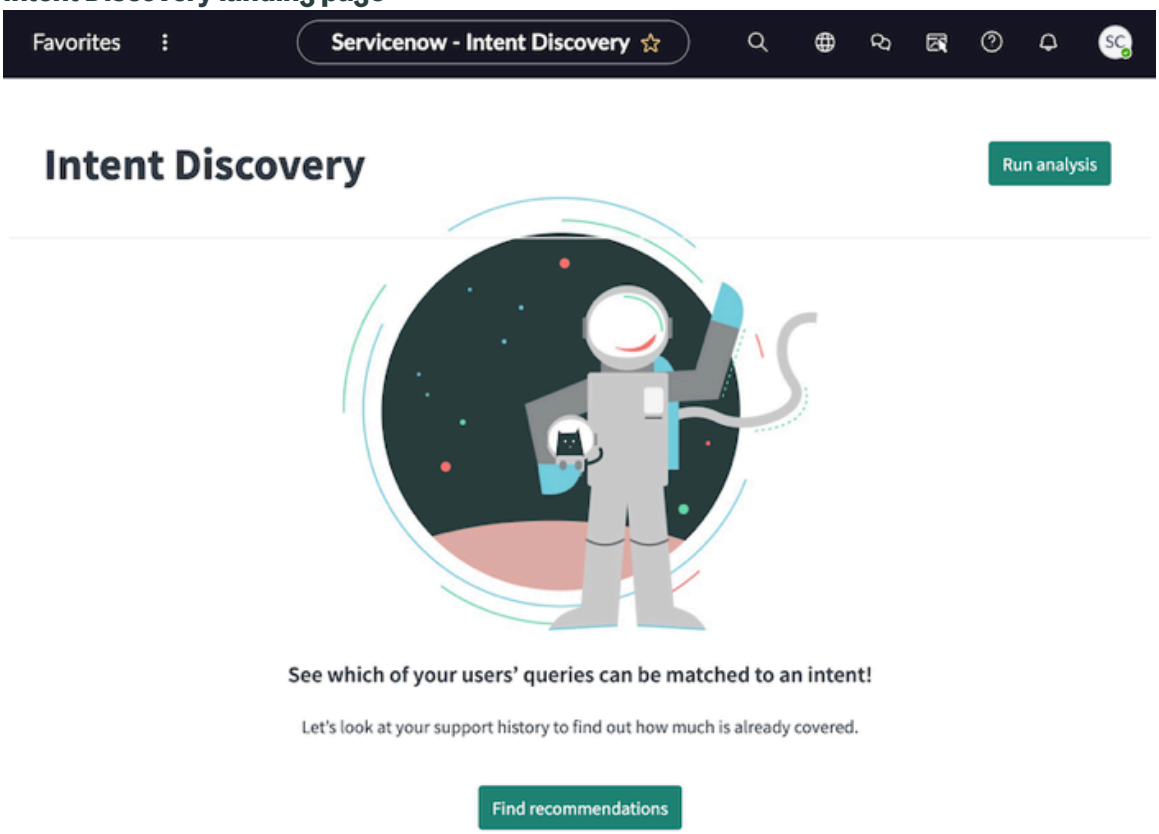
- When **Taxonomy** is selected, the generated report contains intent recommendations against the selected taxonomy. A taxonomy is a prebuilt library of intents in a specific domain. While you don't have access to the underlying intents, when you run Intent Discovery against a specific taxonomy, data that maps to any intent in the taxonomy will be identified.
- **Unmatched records** are the utterances which couldn't match to any intent in the taxonomy.
- **Recommended intents** are the intents which are found from utterances that data was run on.
- The percentage of **Unmatched records (clustered)** are the records that aren't classified (records that don't belong to any of the recommended intents).
- The percentage of unmatched records and the number of recommended intents don't need to match. It's a coincidence if they match.

Creating an Intent Discovery report

1. Using the admin or nlu_admin role, navigate to **All** > **NLU Workbench** > **NLU Advanced Features** > **Intent Discovery**.

2. Select either **Run analysis** or **Find recommendations**.

Intent Discovery landing page



Running an analysis on the report

1. For this example report, you configure the following fields on the Intent Discovery > Create new screen.

- Data Source: Select the **Incident (incident)** table.
- Filter by: **[Created] [on] [This quarter]**

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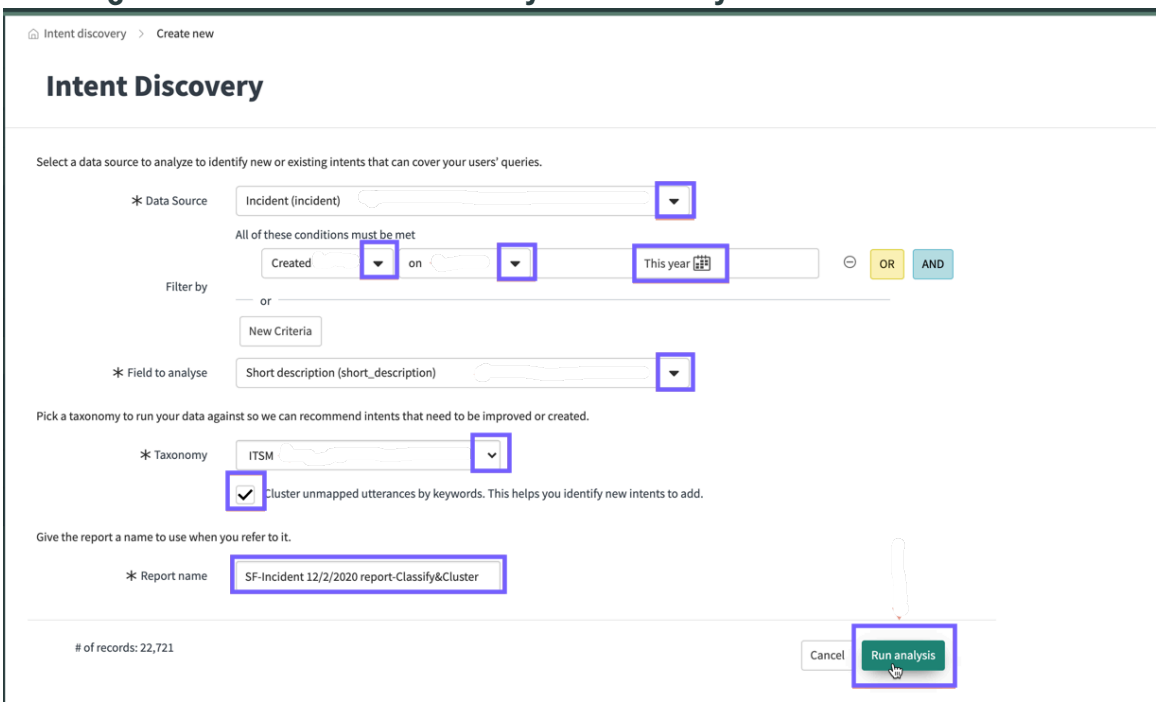
- Field to analyze: **Short description (short_description)**. You choose Short description because it's a highly used string field that references words that can help the system identify an intent.
- Taxonomy: Select **ITSM**. This field tells the system to run classification processing on your ITSM incident records. It has 3 options: Classification, ITSM, or blank, which defaults as Classification.
- Cluster unmapped utterances by keywords... : Select the **check box**. When you check this box, the system groups your incident records that weren't classified into clusters.
- Report name: The field automatically defaults to **Incident <month/day/year>**. You can edit the name if you prefer. In this example scenario, you enter `Incident 12/16/2020 - SF Test`.

2. Select **Run analysis**.

Selecting data sources in Intent Discovery for a run analysis



Result: Your report appears on the Intent Discovery screen, showing its status as the analysis begins. The subsequent status values appear in the following order during the analysis: Preparing to run, Work in progress, Clustering, and Done. This can take from 5 minutes to 30 minutes to complete. The fewer the records you have in a cluster, the less time it takes. Turning clustering off can also speed up the process.

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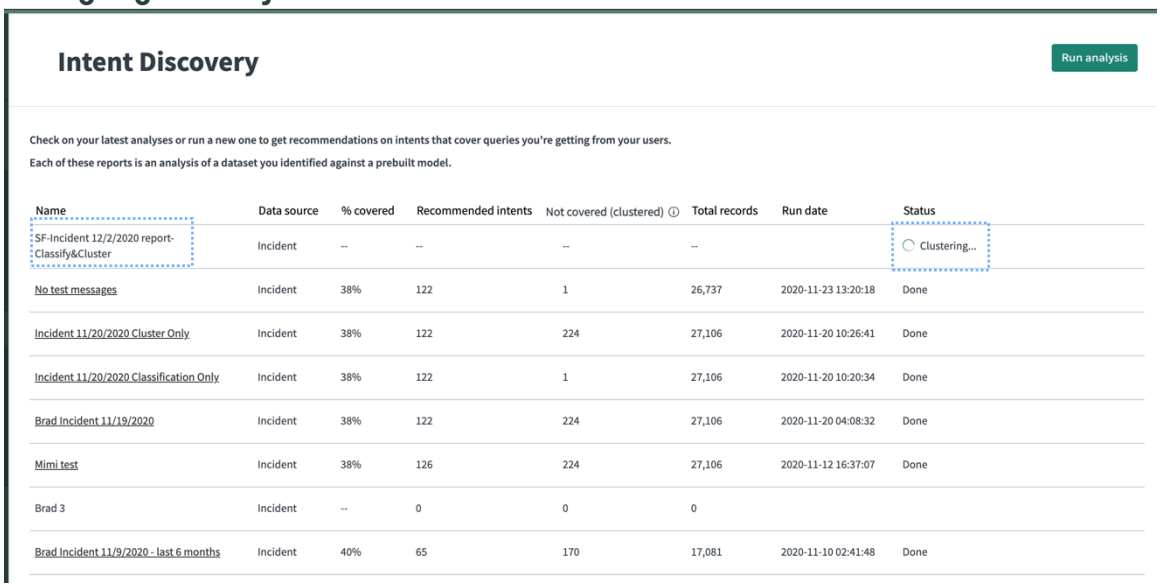
An ongoing run analysis

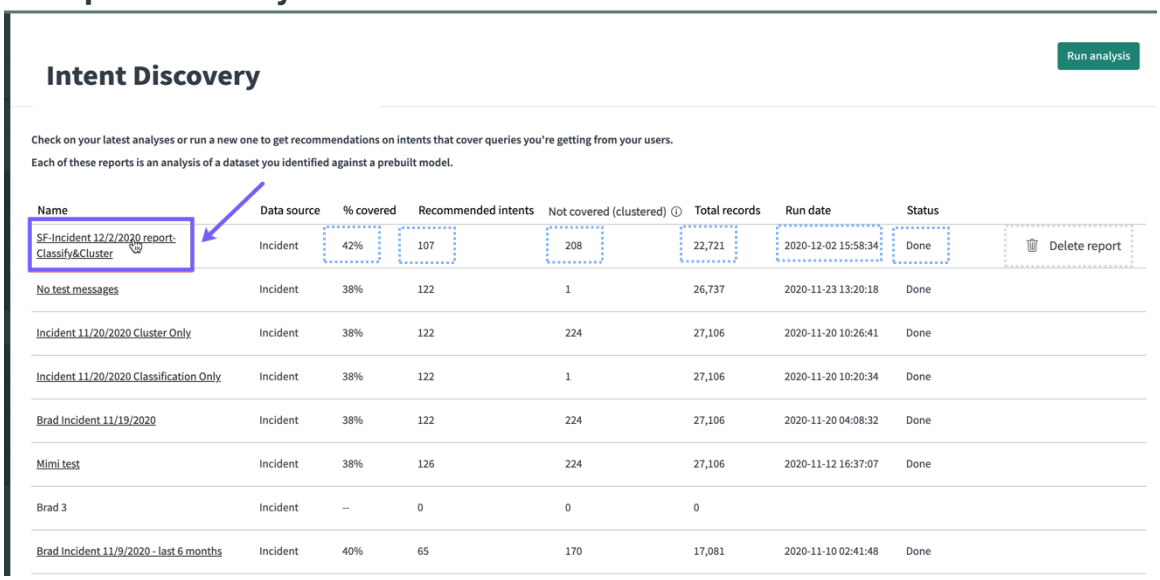


When the analysis is complete, the column values on the screen appear, with the **Status** column value set to **Done**, as shown in the image below.

Note: If you want to delete the report and start over, point to the right of the Status column to invoke the **Delete report** icon.

3. Select the **Name** of your report.

A completed run analysis



Result: The screen refreshes, showing the analyzed incident records and the remaining incident records that were not classified.

Importing recommended intents to new or existing custom models

Before importing intents to an NLU model, ensure that you are in the same application scope as the model. For more information, see Select an application from the application picker.

1. On the Records covered by recommendations section of the screen, select the caret icon on a recommended intent you want to add to a custom model.

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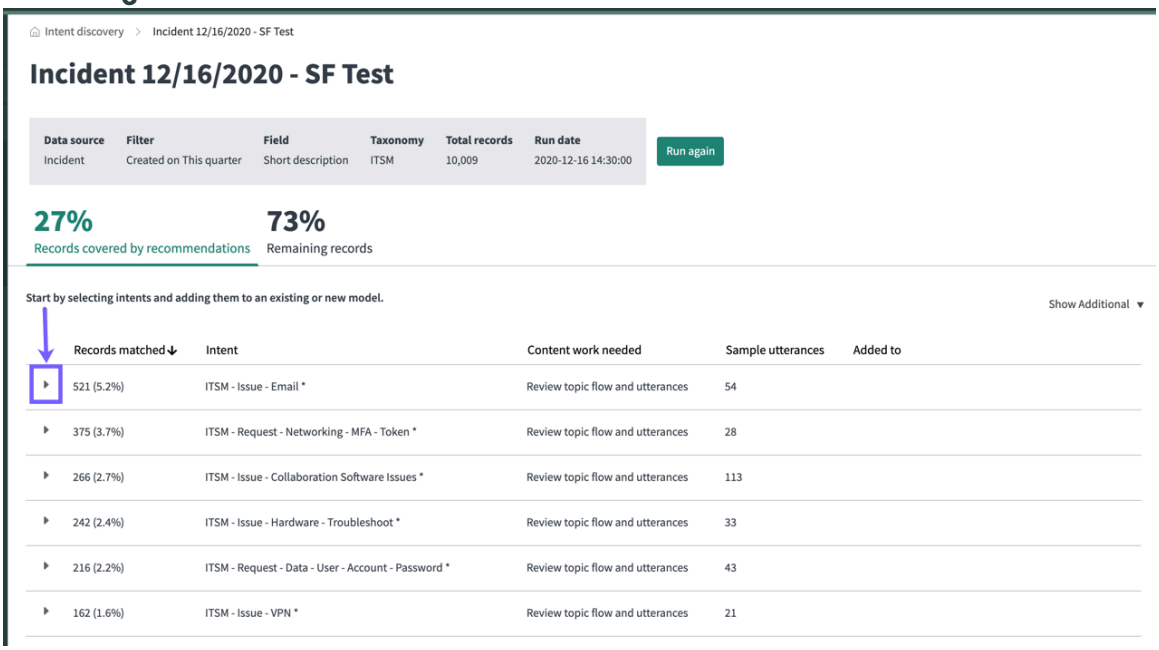
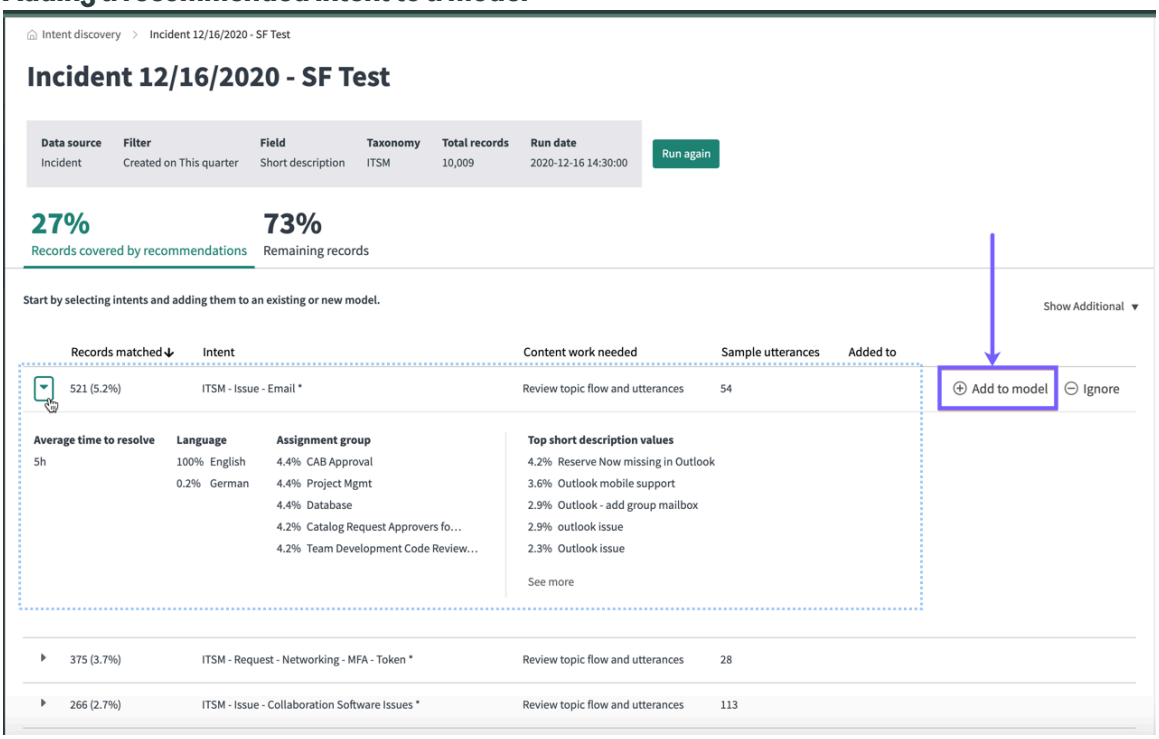
Reviewing a recommended intent



Result: The details of the recommended intent appear so you can review them, as shown in the image below.

2. Select **Add to Model**.

Adding a recommended intent to a model



3. On the Select a destination model screen that appears, choose a model you want to add the recommended intent to. If you can't find an appropriate model, create a new one, return to the report, and add the new model.

Note: The model you choose must have the same application scope as your current scope.

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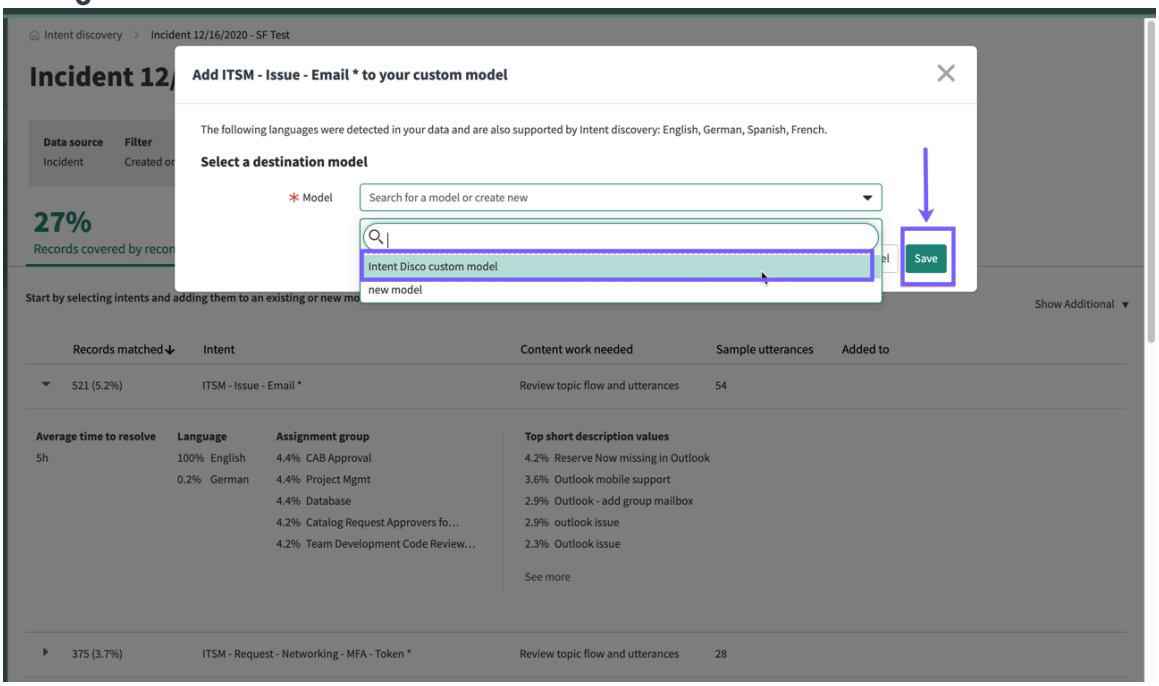
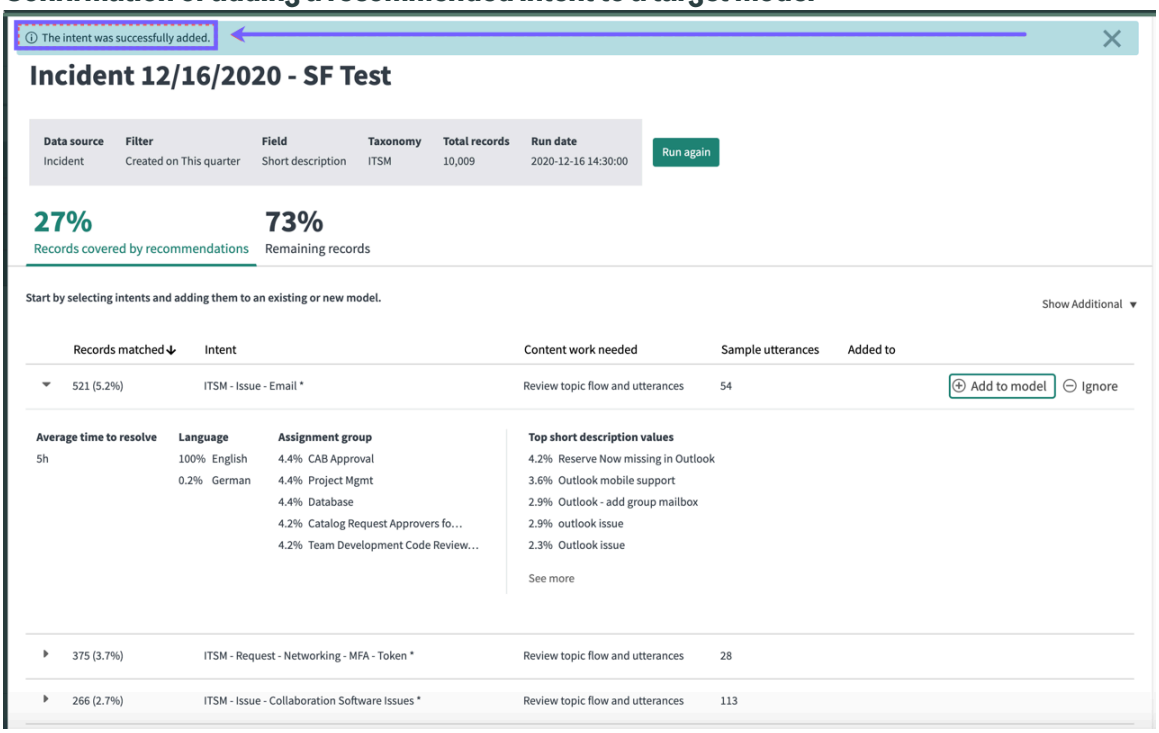
4. Select **Save**.

Saving a recommended intent to a model



Result: A banner appears on the screen, confirming the intent is added to the target model.

Confirmation of adding a recommended intent to a target model



The recommended intent also appears on the Model screen of the target model, as shown in the image below.

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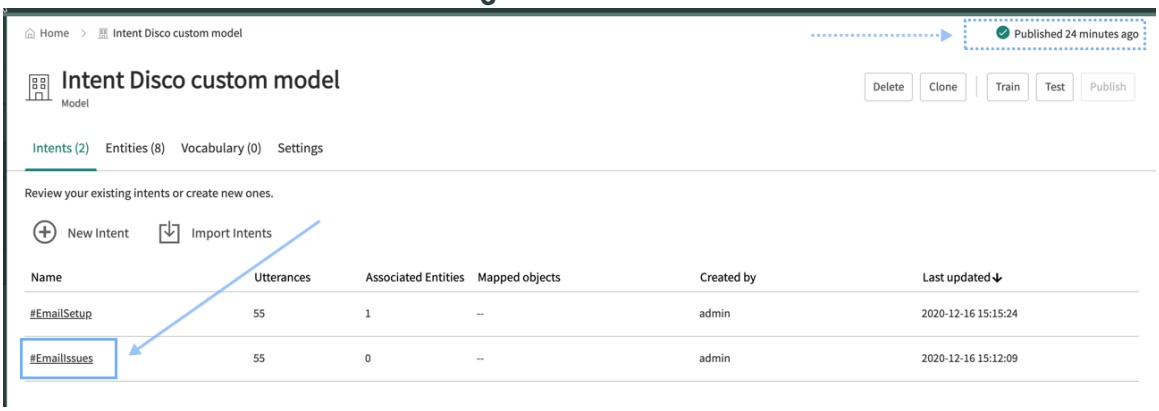
View a recommended intent in the target model



Adding clustered utterances to an intent and its model

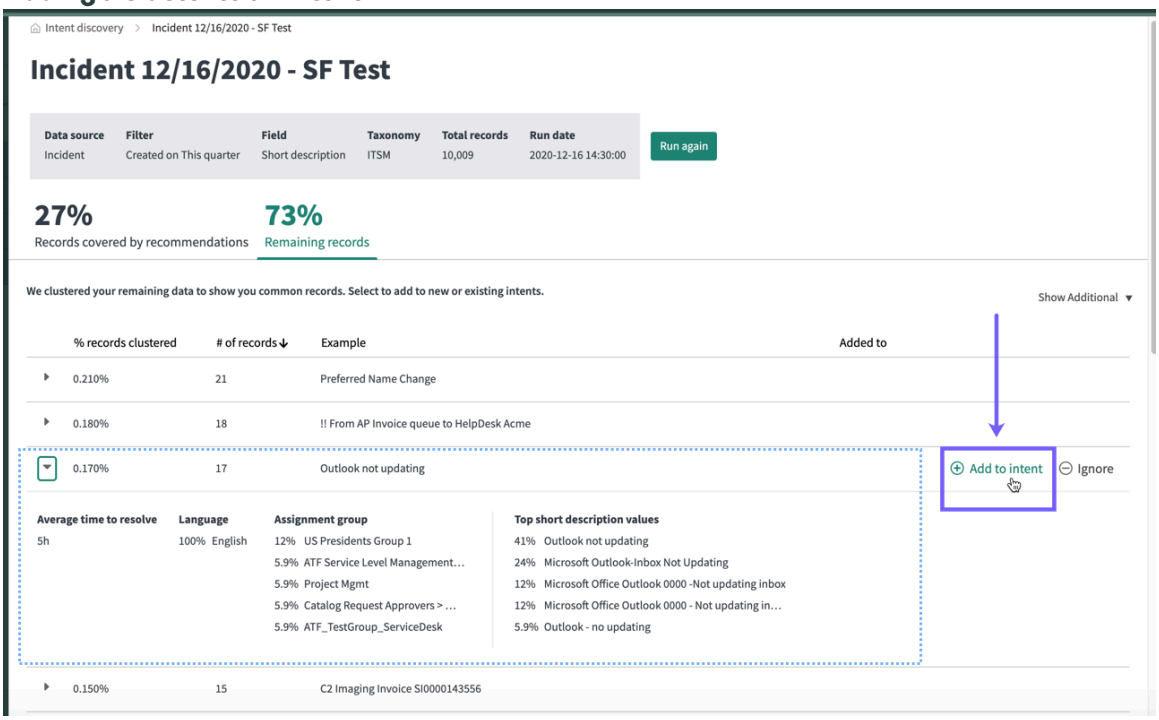
1. On the Remaining records section of the intent discovery records screen, select and open a cluster of utterance and short description data that you want to add to an intent and its associated model.

As you continue to build out new intents from these clusters, you can click the **Ignore** icon to remove any unwanted intents from the report.

There's also a **Show Additional** filter you can use to show or hide the added intents, and the ignored intents as well.

2. Select **Add to intent**.

Adding a cluster to an intent



3. In the Add this cluster to an intent and model screen, select an intent and model pair you want to associate to this cluster.

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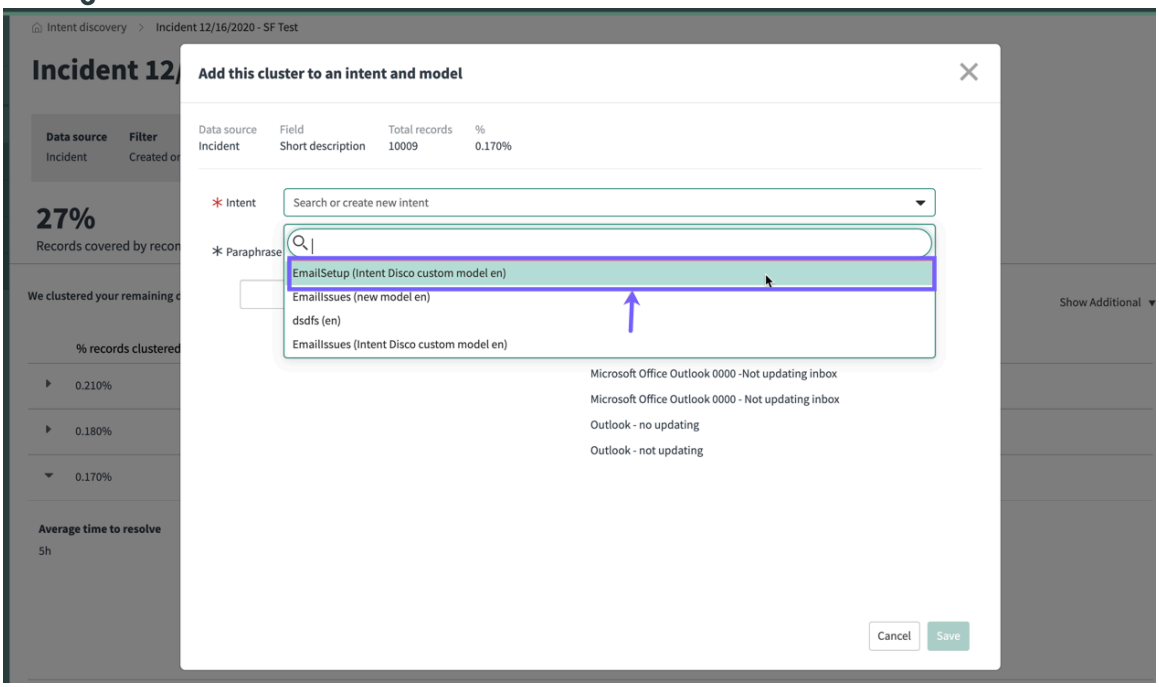
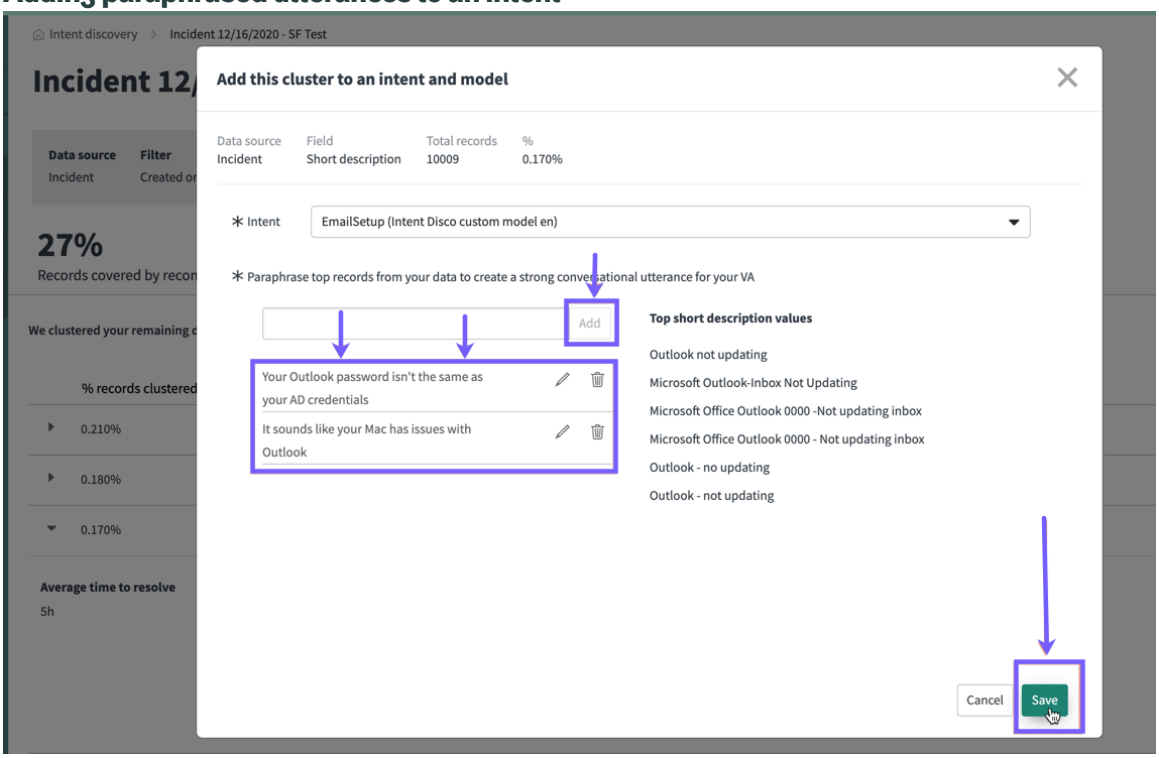
Adding a cluster to an intent and model



4. Enter a few utterance examples into the open text field. Select **Add** each time you complete your entry to save it in the system. Use the pencil icon or the trash can icon respectively to edit or delete your entry.

5. Select **Save**.

Adding paraphrased utterances to an intent



Result: The records screen appears, showing a banner confirming you added two new utterances to the target intent and its associated model. The model and intent pair appears in the **Added To** column, as shown in the image below.

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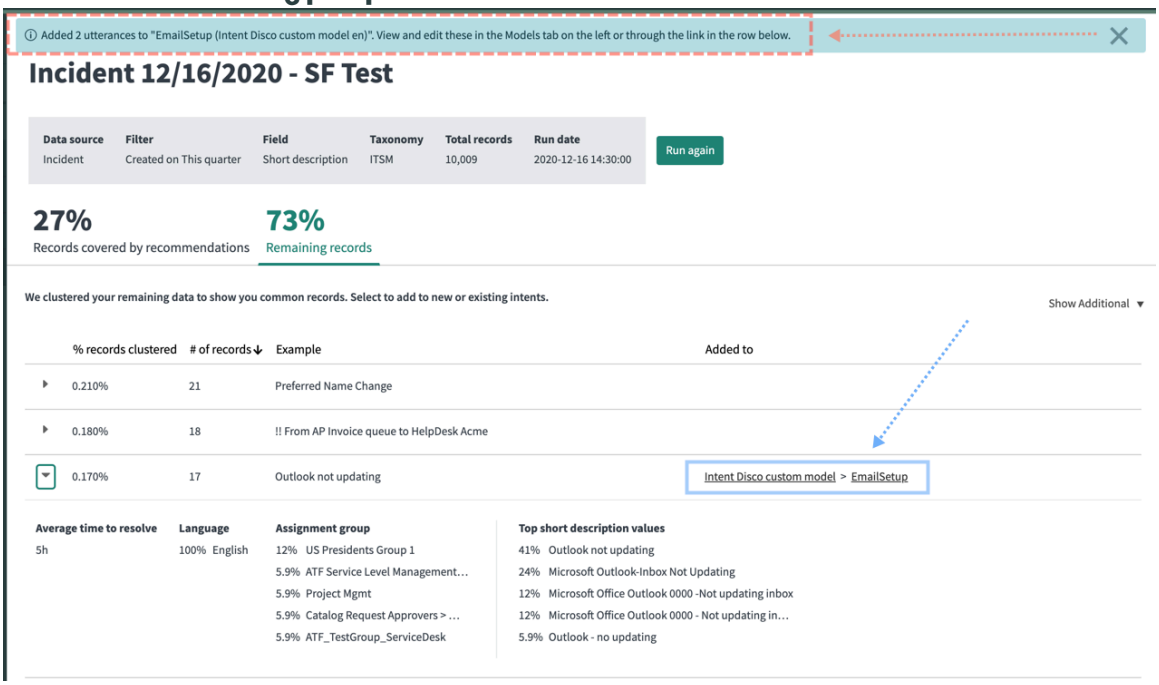
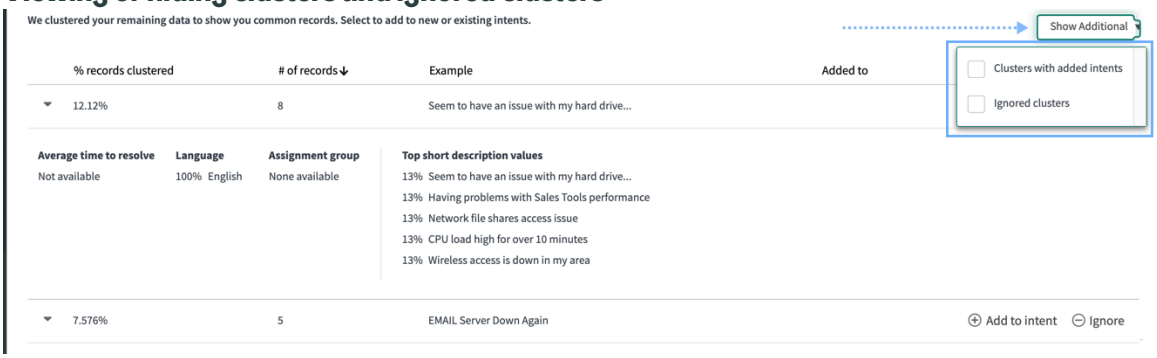
Confirmation of adding paraphrased utterances to an intent



Use the **Show Additional** filter if you want to show or hide the clusters that have added intents, and the clusters that are ignored.

Viewing or hiding clusters and ignored clusters



Running another analysis on your Intent Discovery report

1. Select **Run Again**.

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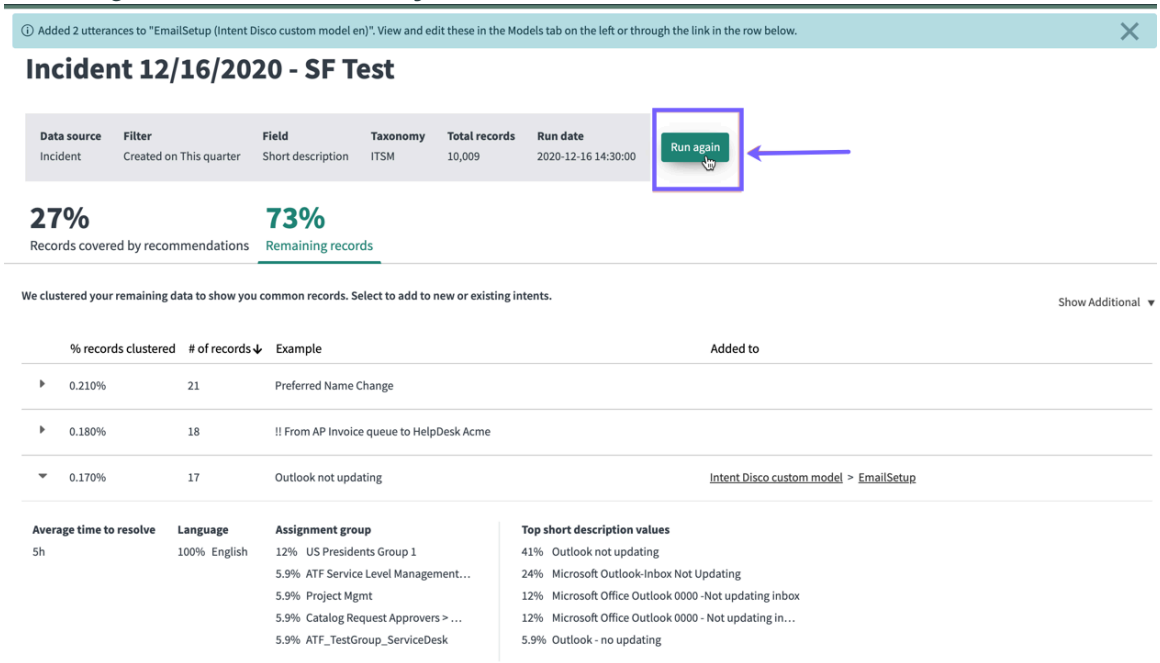
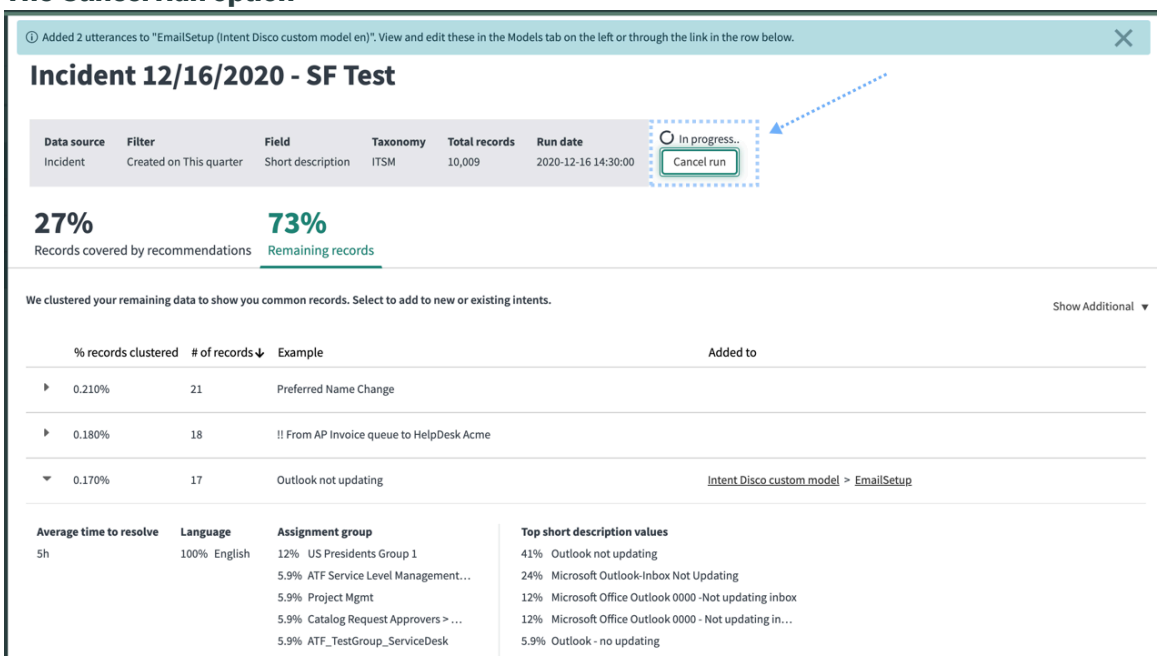
Selecting the version of the analysis to run



Result: The new run begins. When it's in progress, the option to cancel the run appears, as shown in the image below.

The Cancel Run option



When the run is complete, a new banner appears that states you have a new version of the report.

2. Select the new version, then select **Run Again**.

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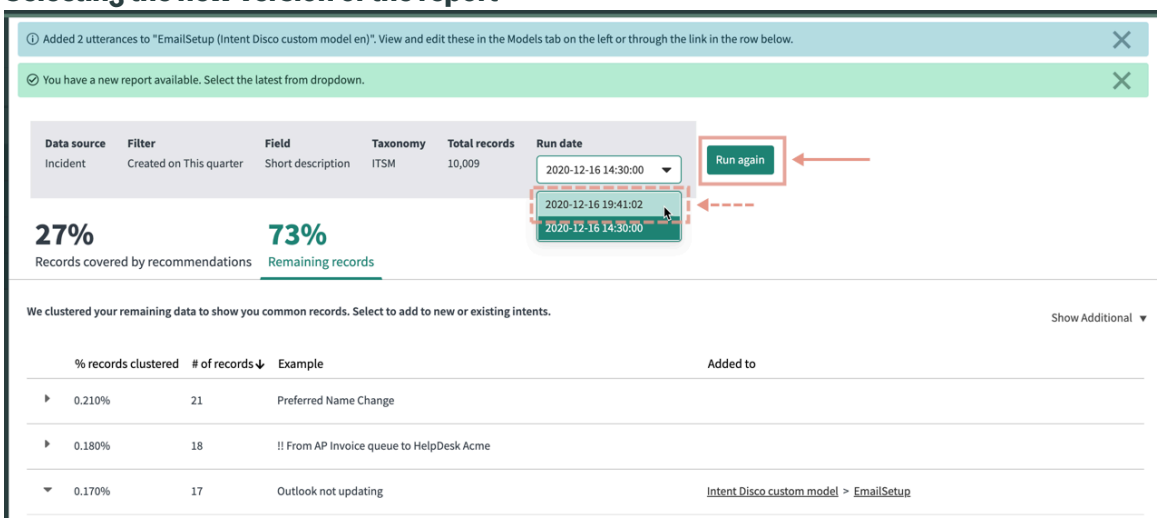
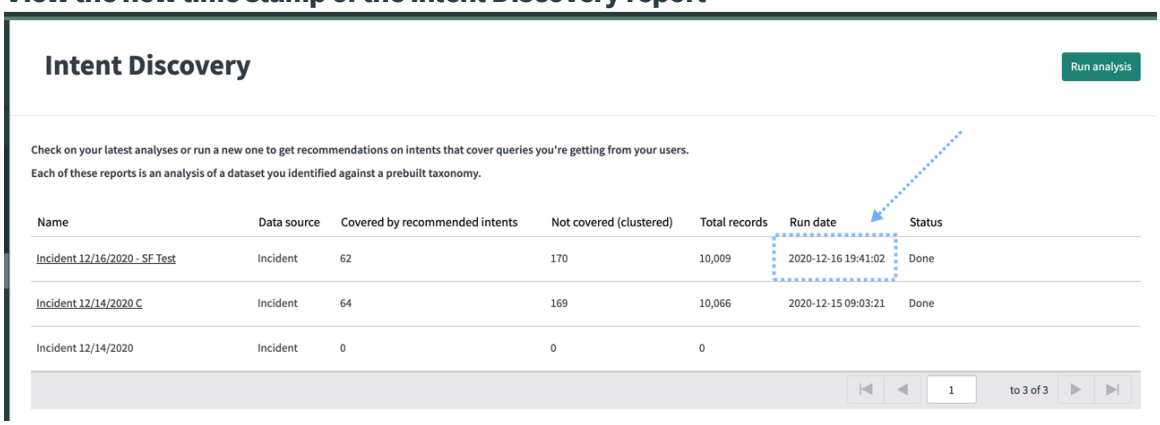
Selecting the new version of the report



Result: The time stamp you selected for the most recent run appears in the **Run date** column of the Intent Discovery screen.

View the new time stamp of the Intent Discovery report



(Legacy) Install Intent Discovery

You can install the Intent Discovery application (sn_nlu_discovery) if you have the admin role.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Intent Discovery application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- Intent Discovery requires the following plugins. Ensure that these plugins are activated before you install Intent Discovery.

Required ServiceNow plugins

Predictive Intelligence (com.glide.platform_ml)

Enables various Predictive Intelligence and Machine Learning capabilities for training models. See Install Predictive Intelligence.

NLU Workbench - Core (com.glide.nlu)

Adds NLU Model capabilities. See (Legacy) Activate the NLU Workbench.

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Role required: admin

About this task

Starting with the Brazil release, Natural Language Understanding is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Tables are installed with Intent Discovery:

For more information, see (Legacy) Components installed with Intent Discovery.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Intent Discovery application (sn_nlu_discovery) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If any plugins or applications need to be installed, you must install them before you can install Intent Discovery.
4. Select **Install**.

(Legacy) Components installed with Intent Discovery

Several types of components are installed with activation of the sn_nlu_discovery plugin, including tables.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Tables installed

Table	Description
Discovery Report [sn_nlu_discovery_report]	Reference table for discovery clusters and intents.
Discovery Message [sn_nlu_discovery_processed_message]	Contains flexible references to the source record and field that was used for analysis.
Discovery Report Trace [sn_nlu_discovery_report_trace]	Contains the information on the utterances added to intents.
Discovery Intent	Contains the intents for a report.

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Table	Description
[sn_nlu_discovery_intent]	
Discovery Cluster [sn_nlu_discovery_cluster]	Contains the clusters for a report.
Discovery Report Definition [sn_nlu_discovery_report_definition]	Includes the necessary information for generating reports.

Natural Language Query

Natural Language Query (NLQ) enables you to query the data in your instance by entering plain language requests into the user interface.

Get started

Choose one of these tiles to get started.

Explore

Learn about NLQ concepts and features.

Use

Use NLQ to query your data with requests in natural language.

Configure

Set up NLQ for your environment.

References

Get details about properties and roles installed with NLQ.

Exploring Natural Language Query

NLQ is a ServiceNow AI Platform feature that is active by default. Use NLQ to query the data in your instance by entering plain language requests into the user interface.

ServiceNow® NLQ translates natural language user input into glide record queries. The queries are rendered into an executable structured format, such as a JavaScript Object Notation (JSON) file or a visual definition. The output, in whichever format, is the response to the user's request.

Note: When a user enters a request directly into the user interface (UI), the text of the request is called an utterance in tables such as NLQ logs.

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NLQ is a ServiceNow AI Platform feature that is active by default and supports the following data operations:

- Driving table suggestion
- Filtering
- Grouping and aggregations
- Sorting
- Data visualization (single score, list, bar chart, pie chart, time series)
- Business calendar
- Single number
- Multi-table

For more information, see Using Natural Language Query.

NLQ doesn't support domain separation. It also doesn't support on-premise instances.

Language support

NLQ supports American English by default. For all applications and features except CMDB, NLQ also supports queries in Spanish, French, French Canadian, German, and Japanese.

You must first activate the languages on your instance for NLQ to parse queries in those languages. For more information, see Activate a language.

Using NLQ in other applications and features

Other ServiceNow® applications and features can consume NLQ functionality. See the following resources for more information.

Features that can consume NLQ

Application or feature	Information
Analytics Q & A	Create a report with Analytics Q&A
Configuration Management Database (CMDB)	Query your CMDB data without needing to know table relationships or data structures. • Querying the CMDB • Intelligent Search for CMDB English is the only supported language for CMDB.
NLQ with AI Search in global search	NLQ Genius Results in AI Search (supports English only)
List V2	Filter through any platform list by entering in a plain-language request.

Using Natural Language Query

With Natural Language Query (NLQ), you can query data in your tables by entering requests in natural, everyday language.

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NLQ overview

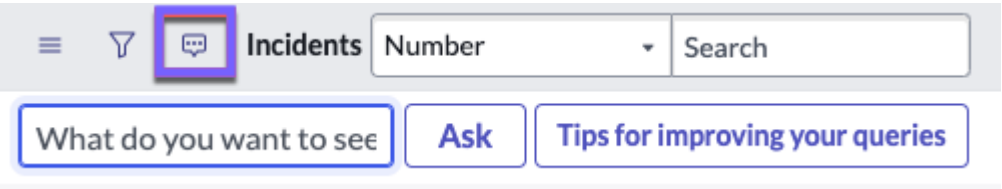
NLQ turns your plain-language requests into structured queries of your data. You don't need to know how to use the condition builder, because NLQ constructs and displays the conditions for you.

If you have a role such as itil that can view and interact with tables, you can use NLQ by selecting the natural language filter icon.

NLQ works on any list on the platform. It returns results only from the table or list you query on.

Find and use the natural language filter

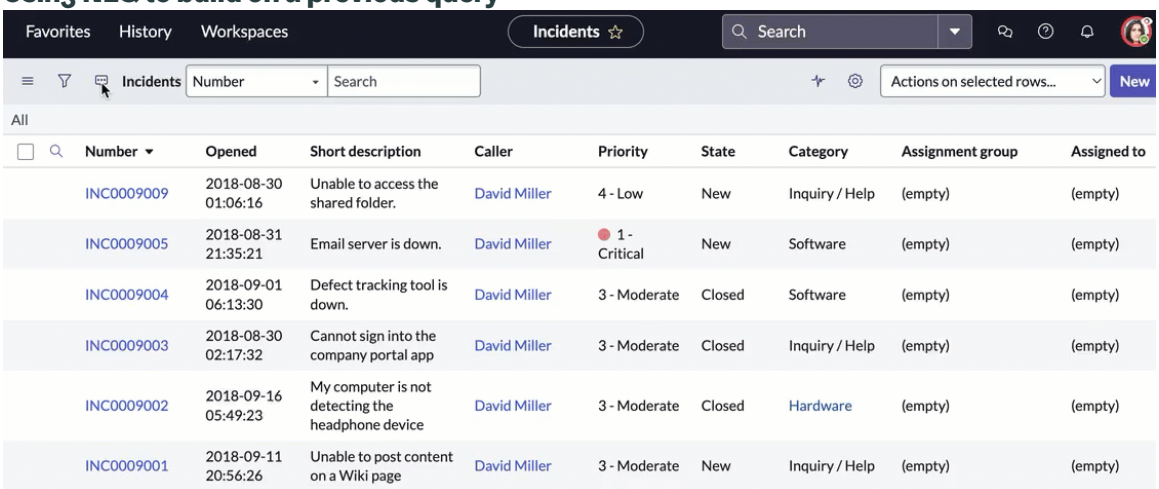
Selecting the natural language filter icon brings up the NLQ interface.



Enter your request in the What do you want to see field, then select **Ask**. NLQ parses your request, then displays the query in the condition builder. The results of the query are displayed in the list.

With the default configuration of NLQ, you can continue to refine your query by entering another request into the What do you want to see field.

Using NLQ to build on a previous query



Number	Opened	Short description	Caller	Priority	State	Category	Assignment group	Assigned to
INC0009009	2018-08-30 01:06:16	Unable to access the shared folder.	David Miller	4 - Low	New	Inquiry / Help	(empty)	(empty)
INC0009005	2018-08-31 21:35:21	Email server is down.	David Miller	1 - Critical	New	Software	(empty)	(empty)
INC0009004	2018-09-01 06:13:30	Defect tracking tool is down.	David Miller	3 - Moderate	Closed	Software	(empty)	(empty)
INC0009003	2018-08-30 02:17:32	Cannot sign into the company portal app	David Miller	3 - Moderate	Closed	Inquiry / Help	(empty)	(empty)
INC0009002	2018-09-16 05:49:23	My computer is not detecting the headphone device	David Miller	3 - Moderate	Closed	Hardware	(empty)	(empty)
INC0009001	2018-09-11 20:56:26	Unable to post content on a Wiki page	David Miller	3 - Moderate	New	Inquiry / Help	(empty)	(empty)

This example image and procedure illustrates how to build a query using NLQ:

1. On the Incident table in the natural language filter, enter `show me active hardware tickets` and select the **Ask** button.
2. The condition builder displays **All** > **Active = true** > **Category = Hardware** as the query. The filtered results are displayed in the list.
3. To narrow down the list of results further, enter `without assignment group`. Notice that as you type, NLQ displays possible matches for columns and fields. Select assignment group from the list of suggestions, and then **Ask**.

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4. In the condition builder, NLQ adds **>Assignment group is empty** to the query. The list refreshes to display only the matching rows.
5. To reset and start a new query, delete everything in the condition builder so that only **All** remains.

Useful information

Keep the following information in mind when using NLQ.

- Your requests can contain periods and apostrophes, but not wildcard characters such as asterisks or regex.
- To group by a field or column, that column must be visible in the list view. Use the personalize list icon ( ) to hide or display columns.
- For information about querying CMDB tables, see Querying the CMDB .

Tips for improving your queries

When you select the **Tips for improving your queries** button, a modal window appears in the user interface. This window offers the following information about terms you can use in your NLQ questions and requests:

- Sorting or grouping: grouped by; sorted by; A-Z; z-a
- Dates: today; yesterday; last; this; next day(s); week(s); quarter(s); year(s)
- Filtering: starts with; ends with; more than; less than; empty; not empty; and; or
- Other information: my; my team; created by; unassigned

Query	Example
Sorting or grouping	incidents grouped by category
Dates	created last month
Filtering	short description starts with computer
Other information	unassigned tickets
Single number	INC0777

Configuring NLQ

Enhance your users' query experience by supplementing NLQ with words and terms used in your environment. Review your users' actual requests in the NLQ logs to find possible synonyms and shortcuts to add.

