

Platform Analytics Academy

Dynamic Guidance



Paty Montesinos

Outbound Product
Manager
AI Platform



Mudit Khandelwal

Product Manager
AI Platform

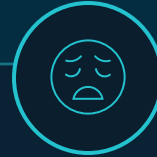
Problem of Adoption

Fragmented help + product complexity = STALLED ADOPTION !!



Static, Fragmented Help

Lacks real-time context — users get outdated, disconnected guidance that doesn't match their workflow



Search Fatigue

Users leave the platform to find answers — bouncing between docs, forums, and support channels



Declining Productivity

Higher support costs, stalled adoption, and poor time-to-value as users struggle to self-serve

Result: Low feature adoption, repeated support tickets, poor time-to-value

Dynamic voice guidance is a new avatar of User Onboarding and Help in ServiceNow that takes use of natural voice conversations to onboard users on ServiceNow capabilities.



Ask it **HOW.**

Dynamic Guidance

Voice-native guidance built into the ServiceNow platform. It hears what you ask, sees what you're doing, and walks you step by step—without ever leaving the page.

Walkthroughs

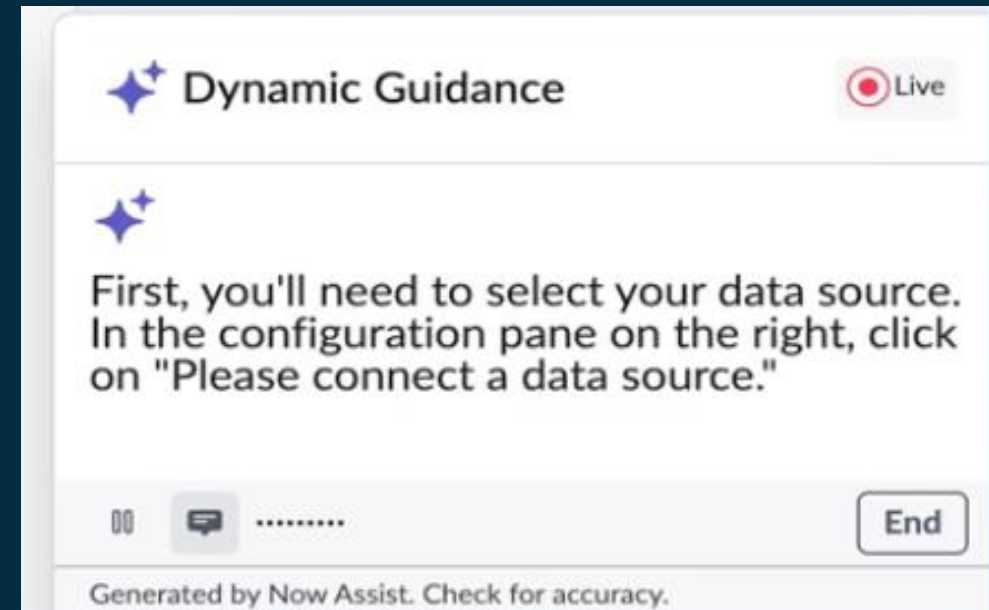
to learn new
processes

Instructions

about any practice/
workflow

Information

about anything you
see on screen



Setup and Enablement

Activate Dynamic Guidance in five steps

Step 1 — Verify Instance Version

Confirm your instance is on Zurich Patch 9 or later.

Step 2 — Activate Now Assist for Platform

Navigate to System Definition › Plugins, search for “Now Assist for Platform (Foundation, Advanced or Prime),” and confirm it is Active.

Step 3 — Enable Google in AI Control Tower

Navigate to Now Assist Admin › AI Control Tower -> Configurations -> AI Model Providers and verify Google is turned ON. Required for Dynamic Guidance to function.

Step 4 — Activate Dynamic Guidance

Navigate to Now Assist Admin › Platform › Other under Now Assist Skills. Search for “Dynamic guidance” and select **Activate skills**.

Step 5 — Assign User Roles

Assign the **sn_dyn_guidance_user** role to users who should have access to Dynamic Guidance.

How to use Dynamic Guidance?

How to initiate a session?

Two options start from:

1) Help Center

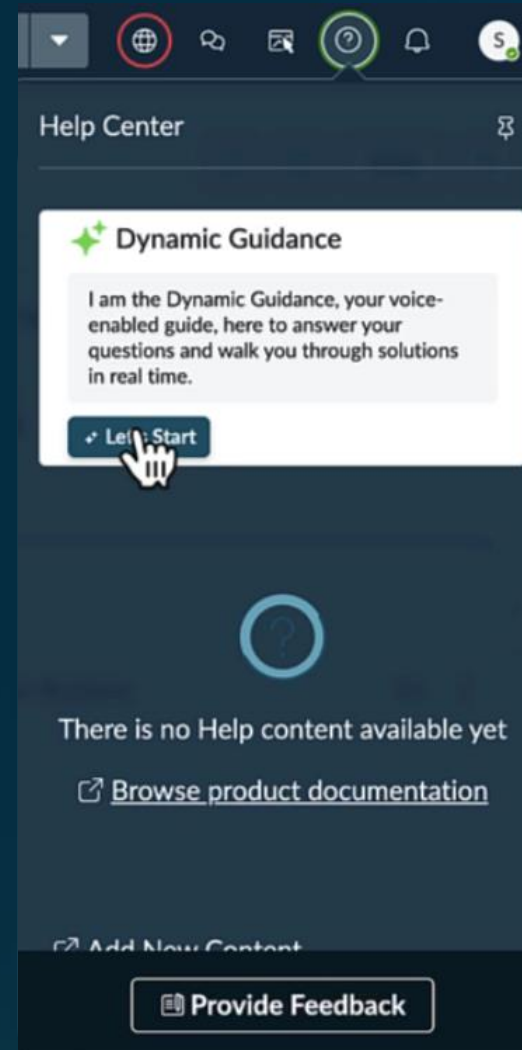
- 1) Launch Help Center from instance to find Dynamic Guidance as your voice-enabled guide
- 2) Select start

2) Now Assist Panel