Natural Language Query functionality is included in the base system. Admins can optionally expand NLQ's range of understanding by adding terms that commonly occur in users' requests. Review the following topics to learn more.

For information about system properties related to NLQ, see Natural Language Query References.

Create an NLQ synonym

Add synonyms to improve the ability of NLQ to recognize the various ways your users request data. With synonyms, you can map commonly used words or terms to table columns.

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Before you begin
Role required: admin, nlq_admin, or pa_analyst

About this task
NLQ synonyms enable you to map common words in your users' requests to the columns in your instance tables. When these words are detected in natural-language queries, NLQ replaces them with actual column and table names, then submits the formal query.

Several synonyms are provided in the base system, and you can add more for your use cases and business requirements. Review NLQ logs of actual user utterances to find possible synonyms to add. For more information, see View NLQ logs.

You can create a new synonym, or modify an existing synonym, as follows.

- If any synonym already exists for your target table and column, you must add your new synonym to the current record. Separate multiple synonyms with a comma.
- Synonyms can point to reference fields, using dot-walking. For more information, see Dot-walking examples.
- Synonyms are case-insensitive in queries.
- Synonyms can contain apostrophes and periods, but not commas.
- Synonym records are associated to one table. You can use the same synonym term for more than one table, but you must create a record for each table.

Procedure
1. Ensure that you are in the application scope you want for your synonym, then navigate to **All** > **NLQ** > **Synonyms**.
2. Select **New**.
   If you are updating an existing record, select its **Column name** in the list.
3. On the form, fill in the fields.

Field	Description
Synonym Type	Type of synonym. ○ **Table or Column**: Synonym for a value on a table or a specific column in that table. ○ **Record**: Synonym for a value on the CMDB tables [cmdb_rel_type_table]. For more information, see Querying the CMDB. **Note:** Supports cmdb_rel_type,cmdb_group, cmdb_ci_service_technical, cmdb_ci_service_discovered, cmdb_ci_query_based_service tables.
Application	[Read only] Application scope that can use the synonym in a query. The default is **Global**. When creating a synonym, ensure that you are in the scope you want for the synonym.
Table	Source table.

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Field	Description
	You can use the same term for more than one table, but you must create a synonym record for each table. The synonym's mapping is unique to the table.
Column name	Specific column on the source table.
Language	Language of the synonym. Should match the language of the source value.
Synonyms	Words or short phrases that the system should map to column names or tables, when converting the utterance to a formal query. Separate multiple synonyms with a comma.
Extend to All Child Tables	**Table or Column** type only. Select this option to make any child tables of the source table inherit the synonyms.

4. Select **Submit** if new, or **Update** if you are modifying an existing record.

Result

The new synonym is available to your users as soon as they refresh the browser window of the list.

Example: NLQ Synonym for the Active field

The following image shows an example of an NLQ synonym record for the **Active** field on a change request. The synonyms open and in progress are replaced by the term active when the system submits a query.

With this synonym record, a user can type `show open change requests` or `change requests in progress` and the system displays active change requests.

Create an NLQ shortcut

Create a semantic shortcut to help improve the ability of NLQ to recognize the various ways your users request data. Semantic shortcuts operate similarly to NLQ synonyms by mapping common words to columns, but for a selected table when certain conditions are met.

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Before you begin
Role required: admin, nlq_admin, or pa_analyst

About this task
Like NLQ synonyms, semantic shortcuts enable you to map common words in your users' requests to the columns in your instance tables. When these words are detected in natural-language queries, NLQ replaces them with actual column and table names, then submits the formal query.

Semantic shortcuts provide a condition builder so that you can filter which records are covered by the terms you provide.

Some semantic shortcuts are provided in the base system, and you can add more for your use cases and business requirements. Review NLQ logs of actual user utterances to find possible terms to add. For more information, see View NLQ logs.

You can create a new shortcut, or modify an existing shortcut, as follows.

- If any shortcut already exists for your target table and filter conditions, you must add your new shortcut to the current record. Separate multiple shortcuts with a comma.
- Shortcuts can point to reference fields, using dot-walking. For more information, see Dot-walking examples.
- Synonyms are case-insensitive in queries.
- Synonyms can contain apostrophes and periods, but not commas.
- Synonym and shortcut records are associated to one table. You can associate the same synonym term to more than one table, but you must create a record for each table.

Procedure
1. Ensure that you are in the application scope that you want for your shortcut, then navigate to **All** > **NLQ** > **Semantic Shortcuts**.
2. Select **New**.
   If you are updating an existing record, select its row in the list.
3. On the form, fill in the fields.

Field	Description
Table	Source table. You can use the same term for more than one table, but you must create a record for each table. The synonym's mapping is unique to the table.
Conditions	Conditions on the source table that must be met for the synonym to work.
Synonyms	Words or phrases that the system should map to column names or tables, when converting the utterance to a formal query. Separate multiple synonyms with a comma.

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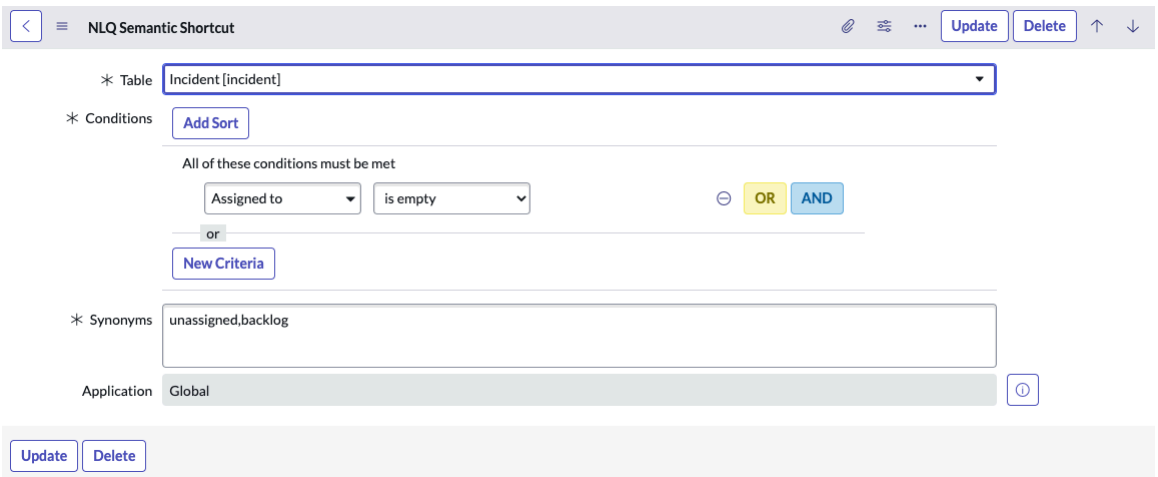
Field	Description
Application	[Read only] Application scope that can use the synonym in a query. Default is **Global**. Ensure that you are in the target application scope for your shortcut before creating it.

4. Select **Submit** if new, or **Update** if you are modifying an existing record.

Result
The new shortcut is available to your users as soon as they refresh the browser window of the list.

Example: Semantic shortcut for Incident backlog
The following image shows an example of a semantic shortcut used on incident records. Incidents contain the Assigned to field. Using the condition builder, you can provide synonyms for when the field is empty. When NLQ detects unassigned and backlog in your users' input, it replaces them with the SQL clause `assigned_toISEMPTY`.



A user can enter `show me incident backlog` or `unassigned incidents` and the system displays incidents with an empty Assigned to field.

View NLQ logs

Review NLQ logs to see how the system has handled your users' plain-language requests. Use log records from attempted requests to expand NLQ synonyms or shortcuts.

Before you begin
Role required: nlq_admin, pa_analyst, or admin

About this task
Every natural language query is logged in the *NLQ* **Query Logs** table [nlq_query_log]. Each log entry provides details such as the table that was queried, whether the query succeeded, and how the results were generated. Other available fields include the following.

- Output Source: how the results were generated. The value **BNF** indicates a rules-based method. The value **GAI** indicates the Now LLM Service (fallback) method.
- Source: the location from which the query was initiated. The value **AC** indicates Analytics Overview. The value **CMDB_WS** indicates CMDB Workspace.
- Utterance: the original natural-language request which triggered NLQ.

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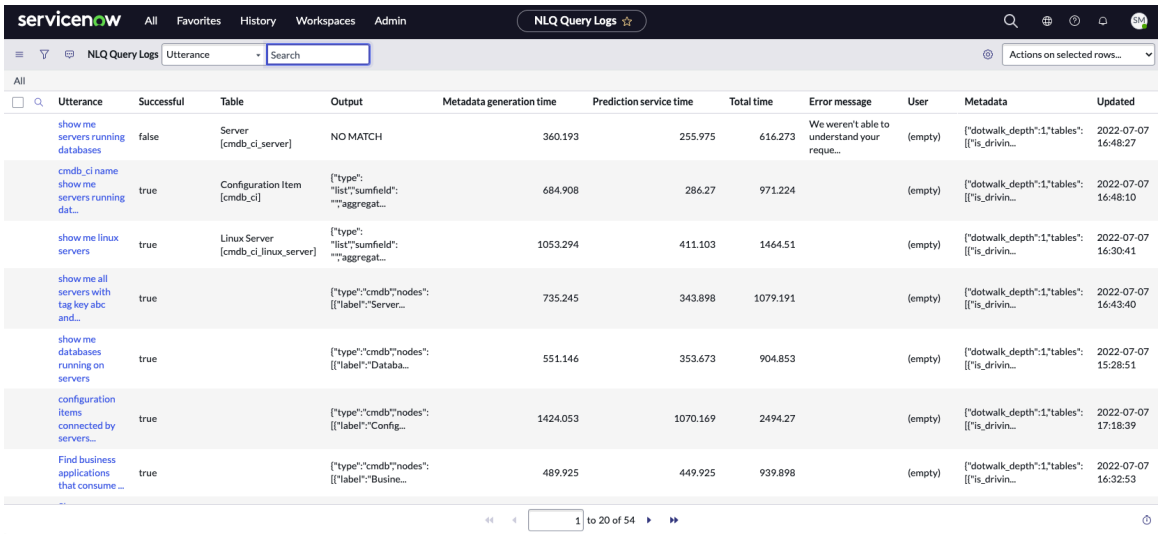
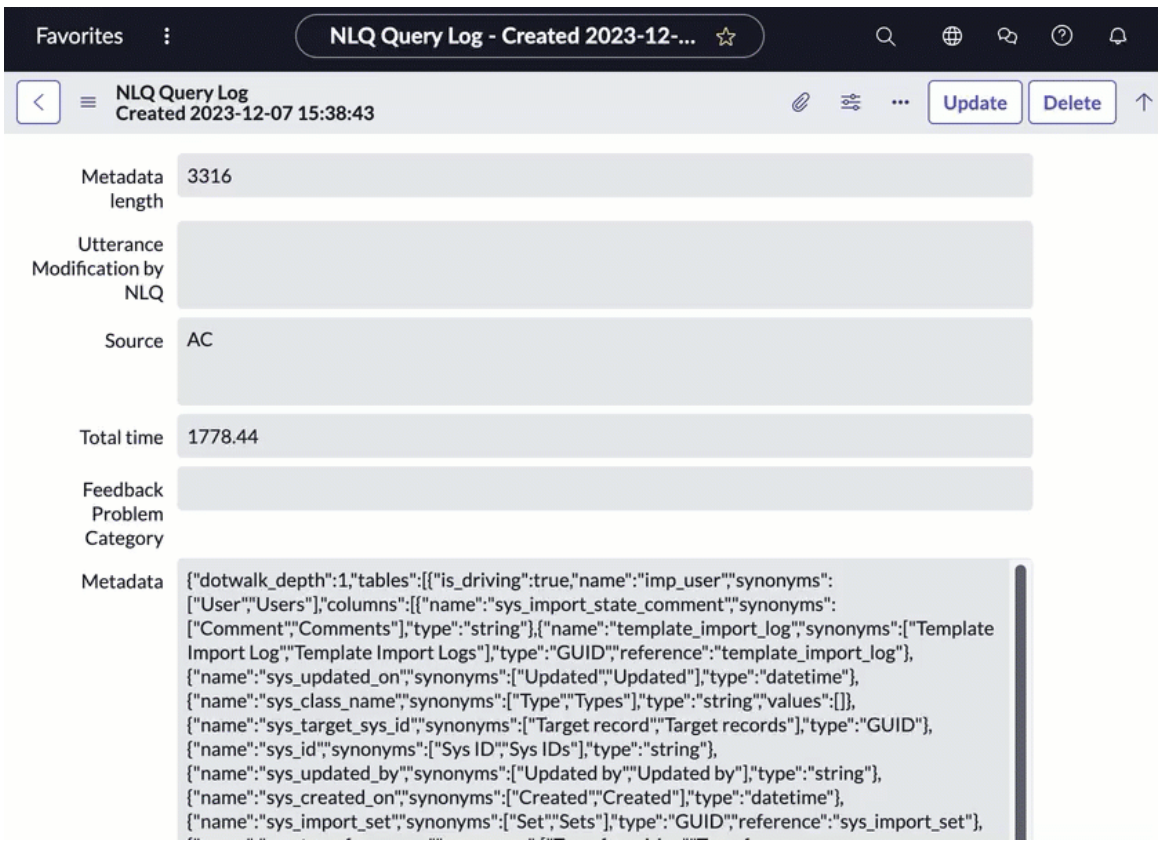
Procedure

1. Navigate to **All** > **NLQ** > **Logs**.



2. Select the value in the **Utterance** column to open the full log entry.



What to do next

Based on your users' attempted queries, consider adding more synonyms or shortcuts.

View NLQ Table Guesser logs

Use the Table Guesser logs to review the CMDB tables that were picked by NLQ in response to plain-language queries.

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Before you begin
This module is read-only.

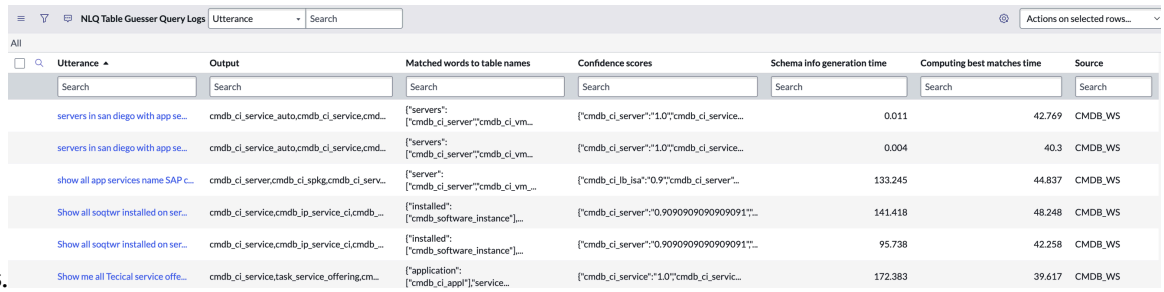
Role required: nlq_admin.

About this task
When a plain-language request for CMDB data is parsed by NLQ, the system tries to determine the specific tables the user intended. The system's guesses, including confidence levels, are recorded in the NLQ Table Guesser logs module [nlq_table_guesser_log].

Review these logs to troubleshoot which CMDB tables were inferred by NLQ.

Note: This list is read-only for NLQ admins. There are no buttons or actionable functions in the UI.

Procedure
1. Navigate to **All** > **NLQ** > **Table Guesser Logs**.
2. Select the personalize list icon ( ) to display the columns **Matched words to table names** and **Confidence scores**.



   The **Utterance** column shows the user's natural language query.
3. Use the information in the **Matched words to table names** column for troubleshooting if needed.
   In this column's value field, the first word was found in the utterance. Next is a list of the CMDB tables that were matched to that word.

What to do next
For more information on CMDB queries, see Exploring CMDB Query Builder.

Natural Language Query References

The following components are installed with Natural Language Query.

NLQ properties

The Natural Language Query (NLQ) properties control how and where NLQ operates.

Admins can edit properties of NLQ by navigating to **All** > **System Properties** > **All Properties**. Filter for the NLQ properties.

Note: Editing these system properties requires the admin role. The nlq_admin role does not have permission to edit records in this table.

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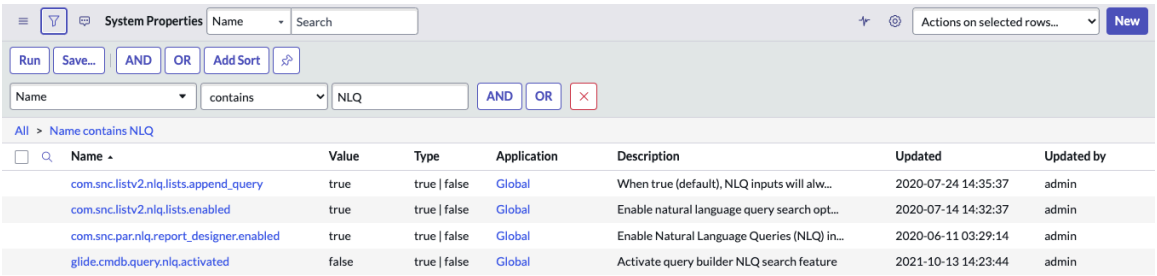

Property	Description
com.snc.listv2.nlq.lists.append_query	• True: NLQ inputs add onto existing queries via an "and" operator • False: New NLQ input replaces any existing queries Example: You run two queries. • Query 1: Incidents with critical priority • Query 2: assigned to John Smith If the property is set to true, the results show incidents with critical priority that are assigned to John Smith. If the property is set to false, the results show only items assigned to John Smith.
com.snc.listv2.nlq.lists.enabled	• True: Enables NLQ search option for List v2 • False: Removes NLQ search option for List v2
com.snc.nlq.gai_enabled	• True: The Now LLM Service fallback is available • False: The Now LLM Service fallback is not available Initially, queries are interpreted using a rules-based method. If that method fails, queries are passed to the Now LLM Service as a fallback. Queries that fail both of these methods are marked as unsuccessful in the NLQ log.
com.snc.par.nlq.report_designer.enabled	• True: Enables NLQ in Report Designer • False: Removes NLQ in Report Designer
glide.cmdb.query.nlq.activated	• True: NLQ search feature is active in CMDB Query Builder • False: NLQ search feature is inactive in CMDB Query Builder

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Property	Description
glide.service_portal.ais_nlq_enabled	• True: Enables NLQ in global search • False: NLQ is not available in global search

Natural Language Query roles

Natural Language Query (NLQ) is installed with these roles.

To learn more about managing per-user subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

NLQ Admin [nlq_admin]

The administrator for Natural Language Query.

Module Access

Has full access to the following modules:

- NLQ Cmdb Implicit Relationships. For more information see Intelligent Search for CMDB.
- NLQ Query Logs
- NLQ Semantic Shortcuts.
- NLQ Synonyms.

Has read-only access to the following module:

NLQ Table Guesser Query Logs.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

To avoid granting an admin role, use the pa_analyst role for NLQ Cmdb Implicit Relationships, NLQ Semantic Shortcuts, and NLQ Synonyms.

Predictive Intelligence

Predictive Intelligence is a powerful interface to train machine learning models. With Predictive Intelligence, you can improve performance, efficiency, and flexibility to your systems across multiple business units.

Get started with Predictive Intelligence

Administrators can harness the power of machine learning to improve productivity and efficiency for their agents and fulfillers. Predictive Intelligence uses artificial intelligence to improve

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processes across the platform. Predictive Intelligence enables you to do things such as the following:

- Automatically populate fields during case creation.
- Categorize and route work based on how records have been handled in the past.
- Recommend resolutions to cases that are similar to previous ones.
- Identify major outages based on incoming incidents.

Explore Learn about Predictive Intelligence and machine learning	**Install** Install Predictive Intelligence and its associated apps	**Configure** Configure Predictive Intelligence on the platform
Train Create and train machine learning solutions.	**Use** Use Predictive Intelligence for machine learning.	**Reference** Get details about Predictive Intelligence components such as properties and language support.

Explore Predictive Intelligence

ServiceNow® Predictive Intelligence is a platform function that provides a layer of artificial intelligence that empowers features and capabilities across ServiceNow® applications to provide better work experiences.

Overview of Predictive Intelligence

Predictive Intelligence is a powerful set of tools applying artificial intelligence and machine learning to make predictions. You can create and train models in three different frameworks: classification, clustering, and similarity. A

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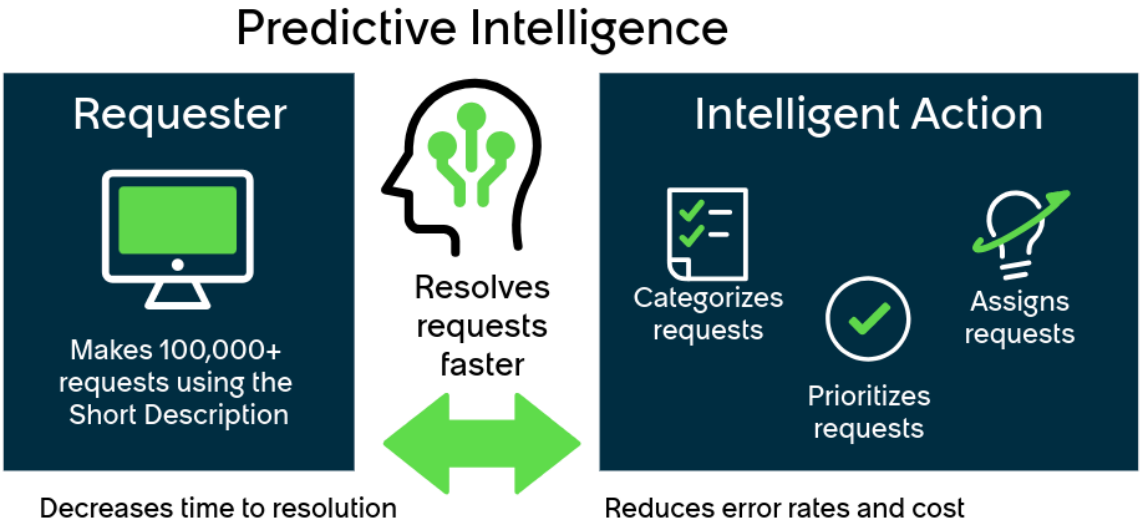
trained solution can be invoked by any ServiceNow application through an API.



To learn more about ways to use existing models, see Using Predictive Intelligence.

Predictive Intelligence for on-premise customers

Predictive Intelligence is also available for on-premise customers. If you're interested in deploying this product on-premise, contact your account manager. For on-premise installation and configuration instructions, see the complete instructions for Machine Learning Engine installation and configuration for self-hosted customers [KB0782052] in the Now Support Self-Hosted Knowledge Base.

Note: Only on-premise accounts can access the Now Support Self-Hosted Knowledge Base.

Terminology

Artificial intelligence

Systems designed to do work that needs a level of human intelligence to accomplish.

Machine learning

Ability for models to improve over time with more experience.

Models

Collections of algorithms, math, and statistics that make predictions and decisions based on input-output data.

Training

Adding or changing data that the model is based on to affect future predictions.

Supervised Training

Providing input-out pairs so that the model can generate rules that connect the two.

Unsupervised Training

Providing raw data so that the model can identify structures in the data set.

Training frequency

How often models are retrained to incorporate new data into an existing model.

Word corpus

Vocabulary that a model can use to look for textual similarity.

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Predictive model components

A predictive model includes these components, some of which you must provide.

Solution definition

A data record you create and configure that specifies these values for training a predictive model.

- The records used to train the model. For example, only train on incidents that are resolved or closed within the last six months.
- The input fields that the model uses to make predictions. For example, use the incident short description to make a prediction.
- The output field whose value the model predicts. For example, set the incident category based on the short description.
- The frequency to retrain the model. For example, retrain the model every 30 days.

Solution

The solution is the result of a solution definition that you've trained in a ServiceNow datacenter. Predictive Intelligence uses the solution to predict a target field value given one or more input field values. All solutions specify these values.

- The solution precision is the aggregate percentage of correct predictions. For example, a precision of 50 means that out of 100 predictions, half of them should have the correct value.
- The solution coverage is the aggregate percentage of records that receive a prediction. For example, a coverage of 50 means half of all eligible records actually receive a prediction.
- The solution classes are the output field values for which the model can make predictions. Each class is an output field value with a list of possible precision, coverage, and distribution metrics to choose from. For example, the Incident Categorization solution has a class for each category such as software, inquiry, and database.
- The class distribution is the percentage of records from the entire table that have this particular output field value. For example, a distribution of 50 for the inquiry class means that half of incidents have the inquiry category.

Predictive Intelligence frameworks

Predictive Intelligence provides three different model frameworks in the Brazil release: classification, similarity, and clustering. Each framework specializes in different types of predictions.

Predictive Intelligence classification framework

The Predictive Intelligence classification framework enables you to use machine-learning algorithms to set categorical field values during record creation. For example, you can use the model to set the incident category based on the short description. You can train predictive models so they act as an agent to categorize and route work automatically based on your past record-handling experience.

Enable Predictive Intelligence to handle volumes of incoming requests at lower costs. Automate the categorization and assignment of requests to reduce:

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- Task resolution times.
- The number of interactions required to resolve tasks.
- The error rates of categorizing and assigning work.

For more information, see Create and train a classification solution.

Predictive Intelligence similarity framework

The Predictive Intelligence similarity framework identifies existing records that have similar values to a new record. For example, you can train a subset of your incident records to recommend a resolution based on the information of a similar incident record. By borrowing from similar closed incidents that have a proven resolution, you can help agents and fulfillers quickly provide the best resolution for an incoming incident.

The similarity framework doesn't need an exact match of keywords for its text comparisons because its algorithms identify similar words and synonyms based on similar contexts. For example, the phrases printer not working and printer broken are both recognized as similar. The framework also collects, learns, and applies your industry-specific context. For example, the phrase unable to join network has a different context in a computer networking company than it does in a healthcare insurance company.

The similarity framework uses a workflow similarity solution. For more information, see Create and train a similarity solution.

Predictive Intelligence clustering framework

Clustering divides data into groups that can then be used to identify patterns. You can then address records collectively or find gaps in existing data. For example, you can group similar new incidents to identify a major outage.

The clustering framework uses a workflow clustering solution. For more information, see Create and train a clustering solution.

Deprecated in the Washington DC release: Predictive Intelligence regression framework

Note: Support for creating new regression solutions was removed in the Washington DC release. You can train and edit any existing solutions, but you can't initiate new ones. The following information is provided for legacy context.

Regression is a machine-learning framework that uses historic data to predict numeric outputs, such as a temperature or a stock price.

For more information, see Create and train a regression solution.

ServiceNow® apps and features that use Predictive Intelligence

Learn about ServiceNow applications and features that leverage Predictive Intelligence. Solutions that you can adapt are available for various business units and industries.

ServiceNow teams work together to offer models that apply the artificial intelligence and machine learning capabilities provided by Predictive Intelligence. For example, Customer Service Management (CSM) partners with Predictive Intelligence to deliver BU-specific solutions to ServiceNow CSM customers.

Following is a listing of some ServiceNow products that use Predictive Intelligence functionality.

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- Machine learning solutions for Customer Service Management
- Machine learning solutions for Event Management
- Issue assignment using the Governance, Risk, and Compliance Predictive Intelligence plugin
- Machine learning solutions for HR Service Delivery
- Predictive Intelligence for Innovation Management
- Machine learning solutions for IT Service Management
- Machine learning solutions for Knowledge Management
- Machine learning solutions for Search administration
- Machine Learning solutions for Vulnerability Response
- Work order insights powered by Predictive Intelligence
- Machine Learning solutions for Flow Designer

Install Predictive Intelligence

Activate Predictive Intelligence on your instance and get started with basic configuration.

Before you begin

Role required: admin

About this task

The Predictive Intelligence plugin (com.glide.platform_ml) is included in the base system, but if necessary you can use the following procedure to activate it.

Other related plugins and store applications are available. For example, Predictive Intelligence for Field Service Management (com.snc.fsm_ml) provides solutions relevant to FSM. Some of these plugins may require a separate license.

When you activate the Predictive Intelligence plugin for the first time on your instance, the system launches a Homepage. The Homepage provides an overview of your solution definitions in the classification, similarity, clustering, and regression frameworks. You can create, train, and test solutions directly on the Homepage. A summary of the latest trained solution is also available.

Procedure

1. Navigate to **System Definition** > **Plugins**.
2. Use the search bar to locate the Predictive Intelligence (com.glide.platform_ml) plugin.
3. Select **Install** and then in the Activate Plugin dialog box, select **Activate**.
   When you activate a plugin, any dependent plugins are activated automatically.
4. Confirm that the activation has successfully created a sharedservice.worker user.
   When training your solutions, Predictive Intelligence operates as this user.

   Note: The sharedservice.worker user includes the following roles:
   - platform_ml_read
   - platform_ml_write
   - platform_ml_create

   These roles are required to create, train, and view solutions. They are internal roles and not meant to be edited or assigned to other users.

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Implement Predictive Intelligence

Implement initial setup and configuration steps for Predictive Intelligence to train a machine-learning (ML) algorithm to make predictions based on your past record data.

Before you begin

Role required: admin or ml_admin

About this task

The training process requires sending record data to a training service in the nearest datacenter. Since every datacenter has its own dedicated training server and the data doesn't leave the datacenter, this service is also available to customers who have data sovereignty requirements. For more information on this process, see Explore Predictive Intelligence.

For frequently asked questions regarding initial configuration and setup, see KB0781894.

Procedure

1. Activate Predictive Intelligence on a non-production instance.
2. From your production instance, export the records that you want your Predictive Intelligence solutions to process.
   For example, export 12 months of incident records to a non-production instance.
3. On the non-production instance, import the records you exported.
4. On the non-production instance, review the default solution definition records to determine if the filter, input fields, and output field are sufficient to predict your incident or task records.
   If necessary, create a solution definition for each record set you want to predict.
5. On the non-production instance, train the solution definition records.
6. Test the solution predictions on the non-production instance by either creating test records or importing more records from production.
7. For classification solutions, review the prediction reports to determine the accuracy and coverage of your solution and individual classes.
8. For similarity solutions, review the similarity examples to update the similarity score threshold if needed.
9. If necessary, update the solution definition filter to include more or different training records.
10. Retrain and retest any updated solution definition records.
11. When you are satisfied with your solutions, activate Predictive Intelligence on your production instance.
12. Recreate any custom solution definition records and train the solution, or import the solution from your non-production instance to your production instance.

Related topics

Create and train a classification solution

Create and train a similarity solution

Configure Predictive Intelligence

Configure solution definitions for Predictive Intelligence to train, test, and monitor solution definitions

Configuration

Use the following links to guide you as you set up your solution definition.

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Database View support for Predictive Intelligence

Use database views to join two or more tables as input for your Machine Learning (ML) solution.

Using database views in an ML solution

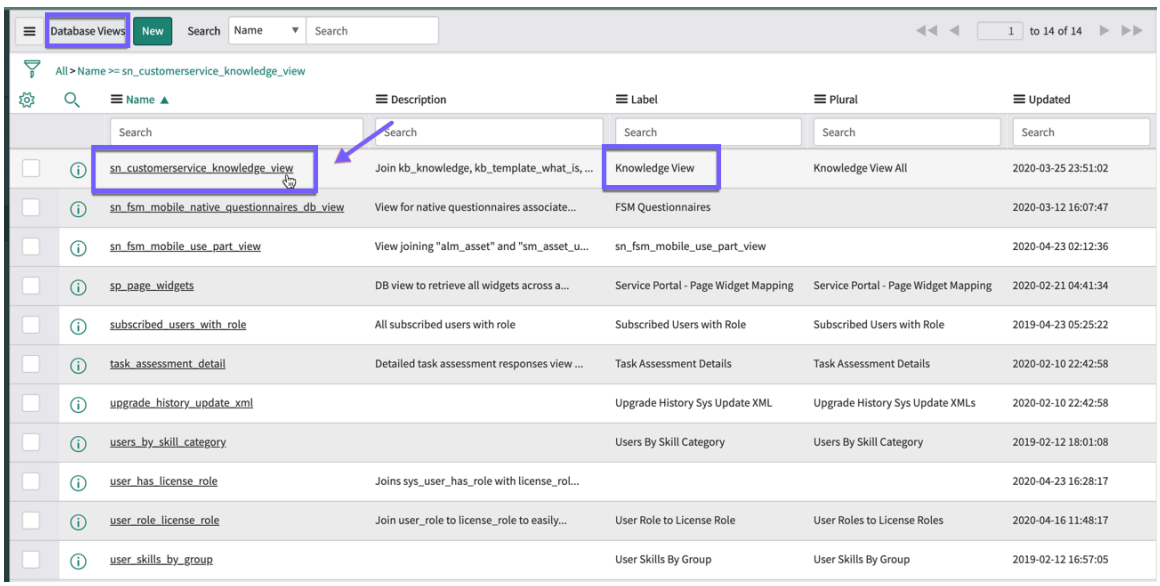
Database views help expand the amount of fields your solution can use for training. By using more than one table in your ML solution definition form, you can access more input data to help enrich the solution outcome.

Database views enable you to join two or more tables into one consolidated view. For this to work in an ML solution you must first create the database view. See Database views.

Database views are supported in all four of the Predictive Intelligence capability frameworks: classification, similarity, clustering, and regression.

A database view example for Predictive Intelligence

In the following example scenario, you've created a database view for use in an ML similarity solution. The image below shows the database view record you've created, including its **Name** and **Label**.



When you click the record **Name**, its content appears, as shown in the image below. Within the database view content, the five Knowledge Base tables you've joined to the view are listed. Most of these tables contain different Knowledge article template types, such as an FAQ or a How To article.

When a database view is used as input to a similarity solution, each of the tables that constitute the view must have at least the required number of records set in the configuration of your ServiceNow instance. The default minimum number required is 10,000. For example, the **Knowledge View** database view has five tables and each table must have 10,000 records. If a table doesn't have 10,000 records, you may not see the results from that table. If you must change that value, contact Customer Support.

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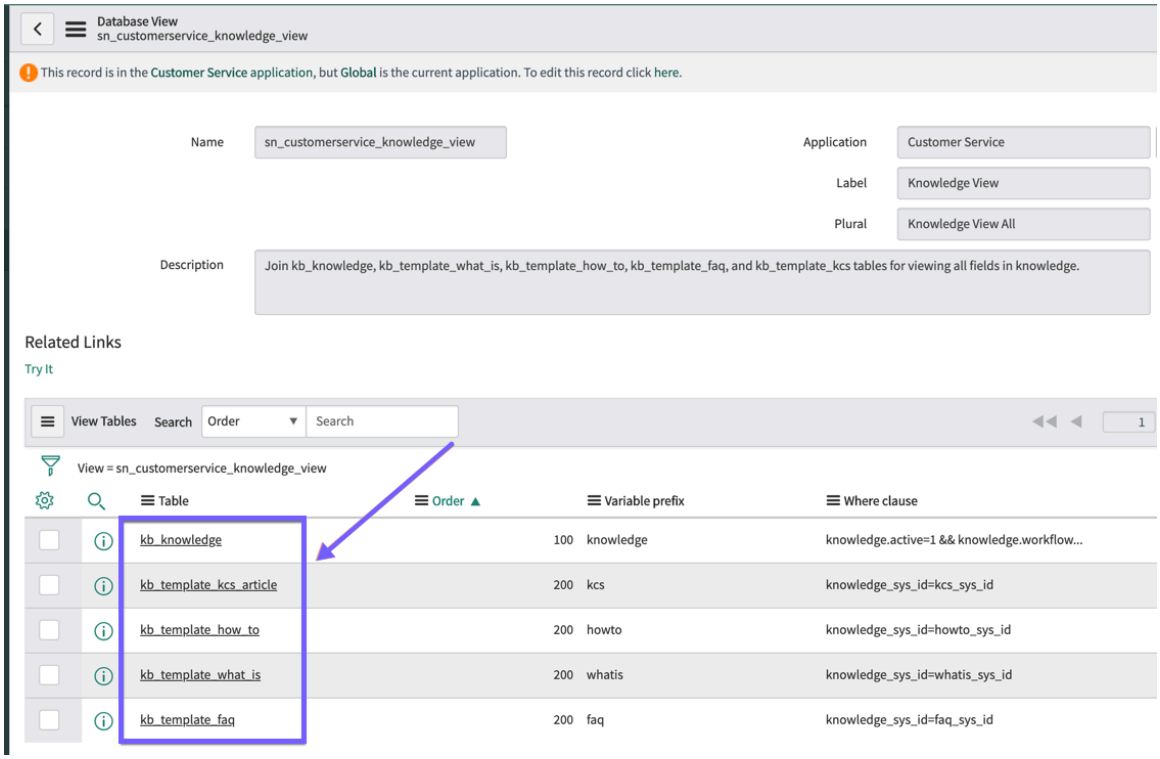
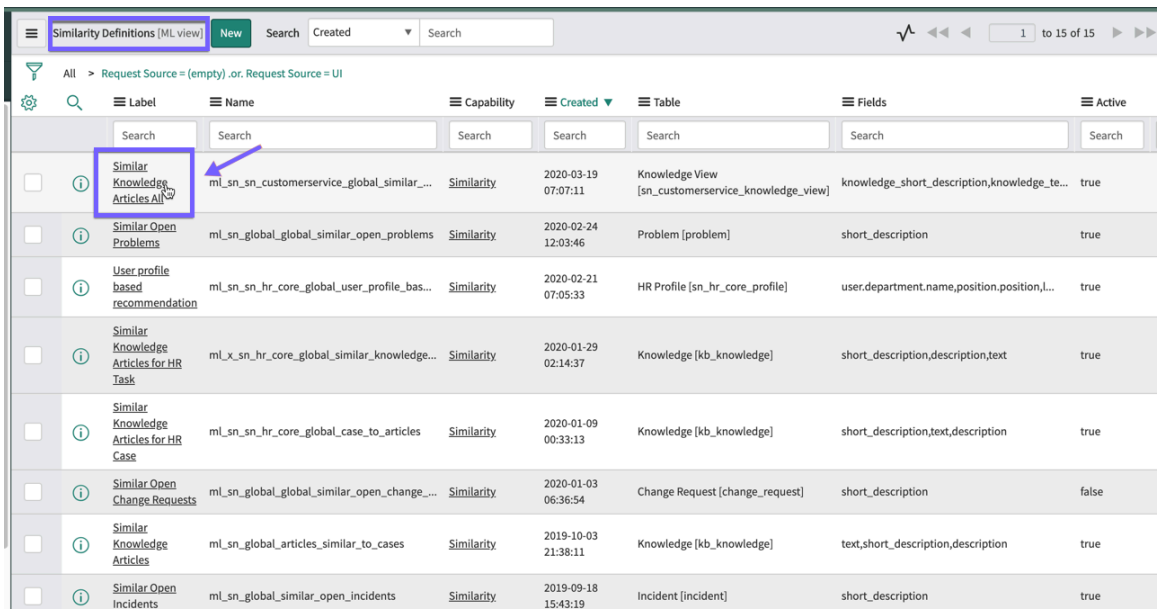


In the image below you can see the similarity solution definition record you've already created, which you plan to associate to your database view. When you click the **Label** for your similarity record, its Similarity Definition form appears.



Similarity Definition forms compare your existing table records based on their similarity by using a table in the **Table** field and another table in the **Test Table** field.

To use a database view in your similarity solution, instead of selecting a table in the **Table** field, you select the database view you created, which in this example scenario is the **Knowledge View** database view. This configuration increases the number of records your solution uses in training because the system compares and processes five tables of data instead of one.

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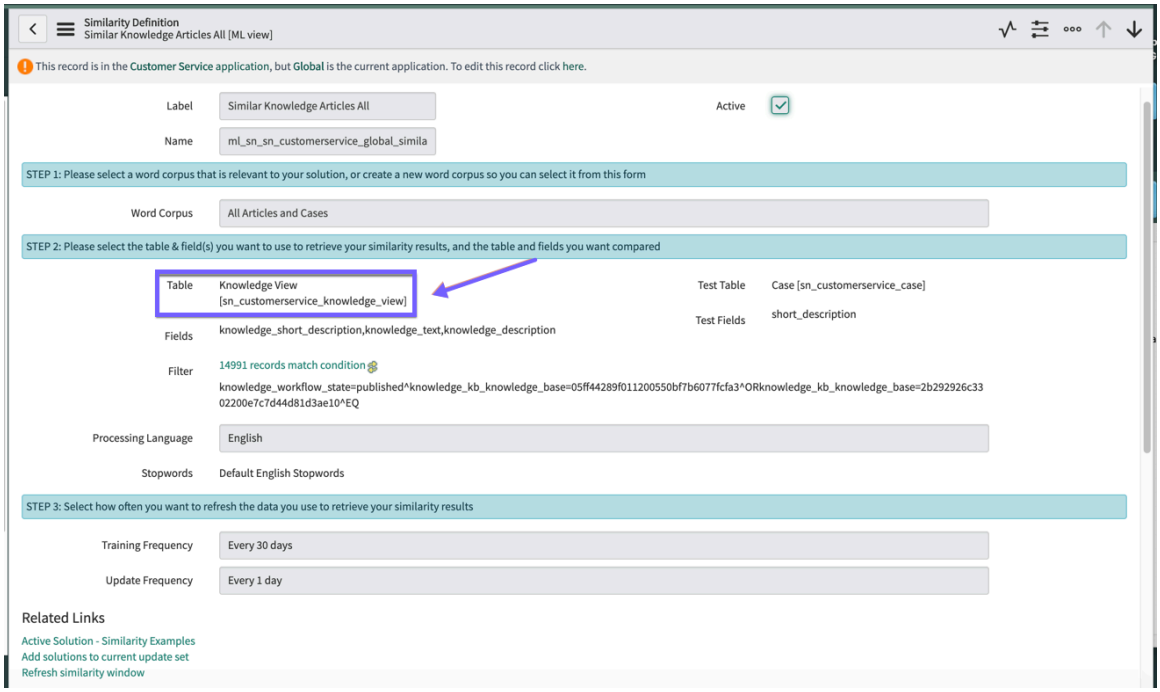

Configuration tips for Predictive Intelligence

If you encounter issues during your solution training and solution prediction, follow these suggested resolutions.

Input Data

It is recommended to have at least 30,000 records to train your models with, but the accuracy of the model is determined by the input data.

There are three primary factors that determine the quality of the input data used to train solutions:

- Cleanliness: Sanitized data reduces noise, making the model more accurate.
- Quality: The input and output should be valid and correct to train the model to make accurate predictions.
- Distribution: Data that represents the entire dataset as a whole will result in a model that can make more generalized predictions.

Most raw data sets contain dirty and unusable data. Reviewing your input sets before training is essential to keeping accurate predictive models.

It is recommended to use approximately 80% of your input data to train your model and about 20% of the data to evaluate whether the model is accurate. You can compare the model's predicted results against the real values for the 20% of remaining data.

Solution training

Issue	Resolution or suggested action
The solution training remains in Waiting for Training status for too long, as the scheduler job is using an incorrect Glide callback instance URL.	Ensure the *glide.servlet.uri* property in the Glide instance is set to the correct instance URL. This issue can occur when:

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Issue	Resolution or suggested action
	• An instance is cloned from production, yet it still refers to the production URL for the *glide.servlet.uri* property. • The Glide instance is provisioned and runs the training for the first time.
New categories have been added and aren't yet having an impact on training.	This is expected behavior, as the new categories may not yet have sufficient data until the solution is retrained.
The solution training fails.	When the training fails, click the **Show Training Progress** related link on the solution screen to determine where the potential problem resides.
The solution training fails due to user authentication.	Navigate to **System Security> Users** and ensure the sharedservice.worker user is set to Active.
The model training returns saying the model cannot be created. The training fails and shows the “Error while training solution” message. The training progress window shows this message: “Solution training failed as either the data used isn't sufficient or the input field isn't predictive of the output field."	This issue can occur when the data quantity or the distribution of field values isn't sufficient for a model to build successfully. Follow these steps to troubleshoot: **1.** Ensure the distribution of the output field isn't skewed. **2.** Retrain the model by changing the date filters to use a larger amount of data. **3.** If the input fields are not fully populated, add a filter to remove null records.
The solution has data in multiple languages but the coverage and precision results are poor.	Use the following options to help improve your metrics. Option 1: Update the processing language of the solution to the most prominent non-English language. **Note:** English is applied by default for all datasets. Option 2: If there's sufficient data for each language/region: **1.** Add a filter criteria for a specific language/region where the primary language can be identified (Dutch, English, French, German, Japanese, or Spanish). **2.** Generate a solution for each language/region and apply the proper processing language to each solution.

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Solution prediction

Issue	Resolution or suggested action
The prediction fails and returns a Java exception where the cause is unknown.	1. Search for the exception in the Predictive Intelligence Glide logs. 2. Submit an Incident record for Predictive Intelligence including all relevant details, such as the exception, the impacted instance, the solution name, and the input string.
There is no prediction applied to the incident/case record but the prediction returns a value when tested in the Rest API Explorer.	This can occur when the confidence of the prediction is less than the threshold required to make a prediction. After your solution is trained, use the following steps to confirm if your solution settings need adjusting. 1. Navigate to **System Web Services > REST > REST API Explorer** to find the confidence level for the prediction. See Test a classification solution prediction. 2. On your ML Solution Definition record, check the threshold set for your outcome class that was returned in the prediction by clicking on the name of the class. The **Class** page appears. 3. Check the **Estimated Precision** and **Estimated Coverage** values. If the corresponding threshold is more than the prediction confidence of the outcome, this is the root cause for why you did not see any prediction. 4. Adjust the class precision and coverage values to increase coverage or precision. See Tune a trained classification solution.

Instance cloning

Issue	Resolution or suggested action
After an instance is cloned, predictions for your existing solutions fail.	The ML solution artifacts in the [ml_artifacts] table are stored in the [sys_attachment table]. If the [ml_artifacts] table isn't included in the clone when you run it, the predictions fail. Ensure your clone includes the machine-learning artifacts, as these are critical components of your Predictive Intelligence solution.
After an instance is cloned, the solution training fails.	As the cloning run proceeds, it is possible that the sharedservice.worker user has either been

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Issue	Resolution or suggested action
	inactivated, locked out, or the user ID isn't set. Resolve these problems so that the solution training succeeds.

Create a custom stopwords list

Exclude common words you want the system to ignore during training and prediction.

Before you begin

Role required: admin or ml_admin

About this task

Stopwords lists enable the system to exclude extraneous words that can impede search and the overall natural language processing of your data.

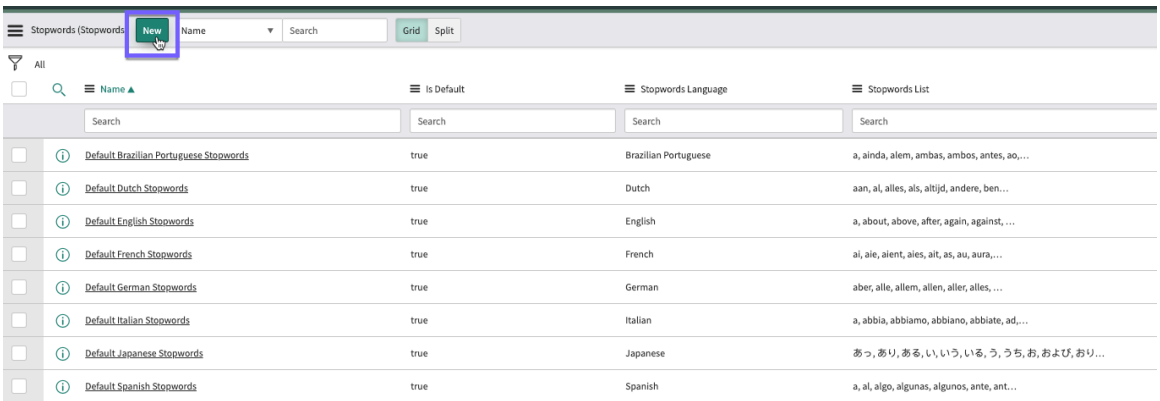
Predictive Intelligence provides you with default stopwords lists for each language the system supports. Examples of stopwords include words such as in, the, and the names of people and companies. You can also define your own stopwords list that's comprised of words specific to your organization and industry.

The custom list you provide works alongside those that the system already uses by default. For example, if incident records are used in a classification solution, and a company name is used in those records, consider adding that name to your list, as it's unlikely to provide any relevant information for the solution you're building.

In this example scenario, you create a custom stopwords list for the Brazilian Portugese language.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Stopwords**.
2. On the Stopwords list, click **New**.



3. In the Stopwords form, configure these fields.

Field	Value
Name	Enter a unique name for the list, such as the name of your company and the

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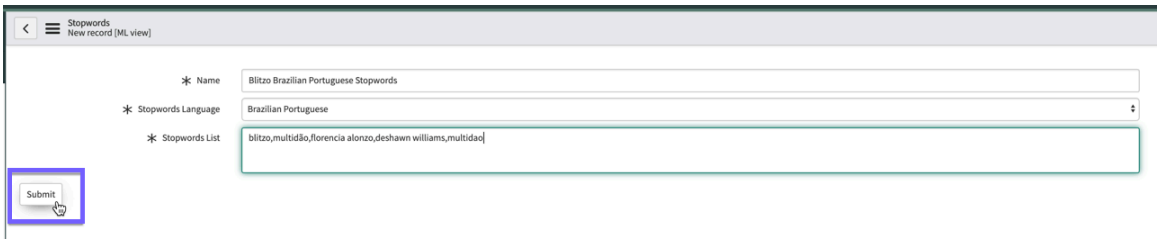
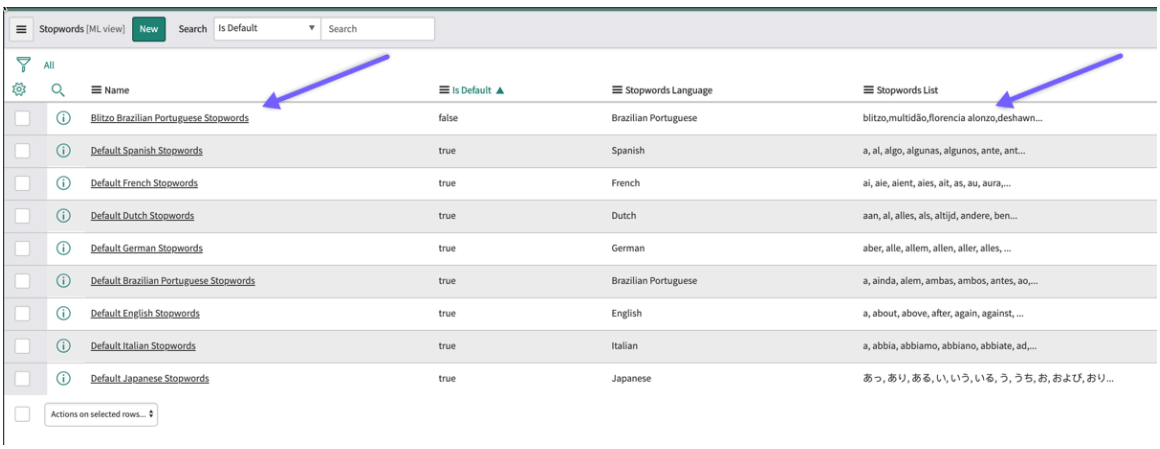
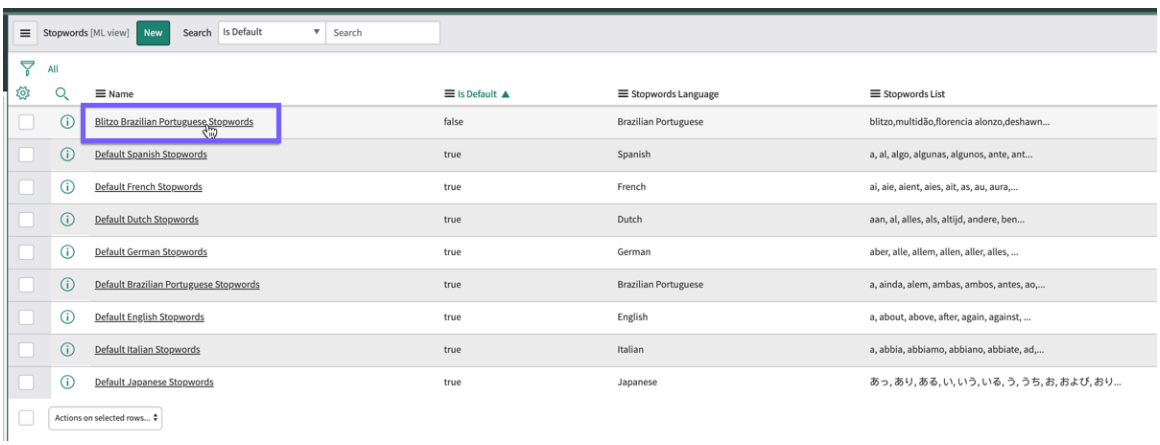
Field	Value
	processing language. For example, `Blitzo Brazilian Portuguese Stopwords`.
Stopwords Language	Select **Brazilian Portuguese**
Stopwords List	Manually enter the stopwords using a comma-separated format. For more examples of stopwords, see the image in Step 2 of this procedure.



4. Click **Submit**.
   Your custom stopwords list appears in the Stopwords list view.



5. **Optional:** If you need to update your stopwords list, just click its Name, add or remove words from the list, and click **Update**.



What to do next

Assign a custom or default stopwords list to a classification, similarity, clustering, or regression solution definition.

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Create a word corpus

Build a collection of words and phrases that functions as the vocabulary the system uses to compare your instance records based on their textual similarity. You can think of the word corpus as a dictionary that you want your machine-learning system to understand.

Before you begin

Role required: admin or ml_admin

Important: In the Brazil release, models in the classification, clustering, and similarity frameworks use Workflow solutions. These are pre-trained, so a word corpus isn't needed for your new solutions.

After upgrading, your existing solutions with a word corpus become Workflow solutions the next time they are re-trained. Also the Word Corpus field is removed from the form.

The following information is provided for legacy context.

About this task

The primary purpose for a word corpus is to infer textual data for training your NLU model. If using a word corpus in a solution, you must specify it for training in the solution definition phase of a solution. A trained word corpus can be reused across solutions and capabilities.

You can use a word corpus to help compare similar record text in a table or across multiple tables. A word corpus can also be helpful in other scenarios, such as clustering, where you group similar records together for data analysis, reuse, or review. The items you add to your corpus should be specific to your company and your industry so you can reuse it in other similarity or clustering solutions and apply it to various use cases.

In this example procedure, you're working on incident records and you want to locate relevant knowledge base (KB) articles that could provide resolutions to those incident cases. Your goal here is to create a word corpus that you can apply to a new similarity solution that compares active incidents to published KB articles.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Word Corpus**.
2. In the Word Corpus form, click **New**.
3. Configure these fields according to the following guidance.

Field	Description
Name	A unique title that references the contents of your corpus. For example, in this use case you could enter a name such as `Active Incidents and Published KBs`, as the name indicates the tables that your corpus will mine to help create your solution.
Active	Select this check box if you're creating more than one word corpus at a time and you plan to configure their detail components later. Otherwise, leave it blank because you can select it in a later step.

4. Select **Submit**.
5. In the Word Corpus list view, locate your new word corpus and click its **Name** value to open the record.
6. In the Word Corpus Contents section, Click **New**.

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7. In the Word Corpus Content form, configure these fields per the following guidance to define a content component for your word corpus.

Field	Description
Name	Enter a title that references the data you want to add to your corpus, such as `Incidents closed in last 6 months`.
Table	Select the table that contains the data you want to include in your word corpus. For this use case, select **Incident [incident]**. **Note:** The number of records per table for Word Corpus creation used in Similarity and Clustering solutions is limited to 300,000.
Filter	Select the following filter condition values: **[Closed] [is not empty] and [Created in last 6 Months]**.
Field List	For this use case, select **Short description**, **Description**, and **Resolution notes**.
Domain	The system automatically displays the user group for your corpus. For example, in this use case it shows the global user group. You can select other user groups as well.

8. Select **Submit**.
9. In the Word Corpus Details section, select **New**.
10. Configure these fields according to the following guidance to define a second content component for your word corpus.

Field	Description
Name	Enter a title that references the data you want to compare to your first content component, such as `Published KB Articles`.
Table	Select the table that contains the data you want to compare to your first content component. For this use case, select **Knowledge [kb_knowledge]**. **Note:** The number of records per table for word corpus creation used in Similarity and Clustering solutions is limited to 300,000 records per table.
Filter	Select the following Filter Condition values: **[Workflow] [is] [Published]**.
Field List	Select **Short description** and **Article body**.

11. Select **Submit**.

    Your two word corpus content components appear on the word corpus form.

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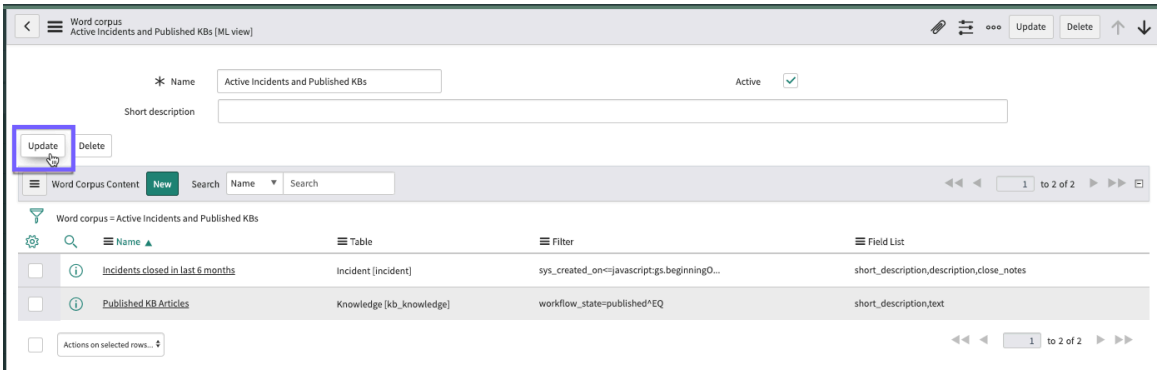
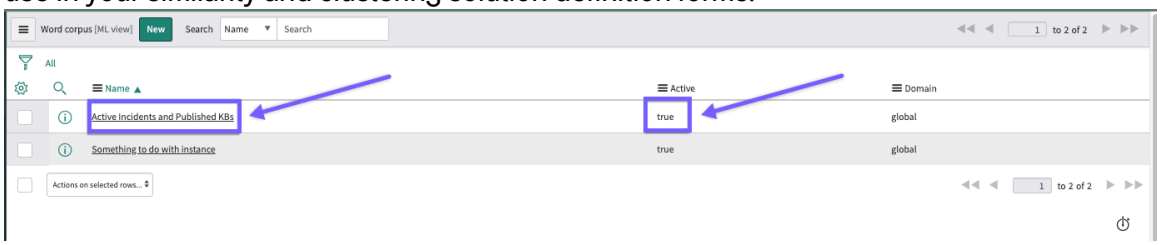


12. Select **Update**.

Result

The completed word corpus you created appears on the word corpus form and is available for use in your similarity and clustering solution definition forms.



What to do next

Create a solution in the appropriate framework. For more information, see the links in the Related Content panel on this page.

Related topics

- Create and train a classification solution
- Create and train a similarity solution
- Create and train a clustering solution

Quick start tests for Predictive Intelligence

Validate that Predictive Intelligence still works after you make any configuration change such as applying an upgrade or developing an application. Copy and customize these quick start tests to pass when using your instance-specific data.

Predictive Intelligence quick start tests require activating the Predictive Intelligence [com.glide.platform_ml] plugin. To execute critical upgrade tests on existing machine learning solutions, create a basic authorization profile named ml_atf in the Basic Auth Configurations table (sys_auth_profile_basic.list). To run the tests successfully, the user attached to the ml_atf authorization profile must have the ml_admin role.

Predictive Intelligence: ATF Test Suite

Test	Description
PI: Presence of ML model artifacts persisted in glide	Verify all the trained ML model artifacts are persisted in glide (sys_attachments table) after model training/instance cloning so that ML prediction calls are successful.

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Predictive Intelligence: ATF Test Suite (continued)

Test	Description
PI: Valid setup of ML user (sharedservice.worker) in glide	Validate if the ML user in glide (sharedservice.worker) is active and not logged out so that model training is successful.
PI: Glide upgrade test for Classification solution	Validate that the classification model prediction on existing active models is producing the same class membership and confidence value results after a glide upgrade.
PI: Glide upgrade test for Similarity solution	Validate that the similarity model prediction API calls on active models are successful after a glide upgrade.

Related topics

Quick start tests

Activate a solution version

Predictive Intelligence activates the most recent version of the solution when it completes training a solution. However, you can activate any previously trained solution version. Only one solution version can be active at a time, and only the active version is used when making predictions.

Before you begin

- Manually train a solution multiple times or set a training schedule.
- Role required: admin or ml_admin

About this task

The system creates a solution version each time you train a solution definition. Typically, you manually create a solution version only when you change the solution definition filter and want to test it. Otherwise, most solution versions are created during scheduled solution training.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Classification** > **Solutions** or **Predictive Intelligence** > **Similarity** > **Solutions** or **Predictive Intelligence** > **Clustering** > **Solutions** or **Predictive Intelligence** > **Regression** > **Solutions** .
2. In the list view of the ML Solutions table, find the row that you want to activate, then select the value in the first column to open the individual record.

   You can also open the individual record by selecting the row's reference lookup icon , then selecting **Open Record**.
3. In the solution record, select **Activate**.
   The system activates this solution version and deactivates any other solution version.

What to do next

For classification solutions, review the trained solution precision and coverage statistics. For similarity solutions, review the similarity examples.

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Export trained solutions to production

Refine and test your ML solutions iteratively on a non-production instance, and then use update sets to export the changes to your production instance. This practice mitigates the risk of retraining solutions on your live production instance.

Before you begin

Prior to testing on a test instance, ensure that the instance hosts recently-cloned data from your production instance so that the solutions you train on the test instance remain valid when you export them to production.

Role required: admin or ml_admin

About this task

Plan your changes carefully, and remember that update sets match records based on the system ID [sys-id] and not the version number. Note that moving solutions to instances can sometimes deliver unpredictable results. If you run into such an issue, retrain the solution again, which takes 5 minutes per solution. For more information on update sets, see System update sets .

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Classification** > **Solution Definitions** or **Predictive Intelligence** > **Similarity** > **Solution Definitions**.
2. Click the name of your trained ML Solution Definition record to open it.
3. In the Related Links section, click **Add solutions to the current update set**.
4. Click **Update**.

Result

Your trained ML solution artifacts, such as solution definitions, template records, and predictive model statistics, are added to the current update set.

What to do next

Depending on where you are in your solution testing, schedule your update set for export to another non-production instance for further testing, or on to production.

Note: After you export a similarity solution, click **Refresh similarity window (Required after Solution Import)** in the Related Links section of the corresponding ML Solution Definition form.

Configuring advanced settings for your ML solutions

Learn about advanced settings for your Predictive Intelligence machine learning (ML) solutions. Apply optional technology and algorithms for classification, clustering, similarity, and regression capabilities.

Using advanced settings in your ML solutions is optional. If you choose to implement any of these settings, make sure you're well informed regarding the technology you're enabling in the solution, and that your use case benefits from what the technology offers. For more information about several of these parameters, see the Dive deeper with Clustering Advanced Parameters article on ServiceNow Community.

Most of the advanced settings are limited to only one capability because their functionality is targeted to specific use cases.

Classification, clustering, similarity, and regression advanced settings

Using the admin or ml_admin role, you apply these technologies by configuring a parameter in the **Advanced Solution Settings** tab on your ML solution definition form.

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To update or remove an existing setting: on the solution definition form, select the **Advanced Solution Settings** tab, then select the name of the solution parameter. For details, see the following procedures.

- Configure class recall for a classification solution
- Configure TF-IDF for solutions
- Configure DBSCAN for a clustering solution
- Configure HDBSCAN for a clustering solution
- Configure XGBoost for classification or regression solutions
- Configure Connect Component algorithm and Levenshtein Distance method for a clustering solution
- Apply purity on a clustering solution
- Analyze a cluster with Cluster Insight

Advanced Solution Settings for Classification

From the Zurich release, classification solutions offer the following advanced solution settings.

- Config parameters for model config in classification
- Configure include only top N labels
- Minimum records needed for label to include it
- Remove others label
- Use LightGBM algo for classification model training

Configure class recall for a classification solution

Create and apply a class recall parameter to an ML solution prior to training its data. For example, you set and apply this solution parameter to 90% recall for all records in the Email class.

Before you begin

Note: Using advanced settings in your ML solutions is optional. If you choose to implement any of these settings, make sure you're well informed regarding the technology you're enabling in the solution, and that you have a use case that benefits from what the technology offers.

- Create and save a classification solution definition or use an existing one.
- Role required: admin or ml_admin

About this task

The class recall solution parameter enables you to steer a solution's training to bias a specific class. For example, classifying an incoming email as a Phish or not can be an important use case in a security-related machine learning solution. In this situation, it's very important to identify every Phish, and it may be acceptable to report a non-Phish as a Phish occasionally. However, no actual Phish should be classified as a non-Phish. In such situations, the recall metric must have a high value to minimize false negatives. High recall values might lead to lower percentages for precision and coverage.

You can apply a recall value to one class per solution definition.

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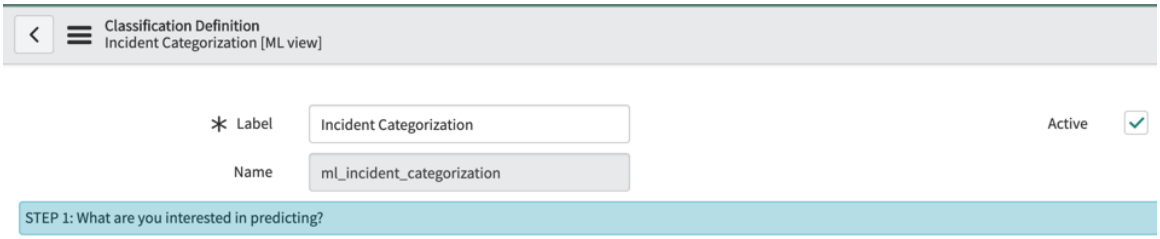
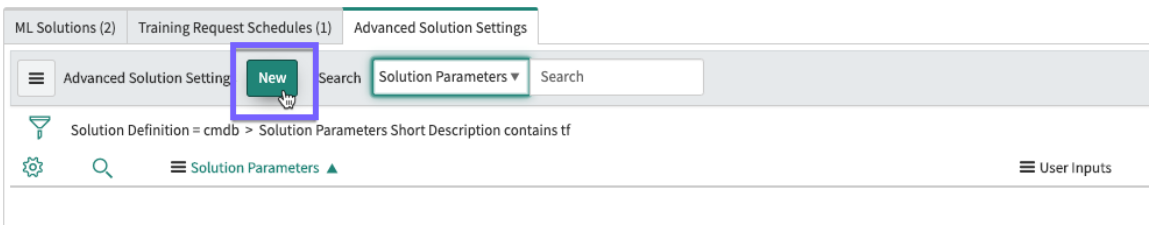
Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Classification** > **Solution Definitions**.
2. Open a saved classification solution definition form.
   In this example scenario, you use an Incident Categorization solution definition form that you haven't trained yet.



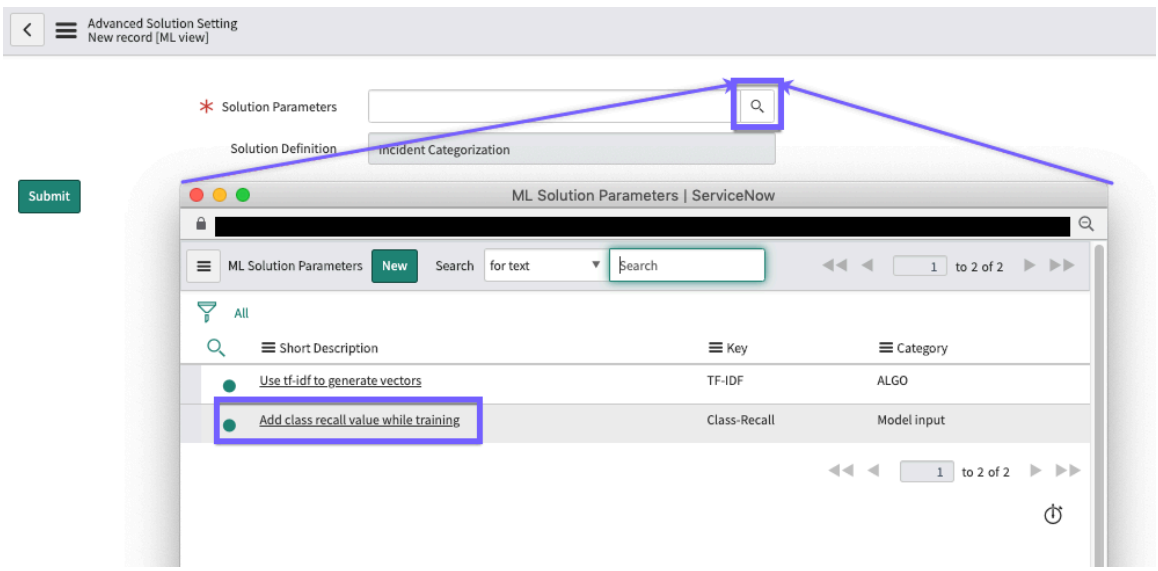
3. On the Advanced Solution Settings tab in the Related Links section of the form, select **New**.



4. Create a parameter record.

   a. In the **Solution Parameters** field, select the search icon.

   b. In the ML Solution Parameters screen, select **Add class recall value while training**.



The Advanced Solution Setting [ml_advanced_solution_settings] record appears.

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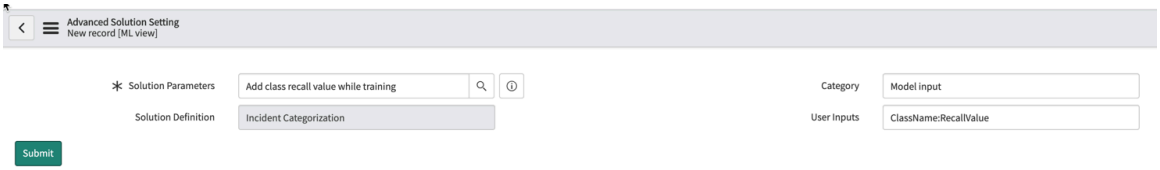
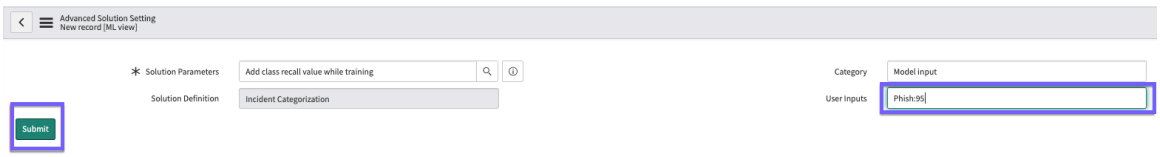


5. Add your values to the **User inputs** field, in the format `ClassName:RecallValue`.

   a. Enter the name of the class for which you want to specify a recall value.
   In this scenario, you enter `Phish` for the **ClassName**.

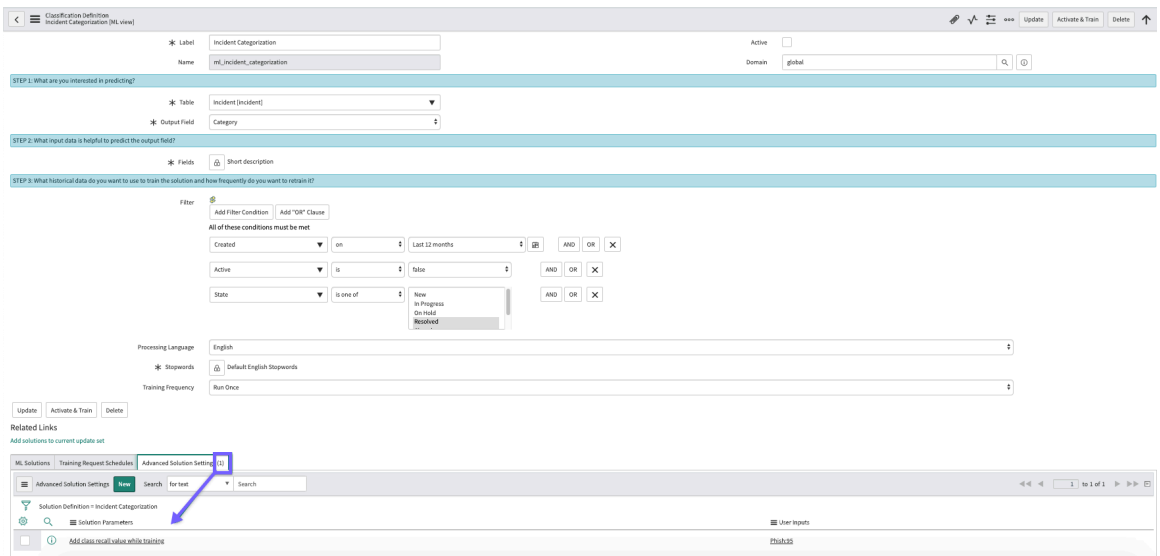
   b. Enter a colon character (:), then the Recall value.
   Enter `95` for the **RecallValue** in the example scenario.

   In other words you're specifying Phish as the target class, and 95 is the Recall percentage you're requesting the system to deliver during solution training (`Phish:95`).



6. Select **Submit**.

   Result: Class recall is configured for your classification solution. Its solution parameter appears on the Advanced Solution Settings tab of your classification solution definition form.



What to do next

Train your saved classification solution so that your updates are incorporated.

Related topics

- Create and train a classification solution
- Configuring target metrics for a trained classification solution
- Configure TF-IDF for solutions

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Configure TF-IDF for solutions

Apply Term Frequency–Inverse Document Frequency (TF-IDF) encoding to classification, clustering, or similarity solutions for Predictive Intelligence.

Before you begin

Note: Configuring advanced settings on your ML solutions is optional. If you choose to configure any of these settings, make sure you're well informed regarding the technology you're enabling in the solution, and that you have a use case that benefits from what the technology offers. For more information, see https://www.servicenow.com/community/intelligence-ml-articles/dive-deeper-with-clustering-advanced-parameters/ta-p/2695847.

- Create a classification, clustering, or similarity solution definition or use an existing one.
- Role required: admin or ml_admin

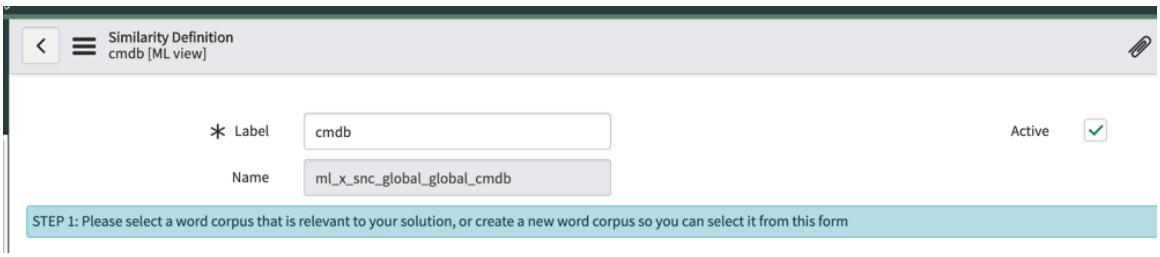
About this task

Predictive Intelligence uses paragraph vector word embedding by default in its classification and similarity frameworks, which is highly effective for processing data comprised of primarily human-readable content. However, TF-IDF might return better prediction results for records that have machine-generated content, such as alerts and error messages for log files. Choose advanced settings that are appropriate for the kind of data your solution is processing.

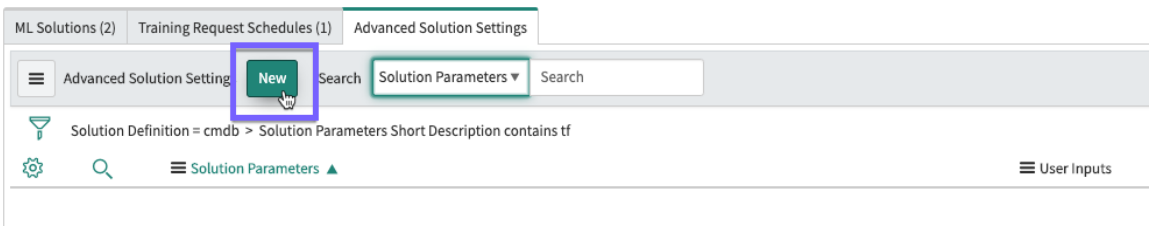
Note: The steps for configuring TF-IDF are the same for all model frameworks, but TF-IDF support for clustering solution definitions is applicable only if you have a Professional subscription.

Procedure

1. Navigate to a **Solution Definition**, such as **All** > **Predictive Intelligence** > **Similarity** > **Solution Definitions**.
2. Open a solution definition form.
   In this example scenario, you use a CMDB similarity definition form.



3. On the Advanced Solution Settings tab in the Related Links section of the form, click **New**.



4. Create a parameter record.
   a. In the **Solution Parameters** field, click the search icon.
   b. In the ML Solution Parameters screen, select **Use tf-idf to generate vectors**.

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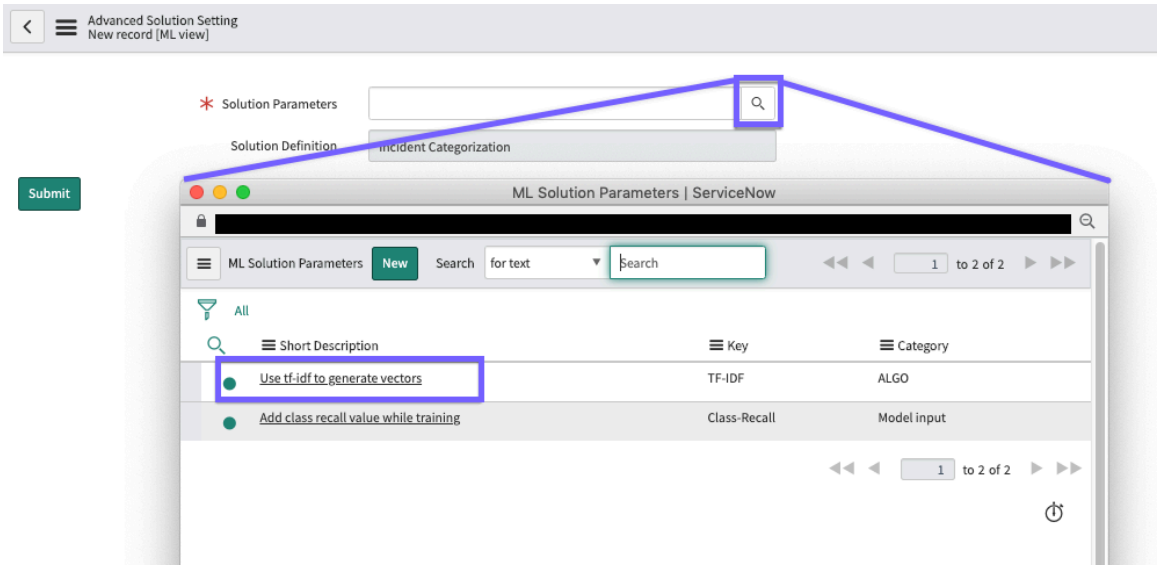
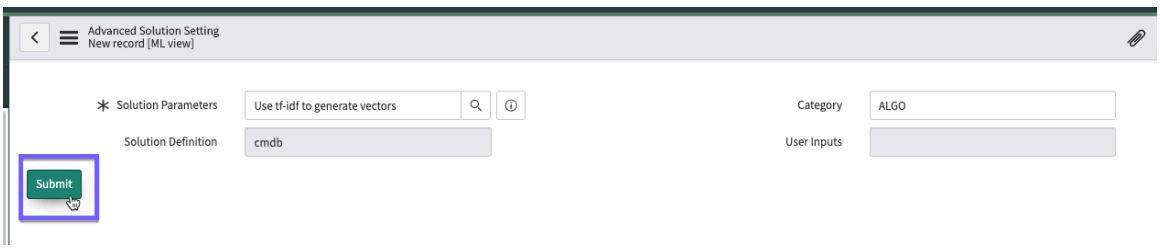


5. Click **Submit**.

   The Advanced Solution Setting record screen refreshes.



6. Click **Submit**.

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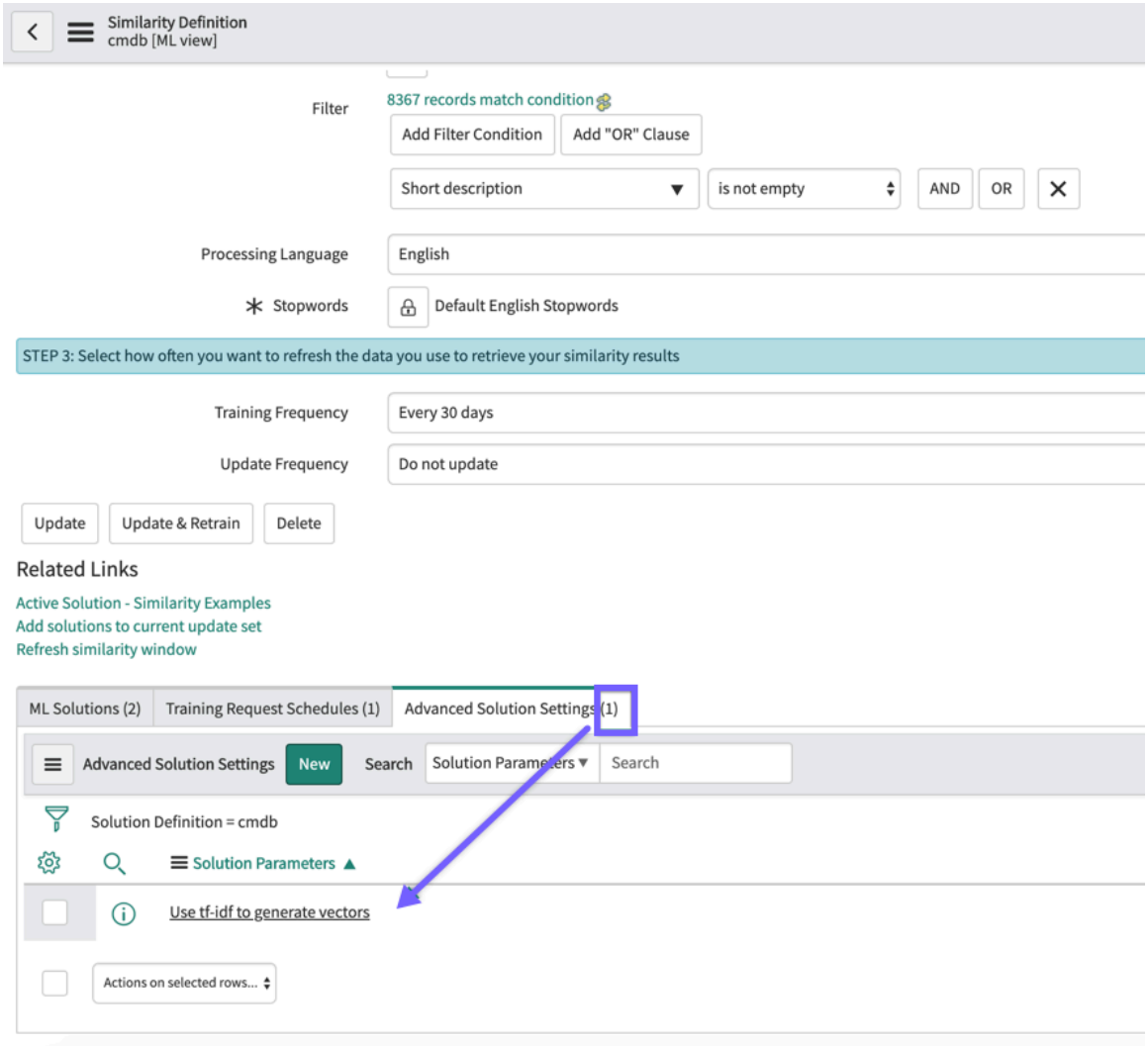
Result: TF-IDF is configured for your similarity solution. Its solution parameter appears on the Advanced Solution Settings tab of your similarity definition form.



Related topics

- Create and train a classification solution
- Create and train a similarity solution
- Create and train a regression solution
- Create and train a clustering solution

Configure XGBoost for classification or regression solutions

Apply XGBoost encoding to optimize the training for your classification or regression solutions.

Before you begin

- Create a classification solution definition or use an existing one.
- Create a regression solution definition or use an existing one.
- Role required: admin or ml_admin

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About this task

XGBoost is an optional gradient boosting framework that uses multiple decision trees and supports both Paragraph Vector-based text and TF-IDF distance-based text. LogR is the default distance-based model algorithm.

From the Brazil release, Test time explainability is available when using xgboost in Classification solutions.

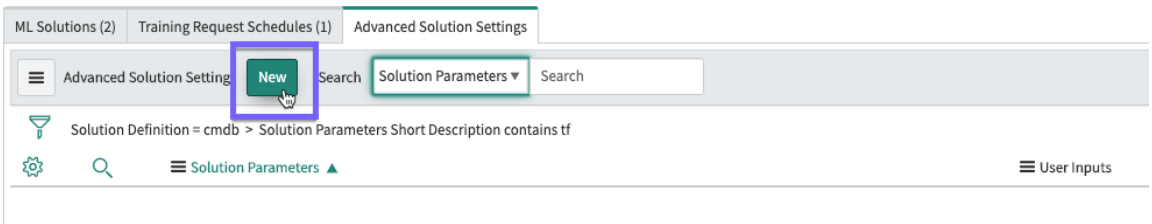
Configuring advanced settings on your ML solutions is optional. If you choose to configure any of these settings, make sure you're well informed regarding the technology you're enabling in the solution. Also make sure you have a use case that benefits from what the technology offers.

In this example scenario, you apply XGBoost to both a classification solution and a regression solution.

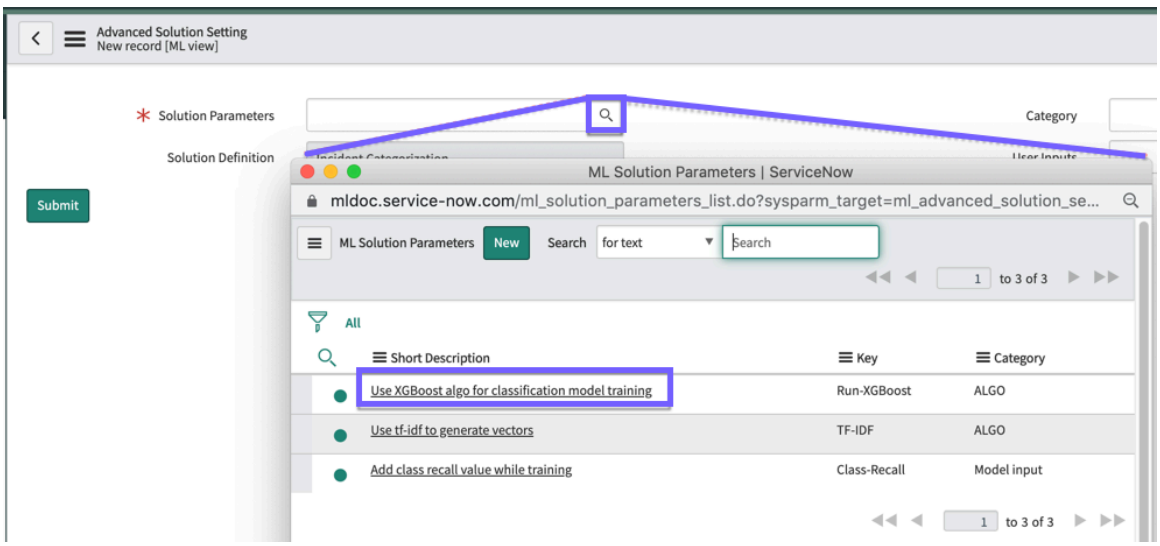
Note: The regression framework is deprecated in the Brazil release. You can continue to use existing regression solutions but you can't initiate new ones.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Classification** > **Solution Definitions**.
2. Open a classification solution definition form.
3. On the Advanced Solution Settings tab in the Related Links section of the form, select **New**.



4. Create a parameter record.
   a. In the **Solution Parameters** field, select the search icon.
   b. In the ML Solution Parameters screen, select **Use XGBoost algo for classification model training**.



5. Select **Submit**.

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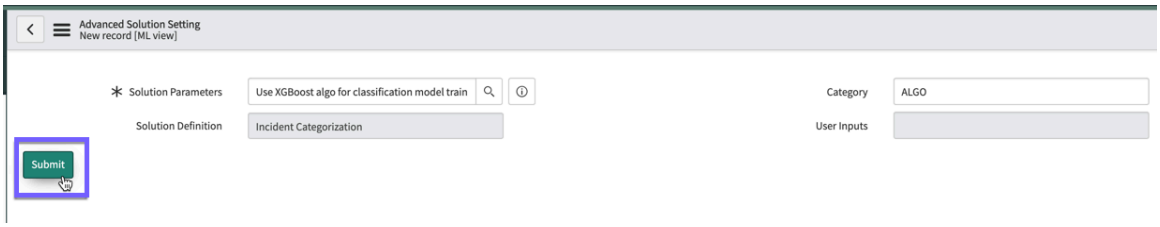
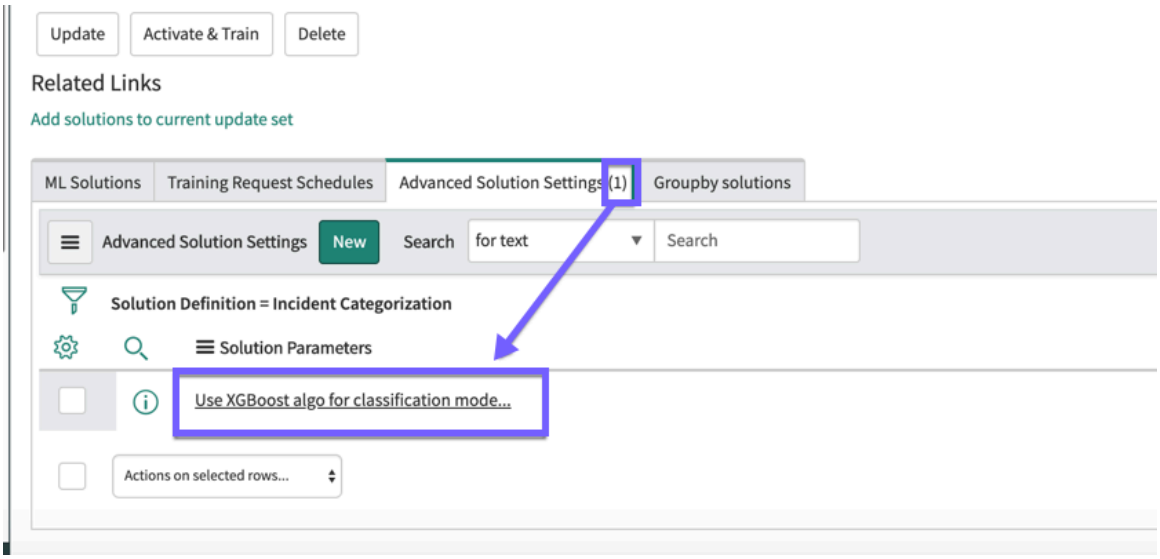
The Advanced Solution Setting record screen refreshes.



6. Select **Submit**.

Result: XGBoost is configured for your classification solution. Its solution parameter appears on the Advanced Solution Settings tab of your classification definition form.



Note: Follow the steps below if you want to configure XGBoost on a regression solution.

7. Navigate to **Predictive Intelligence** > **Regression** > **Solution Definitions** (available only if you had created a regression solution before the regression framework was deprecated).
8. In this second scenario, you open a regression solution definition form.
9. Repeat the steps from the previous classification solution example, except this time you're using a regression solution.
10. Select **Submit**.

Result:

XGBoost is configured for your regression solution. Its solution parameter appears on the Advanced Solution Settings tab of your regression solution definition form.

Related topics

Create and train a classification solution

Create and train a regression solution

Test time explainability

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Configure DBSCAN for a clustering solution

Consider applying the Density Based Spatial Clustering of Applications with Noise (DBSCAN) algorithm to your clustering solution. DBSCAN is available as an alternative to the default clustering algorithm, k-means.

Before you begin

Note: Configuring advanced settings on your ML solutions is optional. If you choose to configure any of these settings, make sure you're well informed regarding the technology you're enabling in the solution, and that your use case benefits from what the technology offers. For more information, see the Dive deeper with Clustering Advanced Parameters article on ServiceNow Community.

- Create a clustering solution definition or use an existing one.
- Role required: admin or ml_admin

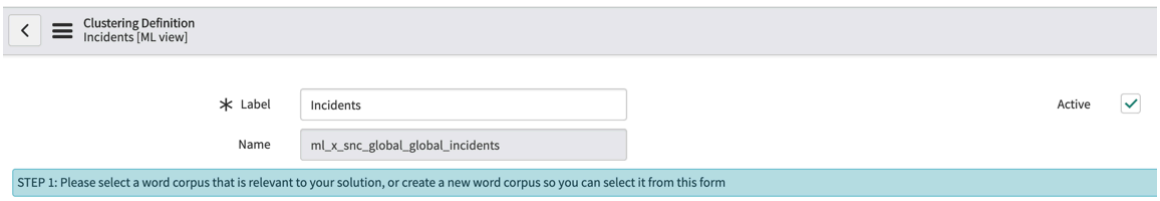
About this task

Predictive Intelligence uses the k-means algorithm by default in its clustering framework. DBSCAN is another clustering algorithm that's also used in data mining and machine learning. Some users prefer DBSCAN as it doesn't require you to specify the number of clusters in the data before clustering. For a summary of the pros and cons for each algorithm, see this conversation and this article.

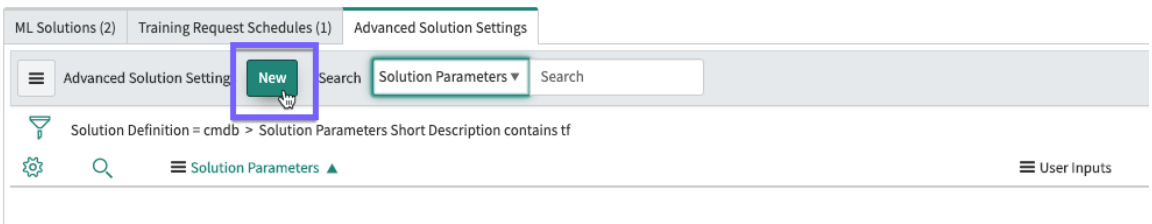
In this example scenario, you apply DBSCAN to a clustering solution.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Clustering** > **Solution Definitions**.
2. Open a clustering solution definition form.
   In this example scenario, you use an Incidents clustering solution definition form.



3. On the Advanced Solution Settings tab in the Related Links section of the form, select **Solution Parameters** from the picker, then click **New**.



4. Create a parameter record.

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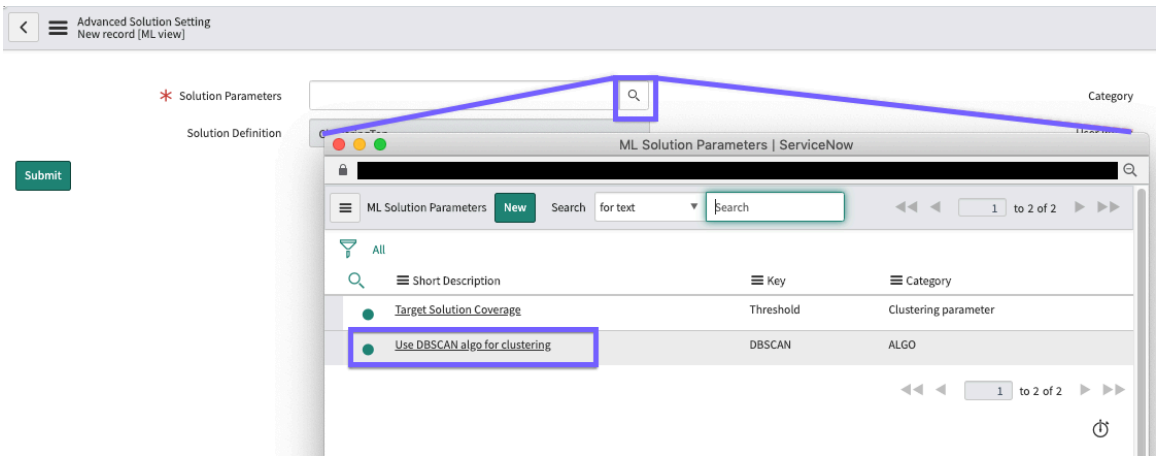
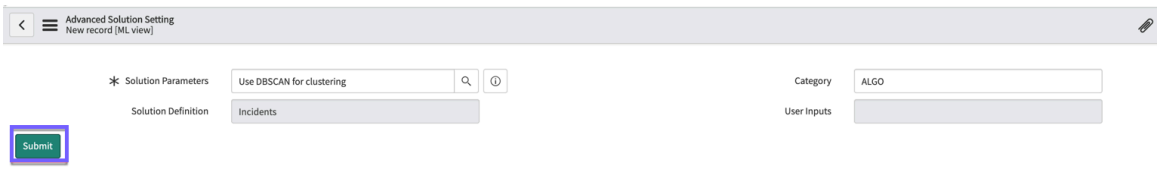
a. In the **Solution Parameters** field, select the search icon.

b. In the ML Solution Parameters screen, select **Use DBSCAN algo for clustering**.



5. Select **Submit**.
The Advanced Solution Setting record appears. The field **User Inputs** is grayed out because it does not apply to this algorithm.



6. Select **Submit**.

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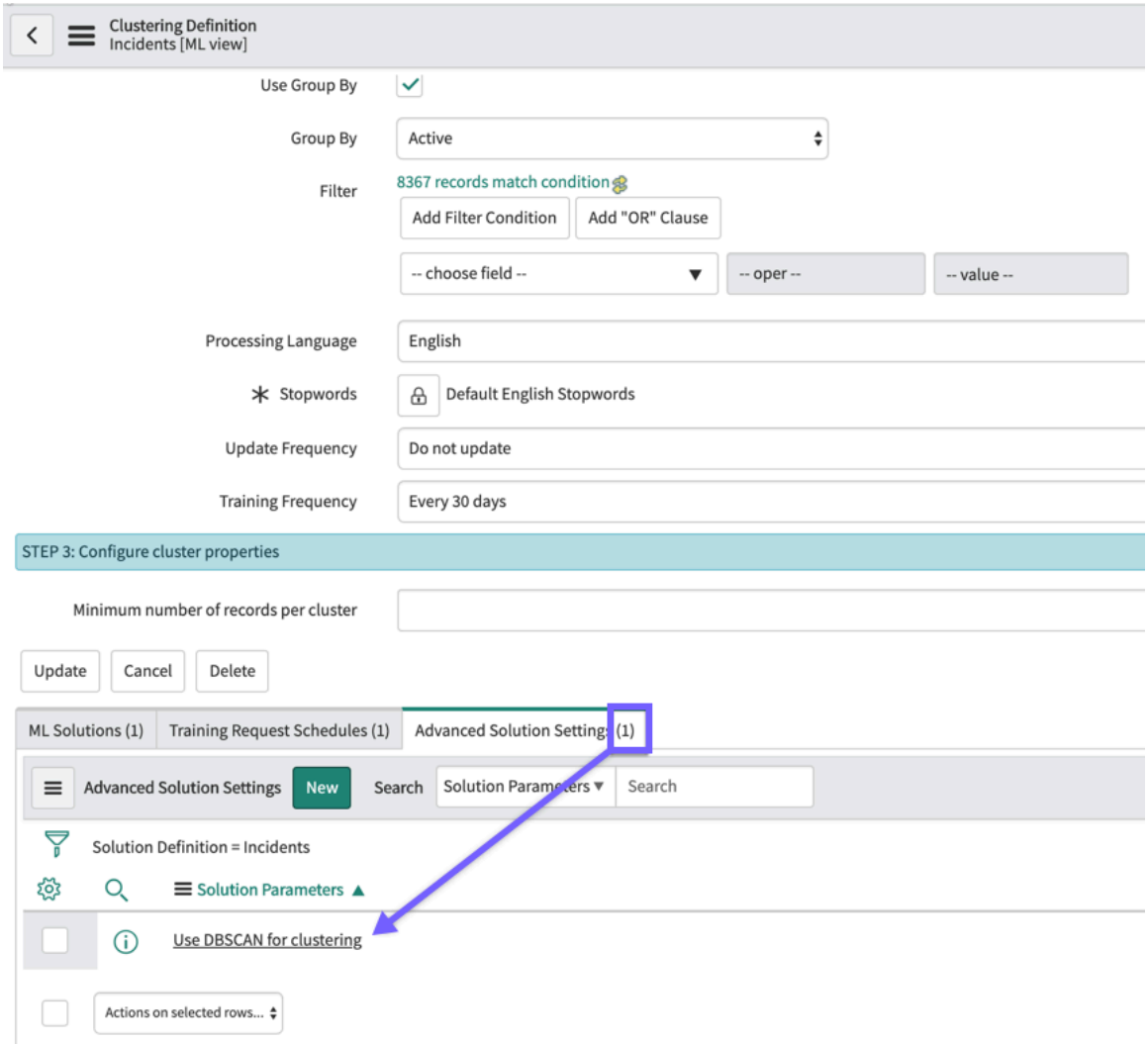
Result: DBSCAN is configured for your clustering solution. Its solution parameter appears on the Advanced Solution Settings tab of your clustering solution definition form.



Related topics

Create and train a clustering solution

Configure HDBSCAN for a clustering solution

Consider applying the Hierarchical Density Based Spatial Clustering of Applications with Noise (HDBSCAN) algorithm to your clustering solution. HDBSCAN is available as an alternative to the default clustering algorithm, k-means.

Before you begin

Note: Configuring advanced settings on your ML solutions is optional. If you choose to configure any of these settings, make sure you're well informed regarding the technology you're enabling in the solution, and that your use case benefits from what the technology offers. For more information, see the Dive deeper with Clustering Advanced Parameters article on ServiceNow Community.

- Create a clustering solution definition or use an existing one.
- Role required: admin or ml_admin

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About this task

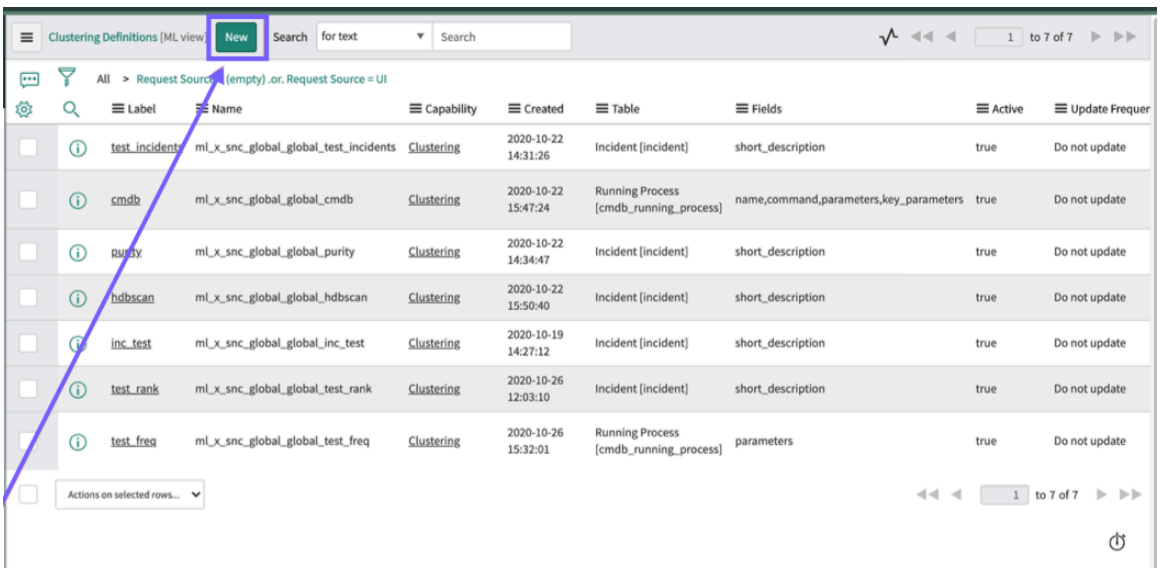
You can apply the HDBSCAN algorithm to help the system identify data samples that aren't assigned to any cluster. For example, you can apply HDBSCAN to support Topic Discovery.

Predictive Intelligence implements the k-means algorithm by default in its clustering framework. HDBSCAN is similar to the DBSCAN clustering algorithm except that it works with minimum-sized clusters and can help deliver more stable and persistent clusters. For a summary of how HDBSCAN works, see this article. For a comparison between DBSCAN and HDBSCAN, see this article and this article.

Note: Clustering solutions trained with HDBSCAN do not support cluster updates. Updates on these solutions fail and the solutions are not logged in the ml_cluster_detail_table. Use DBSCAN or k-means training methods if you want to enable cluster updates.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Clustering** > **Solution Definitions**.



2. Select **New**.
3. Create a new clustering solution definition form or use an existing one.
   In this example scenario, you create the hdbscan-sf clustering definition form as in the image below. Configure the fields as follows:
   - **Label**: `hdbscan-sf`
   - **Word Corpus**: `incident_wc`, or any other word corpus that has incident record data (from the Washington DC release, a word corpus is not needed, so this field does not appear).
   - **Table**: Incident [incident]
   - **Fields**: Short description
   - **Update Frequency**: Do not update
   - **Stopwords**: Default English Stopwords
   - **Training Frequency**: Every 30 days
   - **Processing Language**: English

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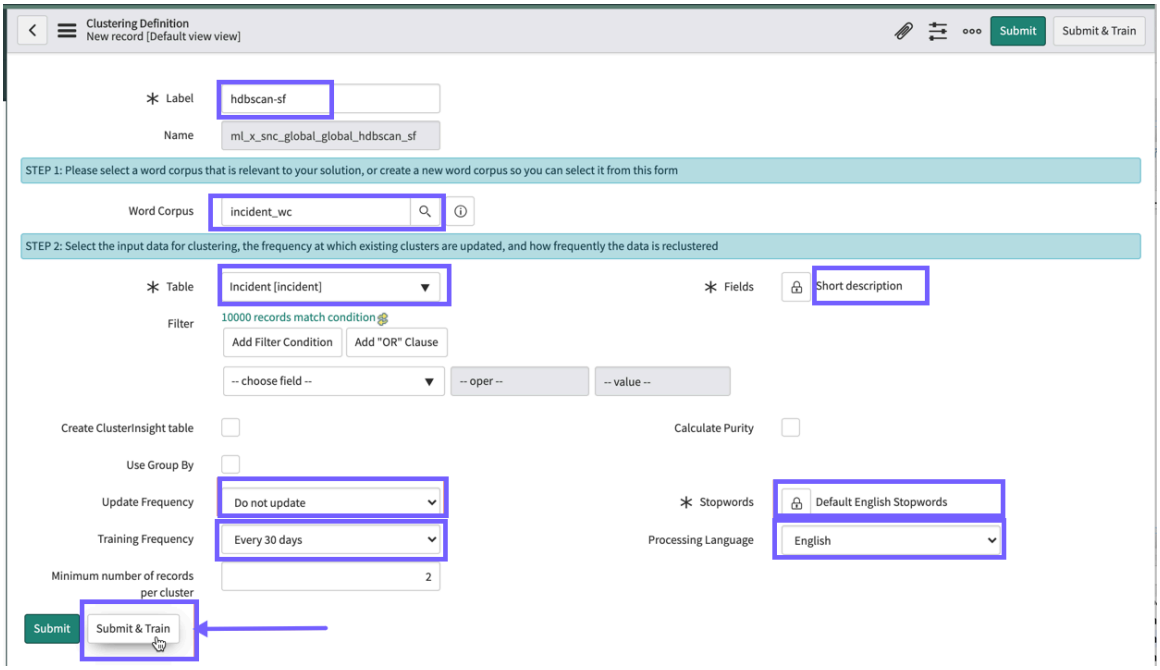
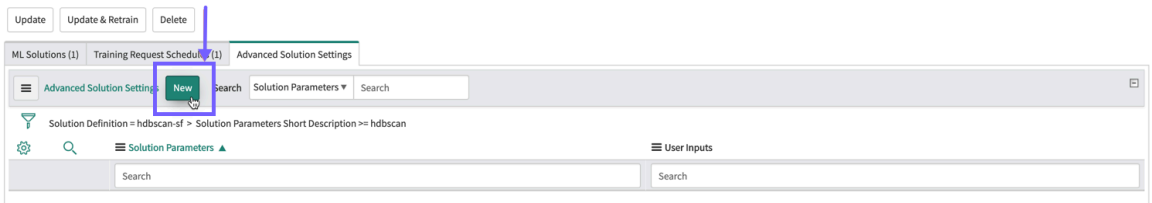


4. Select **Submit & Train**.
5. On the Advanced Solution Settings tab in the Related Links section of the trained form, select **Solution Parameters** from the picker, then select **New**.



6. Create a parameter record.

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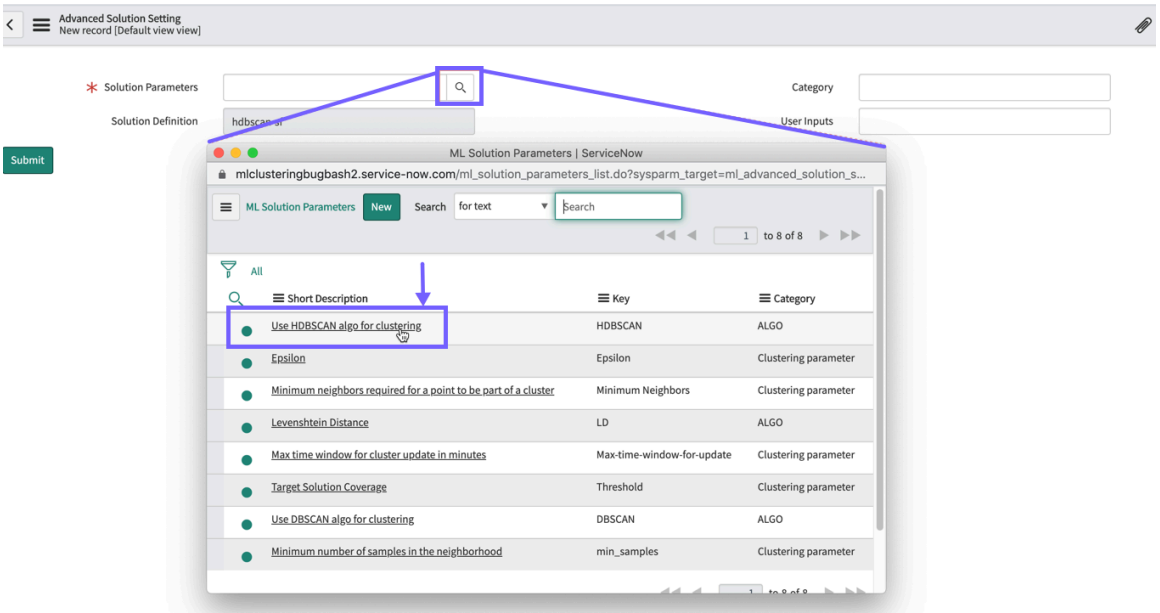
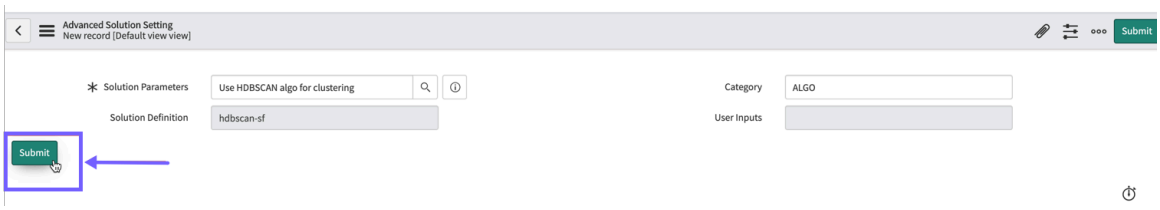
a. In the **Solution Parameters** field, click the search icon.

b. In the ML Solution Parameters screen, select **Use HDBSCAN algo for clustering**.



7. Select **Submit**.
The Advanced Solution Setting record appears with the HDBSCAN algorithm applied to the record. The field **User Inputs** is grayed out because it does not apply to this algorithm.



8. Select **Submit**.

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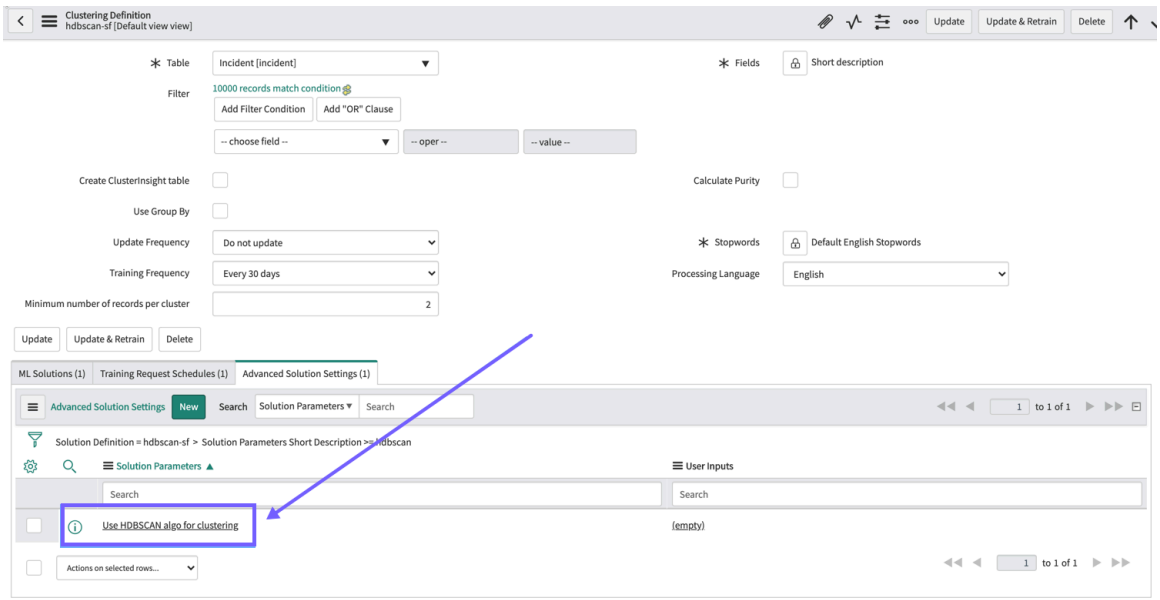
Result: HDBSCAN is configured for your clustering solution. Its solution parameter appears on the Advanced Solution Settings tab of your clustering solution definition form.



Related topics

Create and train a clustering solution

Configure Connect Component algorithm and Levenshtein Distance method for a clustering solution

Apply Configure Connect Component and Levenshtein Distance method encoding to optimize the training for your clustering solutions.

Before you begin

Role required: admin or ml_admin

Note: Configuring advanced settings on your ML solutions is optional. If you choose to configure any of these settings, make sure you're well informed regarding the technology you're enabling in the solution, and that your use case benefits from what the technology offers. For more information, see the Dive deeper with Clustering Advanced Parameters article on ServiceNow Community.

- Create and train a clustering solution definition or use an existing one.
- Role required: admin or ml_admin

About this task

When training clustering solutions, you have the following three options.

- Use the default k-means algorithm.
- Use the optional DBSCAN solution parameter with the Euclidean distance method as a metric.
- Use the optional DBSCAN, Minimum Neighbors, and Levenshtein Distance solution parameters. Connect Component is enabled by DBSCAN and Minimum Neighbors, and supports both Paragraph Vector-based text and Levenshtein Distance-based text. If you train your solution using the Levenshtein Distance method, you don't need to use a word corpus in your clustering solution.

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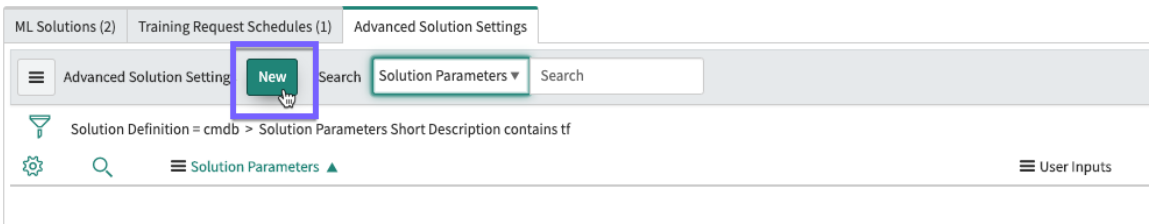
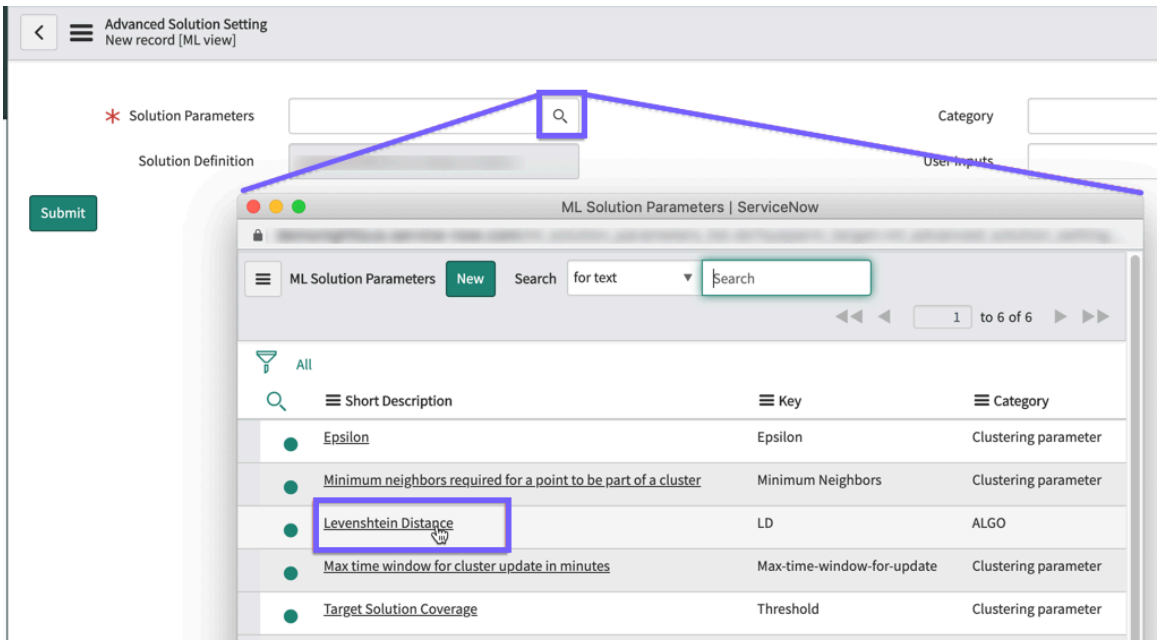
In this example scenario, you train your solution definition by using the third option referenced above.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Clustering** > **Solution Definitions**.
2. Open a trained clustering solution definition form.
3. On the Advanced Solution Settings tab in the Related Links section of the form, select **New**.

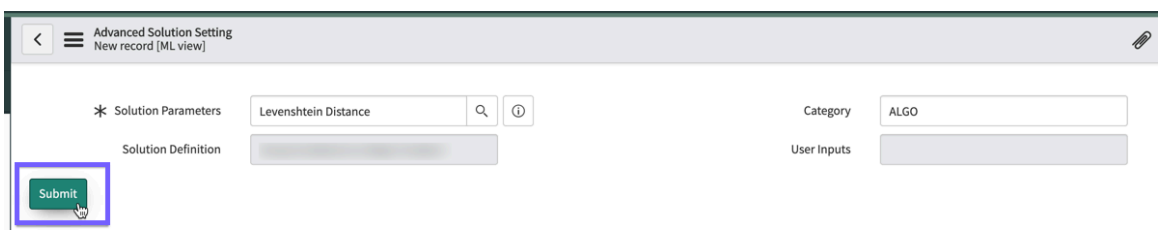


4. Create a parameter record.
   a. In the **Solution Parameters** field, select the search icon.
   b. In the ML Solution Parameters screen, select **Levenshtein Distance**.



5. Select **Submit**.

   The Advanced Solution Setting record screen refreshes.



6. Select **Submit**.

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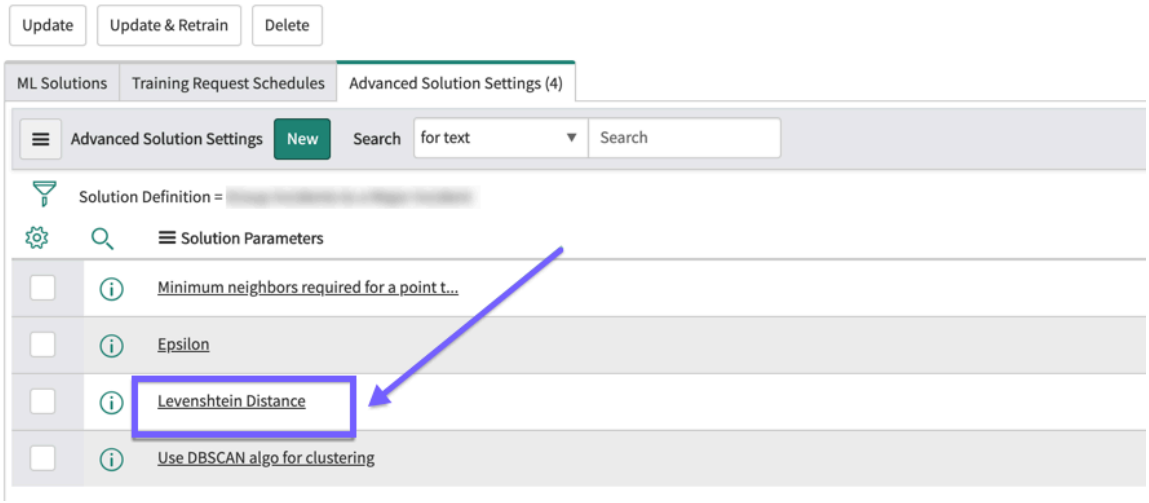
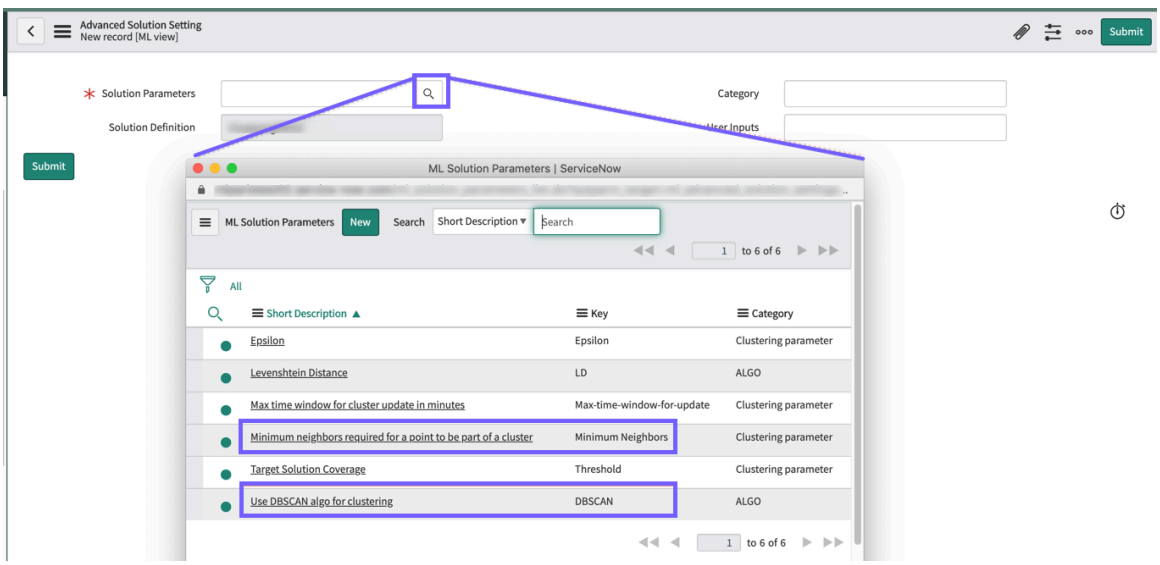
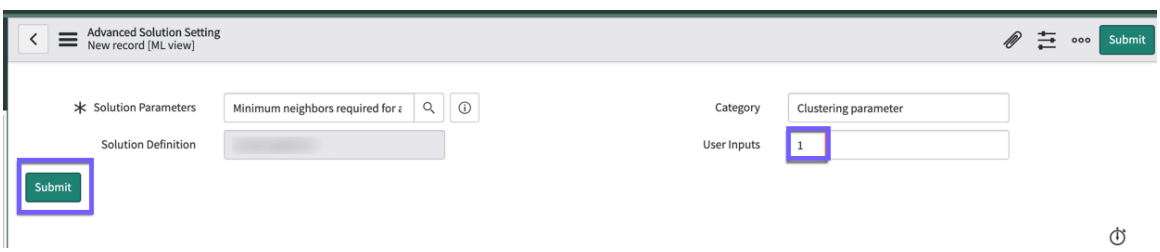
Result: Levenshtein Distance is configured for your clustering solution. Its solution parameter appears on the Advanced Solution Settings tab of your clustering definition form.



7. Repeat steps 1-6 from the previous Levenshtein Distance example, except this time you're creating the **Minimum Neighbors** and **DBSCAN** solution parameters, which together enable the Connect Component feature.



When you select, configure, and submit the **Minimum Neighbors** solution parameter, be sure to set the **User Inputs** field with a value of 1. Only some parameters have a User Inputs field.



Result:

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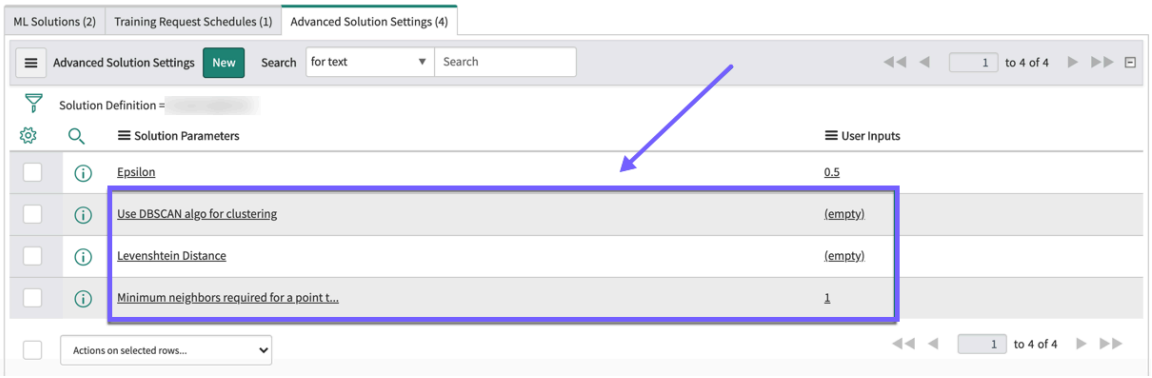
Connect Component is configured for your clustering solution. Its two solution parameters appear on the Advanced Solution Settings tab of your clustering definition form, alongside the Levenshtein Distance parameter you configured in steps 1-6 of this procedure.



Related topics

Create and train a clustering solution

Config parameters for model config in classification

Customize the training behavior of your classification solution by passing in a dictionary of parameters in JSON format.

Before you begin

Role required: ml_admin or admin

About this task

You can fine-tune model performance by passing in a dictionary of parameters to adjust training behavior.

Understand the machine learning hyperparameters relevant to your model objective. This option is advanced and should be modified with care.

You can add these parameters in the solution definition form by using the following procedure.

Alternatively, you can use a script to add these parameters. For the format to use when scripting, see the **What to do next** section of this page.

Procedure

1. Navigate to **All** > *Predictive Intelligence* > **Classification** > **Solution Definitions**.
2. Open an existing classification solution or create a new one.
3. Select the **Advanced Solution Settings** tab in the **Related Links** section of the form.
4. Select **New** to open the **Advanced Solution Setting** (ml_advanced_solution_settings) form.
5. In the **Solution Parameters** field, search for `Config parameters for model config in classification`.
6. In the **User Inputs** field, enter the following key-value pairs, after editing the values per your requirements.

> **Note:** When pasting the parameters into the solution definition form, don't include JSON's enclosing label, braces, or parentheses. Enter the key-value pairs in the format shown here, after editing the values according to your requirements.

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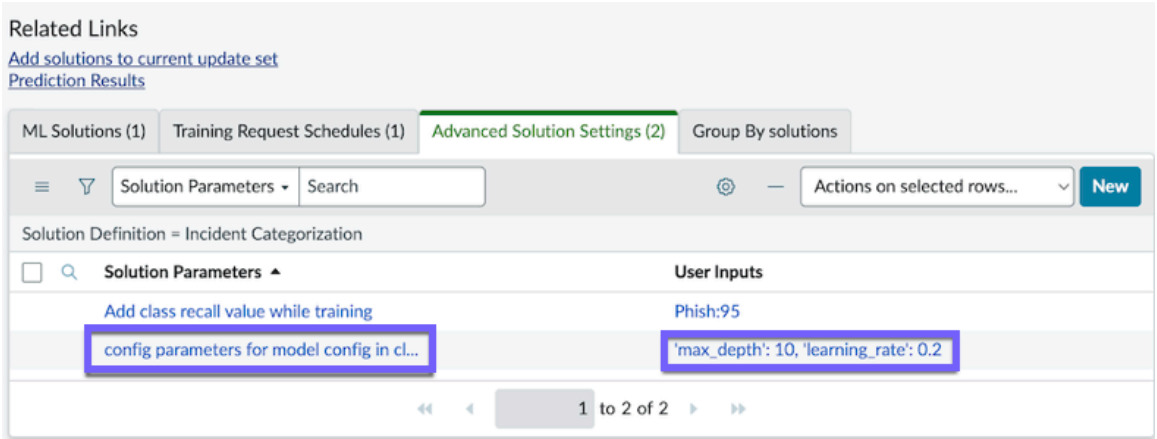
```
'max_depth': 10,'learning_rate': 0.1,'objective':
 'multi:softprob','num_class': 11,'random_state':
 10,'eval_metric': 'mlogloss','booster':
 'gbtree','n_estimators': 150,'verbosity':
 1,'use_label_encoder': false,'tree_method':
 'hist','num_parallel_tree': 1,'gamma': 0.25,'subsample':
 0.8,'max_delta_step': 5,'reg_alpha': 0,'reg_lambda':
 1,'colsample_bytree': 0.8,'colsample_bylevel':
 1,'colsample_bynode': 1,'min_child_weight': 1.25,'n_jobs':
 11,'validate_parameters': true
```

7. Select **Submit** to update the solution definition.

Result

The setting appears as a row on the **Advanced Solution Setting** tab on your solution's form.



What to do next

Retrain your solution.

You can also pass in this dictionary with a script. Be sure to use the enclosing label, braces, and parentheses when scripting.

Script example:

```
config.setModelParams({
                    'max_depth': 10,
                    'learning_rate': 0.1,
                    'objective': 'multi:softprob',
                    'num_class': 11,
                    'random_state': 10,
                    'eval_metric': 'mlogloss',
                    'booster': 'gbtree',
                    'n_estimators': 150,
                    'verbosity': 1,
                    'use_label_encoder': false,
                    'tree_method': 'hist',
                    'num_parallel_tree': 1,
                    'gamma': 0.25,
                    'subsample': 0.8,
                    'max_delta_step': 5,
                    'reg_alpha': 0,
                    'reg_lambda': 1,
                    'colsample_bytree': 0.8,
```

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```
                    'colsample_bylevel': 1,
                    'colsample_bynode': 1,
                    'min_child_weight': 1.25,
                    'n_jobs': 11,
                    'validate_parameters': true
                    });
```

JSON example:

```
            {
              "classification_model_params": {
                'max_depth': 10,
                'learning_rate': 0.1,
                'objective': 'multi:softprob',
                'num_class': 11,
                'random_state': 10,
                'eval_metric': 'mlogloss',
                'booster': 'gbtree',
                'n_estimators': 150,
                'verbosity': 1,
                'use_label_encoder': false,
                'tree_method': 'hist',
                'num_parallel_tree': 1,
                'gamma': 0.25,
                'subsample': 0.8,
                'max_delta_step': 5,
                'reg_alpha': 0,
                'reg_lambda': 1,
                'colsample_bytree': 0.8,
                'colsample_bylevel': 1,
                'colsample_bynode': 1,
                'min_child_weight': 1.25,
                'n_jobs': 11,
                'validate_parameters': true
                }
              }
```

Related topics

Using Machine Learning APIs

Create and train a classification solution

Use LightGBM algo for classification model training

Enable the LightGBM (Light Gradient-Boosting Machine) algorithm as an advanced option for training classification models.

Before you begin

Role required: ml_admin or admin

About this task

The LightGBM algorithm offers performance and efficiency for large datasets. For detailed information about this algorithm see https://lightgbm.readthedocs.io.

Use the following procedure to add this option in the solution definition form. Alternatively, you can use a script to add this algorithm.

To add this option using a script:

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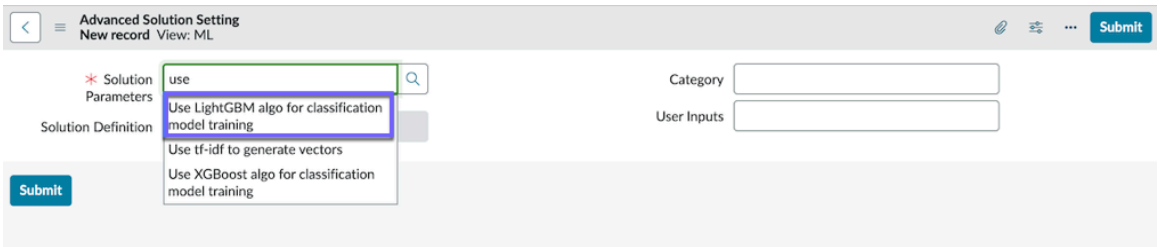
```
var config = new MLPredictorConfig('ml_solution_ID');
                    config.useLightGBM();
                    config.updateConfig();
```

In JSON format:

```
{
    "use_lightgbm": true
    }
```

Procedure

1. Navigate to **All** > *Predictive Intelligence* > **Classification** > **Solution Definitions**.
2. Open an existing classification solution or create a new one.
3. Select the **Advanced Solution Settings** tab in the **Related Links** section of the form.
4. Select **New** to open the **Advanced Solution Setting** (ml_advanced_solution_settings) form.
5. In the **Solution Parameters** field, search for `Use LightGBM algo for classification model training`.
6. Leave the **User Inputs** field blank, and select **Submit**.



Result
The setting appears as a row on the **Advanced Solution Setting** tab on your solution's form.

What to do next
Retrain your solution.

Related topics

Using Machine Learning APIs

Create and train a classification solution

Minimum records needed for label to include it

Set a threshold for the minimum number of records a label must have in your dataset to be included in model training.

Before you begin
Verify that your dataset includes label values suitable for classification.

Role required: ml_admin or admin

About this task
This advanced option helps to eliminate labels that occur infrequently. Setting this minimum threshold can reduce overfitting and unreliable predictions.

To configure, you provide a number for a minimum count of records. Any class value with fewer records than the minimum is dropped from the training set. Class values that are dropped before training can't appear in predictions.

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To add this option using a script:

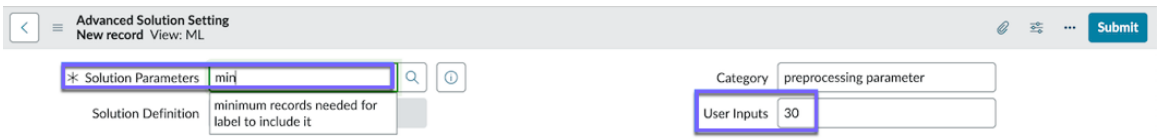
```
config.setMinLabelCount(50);
```

In JSON format:

```
{
    "min_label_count": 50
    }
```

Procedure

1. To add this option in the solution definition form, navigate to **All** > *Predictive Intelligence* > **Classification** > **Solution Definitions**.
2. Open an existing classification solution or create a new one.
3. Select the **Advanced Solution Settings** tab in the **Related Links** section of the form.
4. Select **New** to open the **Advanced Solution Setting** (ml_advanced_solution_settings) form.
5. In the **Solution Parameters** field, search for `minimum records needed for label to include it`.
6. In the **User Inputs** field, enter the number of records you want as the minimum, then select **Submit**.



Result
The setting appears as a row on the **Advanced Solution Setting** tab on your solution's form.

What to do next
Retrain your solution.

Related topics

Using Machine Learning APIs

Create and train a classification solution

Configure include only top N labels

Limit your classification model to use only the most common classes when training. You can specify the number of classes to use.

Before you begin
Role required: ml_admin or admin

About this task
Restricting the model to a fixed number of the most frequent labels improves focus and performance, especially with large datasets.

You can add this option in the solution definition form by using the following procedure. Alternatively, you can use a script to add this option.

To add this option using a script:

```
config.setTopNLabels(100);
```

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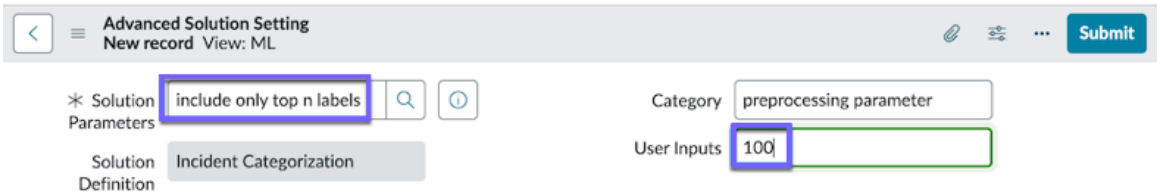
In JSON format:

```
{
    "include_top_n_labels": 100
    }
```

Procedure

1. To add this option in the solution definition form, navigate to **All** > *Predictive Intelligence* > **Classification** > **Solution Definitions**.
2. Open an existing classification solution or create a new one.
3. Select the **Advanced Solution Settings** tab in the **Related Links** section of the form.
4. Select **New** to open the **Advanced Solution Setting** (ml_advanced_solution_settings) form.
5. In the **Solution Parameters** field, search for `include only top n labels`.
6. In the **User Inputs** field, enter the number of classes you want as the limit, then select **Submit**.



Result
The setting appears as a row on the **Advanced Solution Setting** tab on your solution's form.

What to do next
Retrain your solution.

Related topics

Using Machine Learning APIs

Create and train a classification solution

Remove others label

Reduce noise in your classification model and enhance predictive accuracy by removing records with the label "others" from training data. These are records with a distribution frequency of under one percent.

Before you begin
Role required: ml_admin or admin

About this task
When this option is set to true, records under 1% of total data distribution are excluded from training. These records are labeled "others" in the interface. The 1% threshold can't be modified.

You can add this option in the solution definition form by using the following procedure. Alternatively, you can use a script to add this option.

To add this option using a script:

```
config.removeOthersLabel(true);
```

In JSON format:

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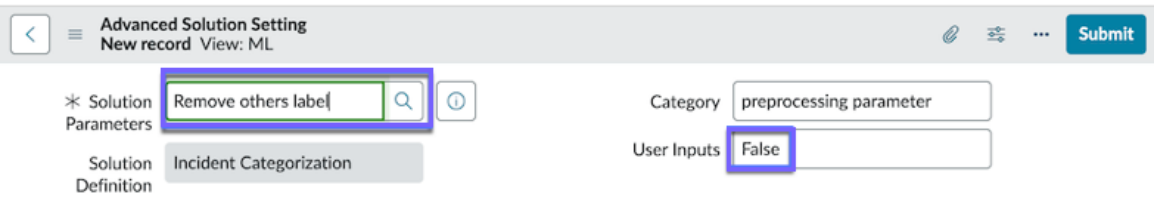
```
{
    "remove_others_label": true
    }
```

Procedure

1. To add this option in the solution definition form, navigate to **All** > *Predictive Intelligence* > **Classification** > **Solution Definitions**.
2. Open an existing classification solution or create a new one.
3. Select the **Advanced Solution Settings** tab in the **Related Links** section of the form.
4. Select **New** to open the **Advanced Solution Setting** (ml_advanced_solution_settings) form.
5. In the **Solution Parameters** field, search for `Remove others label`, then select **Submit** to save your update.



Result

The setting appears as a row on the **Advanced Solution Setting** tab on your solution's form.

What to do next

Retrain your solution.

Related topics

Using Machine Learning APIs

Create and train a classification solution

Creating and training solutions

Use one of the Predictive Intelligence (PI) frameworks to create and train machine-learning solutions. Each framework delivers a different solution type for training the system to predict, recommend, and organize data outcomes.

Types of solutions

The three PI frameworks provide different solutions that can be invoked by any application through a prediction API to make a prediction. Create and train your own solutions using your previous data. Navigate to **All** > **Predictive Intelligence** > **Homepage** to view and create solutions.

Select the best framework for your desired prediction:

- Classification solutions:

  Sets field values during record creation to automatically categorize and route work based on past records. See Create and train a classification solution.

- Similarity solutions:

  Identifies similarities between new and existing records to recommend resolutions. See Create and train a similarity solution.

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- Clustering solutions:

  Groups similar records into clusters to identify patterns and major incidents. See Create and train a clustering solution.

- Regression solutions:

  Note: From the Washington DC release, support for creating new regression solutions was removed. You can still edit and train existing regression solutions, but you won't be able to initiate new ones.

  Uses historic data to predict numeric outputs, such as estimating the time it takes to resolve an incident or case. See Create and train a regression solution.

Selecting data records for training your solution

A solution is only as good as the record data you use to train it. In general, a good training dataset has these characteristics.

- The solution definition input fields are available to users when creating records. To make predictions at record creation, the solution must have the input field values at record creation.
- The solution definition output field is a choice field. To make more accurate predictions, limit the output field to a finite set of possible values.
- The training records only contain correct values for the output field. To make more accurate predictions, filter out any records that have unreliable output field values. For example, if recently closed incidents are subject to review and change for a month, filter out any recently closed incidents.
- The training records contain multiple examples of each output field value that you want the solution to predict. To provide more record coverage, include multiple examples of each output field value.
- The training records include common variations of the input fields. To provide more record coverage, include multiple examples of input field values.

Exporting your solution for training

To train a solution, you export its solution definition and associated records to a centralized training server within the same datacenter. When the training completes, the training server exports the solution back to your instance and deletes all of your training data from the server. Each datacenter has its own dedicated training server and the data doesn't leave the datacenter. Confirm that your configuration aligns with your compliance requirements.

Predictions occur on a centralized prediction server within the same datacenter as the instance. The trained model artifacts are sent from the instance server to the prediction server when the prediction is invoked for the first time. After that, the trained model artifacts are cached on the prediction server for subsequent predictions.

Note: All communication between the instance and the training service occurs within the same datacenter firewall. Even so, all communications occur over HTTPS.

Solution training troubleshooting

For troubleshooting common training issues, see the Predictive Intelligence Common issues [KB781893] article in the Now Support Knowledge Base.

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Create and train a classification solution

Specify the records used to train a classification solution, what fields trigger a prediction, and how often you want to retrain your solution.

Before you begin

- Create a custom stopwords list if needed.
- Role required: admin or ml_admin

Important: In the Brazil release, models in the classification, clustering, and similarity frameworks use Workflow solutions. These are pre-trained, so a word corpus isn't needed for your new solutions. When your existing solutions with a word corpus are re-trained after upgrading, they become Workflow solutions, and the Word Corpus field is removed from the form.

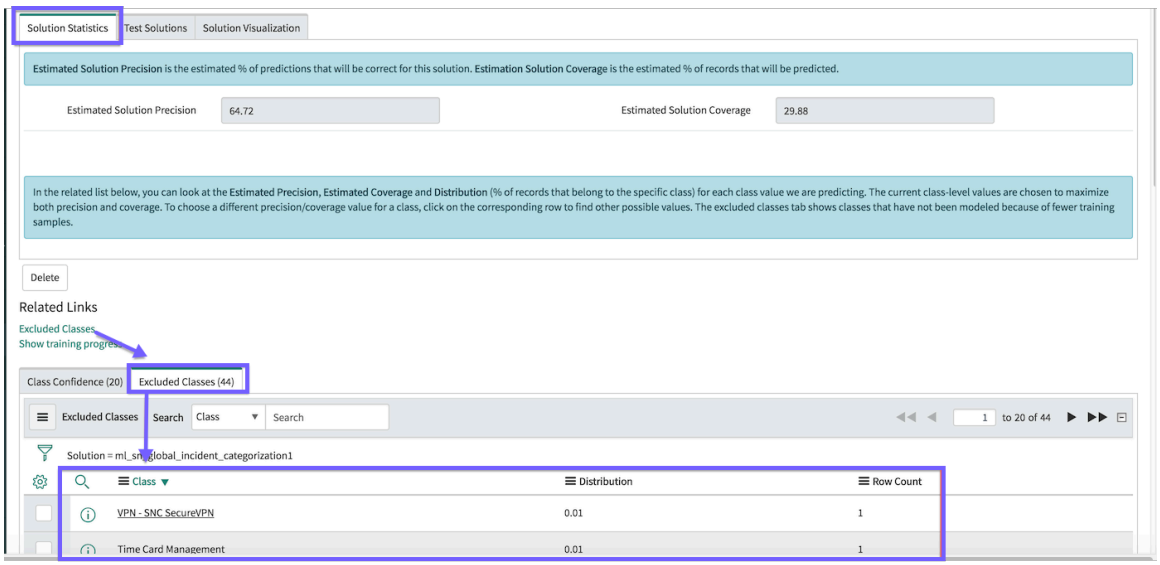
About this task

A predictive model is only as good as the data that you use to train it. To select appropriate records for training, examine the table's database dictionary as well as the current quality of the record values that you want to use.

For information on using encrypted training data, see Data Encryption in Predictive Intelligence.

For information about the minimum and maximum number of records you can use for training, see Predictive Intelligence properties.

Note: Classes that have fewer than 30 records in your training dataset are excluded from solution training. When your solution is trained and complete, any excluded classes are listed in the Solution Statistics section of your ML Solution form.



You must create a separate solution definition for each predictive model you want to support. The following procedure explains how to create a new classification solution, but you can also copy an existing solution definition and its configuration into a new record by selecting **Copy Solution Definition** from the context menu. Edit the field values on the new record as needed.

From the Yokohama release, you can also create a Workflow Classification solution using a script if you want to include an analysis of the key features influencing the model's predictions. For more information see Model Explainability.

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Procedure

1. Ensure that you are in the application scope you want for your solution definition, then navigate to **All** > **Predictive Intelligence** > **Classification** > **Solution Definitions**.
2. On the Classification Definitions list, select **New**.
3. On the empty Classification Definition form, configure the fields according to the following guidance.

Field	Value
Label	Enter a unique name for the solution record.
Name	The system generates the value of this read-only field based on the Label value that you entered.
Word Corpus	Select a word corpus that's relevant to your solution. For more information, see Create a word corpus. **Note:** Word Corpus is not a required field for customers implementing Predictive Intelligence for the first time starting in Utah. A pre-trained model is used instead. The Word Corpus field is removed for pre-trained models.
Table	Select the table containing the target records that you want the system to predict.
Output Field	Select the field whose value you want the predictive model to set. In general, a good output field has these characteristics. ○ It's a choice field or a string field with a finite set of possible values. ○ It has some causal connection to the input fields. For example, on the default **Incident Categorization** solution definition, the output field is set to **Category**.
Fields	Select the input fields that you want the solution to use to generate a prediction. Input fields are fields within a record that may contain the classification information your prediction solution needs to succeed. For example, if you're predicting the correct class for triaging an incident record, the prediction should gather records containing text that references the class. Most records have contextual text in their **Short description** field, so it's a great input field to use in general. You could also use **Resolution notes** as an input field, as it too might reference the incident class in the detailed notes for the incident. In general, good input fields have these characteristics. ○ The fields are available to users when creating records. ○ The field data type can be string, reference, choice, or HTML. The more information that a field provides, the more often a solution can make a prediction, and the more often predictions are accurate. ○ The field has a default value and should not be blank.

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Field	Value
	All default solution definitions use the **Short description** field.
Filter	Click **Add Filter Condition** to apply conditions to the records you're training. For example, the **Incident Categorization** solution definition uses a filter with these conditions: **[Created][on][Last 12 months] AND [Active][is][false] AND [State][is one of][Resolved | Closed]** To train a solution, the filter must return at least one record. If your filter returns no records, update it until it returns records for training. **Note:** The recommended number of records for training a good solution is from 30,000 through 300,000. If you submit more than 300,000 records, the most recent 300,000 records are used to train the solution. Use only authentic records from the database. In general, a good filter has these characteristics. ○ The training records are inactive and their states indicate work completed within your standard process, such as resolved or closed. ○ The target fields contain only correct values. Filter out records with unreliable target field values. For example, if you're predicting the assignment group/ category and your historic incident data contains assignment groups/ categories that are no longer used, add a filter to remove such records from the training. ○ The training records contain multiple examples of each target field value you want the solution to predict. ○ The training records include common variations of the input fields. Use relative date filters such as last 3 months or last 12 months. Don't use hard-coded dates because these filters aren't updated when the solutions are retrained, unless you update them manually.
Processing Language	Select the dominant language of the dataset that you're training on the solution definition. If the dataset language is Italian, choose `Italian`. Also, English processing is applied to all datasets by default. For example, if you select Italian, the system processes the data in both English and Italian. **Note:** The term processing indicates some of the language-specific steps used as part of training a solution. For example, tokenizing words, removing stop words, and stemming.
Stopwords	When you select your processing language, the system automatically adds a Stopwords list for that language. For example, if your processing language is Italian, the **Default Italian Stopwords** list appears. The **Default English Stopwords** list is also included. If you create a custom stopwords list, you can select it from the Stopwords field to add to your solution.
Training Frequency	Select how often the system regenerates the solution. The available options range from **Run once** up to **Every 180 days**. **Note:** The minimum number of records required for classification solution training is set at 10,000.

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Field	Value
	By default, the system runs training once. This provides you time to review and update the solution definition until it provides acceptable coverage and precision values. When your solution definition is fairly stable, consider scheduled trainings, as data can age over time, thus degrading the accuracy of your prediction model. **Note:** The ML scheduler limits the number of trainings an instance can commit to 50 new ML training requests per instance within a 24-hour window. This limit excludes scheduled retraining requests, clustering updates, and similarity updates, even if the new training requests exceed 50 within a 24-hour window.

4. Click the appropriate context menu option or button for your solution definition.

Option	Description
Save or Save & Train	Save your solution definition record so you can return to it later, or save and submit it for training.
Submit or Submit & Train	Create your solution definition record and submit it, or submit and train it.

5. If you submitted the solution for training, click **OK** on the **Training Activation** window to confirm.

   - The system schedules the solution for training with the nearest training service. The system sends you a notification when the training completes, including any errors that may have occurred in the training. Other users can subscribe to the Predictive Intelligence Notifications category. When training completes, the system uploads the solution as an Attachment record.
   - A bubble chart populates the Solution Visualization tab of your solution form, showing the estimated precision and coverage for each of the classes covered by the solution. The

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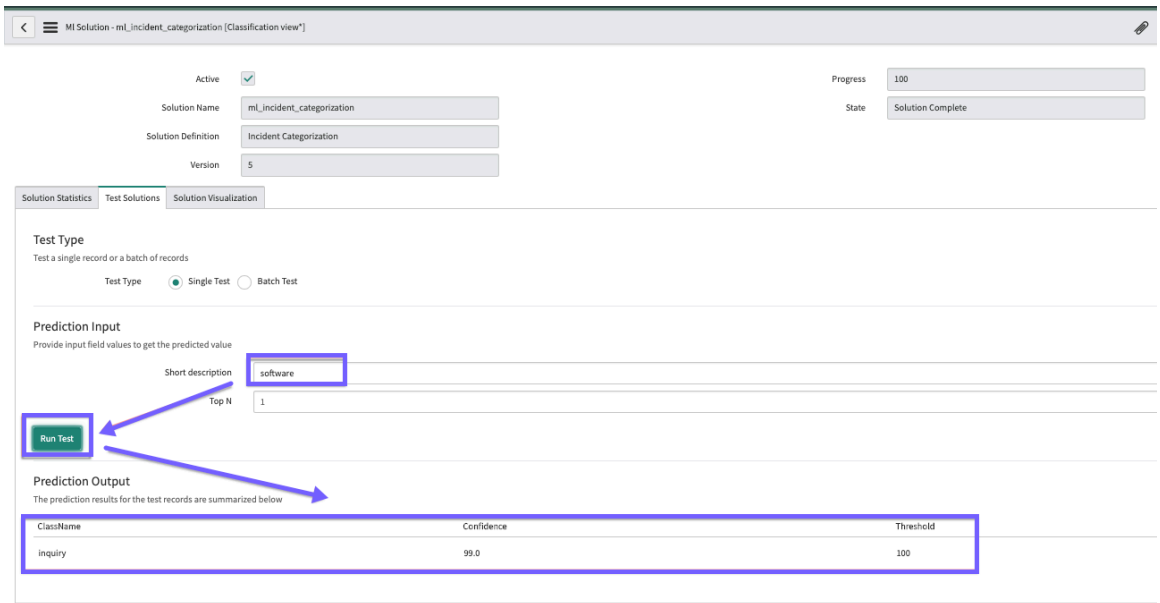
size of the bubble indicates the percent of records (distribution) that belong to the class. When you point to a bubble, you can see its estimated coverage, estimated precision, and distribution.

What to do next

In the Class Confidence section of the Solution Statistics tab in your solution, review the trained solution precision and coverage statistics.

In the Test Solutions tab in your solution, you can test the prediction output by entering values from the input fields, such as the Short Description.



Exclude a class from prediction

Exclude a class from prediction if its precision or coverage aren't satisfactory. Excluding a class prevents the classification model from predicting a particular output field value.

Before you begin

- Train the solution definition whose output field values you want to exclude.
- Role required: admin or ml_admin

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About this task
As part of the testing and refinement of your classification solution, you can try excluding an output class to check the effect on the model's results.

Excluding a class from prediction is temporary. The class is restored the next time you train your solution, as long as the solution definition remains the same. If your precision or coverage targets are still not met, consider deactivating the solution or changing the solution definition.

Typically, you exclude a class from prediction if you want a person to manually set the excluded class value. For example, exclude a particular incident category when the solution doesn't offer sufficient precision or coverage, or because the class triggers other business logic that requires review or approval.

Procedure
1. Navigate to **All** > **Predictive Intelligence** > **Classification** > **Solutions**.
2. In the ML Solutions list, select the solution whose classes you want to exclude.
   This solution must have a **State** of **Solution Complete**.
3. In the **Class Confidence** related list, select the class you want to exclude.
4. In the Class Confidence record, review the precision and coverage combinations available from the **Precision Coverage Lookups** embedded list.
5. Select the check box for the 100 precision and 0 coverage combination.

   You can select only one check box.

6. From the Actions on selected rows control, select **Apply Values**.
   The system shows a **Precision / Coverage Setting** confirmation window.
7. Click **OK** to confirm the change or **Cancel** to discard it.

Result
The solution excludes the class from all predictions until the next training cycle.

What to do next
If you conclude that this class does not contribute to meaningful predictions, consider deactivating the solution or changing the solution definition.

Exclude a class from solution training

Exclude a class from solution training to prevent the model from ever making predictions for a particular output field class. For example, you can exclude a particular incident category from training if you plan to retire or change the category.

Before you begin
Role required: admin or ml_admin

About this task
Excluding a class from training doesn't prevent the solution from making predictions for records that use the excluded class. Solution training still uses the input and output field values as data and attempts to match input field values to a new output field class. This attempt may cause undesirable prediction results unless you have another suitable class to replace the excluded class value.

Typically, you only exclude a class from training if you change the list of valid output field values. For example, if you replaced one incident category with another incident category, you may exclude the old category from training so that the solution only uses the new category for predictions.

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Note: If you specify a target recall for a class, don't exclude the class from training even if the number of records are less than 30 for that class.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Classification** > **Solution Definitions**.
   The system shows the current list of solution definitions.
2. Select the solution definition you want to edit.

   Example
   For example, select **Incident Categorization** to exclude an incident category from training.
3. Edit the filter to exclude the class.
   You can use the **[is one of]** or **[is not one of]** operators to exclude a particular class.

   Example

   For example, if you want to exclude the Hardware class, add this condition: **[Category] [is not one of] [Hardware]**.
4. Click **Update & Train**.
   The system schedules the solution for training with the nearest training service. When training is complete, the system uploads the solution as an Attachment record.

Result
The solution excludes the class from all predictions.

What to do next
Review the trained solution precision and coverage statistics.

Tune a trained classification solution

Tune the performance of a trained classification solution by configuring class level precision and coverage values.

Before you begin

- Train the solution definition whose output field values you want to configure.
- Role required: admin or ml_admin

About this task
The system creates a class record for each output field value that it can predict. Each class record includes a list of possible precision and coverage combinations to choose from. By default, solutions use the highest combination of precision and coverage available. You can select another combination to refine predictions based on acceptable precision and coverage values.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Classification** > **Solutions**.
   The system shows the list of available solutions.
2. Select the solution whose classes you want to configure.
   This solution must have a **State** of **Solution Complete**.
   The system shows the Solution record.
3. From the **Class Confidence** related list, select the class you want to configure.
   The solution only lists output field values for which it can make predictions. If the output field value is missing from this list, update the solution definition filter to provide more data for this output field value, and retrain the solution.

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The system shows the Class Confidence record.

4. Review the precision and coverage combinations available from the **Precision Coverage Lookups** embedded list.
5. Select the check box for the precision and coverage combination you want to use to make predictions for this class.

   You can only select one check box. Some combinations produce special prediction results.

Special prediction combinations

Prediction result	Precision	Coverage
Never include class in predictions	100	0
Always include class in predictions	0	100

6. From the Actions on selected rows control, select **Apply Values**.
   The system shows a **Precision / Coverage Setting** confirmation window.
7. Click **OK** to confirm the change or **Cancel** to discard it.

What to do next

Test predictions for this class to verify that the system produces acceptable results.

Configuring target metrics for a trained classification solution

Set values for precision, coverage, and recall statistics for a trained machine learning solution.

Setting classification metric values at the class or solution level

Predictive Intelligence provides three classification metric types: precision, coverage, and recall. You configure these metrics on the Solution Statistics tab of a trained classification solution form. While you can manually set values to these metrics at the class level, doing so can be challenging if you have a large number of classes to cover. In many cases, you may not know the best value to set until your solution is trained. This topic focuses on setting the metric values at just the solution level.

Configuring solution metrics

When you apply a value to one metric, it changes the values of the other two. This behavior enables you to modify your metrics iteratively in real time to see which value combinations render particular results. When you apply a new value to a metric, the system recomputes it by considering its new targets.

Applying a value to a metric asks the system to train its predictions to favor the metric you set based on the highest percentage value, and at a cost to the other metrics. The system tries to meet these values but may not set them exactly as you request due to how the data you're training is distributed.

When you apply metric values at the solution level, the system automatically sets the appropriate values at the class level.

Here are the basic steps for configuring a target metric for your solution.

1. Navigate to the Solution Statistics tab of a trained ML solution.
2. Review the messages on the green banners of the screen. These define each of the metrics so you can better understand the values you want to assign to the solution. The first two message

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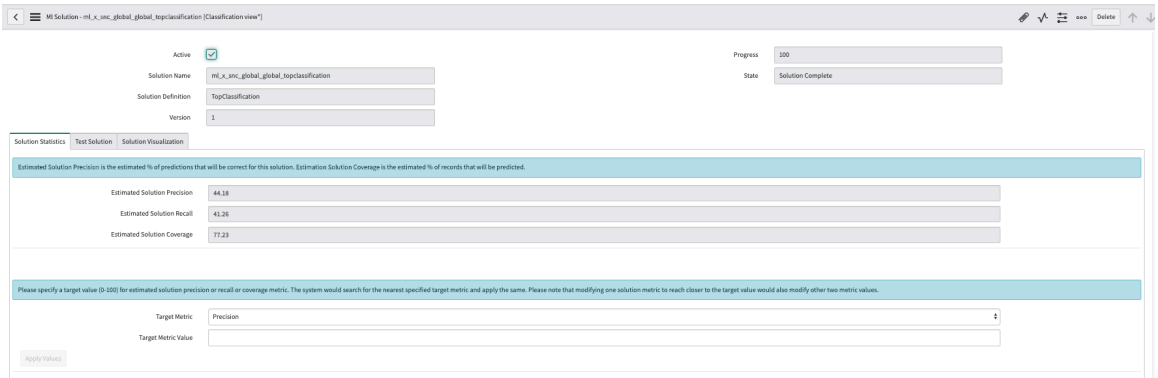
banners address estimated solution-level metrics. The third banner addresses class-level results based on the solution values you applied.

3. In the **Target Metric** choice list, select the metric you want to configure.
4. In the **Target Metric Value** field, enter a numeric percentile value between 0-100.
5. Click **Apply Values**.
6. Result: On the Solutions Statistics tab, you can review the change in values to the **Estimated Solution Precision**, **Estimated Solution Recall**, and **Estimated Solution Coverage**. The system calculates these values based on the **Target Metric** you select and the **Target Metric Value** you enter for the solution.

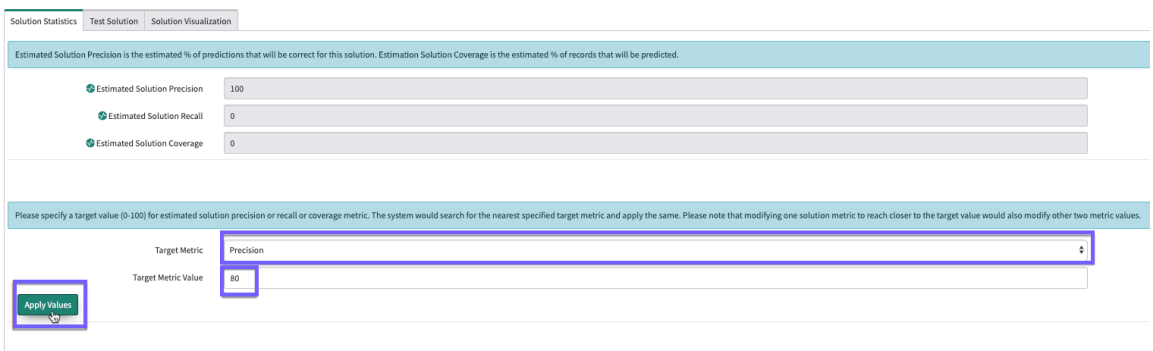
Here's a sample landing page for a recently trained classification solution. As you can see, the precision metric is 44.18, recall is 41.26, and coverage is 77.23.



To adjust these default values for a use case refer to the sample configurations as follows. For example, based on the classification solution you're implementing, you might want to change the target metric value for precision, recall, or coverage. Keep in mind that changing the target metric value for one metric (such as precision) impacts the values of the recall and coverage metrics as well.

Precision configuration example

In this example scenario, you're replacing a manual triage process for routing incident records with an ML classification solution that automatically assigns the records to the correct assignment group. For this scenario, you have a target value in mind and the system must predict correctly at least 80% of the time. So you set the precision metric value to 80 and click **Apply Values**.



Here are the metric values the system applied to the solution. In this scenario, the precision value of 80.04 slightly exceeded your request for 80%, so you're likely satisfied with that value.

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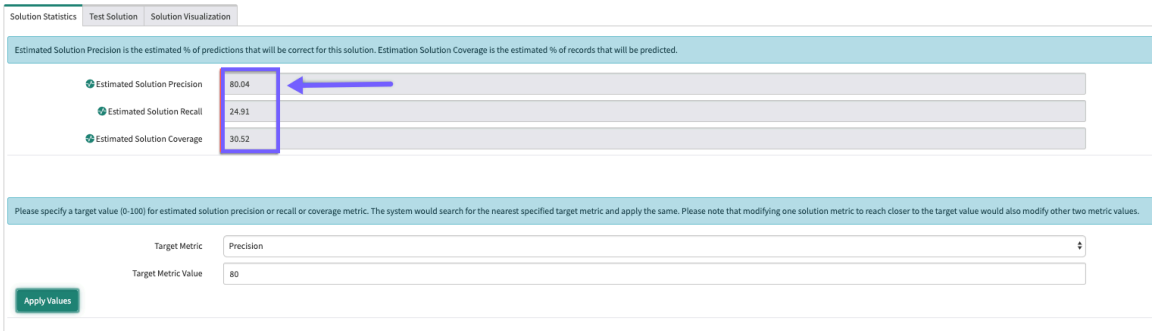
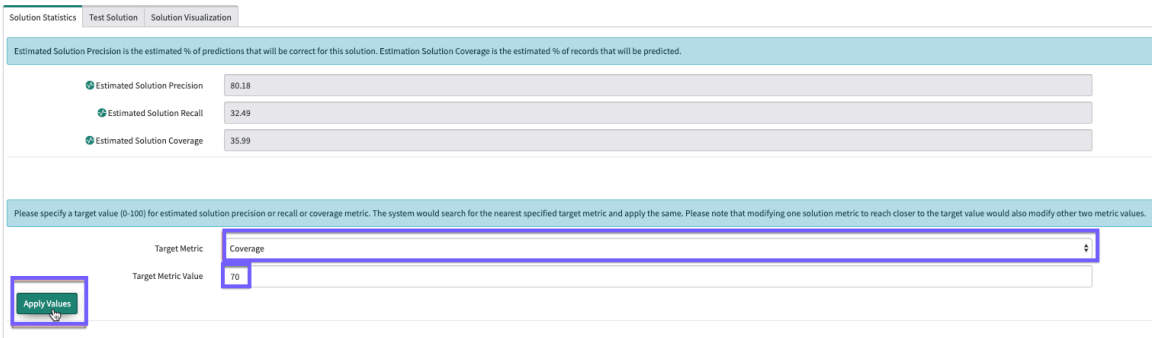
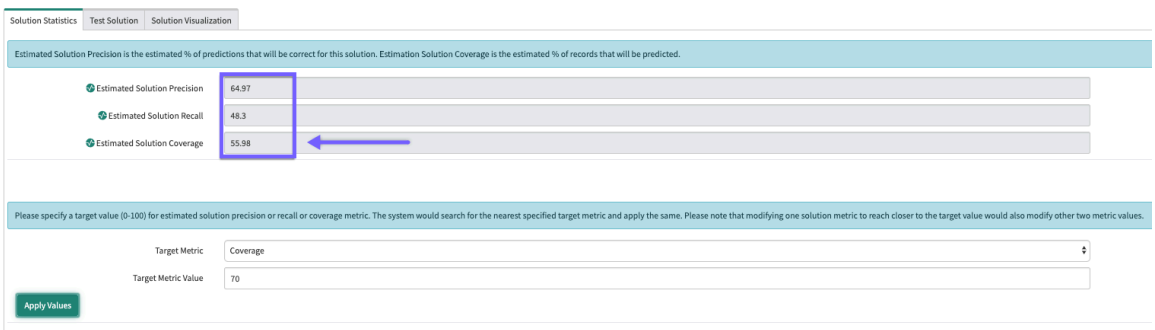


Coverage configuration example

In another example scenario where you're replacing a manual triage process for routing incident records, your minimum goal is to predict at least 70% of incoming incidents in the first quarter of the year. So you set the coverage metric value to `70` and click **Apply Values**.



The metric values the system applied to the solution are shown in the following image. The coverage metric value increased from 35.99 to 55.98. However, the precision metric decreased from 80.18 to 64.97. This could be because you set the coverage metric to a relatively high value of 70, or perhaps because of how the data you're training is distributed.



Recall configuration example

In another scenario, classifying if an incoming email is a Phish or not can be an important use case in a security-related machine learning solution. In this situation, it's very important to identify every Phish, and it may be okay to report a non-Phish as a Phish occasionally. However, no real Phish should be classified as a non-Phish. In such situations, the recall metric must have a high value, which might lead to lower percentages for precision and coverage. So here you can set the recall metric to `95` and click **Apply Values**.

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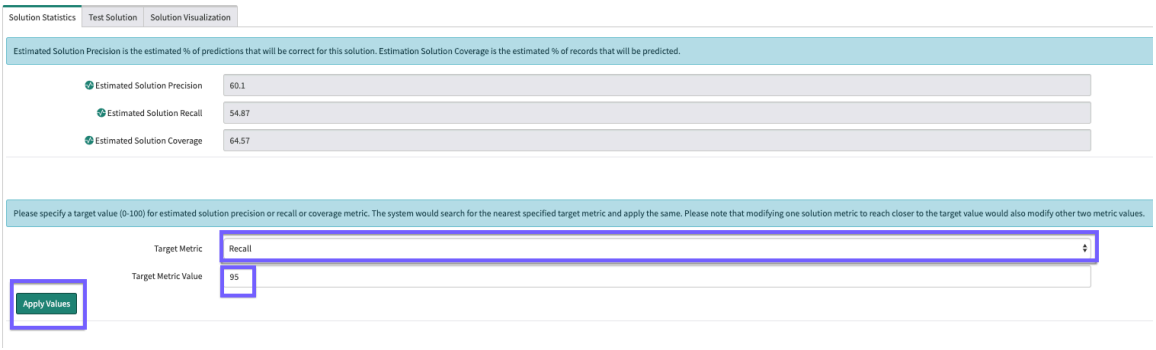
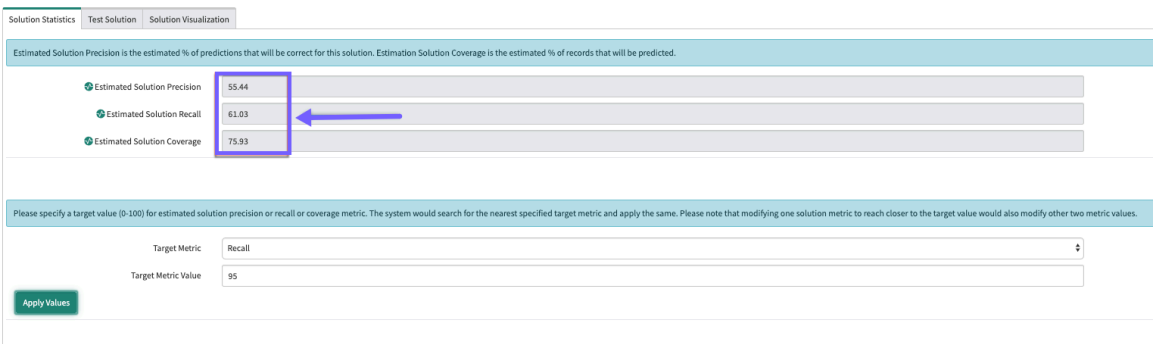


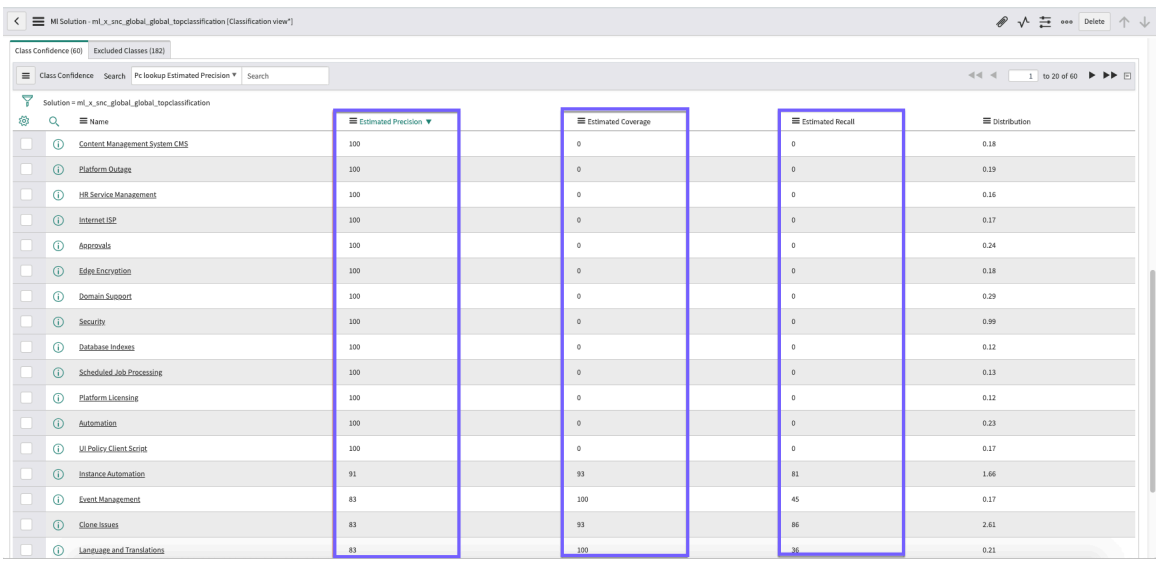
Here are the metric values the system applied to the solution. The recall metric value increased from 54.87 to 61.03. However, the precision metric decreased from 60.1 to 55.44. This is likely because you set the recall metric to the high value of 95.



Class-level results for the solution metric values you apply to your solution

The following image shows an example of the class-level results the system applied to a solution's precision, coverage, and recall statistics for 37 classes. You can keep modifying the metric values until you're fully satisfied with the results.

By Sorting (z to a) on the Estimated Precision column you can see which classes have the highest precision for the solution.



Using Group By for classification

Use APIs to simultaneously submit multiple classification solutions for training based on the Group By field.

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You can use the optional Group By capability to train and maintain one classification solution that covers more than one data area, such as geographical location or domain.

To train a solution using Group By, you must add the groupby parameter while creating a classification solution definition using APIs. The groupby parameter accepts only categorical columns as inputs, where individual models are created on the subset of data belonging to each of the groupby values. Only those child solutions that pass the minimum records criteria set for the capability are created. Here, the prediction calls are routed to the corresponding Group By model based on the Group By value present in the prediction input. Batch predictions are not supported.

A Group By scenario for geographical locations

Let's say your global company uses classification routing for incoming records, with one support center in the US and one in Europe. Here, you want to create a single classification solution that has one model for your United States incidents and another model for your European incidents.

In this scenario, you could use one of these two approaches:

- Create and train two separate ML classification solution definitions, where one is filtered by US incidents only, and one by European incidents only.
- Use the groupby parameter to create Groupby for the country location so that all US definitions create a US model and all European definitions create a European model. Then, based on the incident, the system identifies which model it uses to predict the correct classification category.

The second approach has benefits in that the models you use can even be in different domains, such as healthcare or finance. This approach is especially beneficial if you have several country locations or domains to maintain.

Example usage for training and prediction using Group By via API

```
var myIncidentData = new sn_ml.DatasetDefinition({
    'tableName' : 'incident',
    'fieldNames' :
 ['category','short_description','assignment_group','description
','priority'],
    'encodedQuery' : 'activeANYTHING'
});

var mySolution = new sn_ml.ClassificationSolution({
    'label': 'solution label',
    'dataset' : myIncidentData,
    'groupByFieldName' : 'assignment_group',
    'predictedFieldName': 'category',
    'inputFieldNames':
 ['short_description','description','priority']
});
//Add solution definition
var solution_gr =
 sn_ml.ClassificationSolutionStore.add(mySolution)
//Get existing solution
var my_unique_name =
 sn_ml.ClassificationSolutionStore.get('solution name');
// submit training job
var solutionVersion = my_unique_name.submitTrainingJob();
```

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```
// Run prediction
var input = new GlideRecord("incident");
input.get("sys_id");
// configure optional parameters
var options = {};
options.apply_threshold = false;
var mlSolution = sn_ml.ClassificationSolutionStore.get('solution
 name');
//Prediction using glide record
var results = mlSolution.getActiveVersion().predict(input,
 options);
//Prediction using map
var results =
 mlSolution.getActiveVersion().predict([{ 'short_description':
 input.short_description,

 'assignment_group': input.assignment_group }], options);
```

For more context regarding this example and the general usage of Machine Learning APIs, see the links in the Related Content section on this page.

Related topics

DatasetDefinition - Global

ClassificationSolution - Global

ClassificationSolutionStore - Global

ClassificationSolutionVersion - Global

Model Explainability

Analyze the importance of each input field to your model's predictions using model explainability. Create a Workflow Classification model that includes a graphical analysis of feature importance by executing the provided script.

Before you begin

- This method uses the Workflow Classification Solution API, instead of the Solution Definition form, to create and train a model with explainability added. For information about the components of Workflow Classification models, see Create and train a classification solution.
- Role required: ml_admin or admin

About this task

Model explainability helps identify the key features that influence the model's predictions during training.

Note: Explainability can't be added to an existing model. This method uses a script to create and train a new Workflow Classification model. For more information about scripting the creation of Classification solutions, see ClassificationSolution - Global.

The script provided in the procedure creates and trains a model with explainability set to true. On the new model's solution form, an additional tab labeled **Feature**

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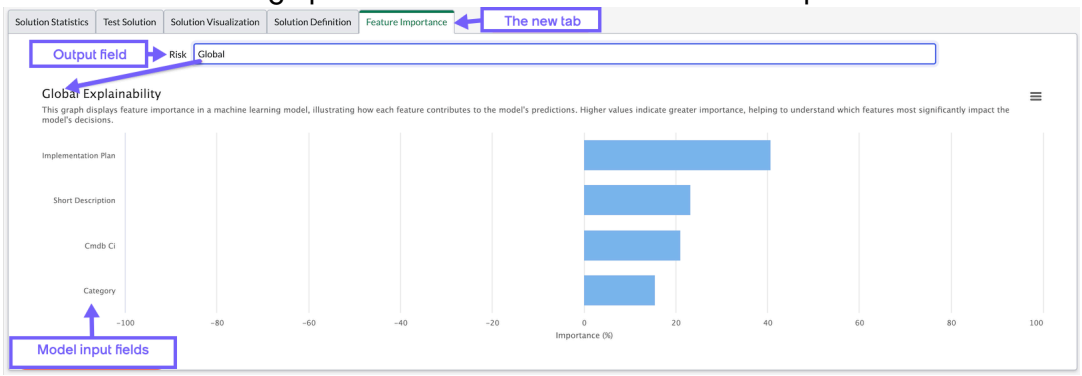
Importance appears. This tab offers a graph of the relative contribution of each input to the prediction.



Procedure

1. Navigate to **All** > **System Definition** > **Scripts - Background**.
2. Edit the query filter and table, field, and variable values in the following script according to your planned model, then execute the script.

```
// Define a dataset
                    var myIncidentData = new
sn_ml.DatasetDefinition({
                    'tableName': 'incident',
                    'fieldNames': ['category',
'short_description', 'sys_updated_by', 'assignment_group',
'description', 'priority'],
                    'encodedQuery': 'activeANYTHING'
                    });

                    // Define a classification solution
definition with explainability field
                    var mySolution = new
sn_ml.ClassificationSolution({
                    'label': 'model explainability',
                    'dataset': myIncidentData,
                    'predictedFieldName': 'category',
                    'inputFieldNames': ['short_description',
'priority'],
                    //setting the explainability field to true.
                    'explainability': true,
                    });

                    // Add solution to
ClassificationSolutionStore
                    var my_unique_name =
sn_ml.ClassificationSolutionStore.add(mySolution)

                    // Submit training job
                    var solutionVersion =
mySolution.submitTrainingJob();
```

Note: Substitute the query filter and table, field, and variable names in this script with your own values.

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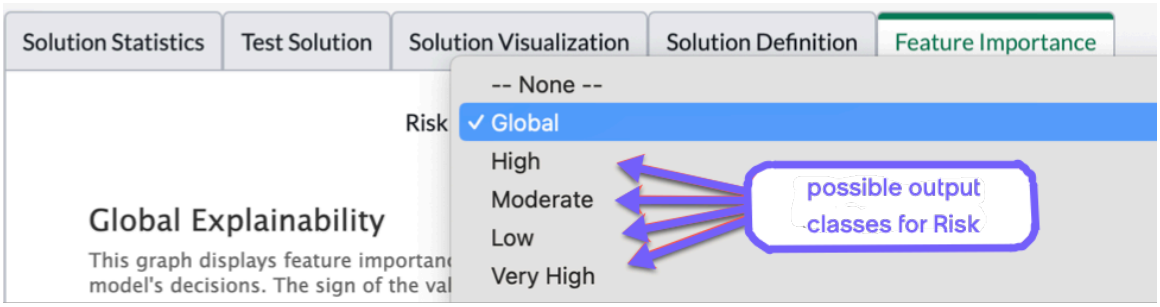
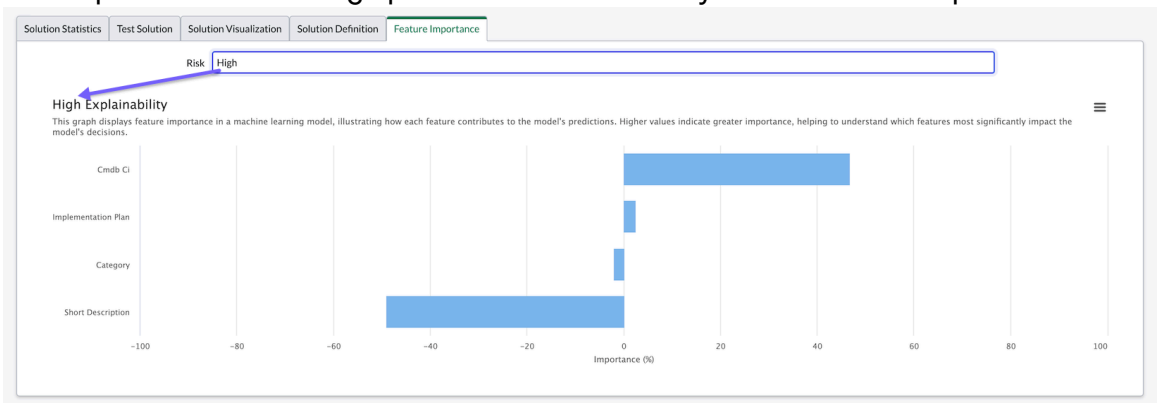
3. Navigate to the ML Solutions [ml_solution] table and open your new solution by selecting the value of its **Active** field.
4. On the solution form, locate and open the **Feature Importance** tab.
   Feature Importance displays a drop-down list.



   - The label for this drop-down list is the name of your output (predicted) field, so the label is specific to each model.
   - The values in the drop-down list are the possible output classes for your output field, plus the **Global** option.

List option	Description
Global	Provides an overview of how the model be haves across all predictions, showing the overall impact of each input feature. Select **Global** to open a graph of the impor tance of your input fields to predictions for all output classes as a whole.
`Your output class value`	Focuses on the model's behavior for the cho sen class only, showing how input features contribute to predictions on a per-class basis. Select one of the possible output classes to open a graph of the importance of your input fields to predictions for that class.

5. Launch the graphical analysis by selecting a value from the drop-down list.
   The y axis shows your input fields and the x axis shows the numerical importance for each input. The label of the graph reflects the class that you chose in the drop-down list.



   You can hover over a bar to display the numerical percentage for each input's importance.

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Result
A positive importance value means that the input field increases the model's prediction score. A negative value means that the input field decreases the prediction score.

What to do next
Consider dropping input fields with low importance scores. Retrain your model after modification.

Related topics
- Using Machine Learning APIs
- ClassificationSolution - Global
- Create and train a classification solution

Test time explainability

Understand the reasons your machine learning solution made a specific prediction with Test time explainability, which returns a list of input features that influenced the prediction.

Overview of Test time explainability

When Test time explainability (TTE) is enabled on a classification solution, every prediction is accompanied by an explanation that lists each input feature along with a contribution score. Features with the largest contribution scores are the strongest drivers of that individual prediction.

Benefits of Test time explainability

- Transparency: Explanations turn scores into confident decisions.
- Accountability: Each prediction comes with a per-decision record of the factors that combined to shape the result.
- Faster troubleshooting: Unexpected predictions are easier to investigate using the list of factors and their influence.

Considerations for using Test time explainability

Be aware of the following considerations when using Test time explainability (TTE).

- TTE supports only workflow Classification solutions.
- TTE supports only the xgboost classifier method. Don't change the classifier_method when the TTE flag is enabled.
- TTE is turned off by default. You must set TTE to true during training and predicting.
- TTE can be applied to nominal (categorical) and numeric columns only, not text columns. If input features consist of a mix of text, nominal, and numeric columns, the text columns are dropped. If the input features consist of text columns only, the solution training fails.

Invoking Test time explainability

Test time explainability is set in two API calls: at the training stage, and at the prediction stage. When TTE is enabled, the prediction response includes an `explanation` object.

The following code snippet shows an example of defining a classification solution for training. The parameter test-time-explainability is set to true (default is false).

```
var mySolution = new sn_ml.ClassificationSolution({
    'label': 'telecom_customer_churn_with_tte',
    'dataset': myData,
```

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```
    'predictedFieldName': 'churn',
    'inputFieldNames': [
        'age',
        'contract',
        'monthly_charge',
        'tenure_in_months',
        'online_security',
        'online_backup'
        // ... additional input fields
    ],
    'test-time-explainability': true
});
```

The following code snippet shows an example of requesting explanations at prediction time, after the model has trained successfully. The option test_time_explainability is set to true (default is false).

```
var input = new GlideRecord('u_telecom_customer_churn_train');
input.get('07601c45ff9232107334fffffffff38'); // record must
 not be empty

var options = {};
options.apply_threshold = "false";
options.test_time_explainability = "true";
options.top_n = 100;

var solutionName = sn_ml.ClassificationSolutionStore.get(
    "ml_sn_global_global_telecom_customer_churn_with_tte"
);
var solutionVersion = solutionName.getLatestVersion();
gs.info(solutionVersion.predict(input, options));
```

The following snippet shows an example of the explanation in JSON format (trimmed for readability).

```
{
  "07601c45ff9232107334fffffffff38": [
    {
      "confidence": 99.53,
      "threshold": 1.61,
      "predictedValue": "0",
      "explanation": {
        "prediction": 0.0047,
        "base_value": -0.1806,
        "all_contributors": [
          { "feature": "contract",          "raw_value": "Two
 Year", "encoded_value": 2.0,  "shap_value": -3.4014 },
          { "feature": "monthly_charge",     "raw_value":
 "58.55",    "encoded_value": 0.212, "shap_value": -0.6699 },
          { "feature": "tenure_in_months",   "raw_value": "29",
      "encoded_value": 28.0,  "shap_value": -0.5553 },
          { "feature": "age",                "raw_value": "68",
      "encoded_value": 49.0,  "shap_value":  0.3234 }
        ]
      }
    }
```

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```
    ]
}
```

Following are the definitions of the fields in `explanation`.

Fields in the explanation response

Field	Definition
prediction	The model's output for this record after all feature contributions are applied.
base_value	The model's expected result before any feature contributions.
all_contributors	The full list of input features and their contribution to this prediction. • feature: The name of the input field. • raw_value: The original value from the record (for example, "Two Year" or "58.55"). • encoded_value: The internal numeric representation of the original value used by the model. • shap_value: The contribution score. A positive value pushes the prediction higher; a negative value pushes it lower. The larger the magnitude, the stronger the influence.

The contributors are ordered by influence, so the features at the top of `all_contributors` are the strongest drivers of the prediction. Starting from the `base_value`, each `shap_value` influences the result up (positive value) or down (negative value).

Related topics

Configure XGBoost for classification or regression solutions

ClassificationSolution - Global

Create and train a similarity solution

Create and train a machine learning solution to collect and compare your existing records to new similar records. For example, you can compare the text in an open Incident record to a resolved Incident record to reuse its resolution.

Before you begin

- Role required: ml_admin or admin

Important: From the Washington DC release, models in the classification, clustering, and similarity frameworks use Workflow solutions. These are pre-trained, so a word corpus isn't needed for your new solutions. When your existing solutions with a word corpus are re-trained after upgrading, they become Workflow solutions, and the Word Corpus field is removed from the form.

About this task

After comparing your existing records based on similarity, the system recommends examples that you can review and reuse in your solution.

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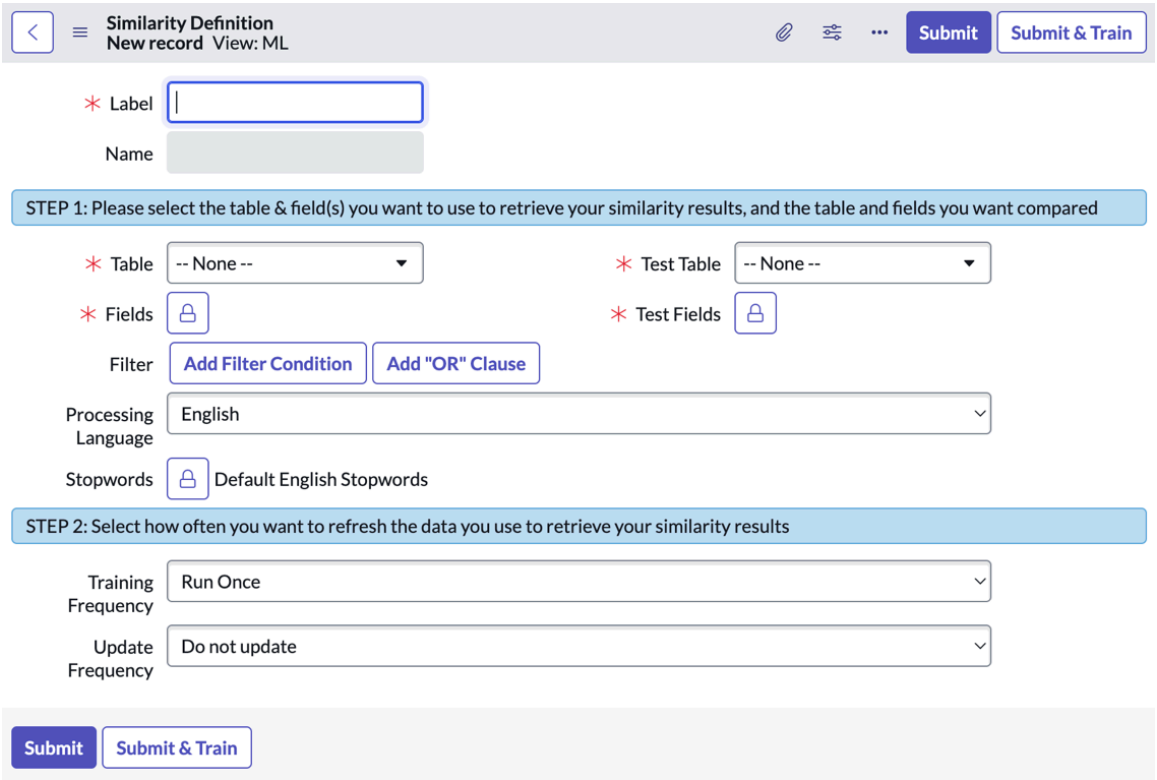
When applied in your forms and flows, similarity solutions are domain-aware, so records from other domains on the instance are not displayed to users. For more information, see KB article Similarity prediction behavior in domain separated environment on Now Support.

For information on using encrypted training data, see Data Encryption in Predictive Intelligence.

In this example procedure, you're working on Incident records and you want to locate relevant Knowledge Base articles that could provide resolutions to those incidents.



Procedure

1. Ensure that you are in the application scope that you want for your solution definition, then navigate to **All** > **Predictive Intelligence** > **Similarity** > **Solution Definitions**.
2. In the Similarity Definitions list, select **New**.
3. On the Similarity Definition form, fill in the fields.

Field	Value
Label	Enter a unique name for your similarity solution. For example, in this use case you could enter `Match Knowledge Articles to Incidents`.
Name	As you enter a Label value, this field automatically populates with a system-assigned, read-only name based on your Label value.
Word Corpus	If you have a legacy similarity solution, you can select a relevant word corpus from the **Word Corpus** field in the definition form.

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Field	Value
	Note: Starting from the Washington DC release, a word corpus is not required because a pre-trained model is used instead. The **Word Corpus** field is not visible in the definition form for pre-trained models. For more information, see Create a word corpus.
Table	In the Table field, select the table that contains records you want to use as an information source. In this use case you select the **Knowledge [kb_knowledge]** table, because its KB Article records might provide information relevant to the Incidents that you're trying to resolve. After you assign a Table, the number of records matching your filter conditions is displayed as a link. Select this link to view the list of records.
Test Table	In the Test Table field, select the table containing the records that you want to target. In this use case, you select the **Incident [incident]** table, as it contains the Incident records that you're trying to resolve. **Note:** You can select the same table for Table and Test Table. For example: using filter conditions, you could collect information from recent Incidents to help with target Incidents.
Fields	For the Table that you selected, enter fields that are likely to contain words and phrases relevant to the Incidents you're trying to resolve. In this example, you choose **Short description** and **Article body**. Including the article body increases your chances of capturing informative details regarding the subject. **Note:** **Journal Type** is not a supported data type.
Test Fields	For the Test Table that you selected, enter fields that contain text that you want to compare to other similar records. In this example, you choose the **Short description** of the Incident records you're trying to resolve.
Filter	Select **Add Filter Condition** to apply conditions to the Fields records you're using as an information source. For example, in this use case you could set a **workflow_state=published** condition to retrieve published KB articles only.

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Field	Value
	Note: Script includes can't be referenced from the Filter. Use database views as an alternative.
Processing Language	Select the dominant language of the dataset you're training on. Also, English processing is applied to all datasets by default. For example, if you select Italian, the system processes the data in both Italian and English. **Note:** The term processing indicates some of the language-specific steps used as part of training a solution, such as tokenizing words, removing stop words, and stemming.
Stopwords	When you select your processing language, the system automatically adds a Stopwords list for that language. For example, if your processing language is Italian, the **Default Italian Stopwords** list appears. The **Default English Stopwords** list is also included. To use a custom stopwords list, select the lock icon( ) and then search in the **Select target record** field.
Training Frequency	Select a retraining frequency. The available options range from **Run Once** up to **Every 180 days**.
Update Frequency	Select how often you want to refresh the data you use to retrieve your similarity results. For example, for open incident records, you could select an update frequency of **Every 15 minutes**, as new incidents typically occur frequently throughout the day. This frequency may increase the likelihood that newly opened records are included in the refresh. However, for KB Knowledge article records, which are typically not created often, you could choose a less frequent update frequency such as **Every 1 day**. **Note:** The ML scheduler limits the number of trainings an instance can commit to 50 new ML training requests per instance within a 24 hour window. This excludes scheduled re-training requests. In addition, clustering and similarity updates are also excluded from this limit, even if the new training requests exceed 50 within a 24 hour window.

4. Select the appropriate button for the solution definition.

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Option	Description
Save	Save your solution definition record so you can return to it later.
Submit & Train	Create your solution definition record and train it.

5. If you submitted the solution for training, select **OK** on the **Training Activation** window to confirm.

Result

- The system schedules the solution definition for processing with the nearest training service and sends you a notification when the training completes. The notification includes any errors that may have occurred during the training. Other users can subscribe to the Predictive Intelligence Notifications category.
- The trained solution delivers paired example records ranked by their degree of similarity. The list of examples is available from **Similarity Examples** under Related Links on your solution's form.
- When training completes, the system uploads the solution as an Attachment record.

What to do next

Review the similarity examples on the Related Links section of your Solution form. See Review solution similarity examples.

Update your similarity score threshold

After you review the similarity examples provided by the system, update your solution similarity score threshold if you want the results returned by the solution to be more or less similar.

Before you begin

- Review your similarity examples and their scores. For more information see Review solution similarity examples.
- Role required: ml_admin or admin

About this task

A deployed solution returns records only when the similarity score is higher than the **Similarity Score Threshold** value:

- The higher the threshold value, the higher the precision and the lower the coverage.
- The lower the threshold value, the lower the precision and the higher the coverage.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Similarity** > **Solutions**.
2. In the ML Solutions list, locate your solution by filtering for the Solution Name, and open its active version.
3. On the solution form, locate and open the **Solution Statistics** tab.
4. In the **Similarity Score Threshold** field, enter a new numerical value that represents a percentage.
   For example, imagine that the current threshold is 80. In your similarity example review you decided to increase the accuracy of your similarity recommendations at the cost of lowering the prediction coverage. So you update the field by entering the higher value of 90.

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5. In the form's context menu (Additional actions), select **Save**.
   Your solution uses the new threshold value that you assigned to it and returns similar results that have a score higher than 90. If you set the threshold to 90, the similarity score must be 91% or above to return records.

Create and train a clustering solution

Group similar records into clusters so you can address them collectively or identify patterns.

Before you begin

Role required: ml_admin or admin

Important: In the Brazil release, models in the classification, clustering, and similarity frameworks use Workflow solutions. These are pre-trained, so a word corpus isn't needed for your new solutions. When your existing solutions with a word corpus are re-trained after upgrading, they become Workflow solutions, and the Word Corpus field is removed from the form.

About this task

In this example procedure, you're creating a solution to identify a major incident by grouping similar incidents that have occurred recently.

For information on using encrypted training data, see Data Encryption in Predictive Intelligence.

Procedure

1. Ensure that you are in the application scope that you want for your solution definition, then navigate to **All** > **Predictive Intelligence** > **Clustering** > **Solution Definitions**.
2. On the Clustering Definitions list, select **New**.
3. On the Clustering Definition form, configure the fields according to the following guidance.

Field	Value
Label	Enter a unique name for your clustering solution. For example, in this use case you could enter `Group Incidents to a Major Incident.`
Name	As you enter your solution Label, this field automatically populates with a system-assigned name based on your Label value.
Word Corpus	If you have a legacy clustering solution, you can select a relevant word corpus from the **Word Corpus** field in the definition form. **Note:** With the Brazil release, a word corpus is not required, because a pre-trained model is used instead. The **Word Corpus** field is not visible in the definition form for pre-trained models. For more information, see Create a word corpus.
Table	Select the table that contains record types that you want to group into one or more clusters. For example, in this use case you select the **Incident [incident]** table as it contains

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Field	Value
	incident records you want to group together for a major incident analysis. When you assign a table value, a link appears in the form that shows the number of records that match your current conditions.
Fields	Select one or more input fields types that help the system identify the records you want to include in your cluster. In this use case, use **Short description**. **Note:** When selecting a reference type field, you must dot-walk to the field's property name. For example, instead of `short_description`, enter `short_description.name`.
Use Group By	Select this check box only if you want to group input records by a field before creating clusters. **Note:** Selecting this check box activates the **Group By** list. If you don't select the check box, all the table records are grouped into clusters.
Group By	Selecting a value from this list is optional. If you do so, the system groups records into one or more clusters based on your selection.
Purity Fields	Choose fields from your table that can help the system identify the class that is most frequent in the cluster. In this example scenario, select **Category** and **Assignment group.Name**.
Filter	Add filter conditions to apply to the input field records that you want to include in your clusters. ○ The maximum number of records for clustering is limited to 300,000. ○ For best results, aim for at least 2000 records as a minimum. **Note:** Script includes can't be referenced from the Filter. Use database views as an alternative.
Processing Language	Select the dominant language of the dataset you're training on the solution definition. If the dataset language is Italian, choose **Italian**. Also, English processing is applied to all datasets by default. For example, if you select Italian, the system processes the data in both English and Italian. **Note:** The term processing indicates some of the language-specific steps used as part of training a solution. For example, tokenizing words, removing stop words, and stemming.

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Field	Value
Stopwords	When you select your processing language, the system automatically adds a Stopwords list in that language. For example, if your processing language is Italian, the **Default Italian Stopwords** list appears. The **Default English Stopwords** list is also included. If you create a custom stopwords list, you can select it from the Stopwords field to add to your solution.
Update Frequency	Select how often you want the system to update your clusters with new and updated records. **Note:** The system pulls records based on the Group By filter conditions that you set on your clustering solution, if any. For example, if you select **Every 15 minutes**, the system identifies which records have arrived within that time frame. The system tries to assign them to the existing clusters, or creates a new cluster if possible. In this example, 20 new records arrive. If 16 of those records make it into an existing cluster and 4 don't, the system forms a new cluster for the four unassigned records. You can also choose not to update your clusters at all.
Training Frequency	Select how often you want the system to discard all previous cluster results and recreate clusters from the beginning. Your options range from daily, every third day, every seven days, or monthly. You can also choose to train your cluster once. **Note:** The ML scheduler limits the number of trainings an instance can commit to 50 new ML training requests per instance within a 24-hour window. The limit excludes scheduled retraining requests. In addition, clustering and similarity updates are also excluded from this limit, even if the new training requests exceed 50 within a 24-hour window.
Minimum number of records per cluster	Enter the minimum number of records you want a cluster to contain. The value you enter must be 2 or higher.

4. Select the appropriate context menu option or button for your solution definition.

Option	Description
Save or Save & Train	Save your solution definition record so you can return to it later, or save and submit it for training.

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Option	Description
Submit or Submit & Train	Create your solution definition record and submit it, or submit and train it.

5. If you submitted the solution for training, select **OK** on the Training Activation window to confirm.

Result

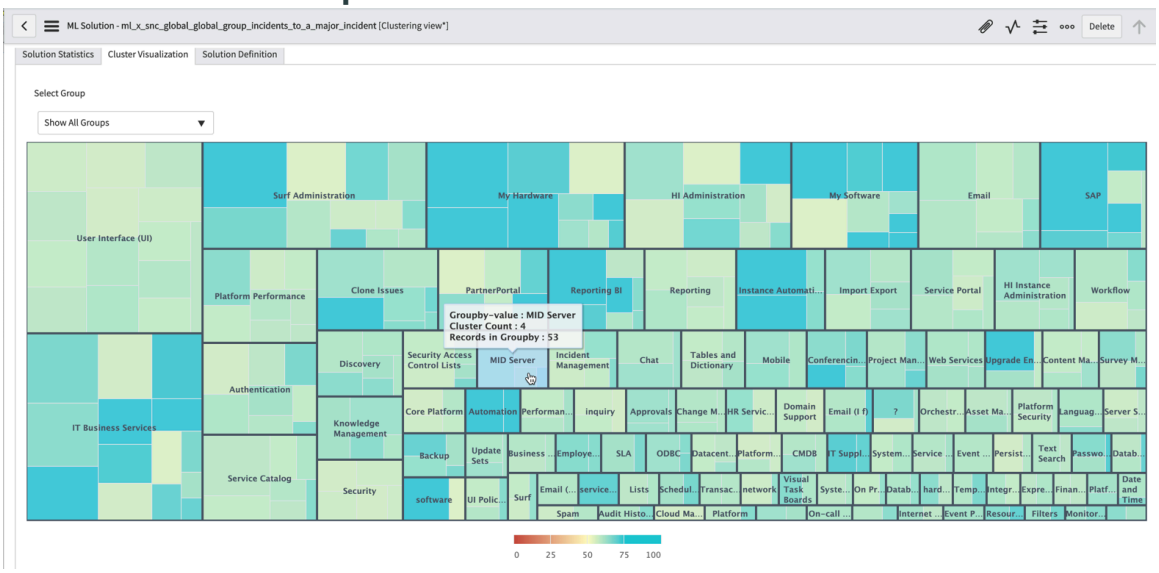
The system trains the solution and notifies you in real time when the training completes.

A treemap plot appears on the Cluster Visualization tab of your Clustering Solution Definition form. The plot shows the clusters the system formed for your solution in descending order from the top-left corner to the bottom-right corner. The treemap node labels are the Cluster Concept, which is created by the top words from the cluster, and helps you see the most prominent content found in each cluster.

Note: The Cluster Concept displays the top words from the processed input data, in the data's language. Depending on the language, the Cluster Concept may display words in their root form and so appear truncated.

Each node is colored from red to green depending on the cluster quality for that node. The Select Group filter appears only when you select the **Use Group By** and **Group By** fields on your Clustering Definition form. When you point to a cluster, you can see its Groupby value, Cluster Count, and Records in Groupby.

Cluster visualization example



To open a cluster, you can click it, or select it from the Show All Groups filter.

Inside the cluster grouping, you can filter the results further by using the two slide bars for cluster size and cluster quality, respectively. You can also navigate backward by clicking the Back button, which only appears when a clustering hierarchy is present. When you point to a cluster at this level, the Purity field percentile values appear along with the Cluster Concept, Quality, and Size values.

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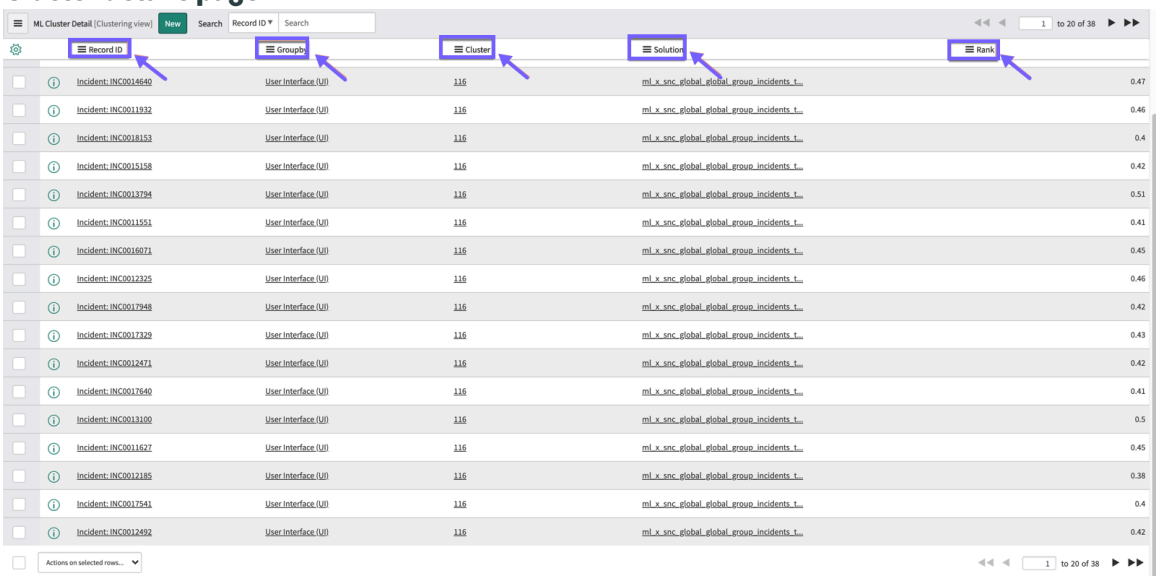
Cluster group example

When you click a cluster node, its ML cluster details appear in a list view format.

Cluster details page



What to do next

- Review the solution output on the Solution Statistics tab of your solution. If you aren't satisfied with your clustering solution results, reconfigure the values you've set to your solution and retrain it until the results are to your satisfaction.

- Review the Cluster Summary tab for a list view of the cluster IDs, quality size, and Groupby values.

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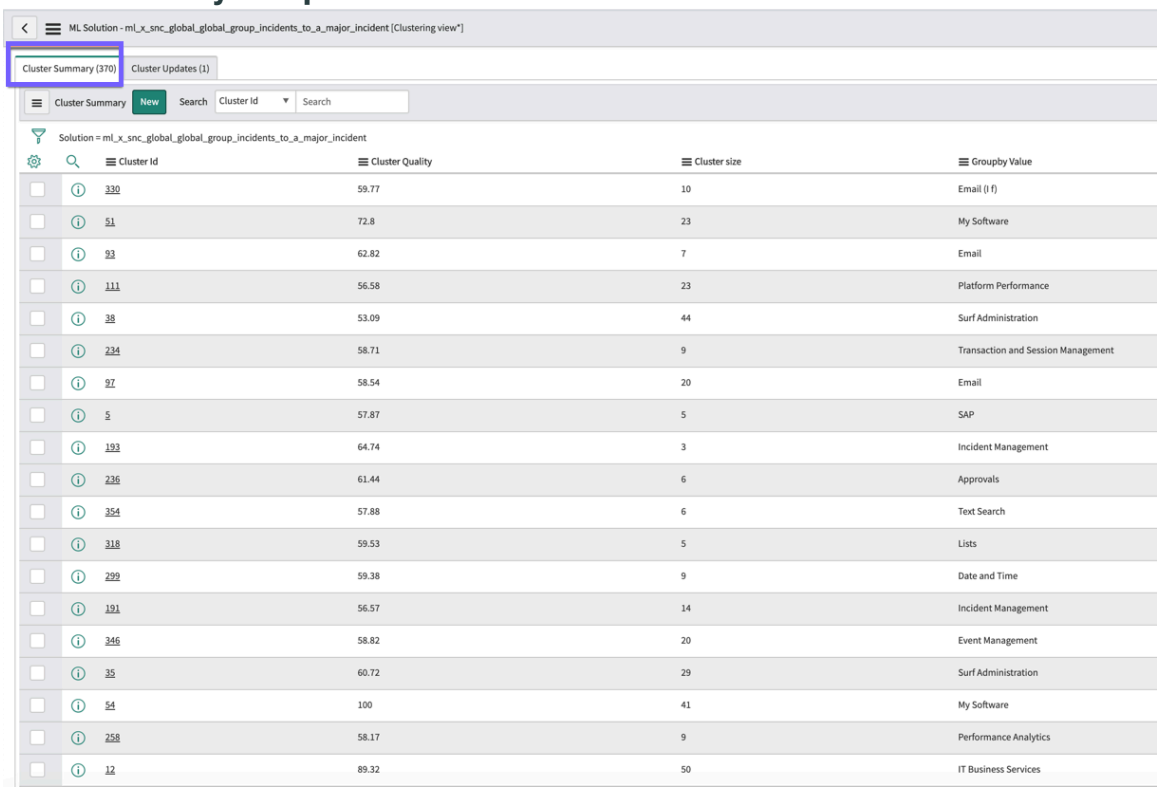
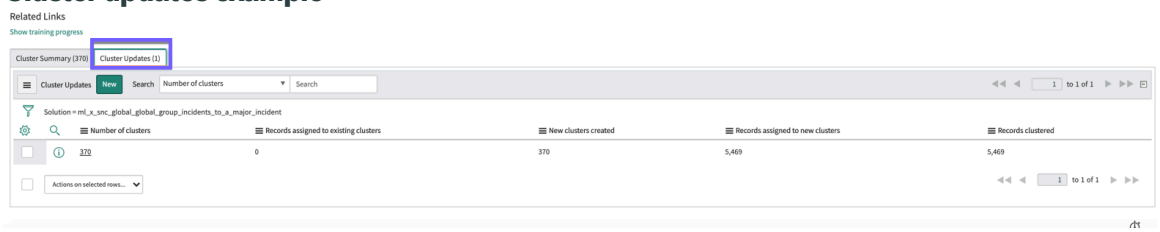
Cluster Summary example



- On the Cluster Updates tab, review the summary of changes to clusters for each cluster update interval you configured in the solution definition.

Cluster updates example



Assign a name to a cluster

Name your clusters to help identify and organize them.

Before you begin

- Create a clustering solution definition or use an existing one.
- Role required: admin or ml_admin

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Clustering** > **Solutions**.
2. Select a solution.
3. Under the **Cluster Summary** related list, select a cluster ID.
4. Enter a name in the **Cluster Name** field.

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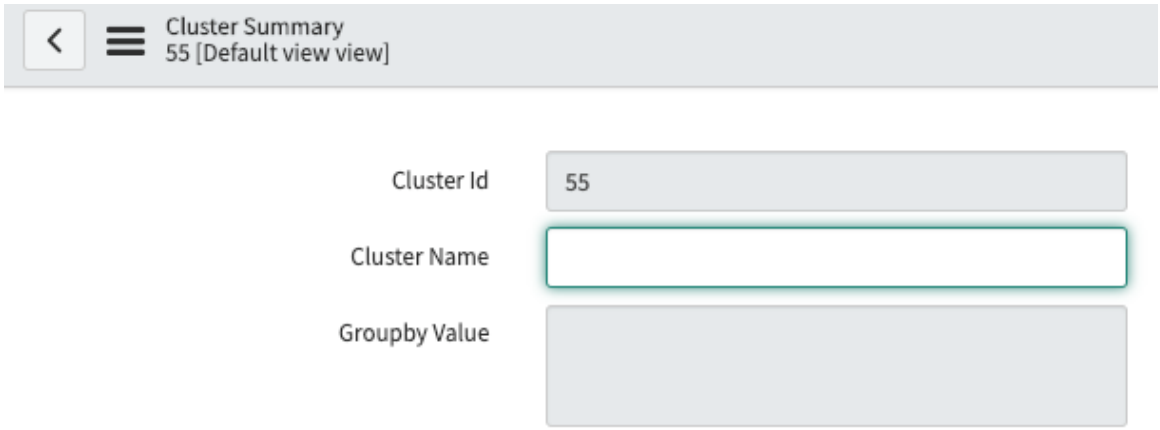


5. Select **Update**.

Generate a representative sample of a cluster

View the top 25 most representative records of a cluster.

Before you begin

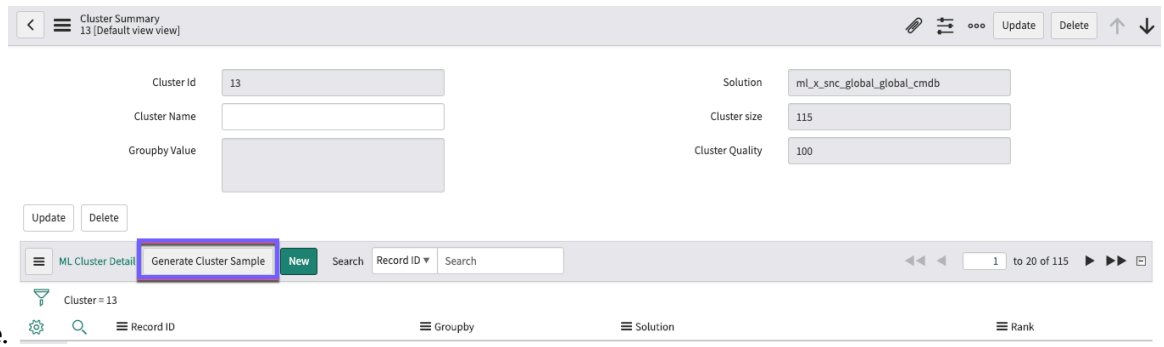
- Create a clustering solution definition or use an existing one.
- Role required: admin or ml_admin

About this task

Generating a sample of a cluster filters the records for that cluster. Generating a sample works on clusters with over 25 records.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Clustering** > **Solutions**.
2. Select a clustering solution.
3. Under the **Cluster Summary** related list, select a cluster ID.
4. Select **Generate Cluster**



Sample.

Result

The **ML Cluster Detail** list shows the top 25 records in the cluster. The cluster sample also applies to the cluster visualization.

Apply purity on a clustering solution

Apply purity to learn details about the composition of each cluster. For example, see what percentage of incidents in a cluster have the same value for Assignment Group. You can specify which fields to focus on, or you can let auto-purity display fields by default.

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Before you begin

- Create a clustering definition solution or use an existing one.
- Role required: admin or ml_admin

About this task

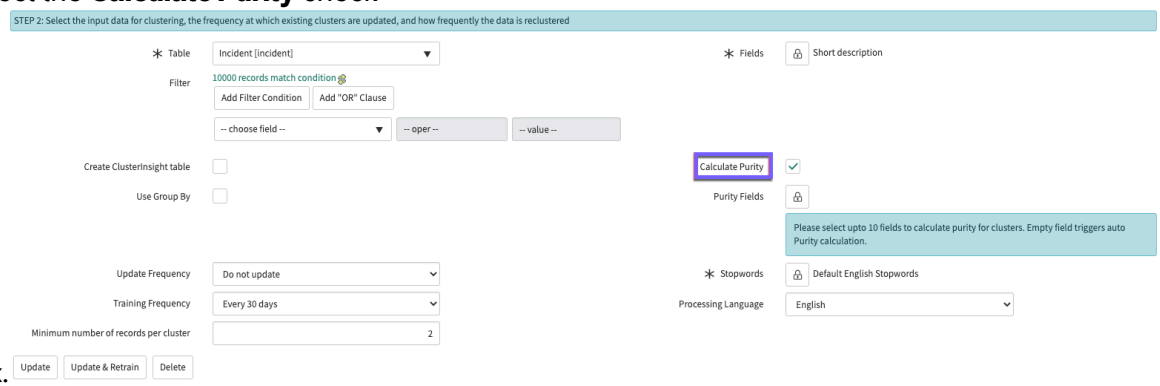
With purity, you can choose field distribution metrics for your clusters to display. The table assigned to your solution determines which fields are available. For more information about purity, see the following articles on ServiceNow Community:

- https://www.servicenow.com/community/intelligence-ml-articles/using-purity-fields-to-better-understand-your-clusters/ta-p/2302441
- https://www.servicenow.com/community/intelligence-ml-articles/predictive-intelligence-using-the-cluster-insight-table-to/ta-p/2301006

If you do not select any fields, auto-purity automatically determines which insights to show based on distribution significance. You can change the default auto-purity selections by editing the ML Auto Purity Configuration [ml_autopurity_config] table.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Clustering** > **Solution Definitions**.
2. Select a solution definition or create a new one.
3. Select the **Calculate Purity** check box.



4. **Optional:** Select the **Purity Fields** lock icon and choose the fields that you want displayed in cluster results.

> **Note:** If you don't select any fields, auto-purity displays the most significant fields based on distribution.

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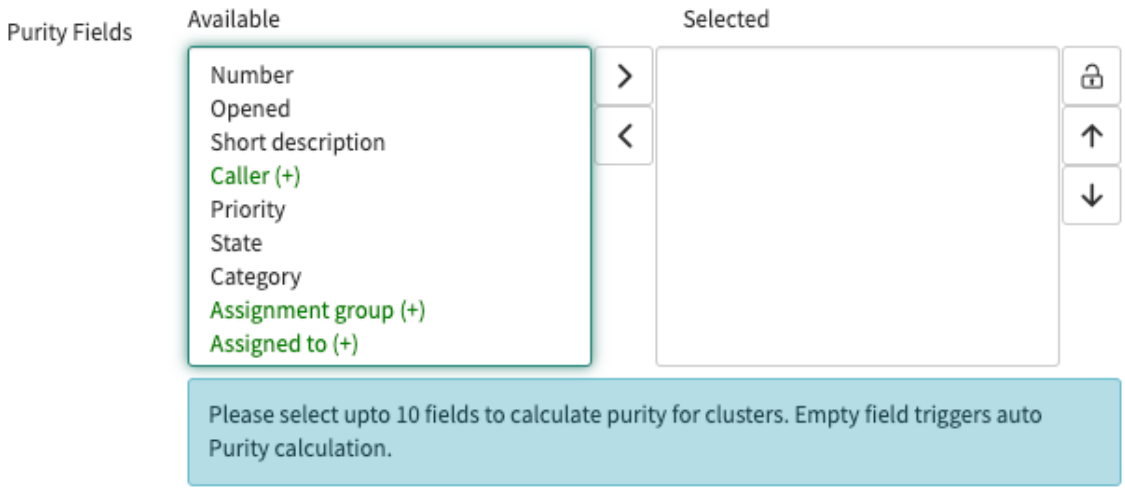


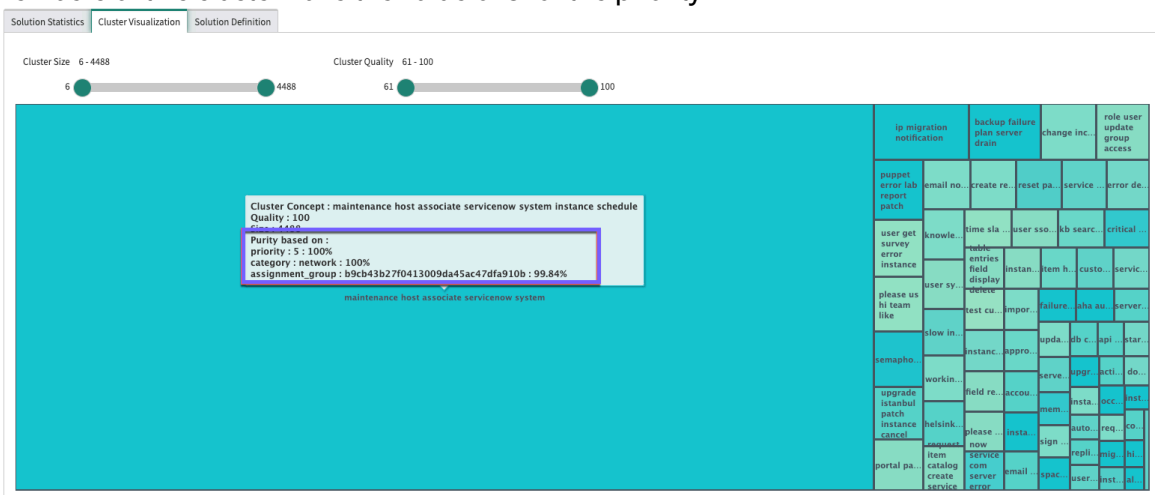
5. Select **Update** or **Update & Retrain**.

Result

View your insights by opening the **Cluster Visualization** tab of your retrained solution, then pointing to a cluster. Under **Purity based on**, the format displays as:

field name : value : percent.

For example, the row priority : 5 : 100% means that 100% of the members of this cluster have the value of 5 for the priority field.



Analyze a cluster with Cluster Insight

Analyze a cluster by a field available on the source table. With the Cluster Insight check box, you can add a filter condition on your input field when you review the list of results.

Before you begin

- Create a clustering solution definition or use an existing one.
- Role required: admin or ml_admin

About this task

Drill down into a cluster and filter its records with Cluster Insight. You can add cluster insight analysis when creating a solution or editing an existing solution. For more information, see https://www.servicenow.com/community/intelligence-

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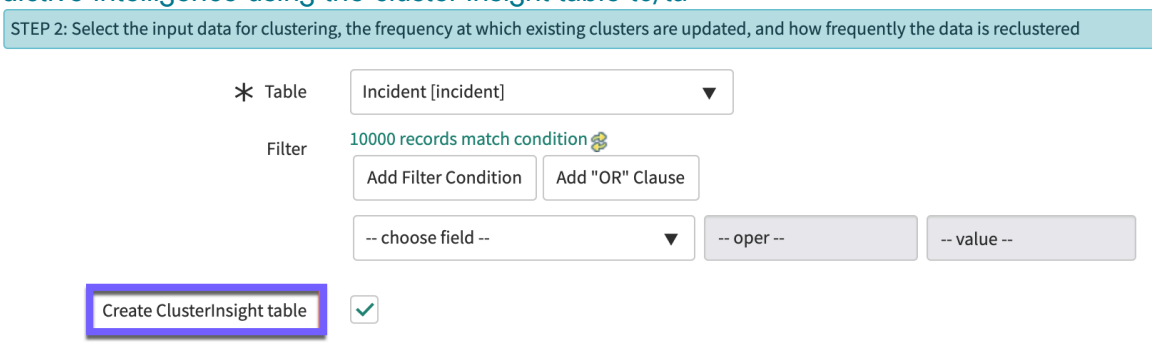
ml-articles/predictive-intelligence-using-the-cluster-insight-table-to/ta-



p/2301006 .

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Clustering** > **Solution Definitions**.
2. Select a solution definition or create a new one.
3. On the definition form, select the **Create Cluster Insight table** check box, then update and retrain the model.

Result

In the **Solutions** [ml_solution] table, open the trained solution, then open the **Cluster Visualization** tab. When you select a cluster, all records included in the cluster are displayed as a list. Using the filter icon ( ), open the list's filter conditions. Search for the input field from your source table. For example, if your source table is Incident and the input field is Short Description, you could filter for records containing the word "help" in the Short Description.

To make other dimensions from your source table available for filtering, add them as input fields on the solution definition form.

Create and train a regression solution

Regression solutions have been deprecated. They could be used to predict numeric outputs, such as a temperature or a stock price.

Before you begin

Note: Support for new regression solutions is deprecated in the Brazil release. You can still edit and train any existing solutions, but you can't initiate new ones. The following information is provided for legacy context.

Role required: ml_admin or admin

About this task

Regression solutions enable you to predict a point estimate and prediction interval. The resulting model delivers the following statistics:

- Mean Absolute Error (MAE), which measures the mean deviation of a predicted value from the actual value. This metric is useful as it's easy to understand as its scale is the same as that of its target. However, MAE is unbounded, making it difficult to compare across models.
- Symmetric Mean Absolute Percentage Error (SMAPE) is a percentage value of the deviation from the predicted to the actual. SMAPE is a bounded version of MAE except that it has a value range between 0 and 100. The lower the SMAPE value, the better the model accuracy.

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- Range Accuracy is the percentage of actual values between a predicted range. In other words, it's the range between the upper and lower bounds of the prediction. For example, if four out of five actual values lie within the predicted range, the range accuracy is 80%.
- Average Interval Width is the difference between the upper and lower bounds of the prediction. This metric explains how informative the interval is. The smaller the average width, the better the model

When making predictions, regression also enables you to specify a confidence level for the prediction interval (range).

In this example procedure, you create and train a regression solution definition to predict the amount of time it takes to restore a cloud database.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Regression** > **Solution Definitions**.
2. On the Regression Definitions list, select **New**.
3. On the Regression Definition form, configure these fields per the following guidance.

Field	Value
Label	Enter a unique name for your regression solution. For example, in this use case you could enter `Regression Test for DB Restore`.
Name	As you enter your solution Label value, this field automatically populates with a system-assigned name that's similar to your label value.
Word Corpus	Select an existing word corpus that's relevant to your solution. For example, in this use case you select a word corpus that has a title such as **Incidents in the last 3 months**. If you don't have a relevant word corpus, follow the steps to create a word corpus first. When the word corpus is complete, you can select it from the Word Corpus field in your Regression Definition form. However, the word corpus selection is optional. If your input data has text columns and you don't choose a word corpus, your regression solution trains a new word corpus model by using the text columns in your input data. The resulting word corpus can be reused in any other regression solution or other ML solution type. **Note:** A pre-trained model is used instead of the Word Corpus for users who activated Predictive Intelligence starting in the Utah release.
Table	Select the database table on which you're applying regression. The table should contain historical records the system can use to predict the length of time for its database restore.

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Field	Value
Output Field	Select the field whose value you want the predictive model to set. In general, a good output field is a numeric, integer, or floating point field. In this example scenario, you use the **Duration** field to measure a length of time. The output field should generate a numeric value.
Fields	Select one or more field types that help the system identify the records you want to train using regression. In this example scenario, you use **Short description**, **Source datacenter**, **Target datacenter**, and **Database size**. (short_description, Sourcedc, Targetdc, and Dbsize.) Input field types can be string, nominal, or numeric.
Filter	(Optional) Add filter conditions to the output field records that you want to train using regression. **Note:** ○ The minimum number of records for regression training is 10,000 records. ○ The maximum number of records for regression training is limited to 300,000.
Processing Language	Select the primary language of the dataset that you're training on the solution definition. If the dataset language is Italian, choose **Italian**. Also, English processing is applied to all datasets by default. For example, if you select Italian, the system processes the data in both English and Italian. **Note:** The term processing indicates some of the language-specific steps used as part of training a solution. These steps include tokenizing words, removing stop words, and stemming.
Stopwords	When you select your processing language, the system automatically adds a Stopwords list that uses the same language. For example, if your processing language is Italian, the **Default Italian Stopwords** list is displayed. The **Default English Stopwords** list also displays in your selection. If you create a custom stopwords list, you can select it from the Stopwords field to add it to your solution. In this scenario, you use the **Default English Stopwords** list.
Training Frequency	Select how often the system regenerates the solution based on records matching the **Filter**. Your options include:

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Field	Value
	○ Run Once ○ Every 30 days ○ Every 60 days ○ Every 90 days ○ Every 120 days ○ Every 180 days In this scenario, you select Every 30 days By default, the system runs training once. This practice provides you time to review and update the solution definition as needed until it provides acceptable coverage and precision values. **Note:** ○ The minimum number of records required for regression solution training is set at 10,000. ○ The ML scheduler limits the number of trainings an instance can commit to 50 new ML training requests per instance within a 24-hour window. This limit excludes scheduled requests for retraining. In addition, clustering and similarity updates are also excluded from this limit, even if the new training requests exceed 50 within a 24-hour window.

4. Select the appropriate context menu option or button for your solution definition.

Option	Description
Save or Save & Train	Save your solution definition record so you can return to it later, or save and submit it for training.
Submit or Submit & Train	Create your solution definition record and submit it, or submit and train it.

5. If you submitted the solution for training, select **OK** on the **Training Activation** window to confirm.

   The system schedules the solution for training with the nearest training service. The system sends you a notification when the training completes, including any errors that may have occurred in the training. Any other users can subscribe to the Predictive Intelligence Notifications category. When training completes, the system uploads the solution as an Attachment record.

What to do next

In this example scenario, you created an ML solution from your solution definition. The Solution Statistics, Test Solution, and Solution Definition tabs appear in the Related Links section of your ML solution.

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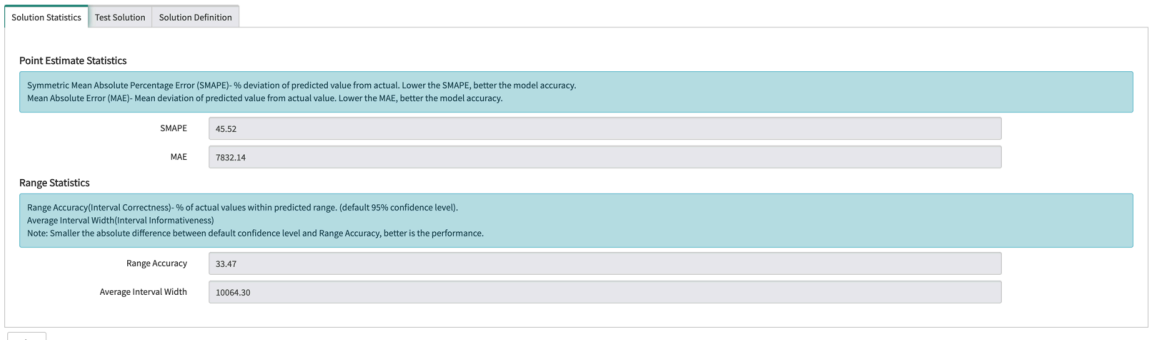
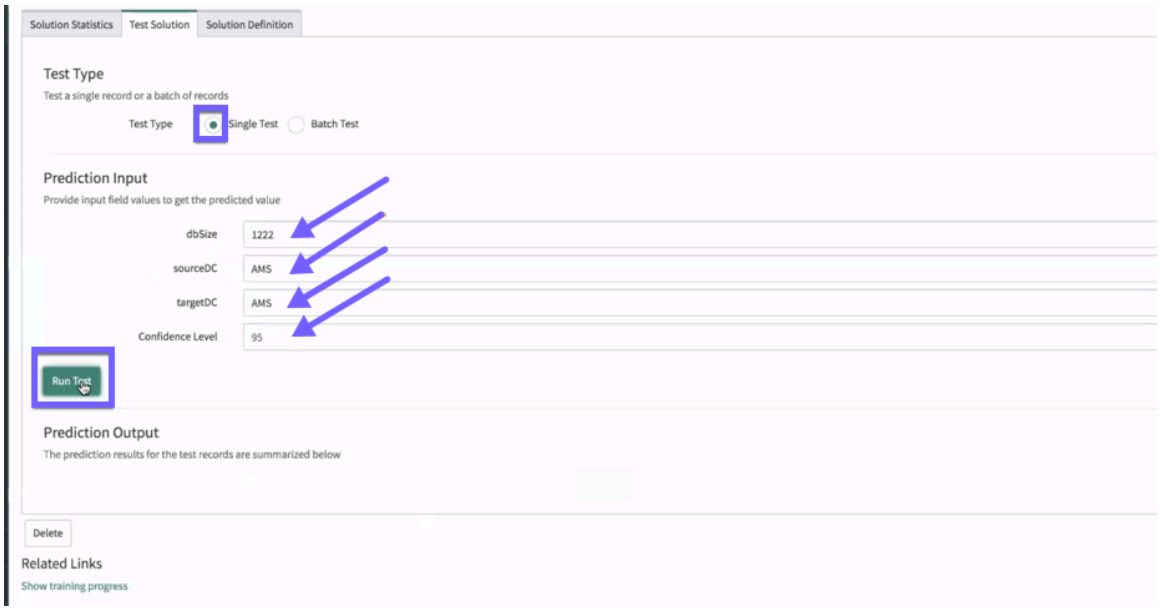
On the Solution Statistics tab, review the Point Estimate and Range (prediction interval) statistics generated by your solution.



On the Test Solutions tab of your solution, you can test the prediction output for the records you used as input to the prediction by entering values for the input fields, such as the **Source datacenter**, **Target datacenter**, and **Database size**. You can also use the default prediction confidence level of 95, or enter a different level between 0 and 100. Using 95 as the value means that the system is 95% confident that the actual prediction falls within the prediction interval. Select the **Run Test** button to find the prediction output.



After you run the test, the prediction output statistics appear. The Point Estimate on the screen is a single value at one point in time. For example, the database restore takes 134.47 seconds to complete. The Lower and Upper bounds on the screen signify a range accuracy value. For example, the database restore takes from 84.53 to 185.41 seconds to complete.

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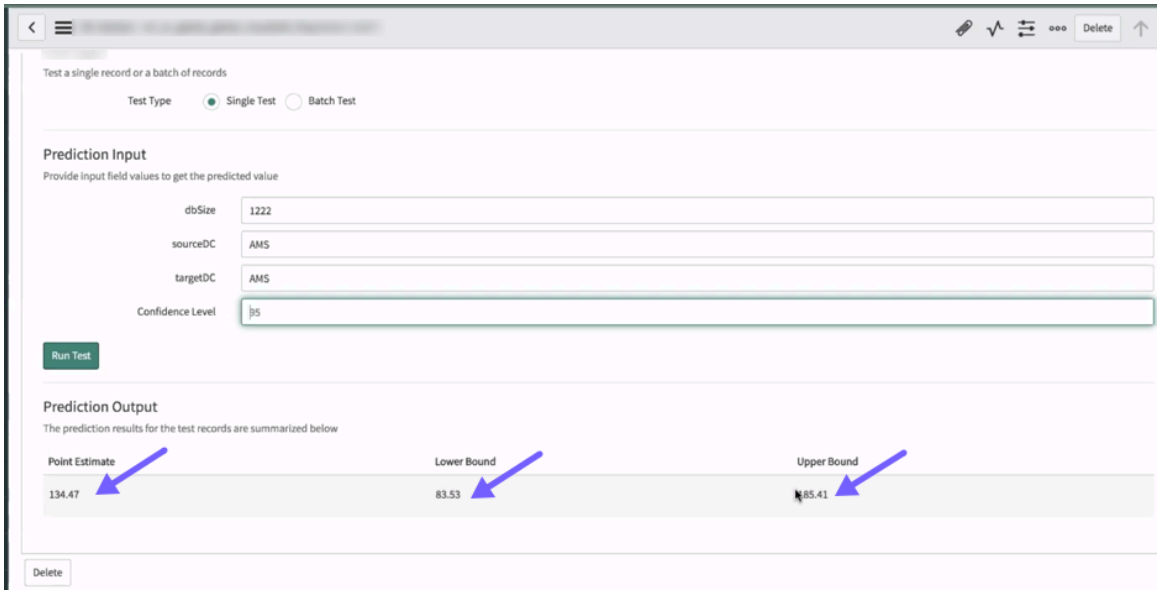

View solution training progress

View your solution training progress or statistics to determine if a solution is available, or how long the next training cycle might take to complete.

Before you begin

Role required: admin or ml_admin

About this task

Solution training involves these steps.

1. Fetching files for training. The system downloads the training records and sends them to the nearest training service.
2. Preparing the data. The system removes duplicate records from the training set.
3. Training the solution. The training service trains the solution.
4. Uploading the trained solution. The training service uploads the solution as attachment records.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Classification** > **Solutions** or **Predictive Intelligence** > **Similarity** > **Solutions**.
2. In the ML Solutions list, select the solution whose progress or statistics you want to view.

   Example
   For example, select **Incident Categorization** to see the training history.
3. In the **Related Links** section, click **Show training progress**.
   Training times vary based on the number of records and classes within the training set. The more records and classes you use, the longer the training can take. For example, a data set containing 100,000 records and several hundred classes can take around five hours to complete.

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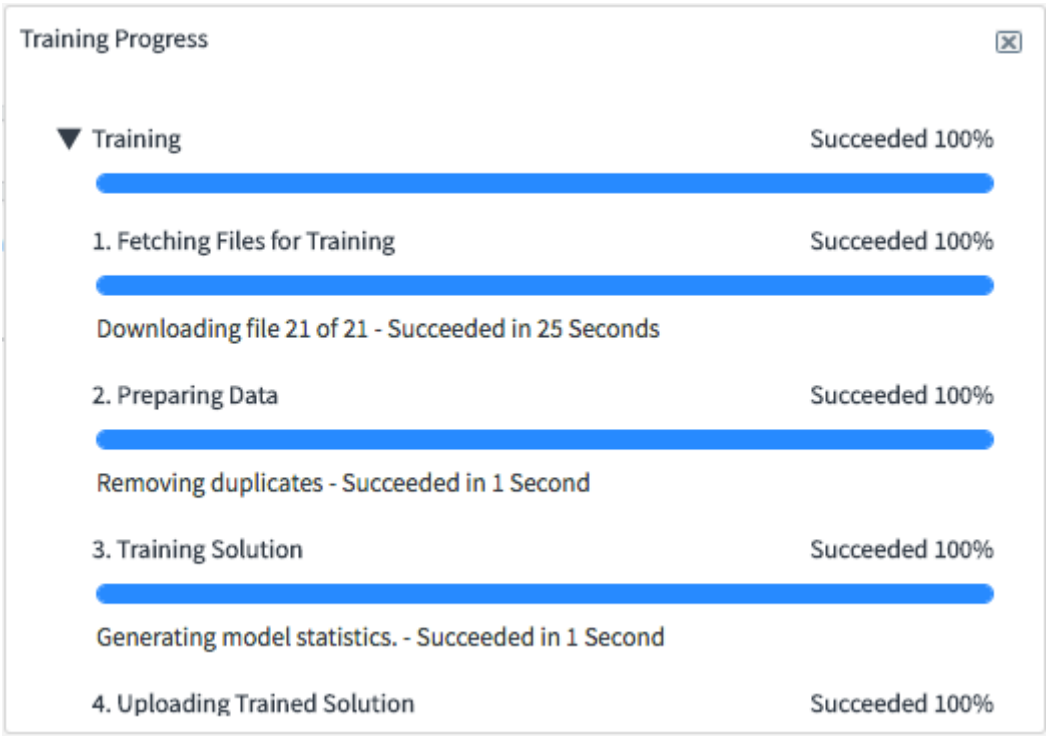
The system shows a Training Progress pop-up window.



What to do next

For classification solutions, see Review classification solution statistics.

For similarity solutions, see Review similarity solution examples and scores.

Review classification solution statistics

The Solution Statistics dashboard in Predictive Intelligence has been deprecated in the Xanadu release. It provided precision and coverage statistics for each class in a classification solution.

Before you begin

- Role required: admin, ml_admin, or ml_report_user

About this task

Important: With the Brazil release, the Solution Statistics dashboard is deprecated. Upgrading customers can continue to use their existing Solutions Statistics dashboards from the application menu. For new customers onboarding with the Brazil release, the Solutions Statistics dashboard is not available. The following information is provided for legacy context.

The Solution Statistics dashboard lists the precision, coverage, and distribution for each class of active solutions. The system uses the classes with the highest number of records when it builds a solution. The number of classes predicted may be less than 50, and may skip a class if there is not enough historical data to build a solution that can predict the class confidently.

The Solution Statistics dashboard is different from the Solution Statistics tab in an ML Solution record. For more information, see Create and train a classification solution.

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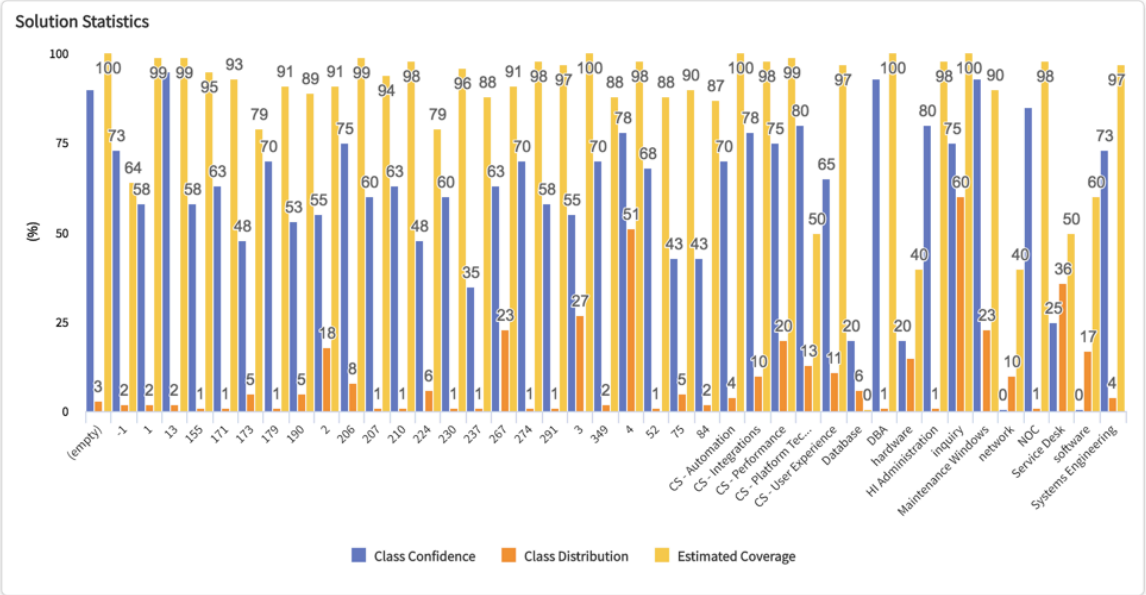
Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Classification** > **Solution Statistics**.
2. From **Filter by solution**, select the solution whose statistics you want to review.
3. From **Filter by version**, select the solution version whose statistics you want to review.
4. Click **Apply.**
   The system updates the dashboard based on the filters selected.



5. Identify classes with unwanted combinations of precision, coverage, and distribution values.

   Example
   For example, identify classes that have low precision or coverage but a high distribution.

6. Identify any missing classes you want the model to include.

   Example
   For example, identify any missing incident categories from the Incident classification solution.

What to do next

If you're satisfied with the solution you've reviewed, the latest version is already active and ready to use. If you're not satisfied, you can choose a different version of the solution and make it active. You can also tune and retune the solution by configuring the class precision and coverage to use acceptable values.

Review solution similarity examples

Review the similarity examples generated during solution training to determine whether the similarity score threshold meets your business requirements.

Before you begin

- Train a similarity solution
- Role required: ml_admin or admin

About this task

Solution training generates a set of paired record examples. Each pair includes a percentile score that estimates the degree of similarity between the two records. The higher the score, the higher the similarity, as follows:

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- A score of 100 indicates identical records.
- A score of 0 indicates dissimilar records.

A deployed solution returns records only when the score is higher than the **Similarity Score Threshold** value:

- The higher the threshold value, the higher the precision and the lower the coverage.
- The lower the threshold value, the lower the precision and the higher the coverage.

On domain-separated instances, the following procedure displays records from all domains to ML admins. However, when solutions are applied in your forms and flows, similarity predictions are domain-aware. Examples from other domains on the instance are not displayed to users.

Note: The similarity filters specified in the solution definition aren't applied for similarity examples and are applied only during prediction.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Similarity** > **Solutions**.
2. In the ML Solutions list, locate your solution by filtering for the Solution Name, and open the active version.
3. In the Related Links section of the form, select **Similarity Examples**.
   A list of paired records opens on the Similarity Examples (ml_similarity_example) table. By default the rows are sorted by the **Similarity Score** column in descending order.
4. Review the similarity examples for accuracy and coverage.
   Based on your review, determine whether to increase or decrease the Similarity Score Threshold value of your solution.

What to do next

If you decide to adjust the Similarity Score Threshold for your similarity solution, see update its similarity solution threshold.

Using Predictive Intelligence

Train and use Predictive Intelligence solutions to accomplish various tasks.

Overview of Predictive Intelligence

Predictive Intelligence is the interface by which you can train models on the ServiceNow AI Platform. These models enable you to predict, estimate, and identify patterns that can be used to route work, populate form fields, and more.

- Show suggestions for relevant articles.
- Assign, categorize, and prioritize tasks.
- Detect major incidents.
- Recommend case resolutions.
- Prevent duplicate articles and ideas.
- Detect phishing attempts.

For more information about the different types of solutions available, see Explore Predictive Intelligence.

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Training your ML solutions

Predictive Intelligence enables you to train predictive models and machine-learning solutions that you can apply using data on your instances. The solutions you create use the frameworks to predict, recommend, and organize data. To get started, see Creating and training solutions.

You can also extend Predictive Intelligence to other processes and applications. For more information, see ServiceNow apps and features that use Predictive Intelligence.

Testing and monitoring predictions

After creating and training your solutions, call the Predictive Intelligence API to make a solution prediction. Use the results to gauge the performance of the solution and iterate as needed.

You can track the coverage and precision of deployed predictive models using the Solution Statistics dashboard, which provides reporting on these prediction areas by default.

Report	Description
Average Prediction Coverage (last 30 days)	The percentage of predictions that yielded an outcome out of the total number of predictions attempted. Select the coverage score to see a breakdown by class.
Daily Prediction Coverage	The percentage of records created on a given day in which the solution was able to predict an outcome.
Average Prediction Precision (last 30 days)	The percentage of predictions in which the predicted value was the same as the final value of the field when the record closed. Select the precision score to see a breakdown by class.
Daily Prediction Precision	The percentage of records closed on a given day in which the predicted field value was the same as the final value.

For more information, see Testing and monitoring predictions.

Preparing your instance

Preparation is the key to getting the most out of Predictive Intelligence. You don't need to write code or do calculations, but deciding what you hope to do with the solution definitions will make implementation easier.

- Identify the problems that you want to solve with Predictive Intelligence.
- Have 30,000–300,000 high-quality records from which Predictive Intelligence can learn.
- Set your expectations.

Note: Inconsistencies or gaps in training data can cause incorrect or unreliable predictions.

Implementation Process

Predictive Intelligence takes approximately 14 days to implement on a production instance.

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- Day 1: Clone production instance over to a non-production instance.
- Days 2–10: Create a solution definition, train it on historical records, and validate that the solution works as desired on the non-production instance.
- Days 11–13: Create import and update sets to move the solution to production, train and validate on the new instance, and set the retraining frequency.
- Day 14 and on: Monitor the solution.

In general, non-production environments are where workflows can be tested and formatted before being moved over to the production instance to further train models and test predictions.

For more information about getting started with Predictive Intelligence, see our guide on how to get started with Predictive Intelligence.

Using Machine Learning APIs

Use ServiceNow Machine Learning (ML) APIs to train Machine Learning models and run inferences.

ML APIs enable training solutions and managing solution versions. You can get and set active versions, monitor training status, and more. The ML API also provides encoders, which enable using term frequency–inverse document frequency (TF-IDF) as a word corpus. Predictability estimates enable assessing the predictive value of table columns.

Note: Predictive Intelligence APIs run with full privileges before the Vancouver Patch 7 Hotfix 2b and Washington DC Patch 7 releases. With later releases, grant access using ACLs. For more information see Query ACLs.

ML API class overview

This section briefly describes classes for training ML solutions and running inferences with trained solutions.

Datasets

A dataset is a set of records including a table name, columns, and row selection criteria to use as input for ML training algorithms. Datasets don't contain the actual data.

For more information, see DatasetDefinition.

ML objects – Solutions, Encoders, and Estimates

ML objects define a specific training configuration to apply on a dataset. Some operations are common across ML objects. Solution objects include classification, clustering, regression, and similarity.

Encoders are text processing objects that are either pre-trained or trained based on the language datasets you provide. You can train encoders that determine how the system interprets and processes text fields. For ML solutions that include text, you can train an encoder to specify how to process text and use the trained encoder in a solution.

PredictabilityEstimate objects estimate which fields in a dataset are predictable and the features on which this predictability is based.

For more information, see:

- ClassificationSolution
- ClusteringSolution

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- Encoder
- PredictabilityEstimate
- RegressionSolution
- SimilaritySolution

Stores

ML objects are maintained in a specific store for each object type. Each store class includes methods for add, get, update, and delete operations.

For more information, see:

- ClassificationSolutionStore
- ClusteringSolutionStore
- EncoderStore
- PredictabilityEstimateStore
- RegressionSolutionStore
- SimilaritySolutionStore

Versions

Each trained object results in a new version that you can run tasks on. Use the version API to get any solution version and run tasks on it.

For more information, see:

- ClassificationSolutionVersion
- ClusteringSolutionVersion
- EncoderVersion
- PredictabilityEstimateVersion
- RegressionSolutionVersion
- SimilaritySolutionVersion

Putting it together: ML API flows

You can use the following flow to configure and train solutions, encoders, and predictability estimates:

1. Define a dataset (DatasetDefinition)
2. Create an ML object (Solution/Encoder/PredictabilityEstimate)
3. Add to store (Store)
4. Train (Solution/Encoder/PredictabilityEstimate)

Note: The encoder definitions support multiple dataset definitions, but have the same training flow.

To train a solution with an encoder, create the encoder first, then include the encoder in the solution configuration.

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1. Create an encoder (Encoder)
2. Define a dataset (DatasetDefinition)
3. Create solution specifying encoder (Solution)
4. Add to store (SolutionStore)
5. Train (Solution)

ML object encoder requirements:

- Required in similarity API solutions.
- Required in clustering API solutions, unless using the Levenshtein distance algorithm, in which case encoders are optional.
- Optional for classification and regression solutions.
- Unavailable for predictability estimates.

Getting started with ML API solution training

Follow this example procedure to learn how to configure and train a solution.

Configure and train a solution

1. Define a dataset using the *DatasetDefinition* API.

```
var myData = new sn_ml.DatasetDefinition({

  'tableName' : 'incident',
  'fieldNames' : ['assignment_group',
 'short_description', 'description'],
  'encodedQuery' : 'activeANYTHING'

});
```

2. Use the constructor to define the solution, including the dataset in the configuration.

```
var mySolution = new sn_ml.ClassificationSolution({

  'label': "my solution definition",
  'dataset' : myData,
  'predictedFieldName' : 'assignment_group',
  'inputFieldNames':['short_description']

});
```

   - *ClassificationSolution()*
   - *ClusteringSolution()*
   - *Encoder()*
   - *PredictabilityEstimate()*
   - *RegressionSolution()*
   - *SimilaritySolution()*

3. Add the solution definition to the store using the *add()* method.

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```
var my_unique_name =
 sn_ml.ClassificationSolutionStore.add(mySolution);
```

- *ClassificationSolutionStore - add()*
- *ClusteringSolutionStore – add()*
- *EncoderStore - add()*
- *PredictabilityEstimateStore - add()*
- *RegressionSolutionStore - add()*
- *SimilaritySolutionStore - add()*

4. Train the solution using the *submitTrainingJob()* method. After training is complete, you can manage the trained solution using a solution version API. A solution can be retrained multiple times. Each training results in a new solution "version" on which you can run inferences.

```
var myClassifierVersion =
 mySolution.submitTrainingJob();
```

- *ClassificationSolution - submitTrainingJob()*
- *ClusteringSolutionVersion – submitTrainingJob()*
- *Encoder - submitTrainingJob()*
- *PredictabilityEstimate - submitTrainingJob()*
- *RegressionSolution - submitTrainingJob()*
- *SimilaritySolution - submitTrainingJob()*

View all classification solutions in a store

You can use the store *getAllNames()* method to see a list of all solutions that have been added to the store.

```
gs.print(JSON.stringify(JSON.parse(sn_ml.Classification
SolutionStore.getAllNames()), null, 2));
```

In the output, the system has named the solution `ml_x_snc_global_global_my_solution_definition`. Use this name in subsequent examples to get version information.

```
*** Script: [
  "ml_incident_assignment",
  "ml_x_snc_global_global_my_solution_definition",
  "ml_incident_categorization"
]
```

- *ClassificationSolutionStore - getAllNames()*
- *ClusteringSolutionStore – getAllNames()*
- *EncoderStore - getAllNames()*
- *PredictabilityEstimateStore - getAllNames()*
- *RegressionSolutionStore - getAllNames()*
- *SimilaritySolutionStore - getAllNames()*

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Getting started with ML API solution versions

Follow these example breakdowns to learn how to manage trained solution versions.

Check training status

Get the classification solution from the store, choose a version, and check its training status. The methods used for checking training status are applicable to all ML object types.

1. Get the solution from the classification solution store using the *get()* method.

```
// Get the solution created in the previous example
 from the classification solution store
var mlSolution =
 sn_ml.ClassificationSolutionStore.get('ml_x_snc_globa
l_global_my_solution_definition');
```

   - *ClassificationSolutionStore - get()*
   - *ClusteringSolutionStore – get()*
   - *EncoderStore - get()*
   - *PredictabilityEstimateStore - get()*
   - *RegressionSolutionStore - get()*
   - *SimilaritySolutionStore - get()*

2. Access the most recent solution version using the *getLatestVersion()* solution method and get its training status using the *getStatus()* version method.

```
// Access the latest version of the solution and print
 its training status
gs.print(JSON.stringify(JSON.parse(mlSolution.getLates
tVersion().getStatus(), null, 2)));
```

   Output when training is complete:

```
*** Script:
 {"state":"solution_complete","percentComplete":"100",
"hasJobEnded":"true"}
```

getLatestVersion()	getStatus()
ClassificationSolution - getLatestVersion()	*ClassificationSolutionVersion - getStatus()*
ClusteringSolution – getLatestVersion()	*ClusteringSolutionVersion – getStatus()*
Encoder - getLatestVersion()	*EncoderVersion - getStatus()*
PredictabilityEstimate - getLatestVersion()	*PredictabilityEstimateVersion - getStatus()*

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getLatestVersion()	getStatus()
RegressionSolution - getLatestVersion()	*RegressionSolutionVersion - getStatus()*
SimilaritySolution - getLatestVersion()	*SimilaritySolutionVersion - getStatus()*

Get predictions using a solution version

After the solution has been trained, get the trained version and run a prediction on it. Get the solution you created from the store. Next, choose the trained version and predict the trained version.

Note: Predictions cannot be made on encoders and predictability estimates.

1. Get the solution from the classification solution store using the *get()* method.

```
// Get the solution created in the first example from
 the classification solution store
var mlSolution =
 sn_ml.ClassificationSolutionStore.get('ml_x_snc_globa
l_global_my_solution_definition');
```

2. Use the GlideRecord API *get()* method to provide a record from the Incident [incident] table.

```
// single GlideRecord input
var input = new GlideRecord("incident");
input.get("<sys_id>");
```

3. Optional. Configure the *ClassificationSolutionVersion - predict()* method *options* parameter to return the top three results and return all results.

```
// configure optional parameters
var options = {};
options.top_n = 3;
options.apply_threshold = false;
```

4. Declare a variable called `results` and assign it to the prediction job.
   To run the prediction job, get the most recent solution version using the *ClassificationSolution - getLatestVersion()* method and call the *ClassificationSolutionVersion - predict()* method on it.

```
var results =
 mlSolution.getLatestVersion().predict(input,
 options);
```

   - *ClassificationSolutionVersion - predict()*
   - *ClusteringSolutionVersion - predict()*
   - *RegressionSolutionVersion - predict()*
   - *SimilaritySolutionVersion - predict()*

5. Print the predicted results output.

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```
gs.print(JSON.stringify(JSON.parse(results), null,
 2));
```

Predicted results example output:

```
*** Script: {
  "<sys_id>": [
    {
      "confidence": 99,
      "threshold": 24.75,
      "predictedValue": "Email",
      "predictedSysId": ""
    },
    {
      "confidence": 5.88210244009169,
      "threshold": 100,
      "predictedValue": "Email (I/f)",
      "predictedSysId": ""
    },
    {
      "confidence": 2.3461203499840932,
      "threshold": 14.81,
      "predictedValue": "Authentication",
      "predictedSysId": ""
    }
  ]
}
```

Reviewing your ML solution training jobs

Use the ML Solutions (ML Training Jobs view) module to monitor the training status and progress for Predictive Intelligence solutions. The module displays training jobs for both user interface and API solutions.

Background and usage

When you submit an ML solution or ML solution definition for training, it goes to a ServiceNow data center for processing to predict and deliver a data outcome. Depending on the solution size, the training can take hours or sometimes days to complete. The ML Training Jobs view helps you stay on top of all in-progress and completed ML solution training jobs in your instance.

To access this view, you use the admin or ml_admin role and the following navigation path: **Predictive Intelligence** > **Training Jobs**.

Note: The ML scheduler limits the number of trainings an instance can commit to 50 new ML training requests per instance within a 24 hour window. This excludes scheduled re-training requests. In addition, clustering and similarity updates are also excluded from this limit, even if the new training requests exceed 50 within a 24 hour window.

ML Training Jobs view summary

The view shows all ML training jobs grouped by the four Predictive Intelligence capability frameworks: classification, similarity, clustering, and regression.

Each record displays values such as solution name, version, training state, and training completion percentage.

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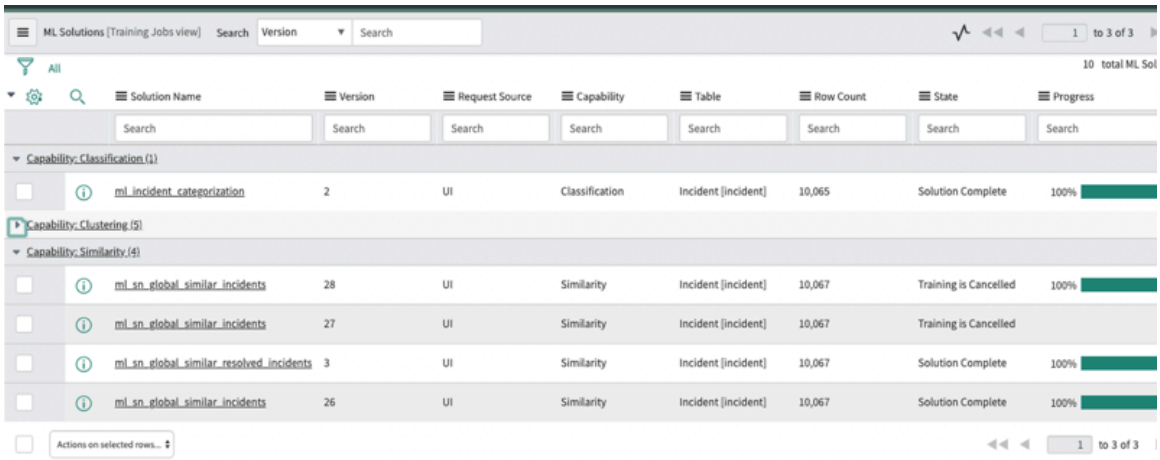
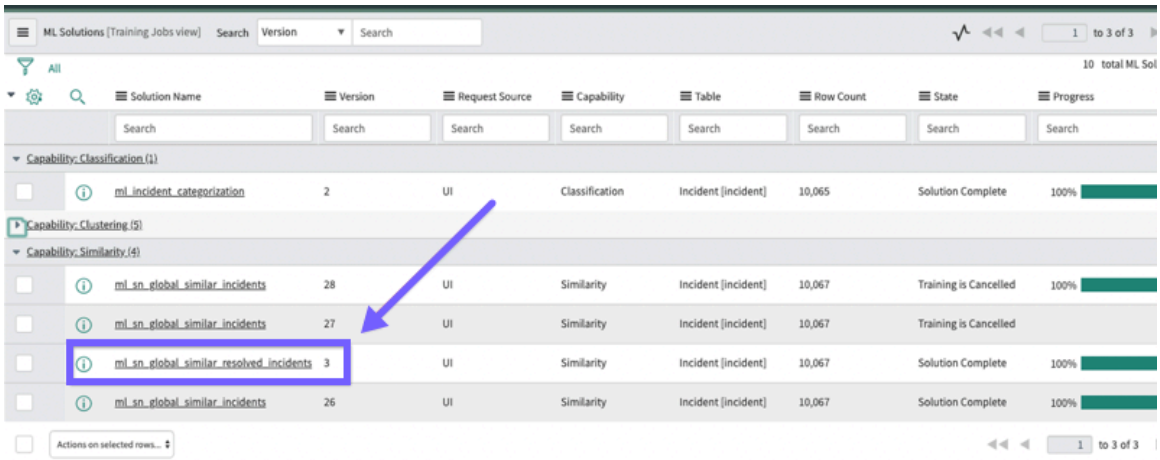
If you don't have any training jobs for a particular capability, the list doesn't display a group for that capability. For example, in this scenario, there is no group for regression because you don't have any regression solutions that you've submitted for training yet.



Select the Solution Name to see the details of the ML solution, as demonstrated in the images below.



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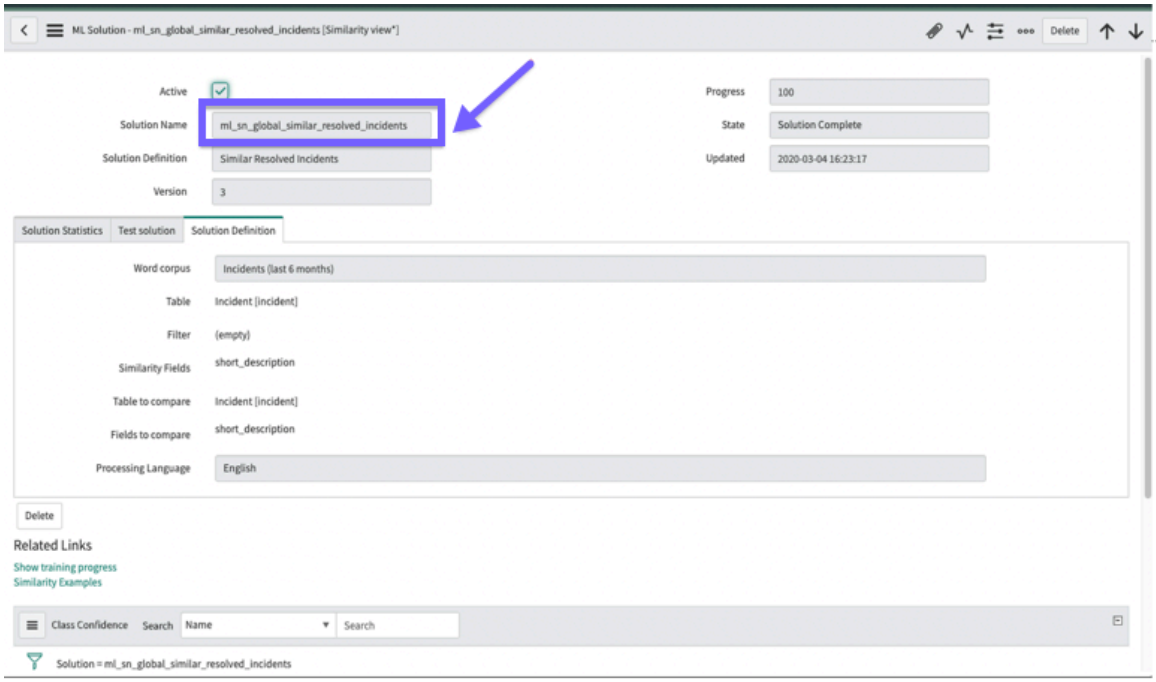

Use Predictive Intelligence in Workflow Studio with ML actions

Use Predictive Intelligence actions in Workflow Studio to create flows that incorporate your model predictions.

Before you begin

- Make sure the following plugins are activated in your instance: Predictive Intelligence (com.glide.platform_ml) and Predictive Intelligence for Workflow Studio (com.snc.ml_flowdesigner).
- Create or use an existing trained Predictive Intelligence solution.
- Roles required: ml_admin or admin, and flow_designer or delegated_developer.

About this task

Workflow Studio enables you to automate complex processes. The first thing to identify is what process you want to automate. In this example scenario, you're automating the assignment of a Category to an incident record. When you complete the flow, the next incident record created in your instance updates the Category field in the record based on the text entered in the **Short description** field.

You can deploy any active and trained classification, similarity, or regression ML solution in your flow, as appropriate for your use case.

Note: The regression framework is deprecated in the Brazil release. You can continue to use existing regression solutions but you can't create new ones.

In this example procedure, you create a flow that implements the ml_incident_categorization solution in a Workflow Studio action. You can find this solution by searching on the ML Solutions [ml_solution] table, as shown in the image below. Confirm that the solution you use has been trained and its **Active** value is set to **true**.

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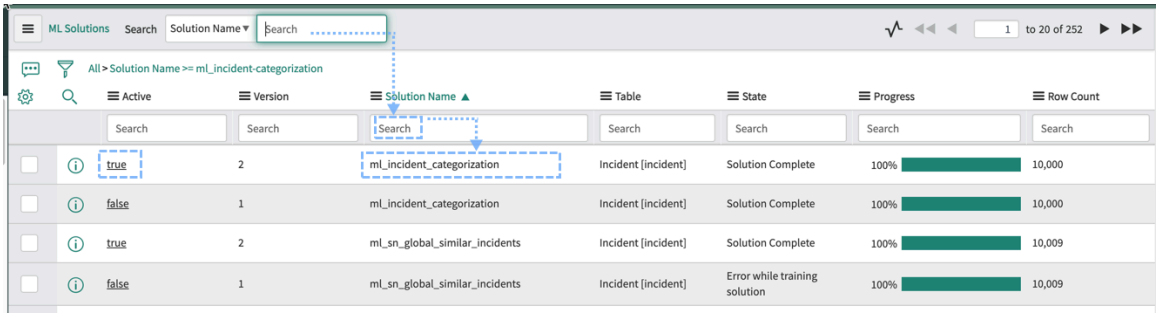
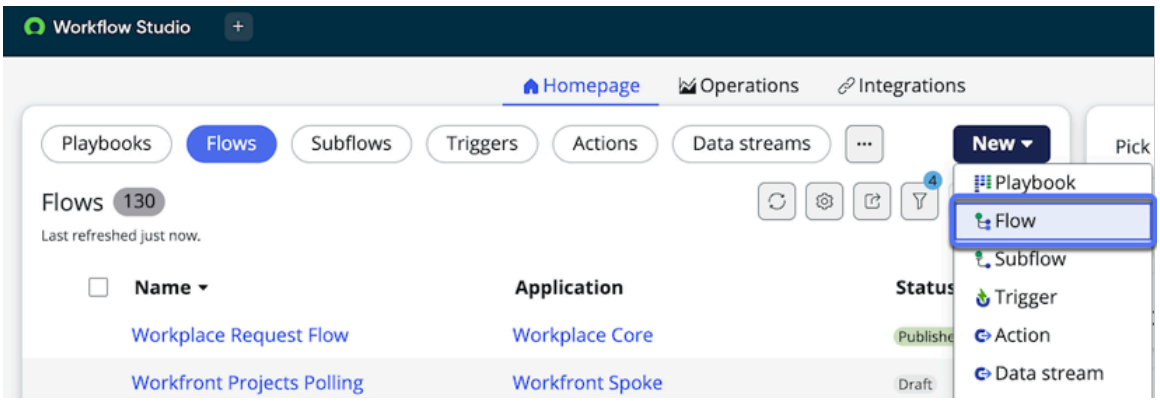


For more information on how to use Flow Designer in Workflow Studio, see Exploring flows. For information about the Actions included in Predictive Intelligence for Workflow Studio, see the Spoke actions table in Machine Learning solutions for Flow Designer.

Procedure

1. Navigate to **All** > **Process Automation** > *`Workflow Studio`*.
2. Select **New** > **Flow**.



3. On the **Let's get the details for your flow** screen, configure the following fields. Expand **Show additional properties** to view all fields.

Field	Description
Flow Name	Provide a name for the flow. In this scenario, you enter `Auto-assign Category to Incident`.
Description	Enter a brief summary description of what the flow delivers. For example, you enter the following: `When an incident is created, it automatically triggers this flow, which uses ML Solutions to predict the correct Category for the incident.`
Application	Select **Global**.
Protection	Select **--None--** or **Read-only**. In this scenario, you select **--None--**.
Run As	Select **User who initiates session**.

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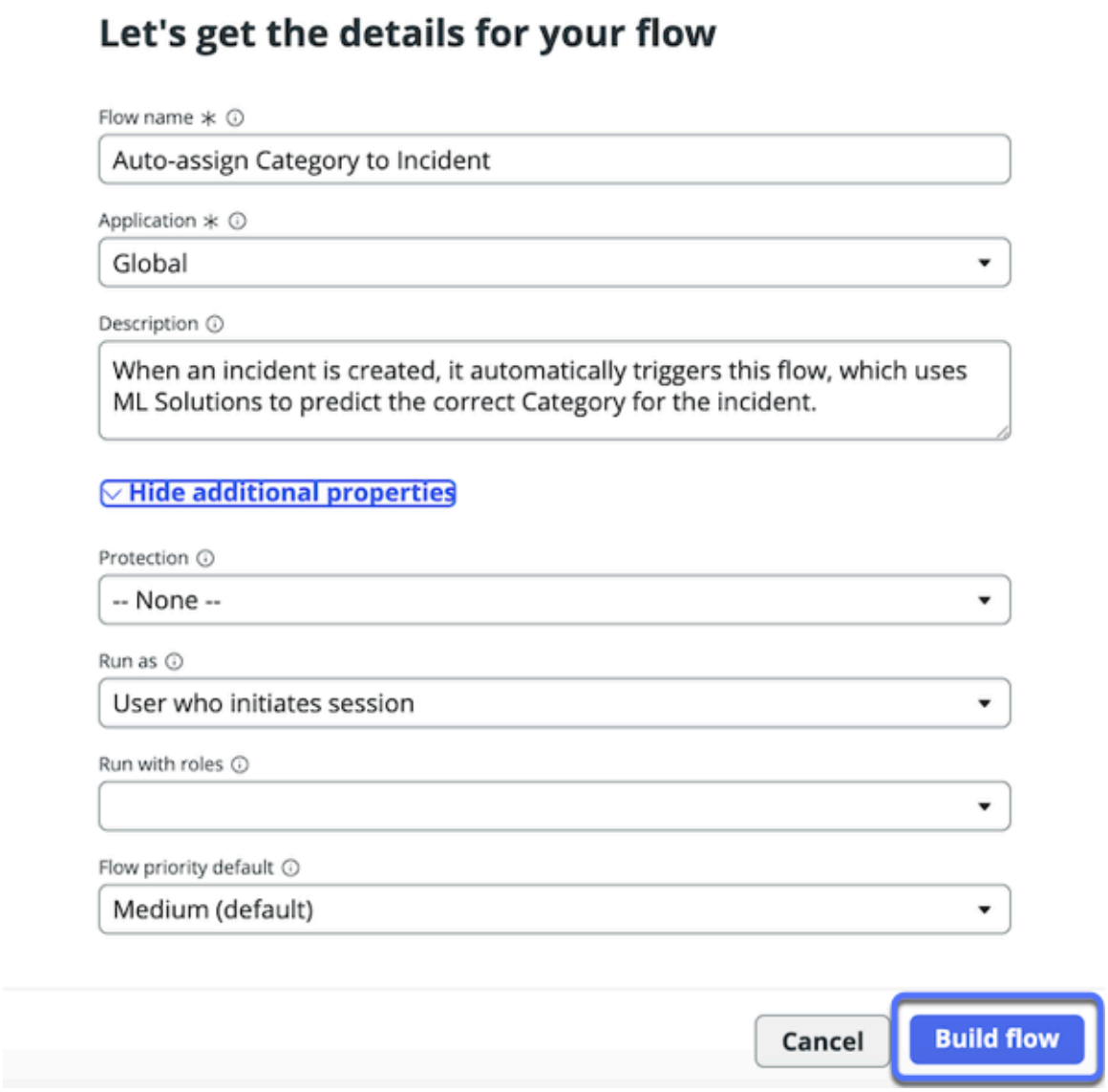
Field	Description
Run with role(s)	Leave blank.
Flow priority default	Medium (default).

4. Select **Build flow**.



The Flow screen appears, showing the Auto-assign Category to Incident name you assigned to the flow. If a Getting started screen appears, select **Skip tour**.

5. In the TRIGGER section of the Flow screen, configure the following fields to create a trigger for the flow.

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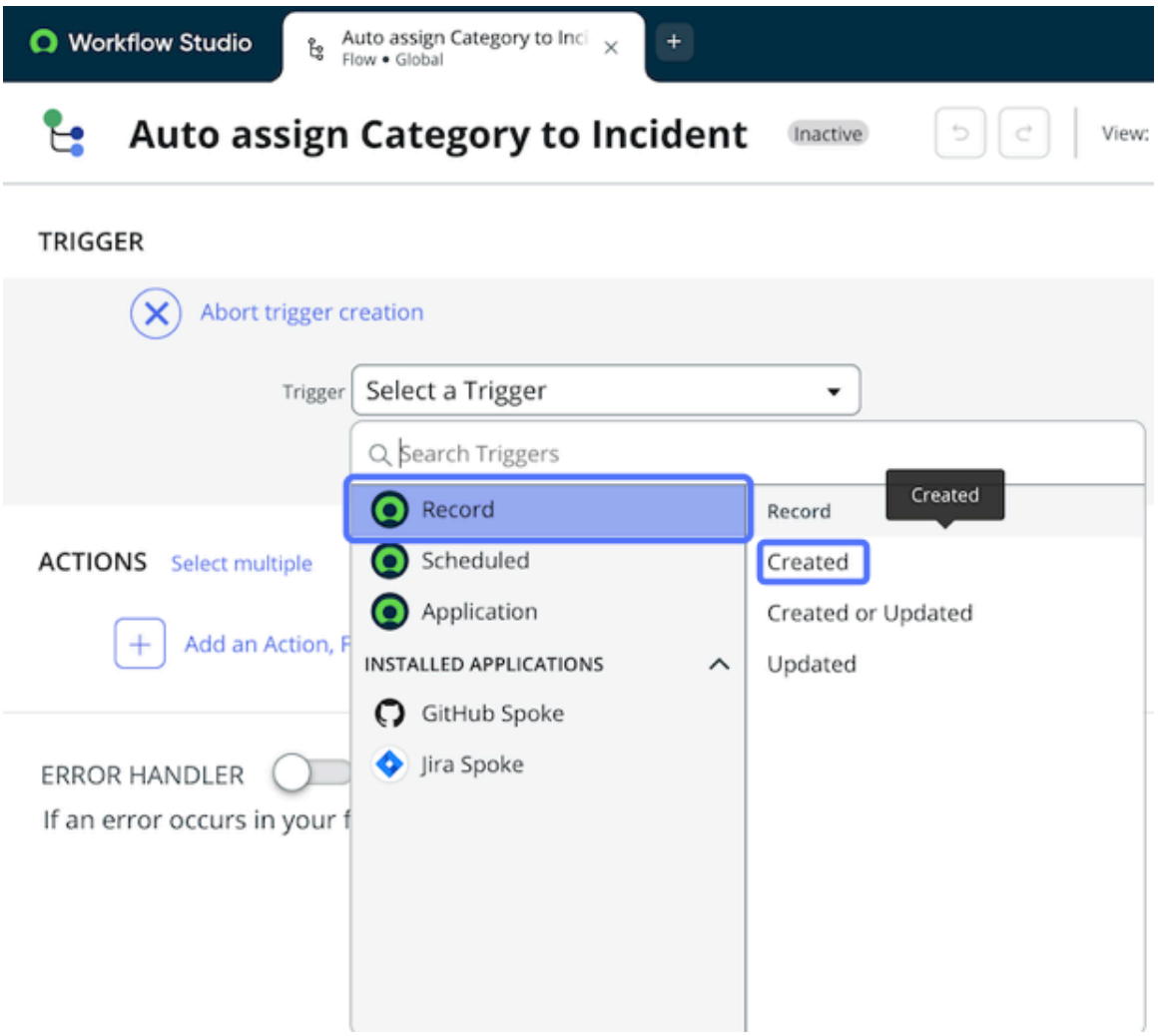
a. **Select a Trigger**: Select **Record**, then from the list of possible options for Record, select **Created**.



b. **Table**: Select **Incident [incident]**.

Note: After you configure both the **Trigger** and **Table** fields, record data pills appear in the **Data** section of the screen so you can use them in your flow.

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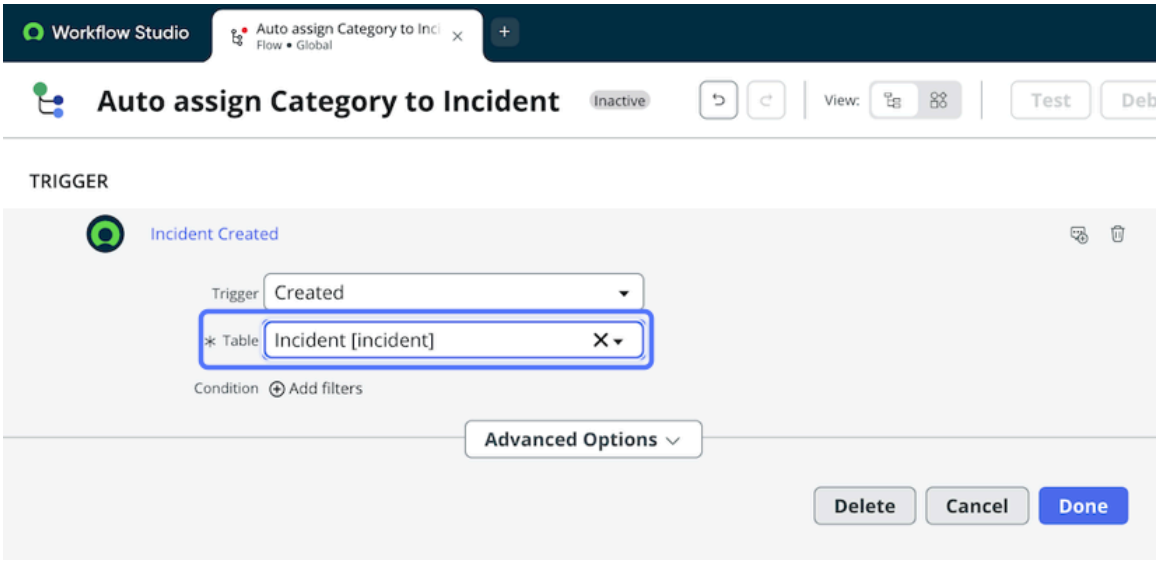


c. **Condition**: Select **Add filters** if you want to add any conditions to the flow.

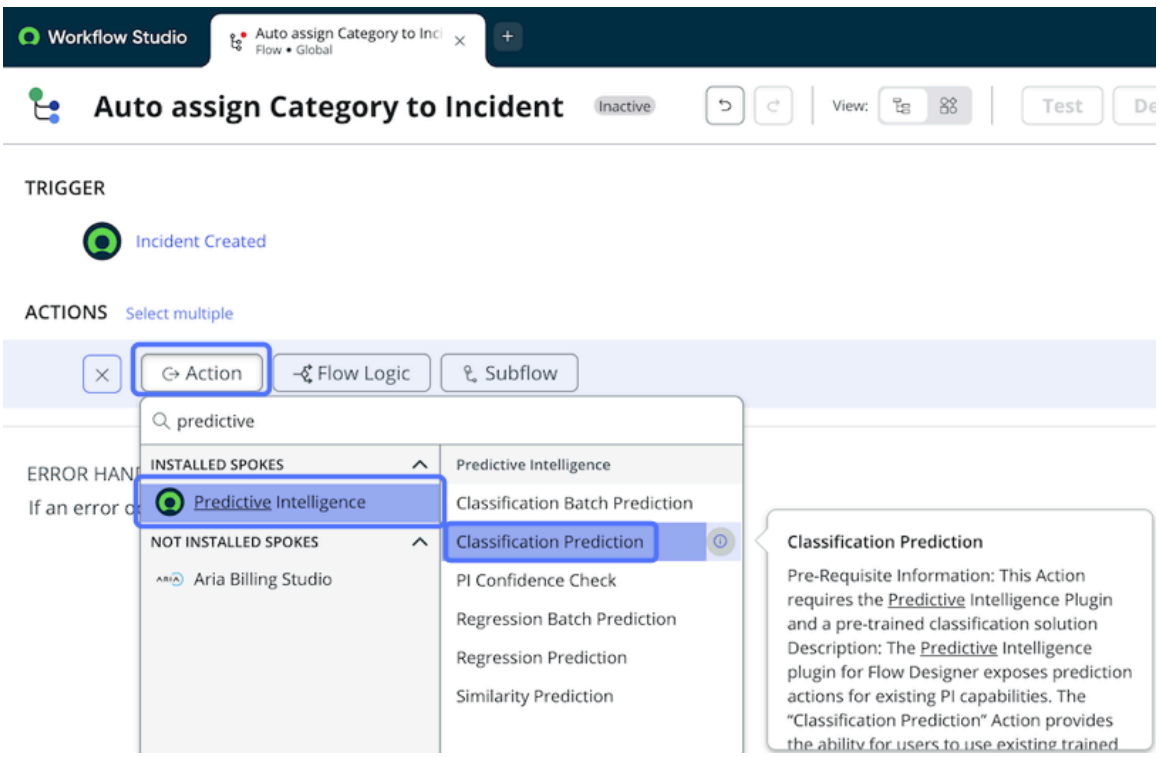
d. **Optional:** Open the **Advanced Options** panel to view additional conditions you can apply to the flow.

e. **Optional:** To close the panel, select **Advanced Options**.

f. Select **Done**.

6. In the ACTIONS section of the screen, configure the following fields to create a Classification Prediction action.

a. **Action** tab: Select **Action** > **Predictive Intelligence** > **Classification Prediction**.



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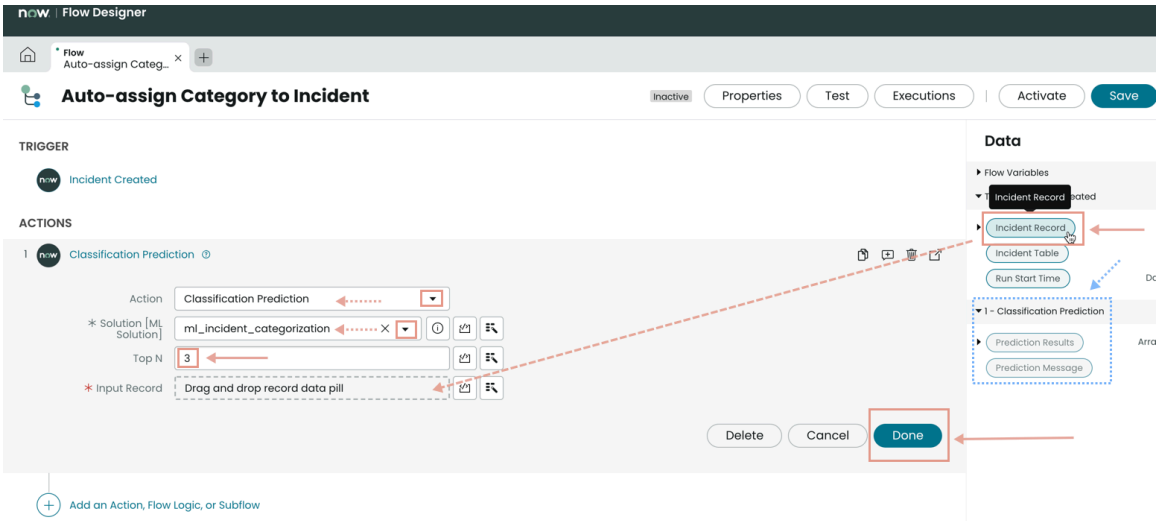
Select the information icon ( ) to see the description of a Classification Prediction.

b. Solution [ML Solution]: Select **ml_incident_categorization**.

c. Top N: Enter 3 for the example scenario.
When you enter a number, such as 3, the system uses the top three ML predictions that have the highest prediction confidence score. If you don't enter anything, the system sets the default value to 1.

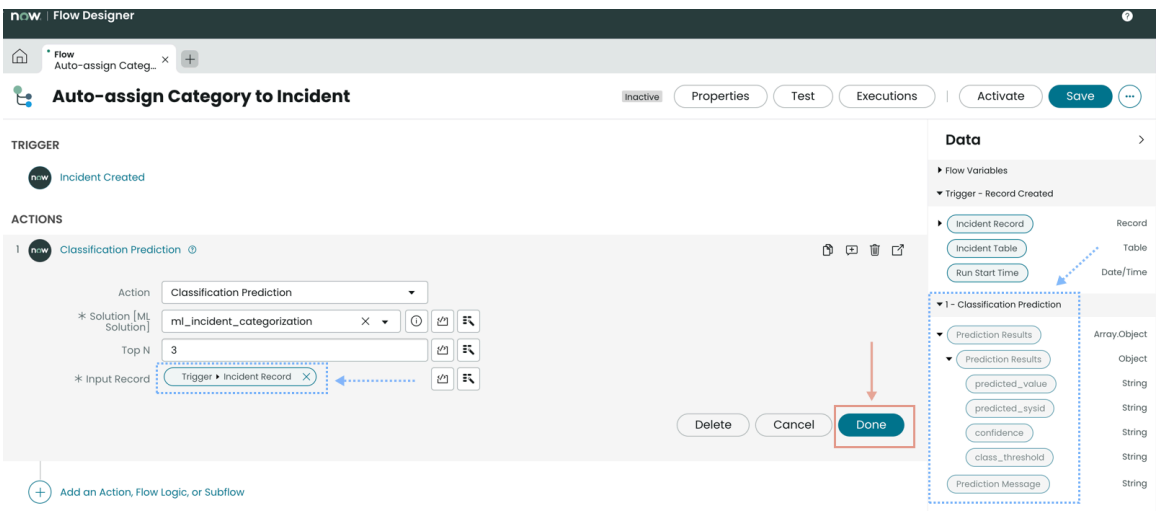
d. Input Record: Drag and drop your **Trigger → Incident Record** data pill into the Input Record field.



The Action, Solution Name, Top N, and Input Record values provide a base for the Category prediction.

Note: The data pill you drop into this record must also be a record. For example, don't try to drop a table pill or a date/time pill into the Input Record field.

e. Select **Done**.
Result: The Classification Prediction action is completed in the flow and its data pills appear in the Data section of the screen.



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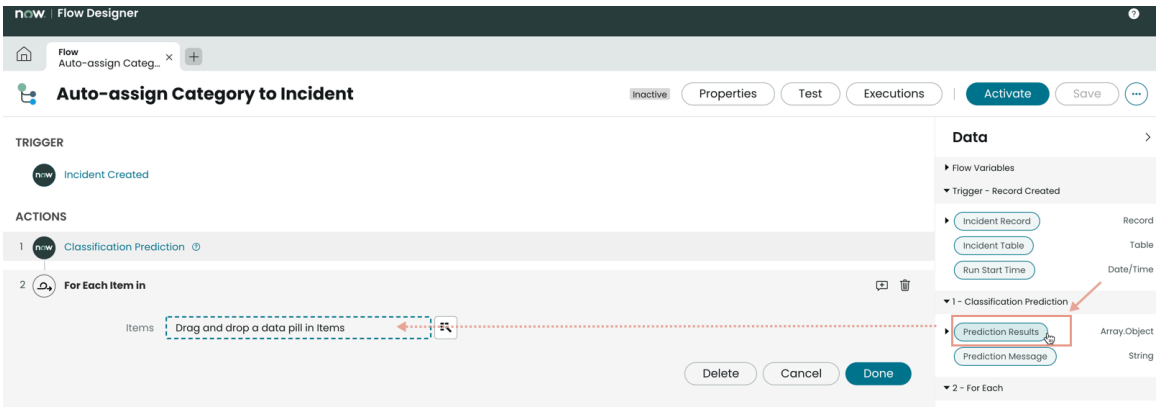
7. In the ACTIONS section of the screen, use the following steps to create actions and flow logic for the incident's Prediction Results.

   Note: Although you can use a loop to iterate through every prediction result, the scenario shown in this documentation uses a relatively small number of actions. For more advanced flow configurations, see the Flow Designer.

   a. **For each item in list of items**: Drag and drop the **Prediction Results** data pill into the **Items** field.



   Note:

   In order to access the list of items in the Regression Prediction action, you don't need the **For Each Item in** flow logic.

   (The regression framework is deprecated in the Brazil release. You can continue to use existing regression solutions but you can't create new ones.)

   b. Select **Done**.
   Result: The Prediction Results action is started in the flow and its data pills appear in the Data section of the screen.

8. In the ACTIONS section of the screen, select **Action** > **Predictive Intelligence** > **PI Confidence Check**.
   The PI Confidence Check is a tool you can use to compare values in a flow. In this use case, it compares prediction result values, and the output from the check is either True or False.

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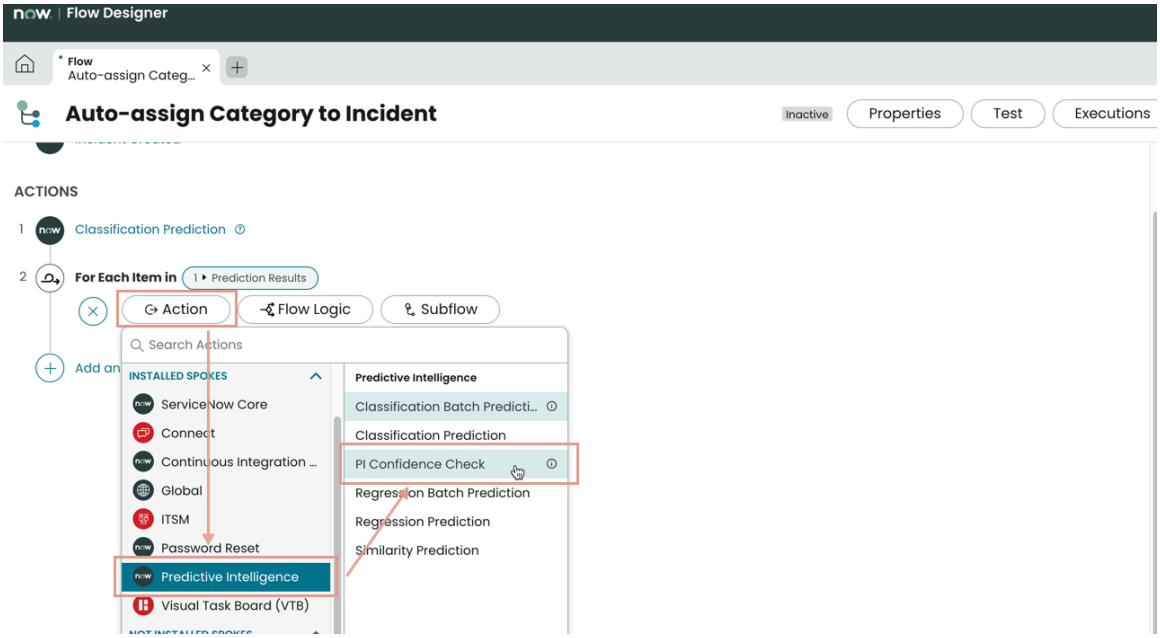
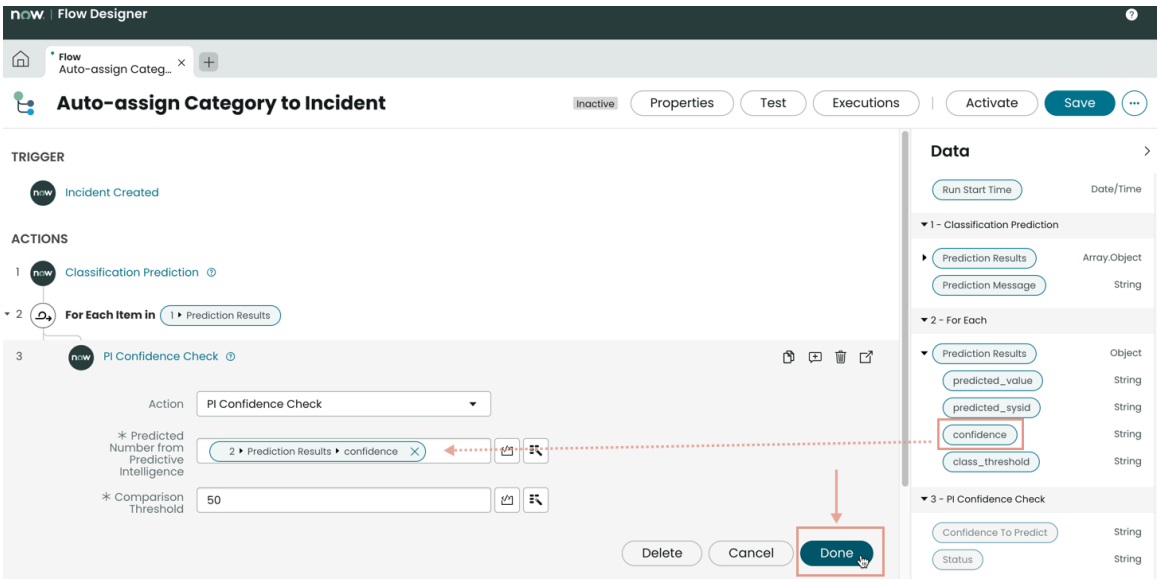


9. Drag and drop the **confidence** data pill into the **Predicted Number from Predictive Intelligence** field.
10. Enter 50 in the **Comparison Threshold** field.
    In this example scenario, you enter the number 50, which tells the system to use predictions that have a confidence score above 50%.
11. Select **Done**.



12. Select **Flow Logic** > **If** to add a condition to the flow.

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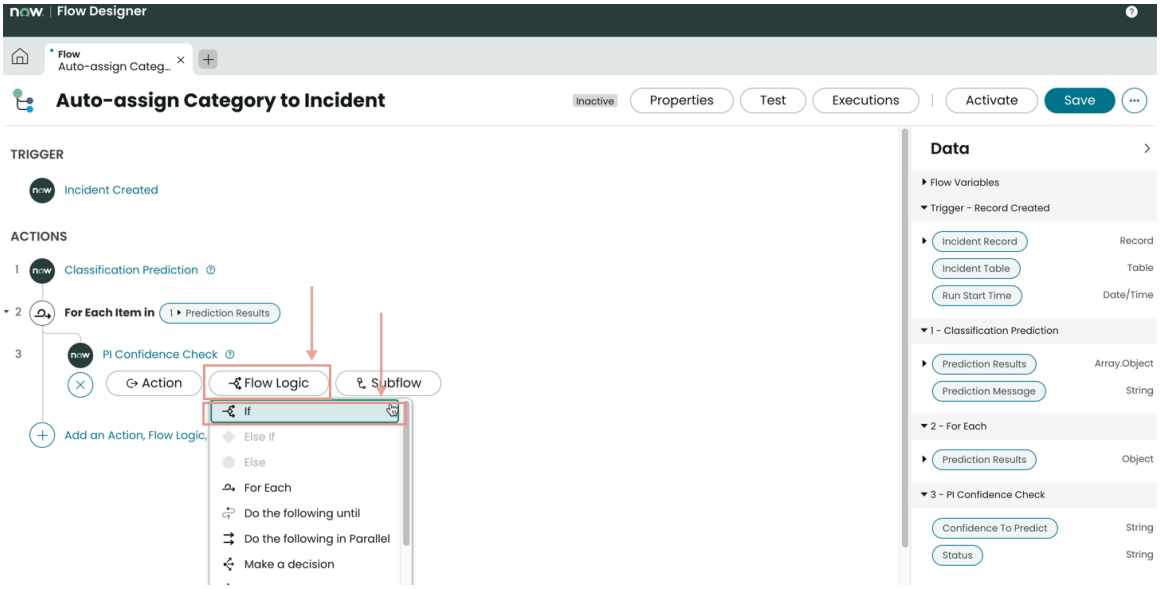
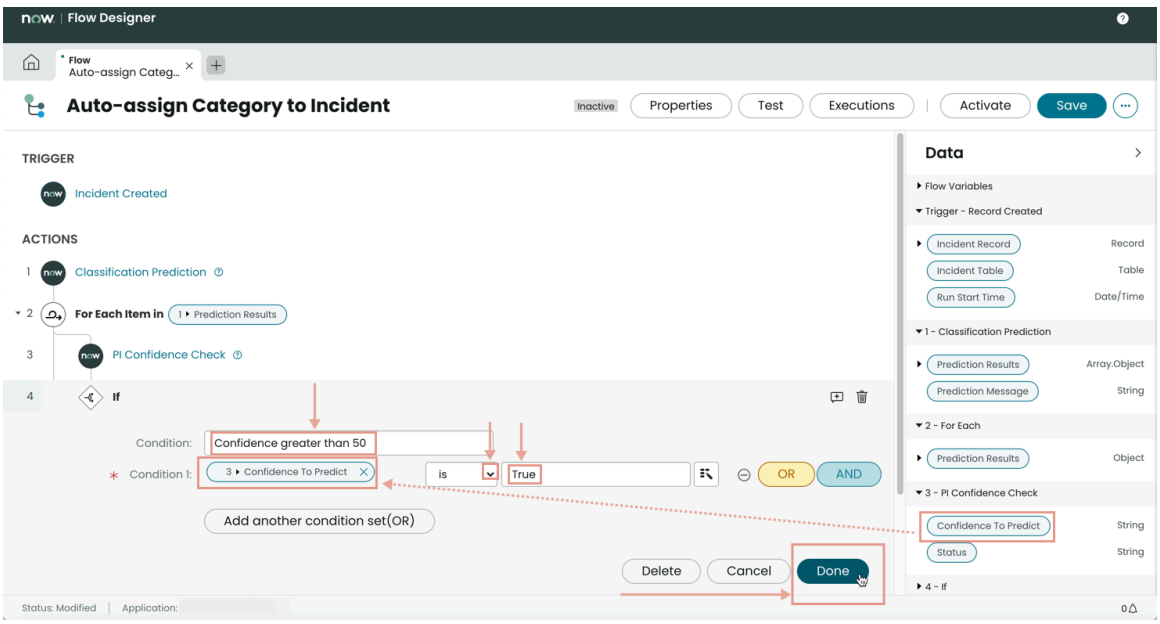


13. Configure the following fields to define the first part of the condition flow logic.

- **Condition**: Enter a name for the condition that defines what it does. In this example scenario, you enter `Confidence greater than 50`.
- **Condition 1**: Drag and drop the **Confidence To Predict** data pill into the field. Select **is**, and enter the value `True`. This step completes the first part (the antecedent) of the condition flow logic.
- Select **Done**.



14. Select **Action** and enter `worknote` into the search field.

15. Select **ITSM** > **Add Worknote** to add a work note as the second part (the conclusion) of the condition.

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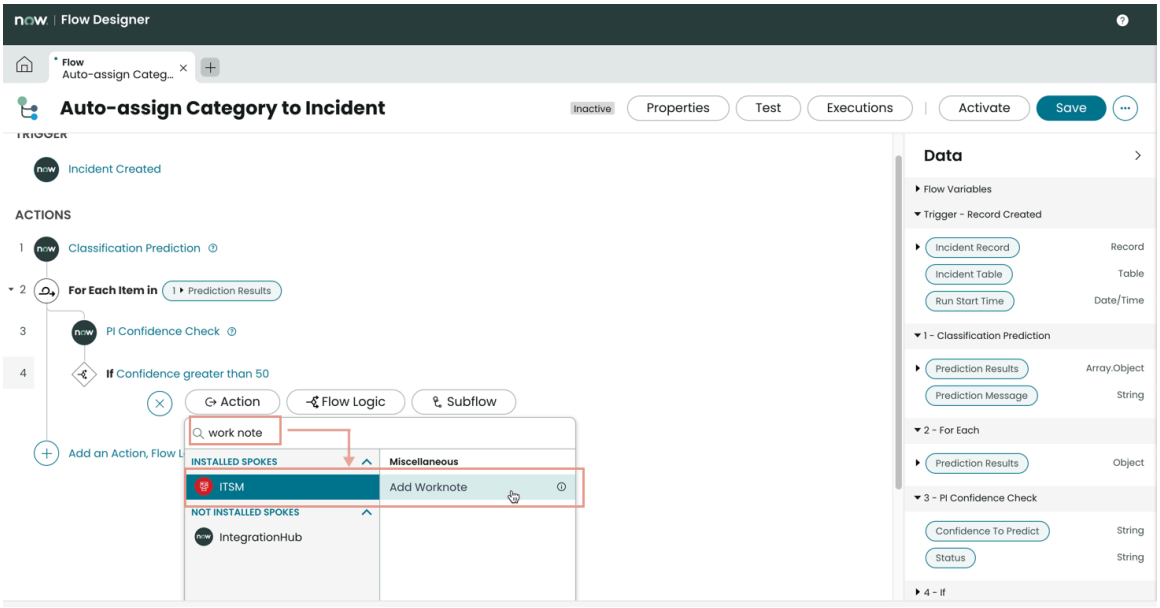
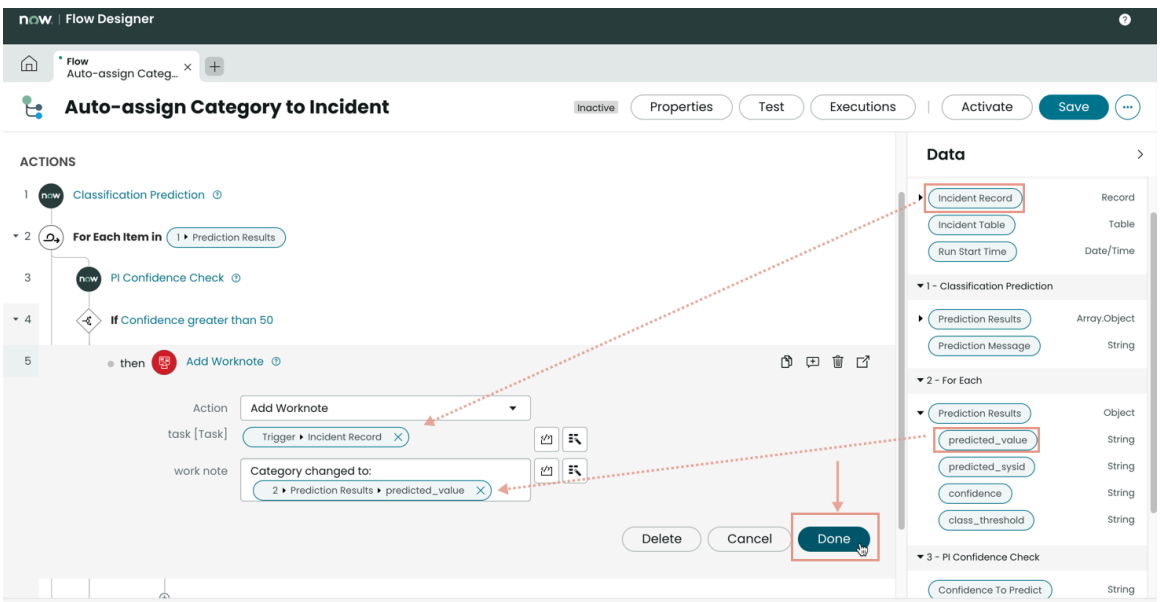


16. Configure the following fields to define the second and final part of the condition flow logic.
    - **Action**: As a result of Step 14 above, **Add Worknote** appears automatically in this field.
    - **task [task]**: Drag and drop the **Incident Record** data pill into the field.
    - **work note**: Drag and drop the **predicted_value** data pill into the field. This step completes the condition flow logic conclusion.
    - Select **Done**.



17. Select **Action** and enter `update record` into the search field.
18. Select **Update Record**.

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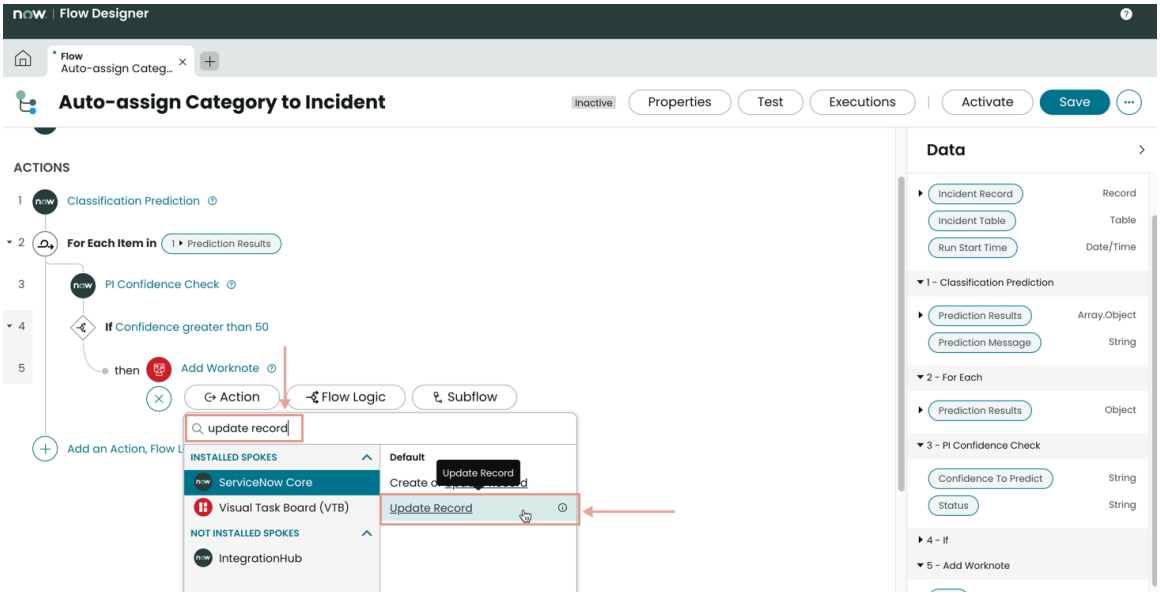
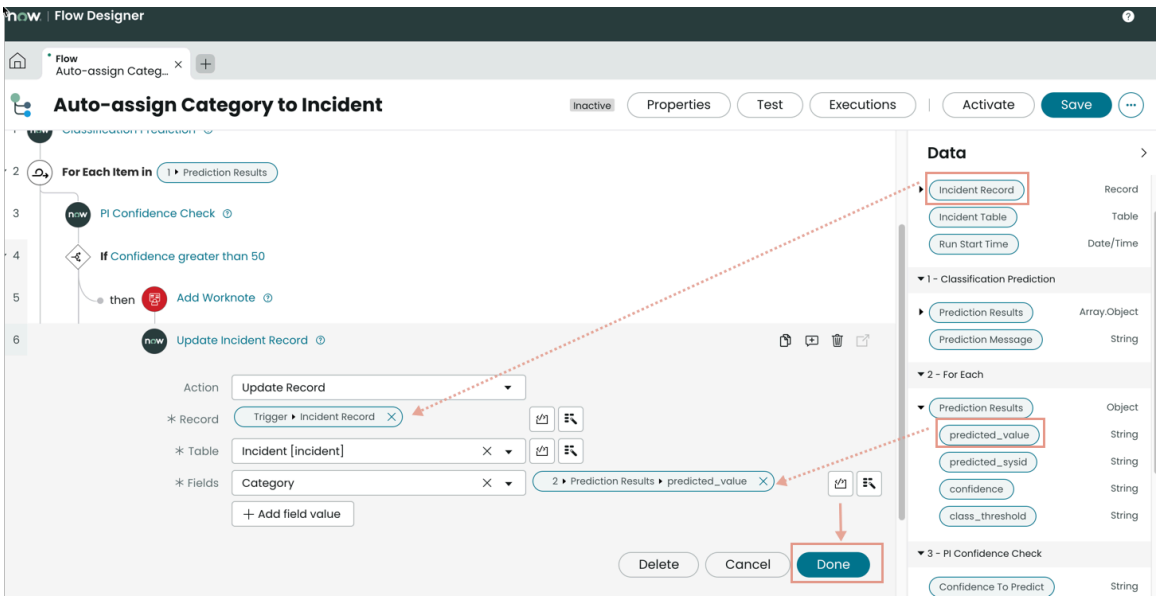


19. Configure the following fields to update the Incident Record.

- **Action**: As a result of Step 16 above, **Update Record** appears automatically in this field.
- **Record**: Drag and drop the **Incident Record** data pill into this field.
- **Table**: Select **Incident [incident]**.
- **Fields**: Select **Category**. Then drag and drop the **predicted_value** data pill into this field, next to the **Category** value.
- Select **Done**.



20. Select **Save**.

21. Select **Activate**.

Result

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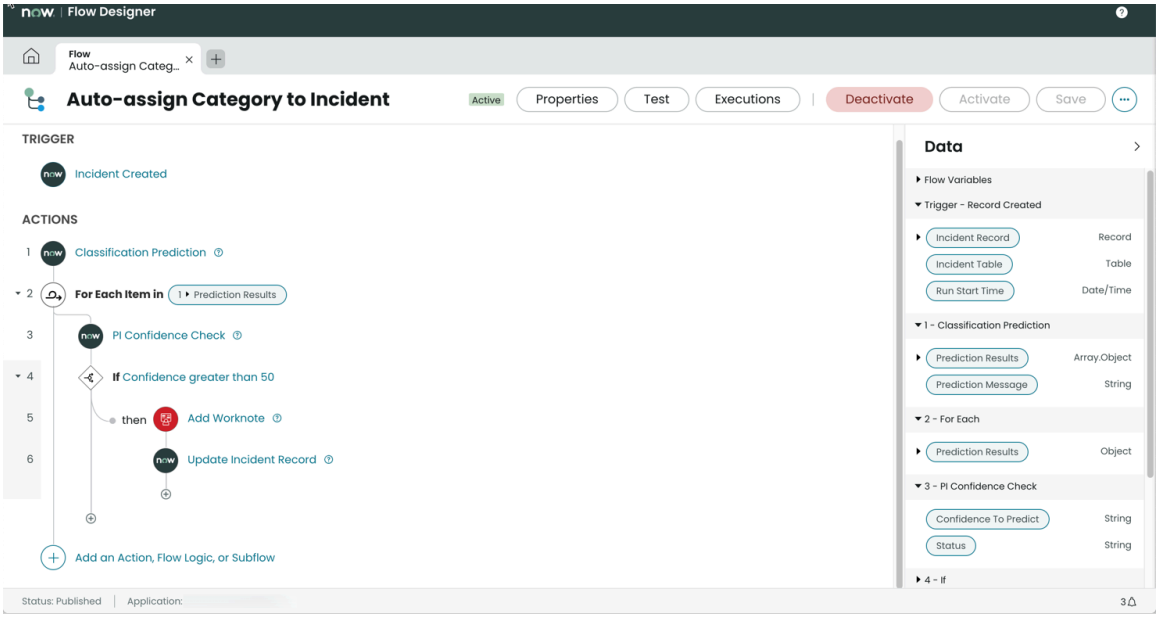
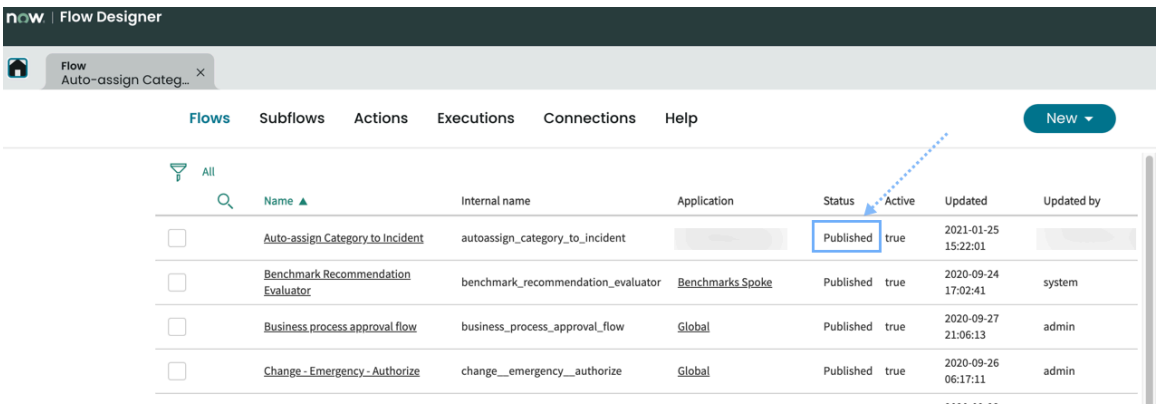
- Your Auto-assign Category to Incident flow is activated and complete.

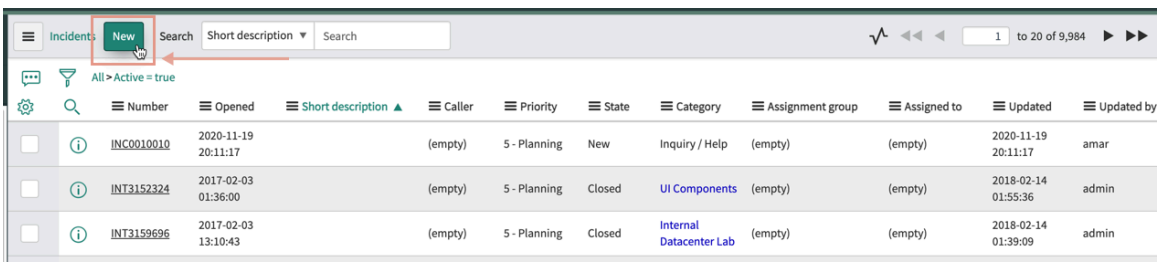


- It also appears as published in the Flows column on the Workflow Studio home screen.



22. Navigate to **Incidents**.

23. Select **New** to create a test incident record in the Incidents table.
In this example scenario, you create record INC0010011.



24. In the record you created, note in the following image that the Category value is set to **Inquiry / Help**.

25. In the **Short description** field, enter `Email not working`.

26. Select **Submit**.

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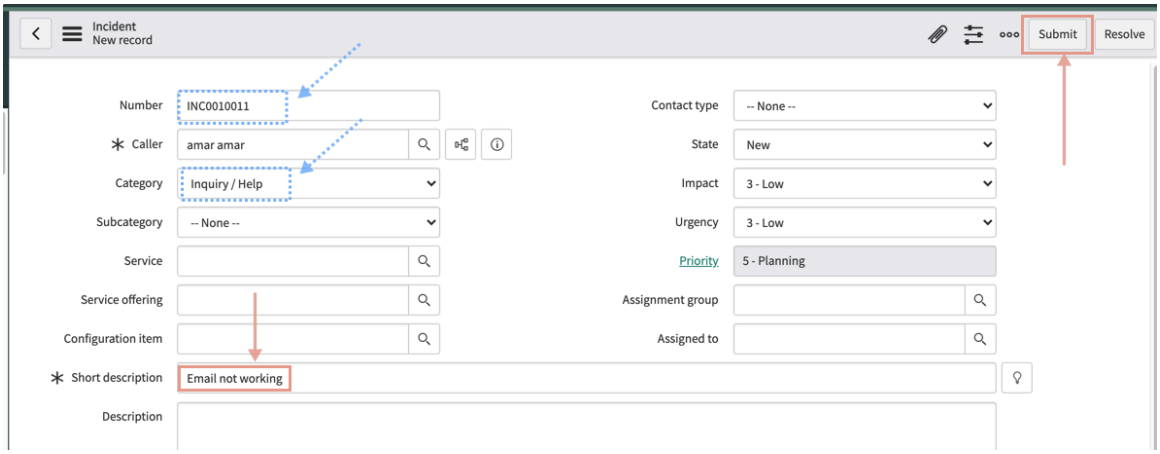
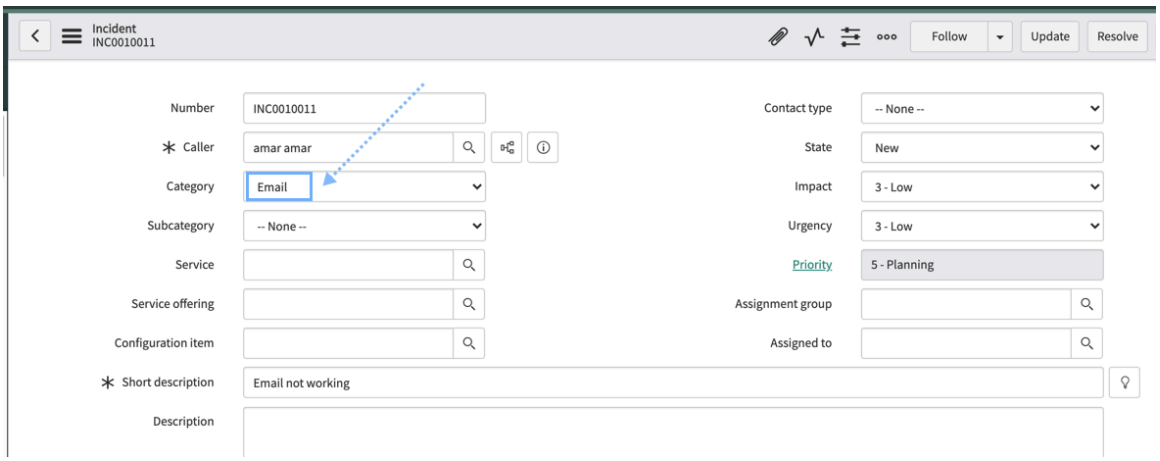
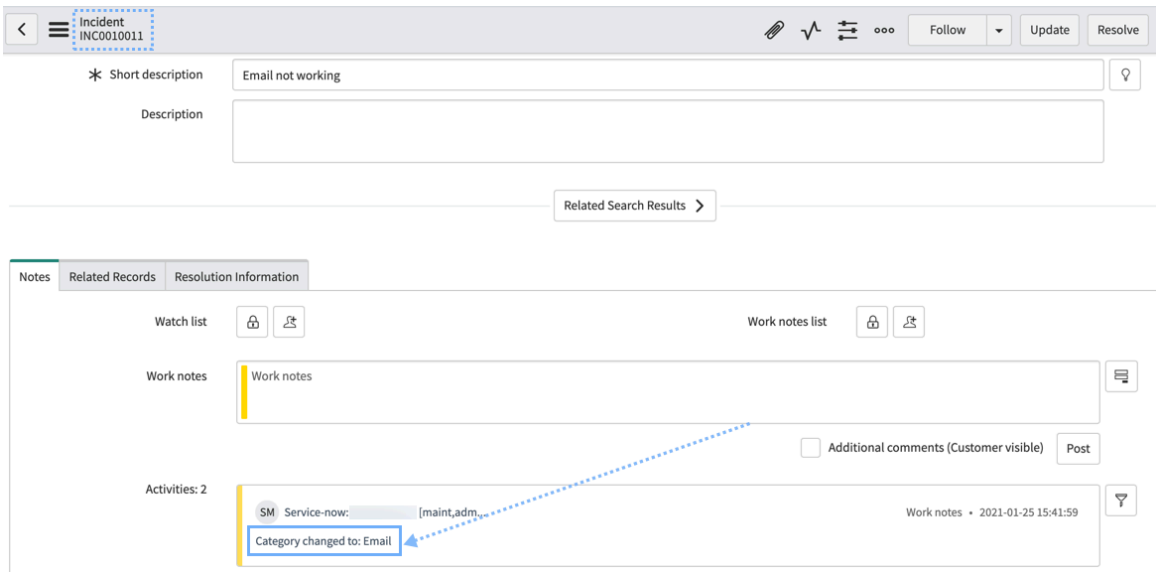


Result

The system updates the incident record to show that its Category value has changed from **Inquiry / Help** to **Email**.

- 

- 

Related topics

Machine Learning solutions for Flow Designer

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Using MLSolutionFactory scriptable objects

MLSolutionFactory scriptable objects enable defining ML functionality. You can use the APIs to compose data-driven functionality, such as subclustering large clusters or clusters with multiple PRBs attached.

You can use scriptable objects in a scripted extension point to modify the Predictive Intelligence REST API method to address unique business use cases.

ServiceNow applications on the NOW platform can call scriptable objects and script includes. External applications can call scripted REST APIs. By default, the Predictive Intelligence REST API - Prediction for multiple solutions (GET) method uses the MLSolutionUtil scripted extension point to take a list of active solution names, run predictions on them given the input, and return results. The MLSolutionUtil extension point enables creating custom implementations for specific usage scenarios, for example, running a second solution prediction only after the condition of a first solution prediction is satisfied.

Here's the high-level process for creating a custom usage scenario.

1. Developers customize a MLSolutionUtil scripted extension point implementation using the MLSolutionFactory scriptable object.
   - Listed as global.MLSolutionUtil in the Extension Point [sys_extension_point] table
   - See Register a custom script include
2. The MLSolutionUtil scripted extension point implementation uses `MLSolutionFactory` to get the scriptable object, and invokes prediction methods on that object.
3. The Predictive Intelligence REST API - Prediction for multiple solutions (GET) method invokes the `MLSolutionUtil extension point` implementation, depending on the scope of the request.
4. Applications call the Predictive Intelligence REST API - Prediction for multiple solutions (GET) end point from a script include form.

For more information, see

- Predictive Intelligence REST API
- MLSolutionFactory - Global

Preserve ML solutions during a system clone

Save your trained machine-learning (ML) solution data during a system clone.

Before you begin

Role required: clone_admin or admin

About this task

The system stores trained ML solutions as Attachment records. These records include your solution artifacts, such as solution definitions, template records, and predictive model statistics, all of which are required components of the Predictive Intelligence prediction functionality. To preserve these records, follow the high-level steps below each time you run a system clone.

Note:

For troubleshooting common issues with cloning solutions, see the Predictive Intelligence Common issues [KB0781893] article in the Now Support Knowledge Base.

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Procedure

1. Enter `sys_properties.list` in the application navigator to access the System Properties list.
2. Ensure the *glide.platform_ml.clone_artifacts* system property is set to **True**.
3. If you want to preserve only the ML solution records and not the numerous other records in the sys_attachments table, exclude the sys_attachments table from your clone run.
4. Request a system clone.
   The system preserves your ML solution records during the system clone.

Testing and monitoring predictions

Evaluate the coverage and precision of your machine-learning (ML) solutions by testing them. Once deployed, track their performance over time. Improve predictions by using performance information to refine your solutions.

Testing solutions

After your ML solutions are trained, you can call on the Predictive Intelligence API to make a solution prediction. Use the API to test the following solutions:

- Test a classification solution prediction
- Test a similarity solution prediction

Monitoring predictions

For classification predictions, use the Prediction Results dashboard to track the coverage and precision of predictions over time.

To learn how, see Track classification prediction results over time.

Prediction troubleshooting

For troubleshooting common issues with solution predictions, see the Predictive Intelligence Common issues [KB781893] article in the Now Support Knowledge Base.

Test a classification solution prediction

Once your machine-learning (ML) solutions are trained, you can call on the Predictive Intelligence API to make a solution prediction. In this example procedure, we use the REST API Explorer to test a classification solution prediction for incident categorization.

Before you begin

Train your ML solution prior to testing a prediction.

Role required: web_service_admin, rest_api_explorer, or admin or ml_admin

About this task

This procedure uses sample data to illustrate what you can do in your instance, and may not represent data or records that are actually in your instance.

This scenario illustrates a classification solution prediction for a hypothetical ML solution that you have previously created and trained. You can also use the REST API Explorer to test a similarity solution prediction.

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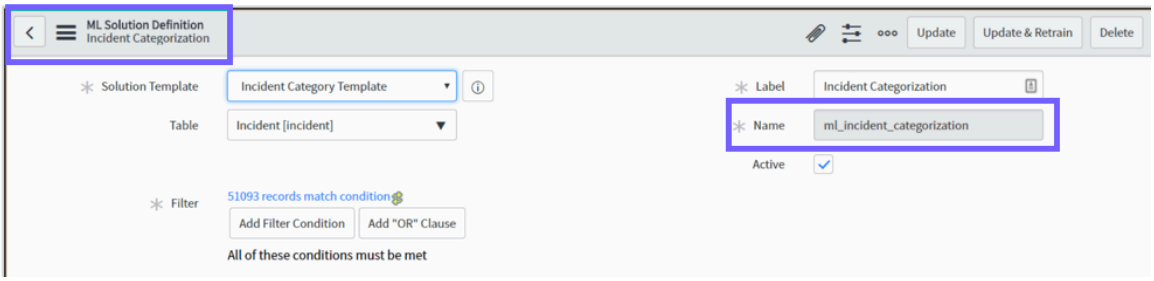
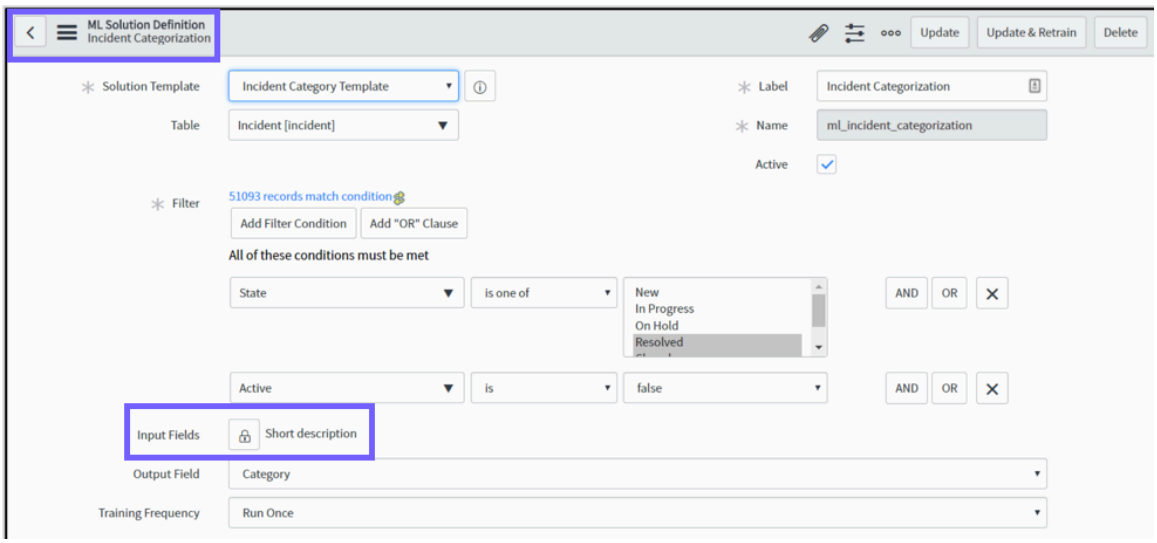
Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Classification** > **Solution Definitions**.
2. Locate the ML solution definition whose prediction you want to test, and copy its **Name** value to your clipboard or a Notepad file.
   In this case, use the **Name** field value in your ML Solution Definition Incident Categorization record, as illustrated in the following example.



3. Write down and save the **Input Fields** used in your ML Solution Definition record that you want the REST API Explorer to use in its call to the Predictive Intelligence API.
   In this case, we use the **short _description** field, as the prediction model has been trained to use this field to learn its category definition.



4. Navigate to **System Web Services** > **REST** > **REST API Explorer**.
5. Set these choice fields as follows.

Field	Value
Namespace	now (leave as default)
API Name	Predictive Intelligence
API Version	latest (leave as default)

   The Predictive Intelligence form appears. You use this form to prepare your call request to the Predictive Intelligence API.
6. In the solution-name **Value** field, type `ml_incident_categorization`.

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Note: This is the Name value you captured in Step 1 of this procedure.

7. Click **Add query parameter**.
   The Predictive Intelligence form refreshes to show the **Query parameters** section.
8. Type `short_description` in the first field.

   Note: This is the input field you captured in Step 2 of this procedure.

9. Type a short description of an incident in the second field.
   For instance, type `Unable to connect`.
10. Click the **Send** button.
    The REST API Explorer sends your request to the Predictive Intelligence API.
    The system predicts the output value in the Response Body section of the API output. You can use other short descriptions to test what the solution is predicting.
11. **Optional:** Send a different request to the Predictive Intelligence API so that you can test the prediction model again.

    a. Return to the **Query parameters** section of the Predictive Intelligence form.

    b. Type a short description that references a different kind of incident in the second field.
    For example, type `Unable to connect to MSSQL`.

    c. Click the **Send** button.

    The Response Body section may refresh to show a different outcome than what you saw in Step 9, depending on which incident categories you configured in your solution definition setup. In other words, changing the short description text can recategorize the incident as a different kind of issue.

Example:
You can also test the Predictive Intelligence prediction model when you create a new incident record using the incident form.

1. Navigate to **Incident** > **Create New**.
2. In the new Incident form that loads, set the fields as follows.
   - **User:** Enter the Caller name.
   - **Category:** Leave as default.
   - **Short description:** Enter a short description that you want to test.
3. Submit the incident form.

Result: When the form refreshes, an information message appears with the incident category automatically set to a specific value.

Note: For some short descriptions, the prediction might not process because the solution does not have enough confidence in predicting the value for this input.

Related topics

Predictive Intelligence API

MLPredictor - Global

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Test a similarity solution prediction

Once your machine-learning (ML) solutions are trained, you can call on the Predictive Intelligence API to make a solution prediction. In this example procedure, we use the REST API Explorer application to test a similarity solution prediction for resolved incident recommendations.

Before you begin

Train your ML solution prior to testing a prediction.

Role required: web_service_admin, rest_api_explorer, or admin or ml_admin

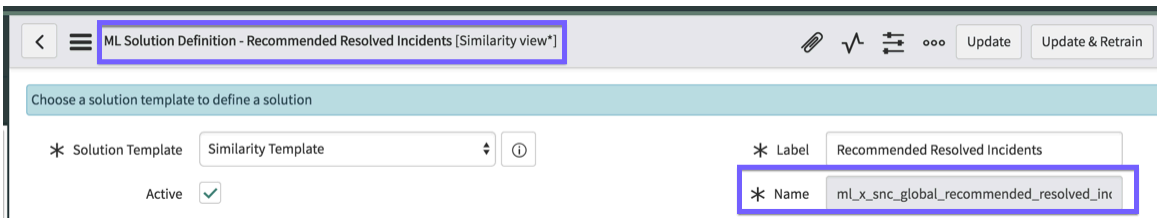
About this task

This procedure uses sample data to illustrate what you can do in your instance, and may not represent data or records that are actually in your instance.

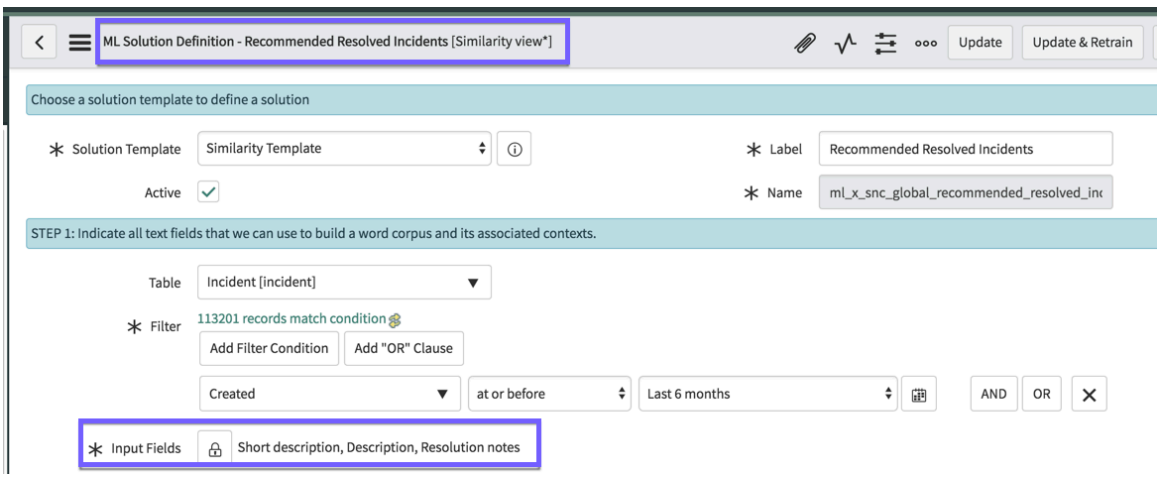
This scenario illustrates a similarity solution prediction for a hypothetical ML solution that you have previously created and trained. You can also use the REST API Explorer to test a classification solution prediction.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Similarity** > **Solution Definitions**.
2. Locate the ML solution definition whose prediction you want to test, and copy its **Name** value to your clipboard or a Notepad file.
   In this case, we use the **Name** field value in your ML Solution Definition Recommended Resolved Incidents record, as illustrated in the following example.



3. Copy the **Input Fields** value(s) used in your ML Solution Definition record that you want the REST API Explorer to use in its call to the Predictive Intelligence API.
   In this case, we use the **Short description** field type, as the prediction model has been trained to use this field to learn, pair, and recommend similar records for your review.



4. Right-click the browser tab you're using to view your instance, and select **Duplicate**.

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5. In the duplicate browser tab, navigate to **System Web Services** > **REST** > **REST API Explorer**.
6. Click **Explore**.
7. Set these choice fields as follows.

Field	Value
Namespace	now (leave as default)
API Name	Predictive Intelligence
API Version	latest (leave as default)

The Predictive Intelligence form appears. You use this form to prepare your call request to the Predictive Intelligence API.

8. In the solution-name **Value** field, enter `ml_x_snc_global_recommended_resolved_incidents`.

Note: This is the Name value you captured in Step 2 of this procedure.

9. Click **Add query parameter**.
10. In the Query parameters section, enter the value of one of the Input Fields from the solution you're testing.

a. In the first field, paste `short_description`.

Note: This is one of the input fields you captured in Step 2 of this procedure.

You can use other field types, such as **Description** or **Resolution notes** to test what the solution is predicting.

b. In the second field, enter some text that you might find in an incident record.
For instance, enter `Discovery errors`.

11. Click the [+] button to create a second query condition that defines the number of results you want to query.

a. In the first field, enter `top_n`.

b. In the second field, enter `3`.
These conditions set the query to retrieve the top three most similar incident records.

12. Click **Send**.
The REST API Explorer sends your request to the Predictive Intelligence API.
13. In the Response body section, copy the three outcome values that your API call returned, as illustrated in the image below.

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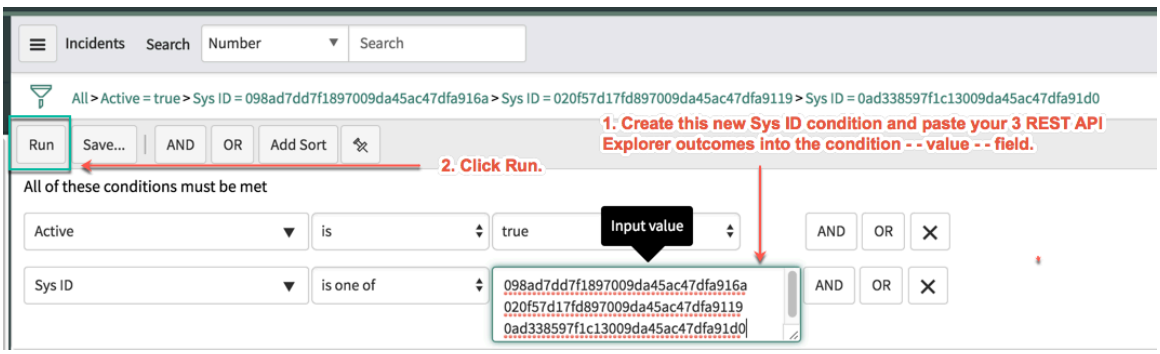
14. In your original browser tab, navigate to **Servicedesk** > **Incidents**.
15. As shown in the image below, set filter conditions for the three REST API outcomes to the Incidents table list view.
    a. Add the Active and Sys ID conditions below to the Incidents list view Filter icon.
    b. Paste the three REST API outcomes into the **Input value** field of the Sys ID condition that you created.
    c. Click **Run**.



16. Per the image below, compare the returned list of incidents with the input for the prediction output in the REST API Explorer.

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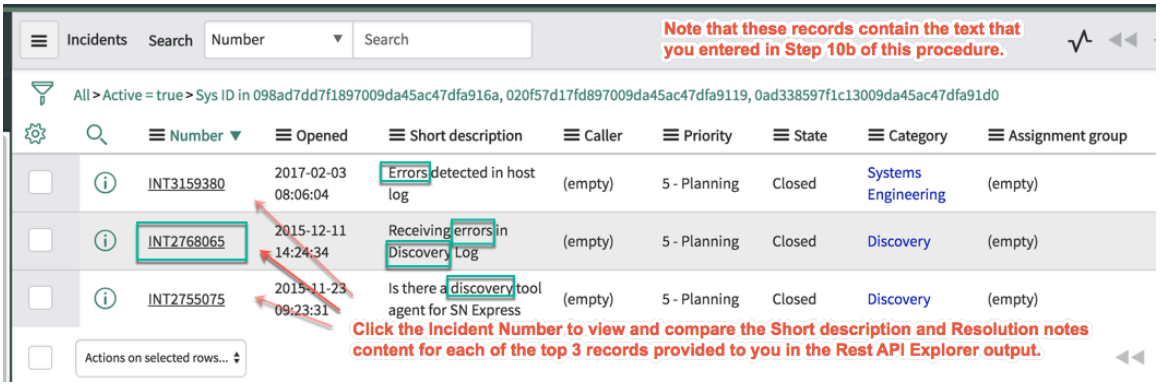
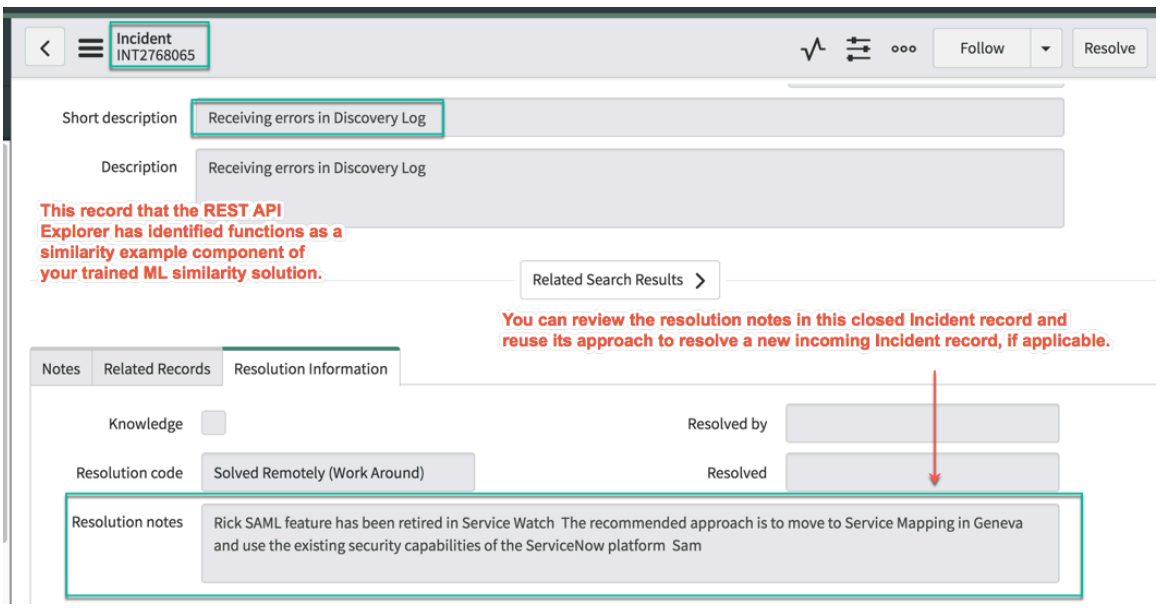
a. Click the Incident Number to open the Incident record.



b. Per the image below, review the Resolution notes text in the Incident record.



Related topics

Predictive Intelligence API

MLPredictor - Global

Track classification prediction results over time

Use the Prediction Results dashboard to determine if classification solution predictions are improving over time. Identify solutions that need refining or retraining.

Before you begin

- Role required: admin, ml_admin, or ml_report_user

About this task

The Prediction Results dashboard reports on coverage, precision, and recall over time for classification solutions.

With the Xanadu release, this dashboard has been migrated to the Next Experience UI. Customers upgrading from previous releases

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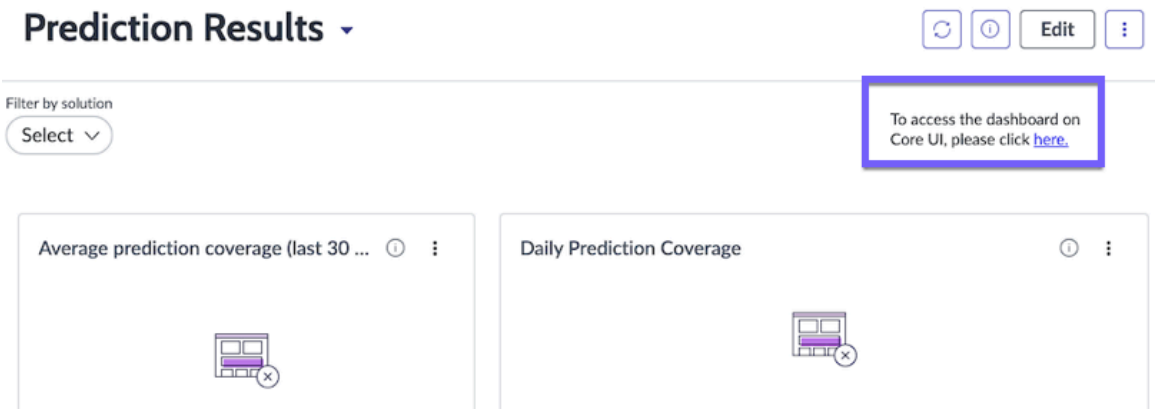
can access the Core UI version from the current dashboard.



On the Prediction Results dashboard, statistics are provided in two timeframes: the average for the past 30 days, and daily. The indicators coverage, precision, and recall are defined as follows.

Prediction Results indicators

Report type	Definition
Coverage	The percentage of predictions that yielded an outcome out of the total number of predictions that were attempted.
Precision	The percentage of predictions where the predicted value was the same as the final value of the field when the report closed.
Recall	The percentage of correct predictions that yielded an outcome out of the total number of predictions that were attempted.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Classification** > **Prediction Results Report**.
2. In the Prediction Results dashboard **Filter by solution** prompt, select the solution statistics you want to review.
   The system updates the dashboard based on the solution you selected.
3. Identify classes with anomalous coverage, precision, or recall values.

   Example
   For example, identify solutions where coverage, precision, or recall is declining over time.

What to do next

Refine the solution definition filter by including or excluding classes as needed. After updating, retrain the solution.

Reviewing prediction errors with the Observability Dashboard

The Observability Dashboard offers a unified view and actionable insights for errors detected in Predictive Intelligence. Use this dashboard to visualize logged errors and gain information on prediction reliability and potential problem areas.

View the PI - Observability Dashboard by navigating to **Predictive Intelligence** > **Dashboards** > **Observability**. The dashboard contains the following widgets.

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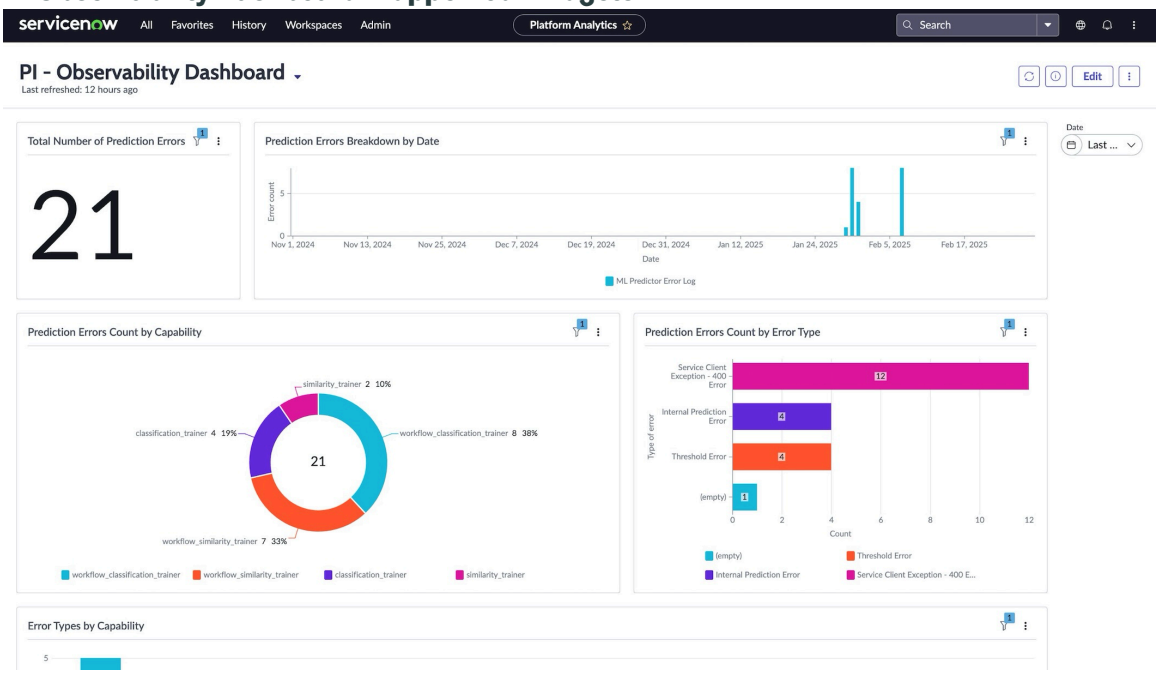
- Total Number of Prediction Errors
- Prediction Errors Breakdown by Date
- Prediction Errors Count by Capability
- Prediction Error Count by Error Type
- Error Types by Capability
- Successful and Unsuccessful Predictions Breakdown by Date

You can drill down to the underlying records from the widget graphics. You can also change the date range of all widgets by selecting **Date** to open the selector.

PI Observability Dashboard — upper four widgets



The PI - Observability Dashboard draws from a table dedicated to logging prediction errors: **ML Predictor Error Logs** [ml_predictor_error_logs].

- Fields in the table include Error Type, Error Message, Status code, Solution, and Capability.
- View this table's records directly by entering `ml_predictor_error_logs.list` in the navigator.
- Roles required to access the table: ml_report_user or ml_admin.

The table logs the following types of granular errors.

- Client-side issues (400 Series) — captures request errors such as timeouts and invalid inputs.
- Server-side issues (500 Series) — tracks internal server errors encountered during prediction.
- Internal prediction failures — identifies instances when the model was unable to generate a prediction.
- Low confidence predictions — records log results falling below a defined confidence threshold.

Note: Errors in training aren't included in this table. For a dashboard reporting on training errors, see Predictive Intelligence Usage Analytics dashboard.

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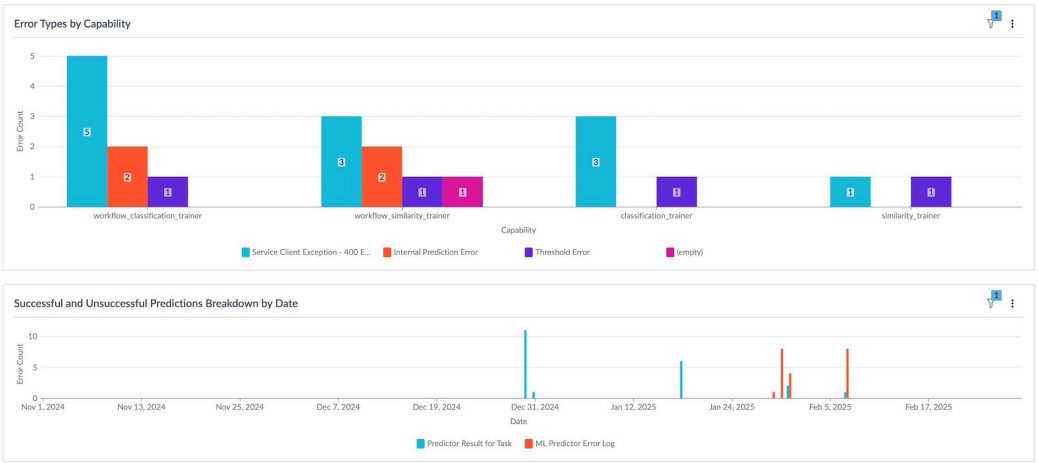
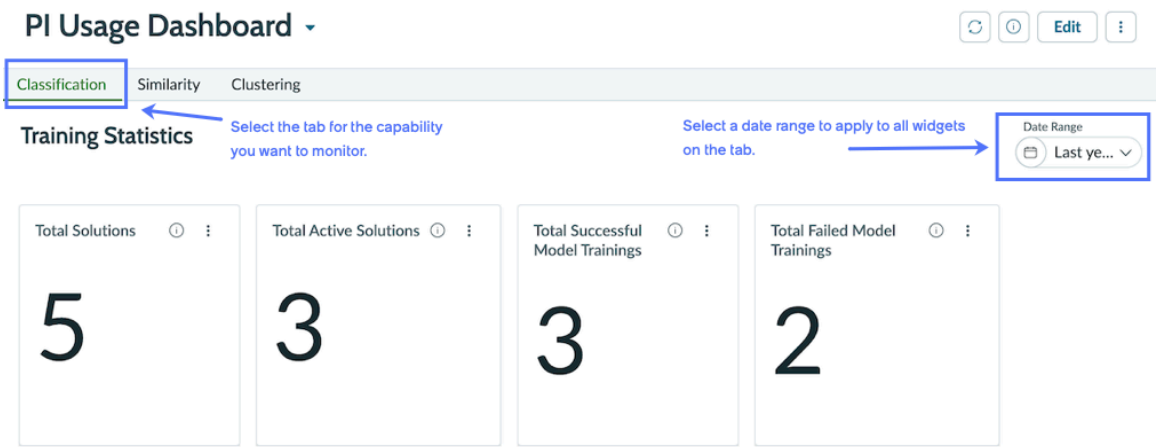
PI Observability Dashboard — lower two widgets



Predictive Intelligence Usage Analytics dashboard

The Predictive Intelligence Usage Analytics dashboard is a central location to understand the effectiveness and overall value of all your Predictive Intelligence solutions. View metrics for model training successes and failures. Monitor prediction statistics including breakdowns by individual model.



For your models in the Classification, Similarity, and Clustering capabilities, the Predictive Intelligence Usage Analytics dashboard gives you visibility into training and predictions. You can specify the time periods to report on, as well as select specific solutions for a deep dive.

With the ml_report_user or ml_admin role, view the Predictive Intelligence Usage Analytics dashboard by navigating to **Predictive Intelligence** > **Dashboards** > **Monitoring**.

The dashboard has separate tabs for each capability. The Classification tab opens by default, or you can select Similarity or Clustering. Each tab contains a set of reports in the form of widgets.

You can drill down into the underlying records by selecting a report's chart or graph, which opens a query-filtered list. Many reports in the Training Statistics section of PI Usage Dashboard are drawn from the ml_solution table. Reports in the Prediction Statistics section are drawn from the ml_predictor_results table.

Date Range

The **Date Range** selector opens a calendar picker where you can select the time frame for the reports. Your selected date range applies to all widgets on the current tab.

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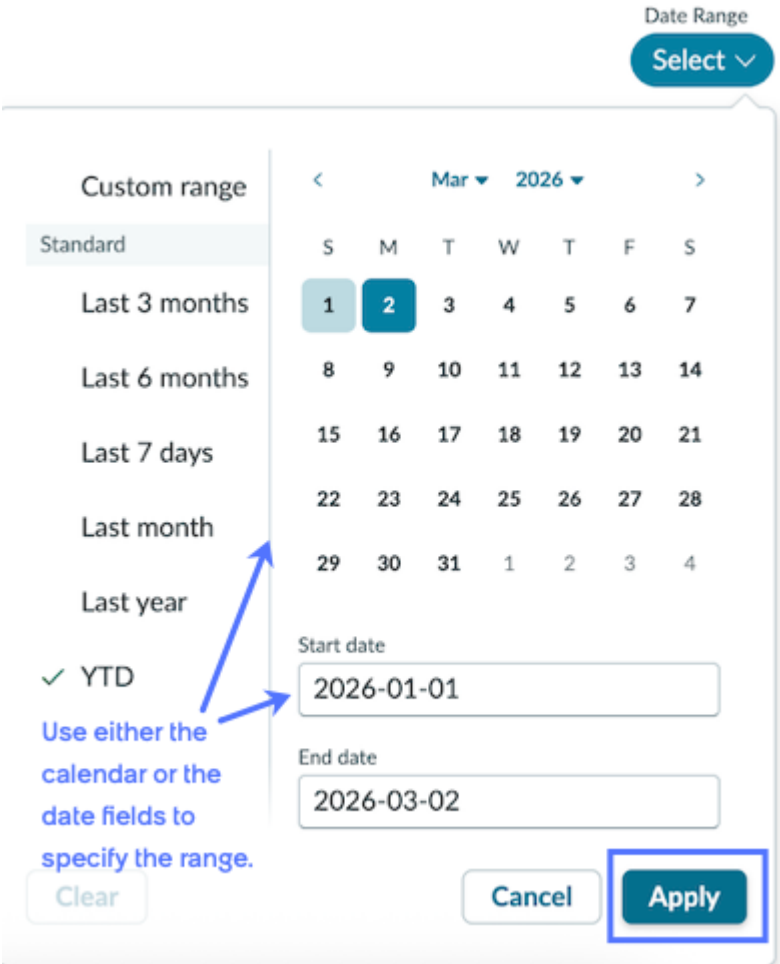
The calendar picker offers a variety of preset dates under its **Standard** subhead. Choose from **Last 3 months**, **Today**, **YTD** (year to date, from January 1 of the current calendar year), and so forth.

You can also choose **Custom range** to select your own dates. Enter dates directly into the **Start date** and **End date** fields, or select a date range using the calendar. Then select **Apply** to update the reports in all widgets on the page.



Available metrics for Classification and Similarity

The following tables describe the widgets available on both the Classification and Similarity tabs, unless otherwise noted. The Clustering capability has different widgets, so refer to the **Available metrics for Clustering** section on this page.

Widgets available in Training Statistics for Classification and Similarity solutions

Widget	Description
Total Solutions	Total number of Classification (or Similarity) solutions created.
Total Active Solutions	Total number of Classification (or Similarity) solutions that are active.
Total Successful Model Trainings	The number of Classification (or Similarity) jobs that have been successfully completed in the instance.

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Widgets available in Training Statistics for Classification and Similarity solutions (continued)

Widget	Description
Total Failed Model Trainings	The number of Classification (or Similarity) jobs that have failed in the instance.
Trained Solutions - By Month	Total trained Classification (or Similarity) solutions aggregated monthly.
Active Solutions - By Month	Total active Classification (or Similarity) solutions aggregated monthly.
Classification (or Similarity) Training Status	The distribution of Classification (or Similarity) model training states.
Active Status Distribution	The distribution of active versus inactive records. The "true" portion indicates active items, while "false" represents inactive ones.
Training Frequency Distribution	The training frequency distribution across all Classification (or Similarity) solutions. The available options range from **Run once** up to **Every 180 days**.
Update Frequency Distribution (Similarity only)	The update frequency distribution across all similarity solutions. The available options range from **Run once** up to **Every 180 days**.

Prediction Statistics

Widget	Description
Total Successful Predictions - By Month	Count of total Classification (or Similarity) predictions calculated per month.
Total Successful Predictions	Total number of successful predictions made on all Classification (or Similarity) solutions.
Total Failed predictions	Total number of failed predictions made on all Classification (or Similarity) solutions.

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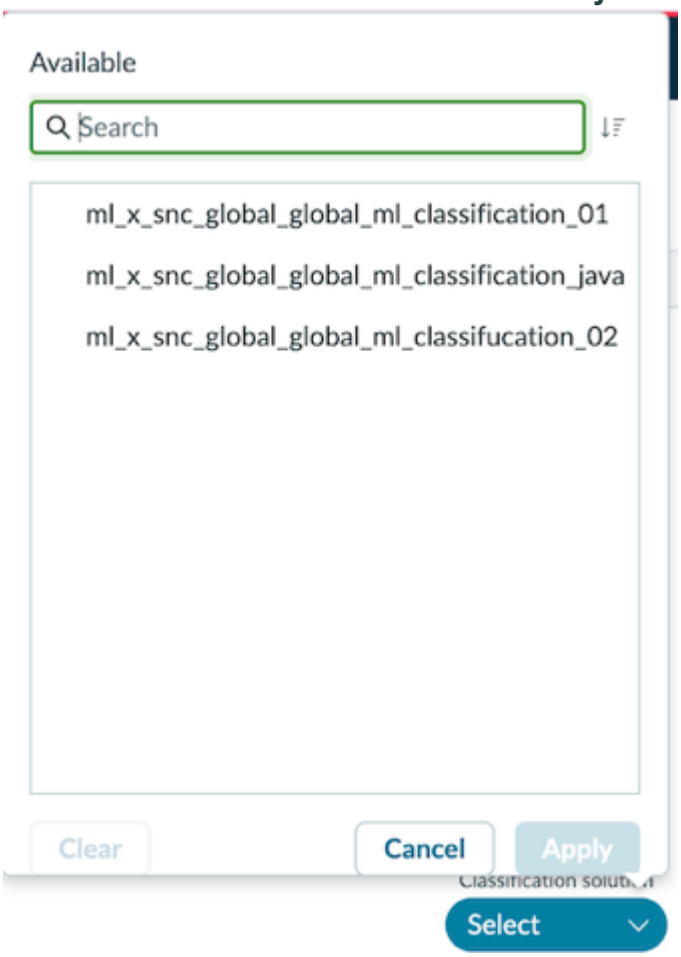
Solution selector for Classification or Similarity



For the following widgets, use the selector labeled **Classification solution** or **Similarity solution** to choose an individual model.

Selected Active Classification Solution Details

Widget	Description
Successful Predictions per Solution	The number of successful predictions for the selected Classification (or Similarity) solution.
Failed Predictions per Solution	The number of failed predictions for the selected Classification (or Similarity) solution.

Available metrics for Clustering

The following table describes metrics available on the Clustering tab of the Predictive Intelligence Usage Analytics dashboard.

Training statistics for Clustering

Widget	Description
Total Solutions	The total number of clustering solutions created in the instance.
Total Active Solutions	The number of active clustering solutions in the instance.

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Training statistics for Clustering (continued)

Widget	Description
Total Successful Model Trainings	The number of clustering jobs that have been successfully completed in the instance.
Total Failed Model Trainings	The number of clustering jobs that have failed in the instance.
Trained Solutions - By Month	The number of clustering trainings triggered per month.
Active Solutions - By Month	The number of active clustering solutions trained per month.
Clustering Training Status	A pie chart showing the training status distribution across all clustering solutions in the instance.
Active Status Distribution	A pie chart showing the distribution of active and inactive clustering solutions.
Training Frequency Distribution	The percentage of training frequencies set across the clustering solutions.
Update Frequency Distribution	The percentage of update frequencies set across the clustering solutions.

For the following widgets, use the selector labeled **Clustering solution** on the Clustering tab to pick an individual model.

Selected Cluster Solution Breakdown

Widget	Description
Cluster details	The details of each cluster created in the specified solution.
Number of clusters	The number of clusters created in the specified clustering solution.
Total Records Clustered	The total number of records clustered in the specified clustering solution.
Number of updates completed (in last 7 days)	The number of update jobs completed for a specified clustering solution.
Details of Last Update (in last 7 days)	When the clustering solution was last updated, number of new clusters created, records assigned to existing clusters, and new clusters in the last update.

Related topics

- Reviewing prediction errors with the Observability Dashboard
- Track classification prediction results over time

Predictive Intelligence references

Reference pages for components of Predictive Intelligence.

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Domain separation and Predictive Intelligence

Domain separation is supported in the Predictive Intelligence application. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Standard

- Includes all aspects of **Basic** level support.
- Application properties are domain-aware as needed.
- Business logic: The service provider (SP) creates or modifies processes per customer. The use cases reflect proper use of the application by multiple SP customers in a single instance.
- The instance owner must configure the minimum viable product (MVP) business logic and data parameters per tenant as expected for the specific application.

Sample use case: An admin must be able to make comments required when a record closes for one tenant, but not for another.

For more information on support levels, see Application support for domain separation.

Overview of domain separation and Predictive Intelligence

With Predictive Intelligence, you can create machine learning solutions using historic datasets. A machine learning solution is created and trained in the global domain, and that solution's predictions can be applied in any domain on the instance.

Similarity solutions are domain-aware when applied in your forms and flows, so records from other domains on the instance are not displayed to users. For more information, see KB article Similarity prediction behavior in domain separated environment on Now Support.

How domain separation works in Predictive Intelligence

An instance owner can train a machine learning (ML) solution for each domain by creating a solution definition for each domain and training those solutions. In this way each solution uses data specific to the corresponding domain.

- Data can be domain separated
- Domain column is present for base system application tables
- Domain-specific configuration is managed by instance owner
- Tenant domains can manage their own application data
- Application properties are domain-aware when needed

Related topics

Domain separation for service providers

Data Encryption in Predictive Intelligence

Learn which types of encryption are supported for training Predictive Intelligence solutions.

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Predictive Intelligence support for encrypted training data

Encryption type	Supported	Notes
Field Encryption	Yes	Ensure the sharedservice.worker user has the same encryption module role that's been used for encryption.
Edge Encryption	No	None.
FDE (Full Disc Encryption)	Yes	None.

Predictive Intelligence language support

Predictive Intelligence provides international language support. Learn which languages are available to Predictive Intelligence solutions.

When you create a Predictive Intelligence solution, you can choose the language you want the system to use for processing your training records. English is the default language.

For an example of how to assign a language to a solution, see the Processing Language section in Step 3 of the Create and train a classification solution documentation.

You can also create custom stopwords lists for a language. For more information, see Create a custom stopwords list.

Language support coverage

The current available languages for Predictive Intelligence solutions and stopwords lists are as follows: Brazilian Portuguese, Chinese (simplified), Danish, Dutch, English, Finnish, French, French Canadian, German, Italian, Japanese, Korean, Norwegian, Polish, Portuguese, Spanish, and Swedish.

Predictive Intelligence properties

The properties for Predictive Intelligence control certain parameters of its machine-learning solutions, solution training process, and caching.

Using the maint role, navigate to **Predictive Intelligence** > **Configuration** to review or edit.

Note: Most of the properties related to training require the maint role to review or edit. Some properties may require other roles.

Predictive Intelligence properties

Property	Property Name	Description
Override ml_solution_definition record's readonly state during training	glide.platform_ml.override_training_lock	• True: Overrides the **readonly** state during training, enabling you to edit ml_solution_definition. • False: ml_solution_definition remains in the **readonly** state.

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Predictive Intelligence properties (continued)

Property	Property Name	Description
Minimum number of records for Regression	glide.platform_ml.api.min_regression_records	Sets the minimum number of records required for Regression solution training. • Type: Integer • Default value: 10000 **Note:** Support for new regression solutions is deprecated as of the Washington DC release. You can edit and train any existing solutions, but you can't create new ones.
Maximum number of records for Regression	glide.platform_ml.api.max_regression_records	Sets the maximum number of records that can be used in Regression solution training. • Type: Integer • Default value: 300000 **Note:** Support for new regression solutions is deprecated as of the Washington DC release. You can edit and train any existing solutions, but you can't create new ones.
The time (in ms) an in-training solution will wait without updates before timing out	glide.platform_ml.training_timeout	Sets the time-out time in milliseconds for an in-training solution. • Type: Integer • Default value: 21600000 (ms)

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Predictive Intelligence properties (continued)

Property	Property Name	Description
Maximum model size	glide.platform_ml.api.model_size	Sets the maximum number of records you can use to train a model. • Type: Integer • Default value: 524288000
Maximum number of records used in training	glide.platform_ml.api.csv_max_line	Sets the maximum number of records that can be used in Classification solution training. • Type: Integer • Default value: 300000
Minimum number of records used in training	glide.platform_ml.api.csv_min_line	Sets the minimum number of records required for Classification solution training. • Type: Integer • Default value: 10000
Maximum number of days worth of records on request can retrieve	glide.platform_ml.api.csv_split_days	Sets the maximum number of days a single request can retrieve from your records. • Type: Integer • Default value: 30
Maximum number of records per table for word corpus	glide.platform_ml.api.max_wordcorpus_records	Sets the maximum number of records per table for Word Corpus creation for Similarity and Clustering solutions. • Type: Integer • Default value: 300000

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Predictive Intelligence properties (continued)

Property	Property Name	Description
		Note: With the Washington DC release, classification, clustering and similarity solutions use Workflow solutions. These are pre-trained so a word corpus isn't needed. The Word Corpus field is removed from Workflow solution forms.
Maximum number of records for similarity window (to lookup results)	glide.platform_ml.api.max_similarity_window_records	Sets the maximum number of records that the Similarity Window can retrieve to look up results. • Type: Integer • Default value: 100000
Maximum number of records for Clustering	glide.platform_ml.api.max_clustering_records	Sets the maximum number of records you can include in a cluster. • Type: Integer • Default value: 100000
ML Trainer - Glide communication KAA	glide.platform_ml.kaa_auth_enabled	The KAA validation to the ML Trainer server occurs only if mTLS is enabled on the instance. If this property is enabled but mTLS isn't enabled, the KAA validation is skipped. For more information see KB2977679 on the Now Support portal. • Type: Boolean • Default value:true (from the Australia release)

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Shared Service Scheduler

Property	Property Name
Shared service scheduler url	glide.shared_service_scheduler.url

Machine Learning Artifacts

Property	Property Name
Maximum number of artifacts cached (in MB)	glide.cache.size.ml_object_cache
Artifact cache compression scheme	glide.platform_ml.artifact.cache_compression_scheme

Predictive Intelligence roles

Predictive Intelligence is installed with these roles.

To learn more about managing per-user subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

ML Admin [ml_admin]

Can create, read, write or delete the ml_predictor_results table and the ml_predictor_results_task table.

Contains Roles

List of roles contained within the role.

- *pa_data_collector*
- *pa_viewer*

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Avoid granting an admin role when more specialized roles are available.

ML Labeler [ml_labeler]

Can create, read, write or delete the ml_label_candidate table.

Contains Roles

List of roles contained within the role.

- *sn_ace.ace_user*
- *nlu_user*

Groups

List of groups this role is assigned to by default.

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None.

Special considerations

None.

ML Report User [ml_report_user]

Can read the ml_predictor_results table and the ml_predictor_results_task table.

Contains Roles

List of roles contained within the role.

pa_viewer

Groups

List of groups this role is assigned to by default.

None.

Special considerations

None.

Task Intelligence

Task Intelligence uses machine learning to train solutions with your data and achieve important outcomes.

Overview of Task Intelligence

Task Intelligence enables you to set up machine learning models to automate task creation, triage, and investigation. You can then track and assess the performance of your solutions to optimize their potential to help you work more efficiently and lowering the mean time to resolve (MTTR).

Get started

Explore	Install	Configure
Explore Task Intelligence and machine learning models.	Install Task Intelligence and related applications.	Configure machine learning models.

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Create models	Analyze models	References
Create and edit Task Intelligence models.	Monitor and analyze model performance.	References for components installed with Task Intelligence and language support.

Troubleshoot and get help

- Search the Now Community portal for AI & Intelligence
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Task Intelligence

Learn more about Task Intelligence and how machine learning models can learn from your data to make predictions and achieve important outcomes.

Task Intelligence overview

With Task Intelligence, you can easily set up machine learning solutions that interact with your data. Then, track how the solutions are impacting creation, deflection, triage, remediation, and optimization moments. With automated task creation, triage, and investigation, agents spend less time receiving and preparing information, so tasks can proceed faster. These models can help you work more efficiently, helping to lower the mean time to resolve (MTTR) of tasks.

With Task Intelligence, agents:

- Solve issues faster for better service and experiences
- Focus on meaningful, high-value work
- Reduce error rates and drive down costs
- Improve time to value with intuitive experiences

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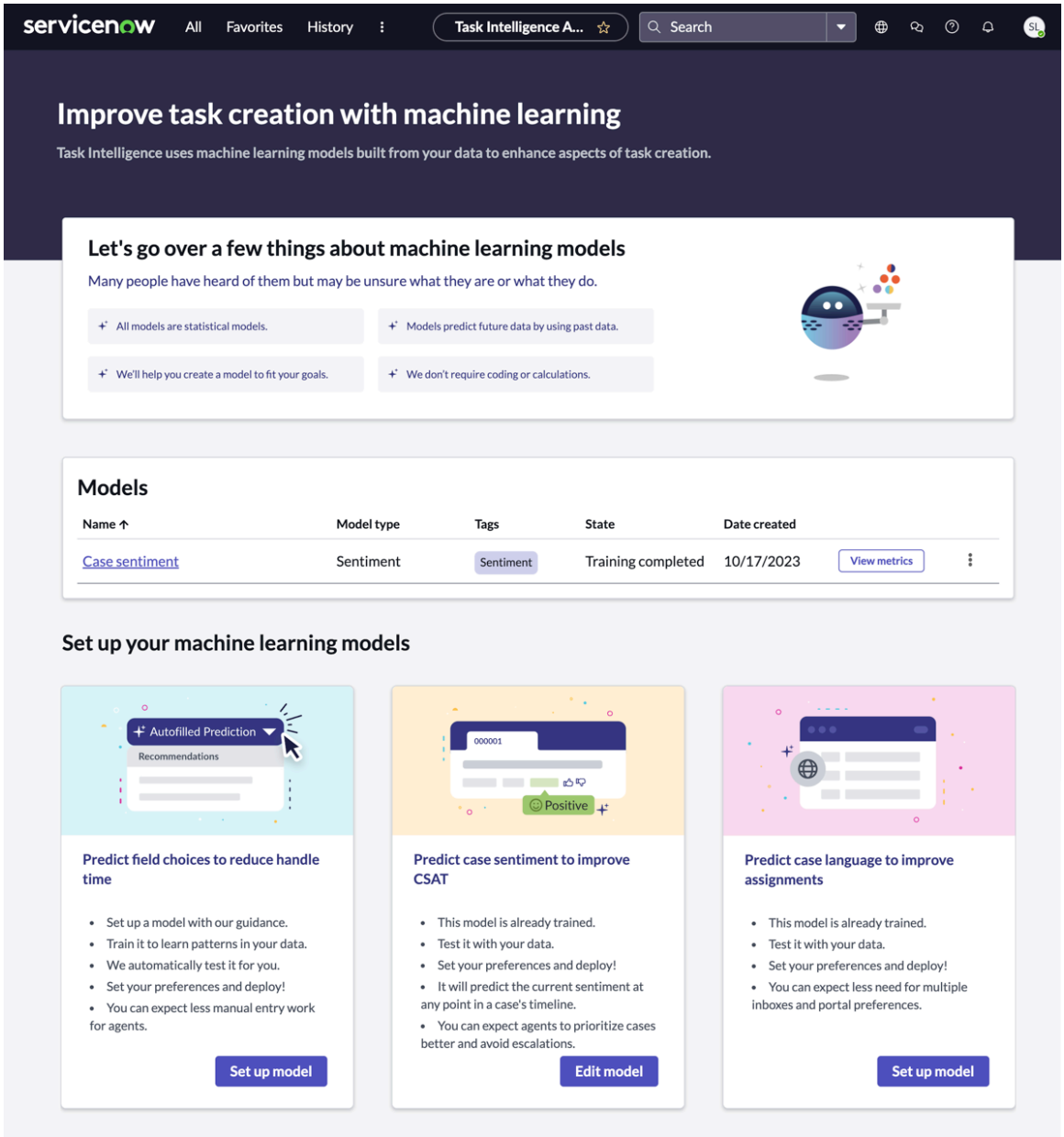

The Admin Console supports the following model types:

Model	Application	Description
Incident field prediction	Task Intelligence for ITSM	Create an incident field prediction model
Similarity model management	Task Intelligence for ITSM	Create a similar records prediction model in Task Intelligence for ITSM
Case field prediction	Task Intelligence for CSM	Predicts output fields on case forms, including categorization. Record categorization

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Model	Application	Description
Sentiment prediction	Task Intelligence for CSM	Predicts current and trending user sentiment. **Note:** Model is pre-trained but can be tested and edited. Only one sentiment model can be configured.
Language detection	Task Intelligence for CSM	Detects language which language is being used. **Note:** Model is pre-trained but can be tested and edited. Only one language detection model can be configured.

Task Intelligence workflow

The Task Intelligence Admin Console uses machine learning models. The models are statistical and can predict future data by training with your past data.

With the Admin Console, create, configure, train, test, and deploy predictive models used for automation in other ServiceNow features and applications, such as Customer Service Management (CSM).

Training a machine learning model is when the model learns patterns in past data to make predictions for new data. Models are trained using a lot of data so that they can learn patterns and the large data set makes the learned patterns statistically significant. By answering questions about your information systems, business process, and service operations, the system actively learns from your responses.

Task Intelligence benefits

The Task Intelligence Admin Console provides admins with a no-code experience for deploying Task Intelligence solutions. The seamless experience helps you automate and optimize task creation, deflection, triaging, and resolution.

Features are implemented by two applications: Task Intelligence for Customer Service and Task Intelligence for ITSM.

Benefit	Feature	Users
Predict form field values to auto-populate or recommend as suggestions	Create a field prediction model	Admins, agents
Categorize emails and cases based on language and attachment content	Record categorization	Agents
Predict incident category and priority based on previous incidents to lower time to resolution	Create an incident prediction model	Agents
Analyze initial and ongoing sentiment during customer service cases	Sentiment Analysis	Agents
Identify the language used to create customer service cases	Language detection	Agents

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Benefit	Feature	Users
Analyze and assess the performance of models	Task Intelligence Analytics and Monitoring	Admins

Configure Task Intelligence

Configure and install the Task Intelligence Admin Console and its related applications.

Configuration overview

The Task Intelligence Admin Console is installed along with Task Intelligence for CSM or Task Intelligence for ITSM. See Install Task Intelligence Admin Console for more details.

Configure Task Intelligence for ITSM

Configure Task Intelligence for ITSM so that agents can use the application to fulfill their requirements efficiently.

Configure Task Intelligence for Customer Service

Install the Task Intelligence for Customer Service application and configure the different features: case categorization, language detection, sentiment analysis, and Document Intelligence for Customer Service.

Install Task Intelligence Admin Console

You can install the Task Intelligence application (sn_ti_admin) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Task Intelligence Admin Console application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Task Intelligence Admin Console:

- Roles
- Tables

For more information, see Task Intelligence roles.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Task Intelligence Admin Console application (sn_ti_admin) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

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In the list next to the **Install** button, the versions that are available to you are displayed.

3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Manage machine learning models with Task Intelligence

Create, edit, train, and assess machine learning models to make predictions for customer service cases and incidents.

Managing Task Intelligence for ITSM models

Use the machine learning capabilities of Task Intelligence for ITSM to predict and recommend incident field information and help with incident categorization.

Use Task Intelligence for Customer Service

Use the Task Intelligence features to create field prediction and sentiment models for cases, and review Task Intelligence analytics and prediction history.

Create a Task Intelligence model

Create machine learning models to predict field values, analyze case sentiment, or detect case language.

Create a model to predict incident fields

Create and deploy incident-prediction, solution-based models to predict incident fields for new IT service incidents.

Create a model to predict record fields

Create and train a model to predict fields for customer service cases.

Edit a Task Intelligence model

Retrain your machine learning models or edit what they predict to better align with your business goals.

Edit a model to predict incident fields

Edit the incident prediction model that has already been trained and deployed. Change the model configurations, view the updated training results, and redeploy the model.

Create and edit a case field prediction model

Create, train, and edit a model to predict fields for customer service cases.

Create a model to predict case sentiment

Edit and test the pre-trained sentiment model to predict sentiment for customer service cases.

Create a model to detect case language

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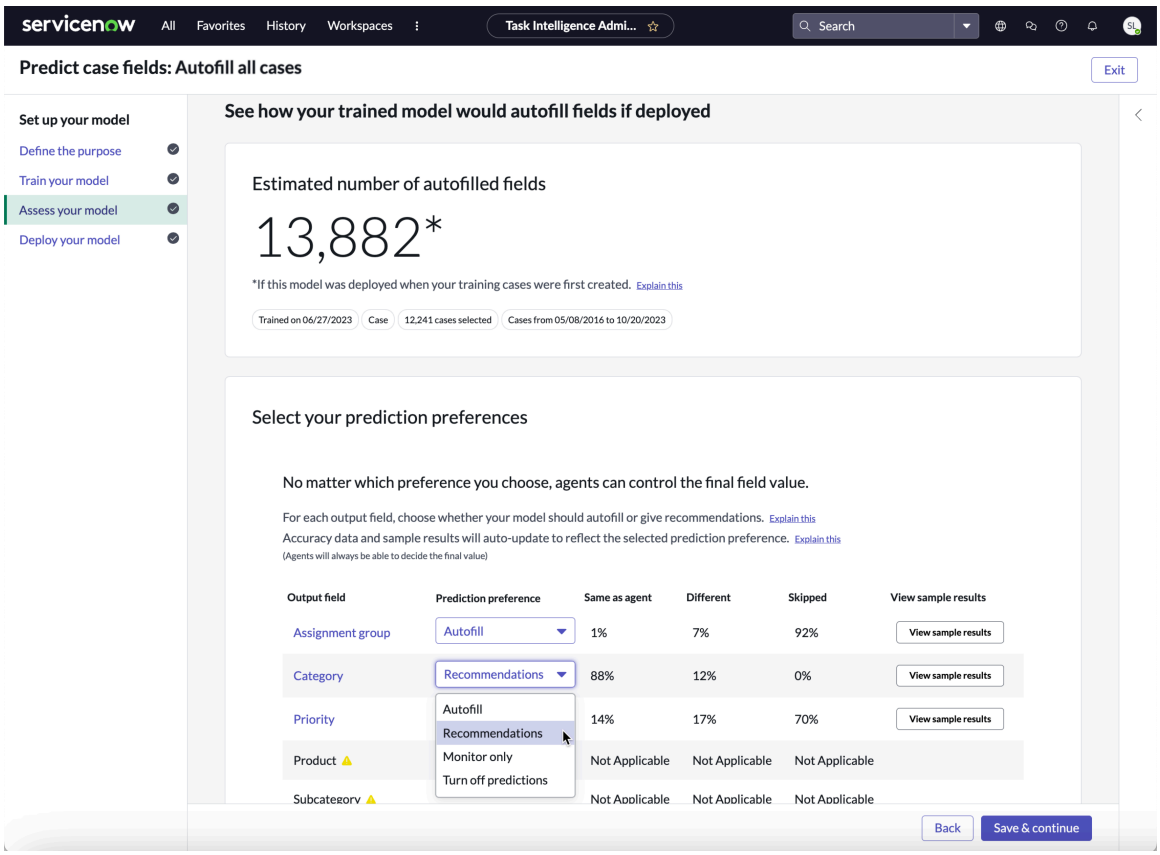
Edit and test the pre-trained model to detect the language used to create customer service cases.

Assess a Task Intelligence model

Assessing a machine learning model's performance helps determine how to use and train the model to achieve your desired outcomes.

The Assess Your Model screen allows you to evaluate the model's performance. After training or retraining your model, the Assess Your Model screen will show an estimate of the model's average performance against your most recent data.

Note: It is normal to see some variability in model performance from day to day. Performance tends to average out to the estimated performance over time.



The Assess Your Model screen also allows you to view example predictions on a sample of records. These examples demonstrate the predictions but do not necessarily reflect the quality or average performance of the model. The estimates provided on the Assess Your Model screen as well as the reports on the **Monitoring** page are calculated from a much larger number of cases.

You can also use the Assess Your Model screen to choose one of the following preferences for each field:

- **Autofill** the predicted value in the field.
- **Recommendations** are provided for the predicted value in the field.
- **Monitor only** and run the prediction model for the field only in the background.
- **Turn off predictions** for the field.

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Monitoring mode

Monitoring mode allows you to monitor the performance of a model at the field level without the predictions being applied to records. The model runs in the background only and can be trained and retrained until you are satisfied with its performance. You can set the model fields to Monitoring mode from the Assess Your Model screen when editing your model.

You can view and track model performance with the Task Intelligence Admin Console. See Task Intelligence Analytics and Monitoring.

Assess field-level accuracy for multi-output models

Evaluate the performance of your model by field.

Before you begin

Role required: admin

About this task

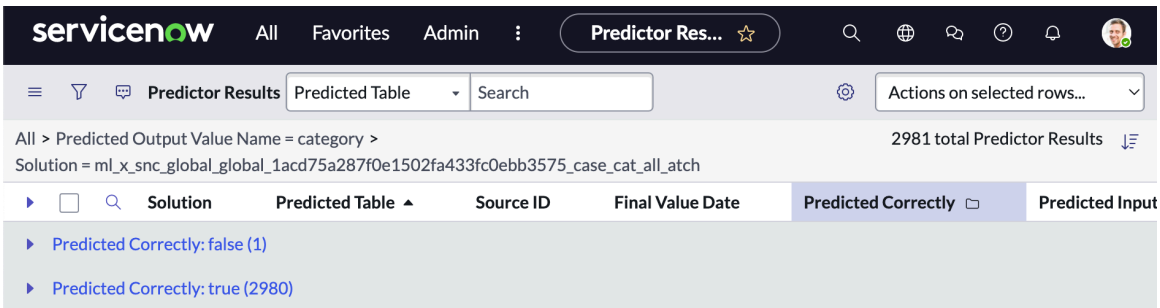
After you have created and tested your model, assess its performance to evaluate how well it's predicting what you want it to predict. For multi-output models that predict multiple fields, you may want to assess the performance of each field individually.

If you have not already created a model, see either Create a model to predict record fields or Create a model to predict incident fields to make one.

Your model must be in Monitoring mode. You can set Monitoring mode on the Assess Your Model screen. For more details, see the Set your preferences step in Create a case field prediction model or Create a model to predict incident fields model.

Procedure

1. Navigate to the **Predictor Results** (ml_predictor_results_task) by entering `ml_predictor_results_task.list` in the Application navigator.
2. Filter the **Predicted Output Value Name** for the name of the field you want to assess, such as "product" or "category."
3. Group the list by **Predicted Correctly** by selecting the list controls icon in the top left corner of the screen.



4. Divide the number of records where **Predicted Correctly** is **true** by the total number of records. This represents your accuracy for the specific field.
5. Follow steps 2-4 for each field in which you would like to calculate the accuracy.
6. **Optional:** View the performance of your model on the Monitoring screen.

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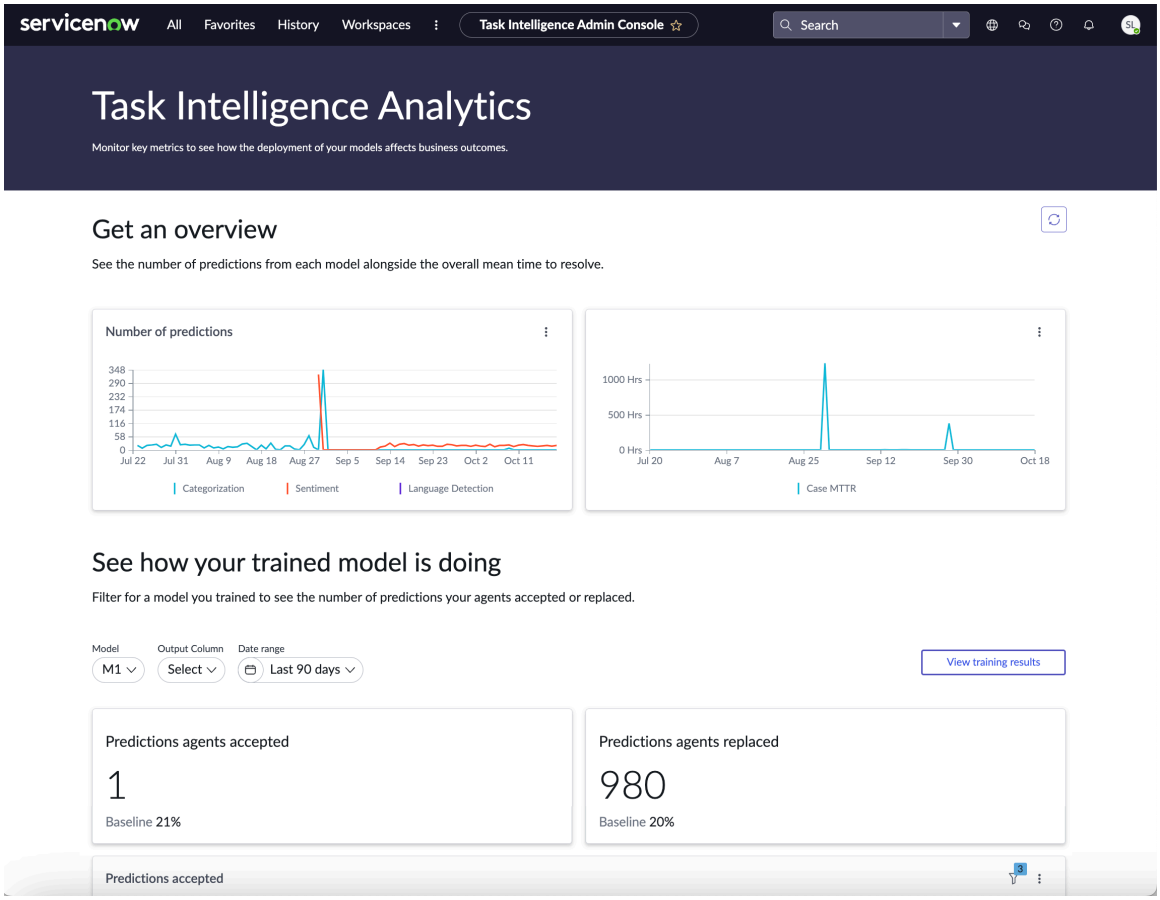
a. Navigate to **Task Intelligence for Customer Service** > **Monitoring** in the Application navigator.

(Optional) The Monitoring screen allows you to select the model, field, and date range to display in the charts. Accuracy is measured based on whether the top autofilled value or the top 3 recommendations are correct.



b. Select a model.

c. Select an output column for the field.

d. Select a date range.

What to do next

If the accuracy of each field is acceptable, transition your model from monitoring mode to real-time predictions and deploy. If the accuracy of a specific field is not acceptable, you can remove that output field from your model, retrain, and deploy. See Edit a Task Intelligence model for more information on editing your model.

Task Intelligence Analytics and Monitoring

Use the Task Intelligence Admin Console to monitor, analyze, and assess the performance of your machine learning model.

Task Intelligence for ITSM Analytics and Monitoring

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View the impacts of your Task Intelligence models. Monitor model performance overtime, track business value, and view what predictions your agents did and didn't use.

View Analytics for Task Intelligence for CSM

View Task Intelligence for Customer Service analytics and see how your machine learning models are working.

View Task Intelligence prediction history

View details about historical predictions in the Predictor Results for CSM models.

Export a Task Intelligence model

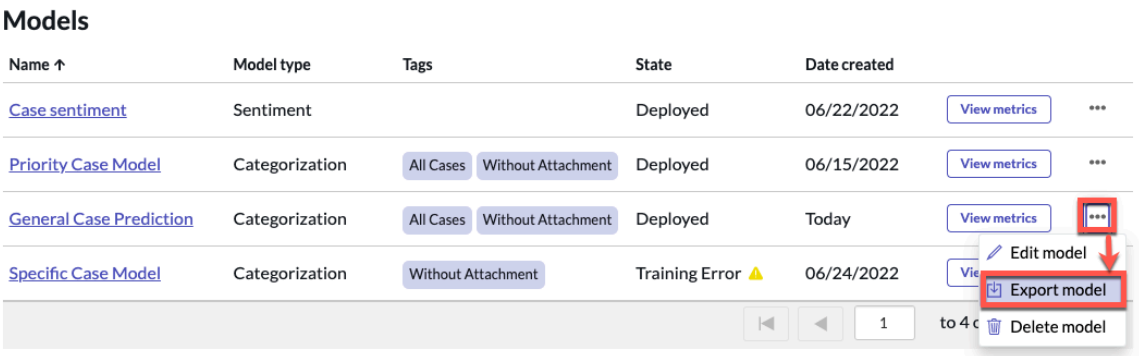
Export a Task Intelligence model to another instance.

Before you begin

Role required: admin or tia_admin

Procedure

1. Navigate to **All** > **Task Intelligence for CSM** > **Setup** or **All** > **Task Intelligence for ITSM** > **Setup**, depending on which application and context you want to export for.
2. In the **Models** list, click the more options menu of the model you want to export.



3. Click **Export model**.
   A new tab opens with authentication steps.
4. Click **Allow**.

Result

The XML file downloads to your browser.

What to do next

You can use the XML file to easily transfer the model to another instance using update sets. To learn more, see System update sets.

Task Intelligence references

Reference topics provide additional information about components installed and language detection details.

Task Intelligence roles

Reference for user roles that are installed with activation of the sn_ti_admin plugin.

Reference for Task Intelligence for ITSM

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Reference topics provide additional information about components installed with Task Intelligence for ITSM.

View Task Intelligence Analytics

View Task Intelligence for Customer Service analytics and see how your machine learning models are working.

Languages supported by Task Intelligence

The language detection feature for Task Intelligence for CSM supports 22 different languages.

Task Intelligence roles

Task Intelligence is installed with these roles.

To learn more about managing per-user subscriptions, see Managing per-user subscriptions in Subscription Management and contact your account representative.

Task Intelligence Admin [tia_admin]

Admin user with rights to all actions in the application. Creates, edits, and monitors all Task Intelligence models.

Contains Roles

List of roles contained within the role.

- ml_admin
- platform_ml_read

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Important: Avoid granting an admin role when more specialized roles are available.

Task Intelligence User [tia_user]

Views and monitors Task Intelligence models. Requires additional accesses to see training.

Contains Roles

List of roles contained within the role: ml_report_user.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Important: Avoid granting an admin role when more specialized roles are available.

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Task Intelligence Analyst [tia_analyst]

Monitors Task Intelligence models through the Analytics dashboard.

Contains Roles

List of roles contained within the role: ml_admin.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

Important: Avoid granting an admin role when more specialized roles are available.

Languages supported by Task Intelligence

The Task Intelligence application provides support for predictions in different languages.

Each of the supported languages has an associated two-character code. For example, `English - en`.

The following table lists the languages supported for Task Intelligence along with the models they support.

Note: Only languages included in the training dataset are supported.

Language name	Language code	Incident fields (ITSM)	Case fields (CSM)	Sentiment prediction (CSM)	Language detection (CSM)
Arabic	ar				X
Brazilian Portuguese	pb	X			
Chinese (simplified)	zh	X			X
Czech	cs				X
Danish	da	X			
Dutch	nl	X			X
English	en	X	X	X	X
Estonian	et				X
Finnish	fi	X			X
French	fr	X	X		X
French Canadian	fq	X			
German	de	X	X		X
Hebrew	he				X

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Language name	Language code	Incident fields (ITSM)	Case fields (CSM)	Sentiment prediction (CSM)	Language detection (CSM)
Hungarian	hu				X
Italian	it	X			X
Japanese	ja	X			X
Korean	ko	X			X
Norwegian	nb	X			X
Polish	pl	X			X
Portuguese	pt	X			X
Russian	ru				X
Spanish	es	X	X		X
Swedish	sv	X			X
Thai	th				X
Turkish	tr				X

Additional resources for AI products and solutions

If you're looking for AI best practices, troubleshooting, or other implementation guidelines, select a feature or resource type to discover ServiceNow resources on other relevant websites.

Resource links

AI features or products	Resource type	Resources
AI Agents	Release Notes	Now Assist AI Agents Release Notes.
AI Agents	Getting started	Getting started with AI Agents. Identifying agentic workflows.
AI Agents	Best practices	Build custom skills Assess the AI agents' and agentic workflows' performance
AI Agents	Glossary	AI glossary
AI Agents	Training	AI Agents Essentials (2025 Q1 Store Release) AI Agent Readiness AI Essentials Initiating AI Agents

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Resource links (continued)

AI features or products	Resource type	Resources
		Introduction to Agentic AI Now Assist AI Agents learning path
AI Control Tower	Release notes	https://www.servicenow.com/docs/access?context=ai-control-tower-rn&version=brazil&pubname=brazil-release-notes&ft:locale=en-US
AI Control Tower	Getting started	Overview of Advanced AI and Data Products
Document Intelligence	Release notes	
Document Intelligence	Getting started	Getting started with Document Intelligence Document Intelligence quick start guide (ServiceNow Community)
Document Intelligence	Tips and examples	Document Intelligence examples
Document Intelligence	Troubleshooting	Troubleshooting and best practices for Document Intelligence
Document Intelligence	FAQs	Document Intelligence FAQs
Document Intelligence	Training	Document Intelligence Overview Document Intelligence Fundamentals
Natural Language Understanding and Natural Language Query	Getting started	Getting started with NLU NLU quick start guide (ServiceNow Community)
Natural Language Understanding and Natural Language Query	Best practices	Best practices for NLU
Natural Language Understanding and Natural Language Query	Tips and examples	NLU examples

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Resource links (continued)

AI features or products	Resource type	Resources
Natural Language Understanding and Natural Language Query	Troubleshooting	Troubleshooting for NLU
Natural Language Understanding and Natural Language Query	FAQs	NLU FAQs
Natural Language Understanding and Natural Language Query	Training	Natural Language Understanding (NLU) Fundamentals
Now Assist	Release notes	https://www.servicenow.com/docs/access?context=now-assist-for-itsm-rn&version=brazil&pubname=brazil-release-notes&ft:locale=en-US
Now Assist	Getting started	Getting Started with Now Assist (YouTube) Getting started with Now Assist for Code (YouTube) Getting Started with Now Assist for Creator (YouTube) Getting Started with Now Assist for CSM (YouTube) Getting Started with Now Assist for ITSM (YouTube) Getting Started with Now Assist for AI Search (YouTube) Now Assist quick start guide (ServiceNow Community) Now Assist for Code quick start guide (ServiceNow Community)

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Resource links (continued)

AI features or products	Resource type	Resources
		Now Assist panel fundamentals (YouTube)
Now Assist	Best practices	Now Assist best practices (ServiceNow Community) Knowledge article best practices (ServiceNow Community)
Now Assist	Tips and examples	Now Assist conversational catalog request in practice (ServiceNow Community) Now Assist examples
Now Assist	FAQs	Generative AI Controller FAQ Now Assist FAQ Now Assist in AI Search FAQ
Now Assist	Training	AI Builder Fundamentals Introduction to Generative AI Now Assist Essentials (November 2024 Store Release) Now Assist in Virtual Agent Implementation (November 2023 Store Release) Now Assist in Virtual Agent Implementation (August 2024 Store Release) Now Assist in Search Implementation (Nov 2023 Store Release) Now Assist in Search Implementation (Feb 2024 Store Release) Now Assist for Creator Implementer Now Assist for Field Service Management (FSM) Implementer Now Assist for Customer Service Management (CSM) Implementer Now Assist for HR Service Delivery (HRSD) Implementer Now Assist for IT Service Management (ITSM) Implementer

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Resource links (continued)

AI features or products	Resource type	Resources
Predictive Intelligence	Release notes	https://www.servicenow.com/docs/access?context=predictive-intelligence-rn&version=brazil&pubname=brazil-release-notes&ft:locale=en-US
Predictive Intelligence	Getting started	Getting started with Predictive Intelligence Predictive Intelligence quick start guide (ServiceNow Community)
Predictive Intelligence	Best practices	Predictive Intelligence best practices
Predictive Intelligence	Tips and examples	Predictive Intelligence examples
Predictive Intelligence	FAQs	Predictive Intelligence FAQs
Predictive Intelligence	Training	Predictive Intelligence Fundamentals
Task Intelligence	Getting started	Getting started with Task Intelligence Task Intelligence quick start guide (ServiceNow Community)
Task Intelligence	Best practices	Troubleshooting and best practices for Task Intelligence
Task Intelligence	FAQs	Task Intelligence FAQs
Task Intelligence	Training	Task Intelligence for ITSM - Quick Start Guide Task Intelligence for CSM - Quick Start Guide AI Academy Get Started with Task Intelligence -use AI to categorize cases AI Academy Task Intelligence for ITSM AI Academy Task Intelligence - Customer Service Management

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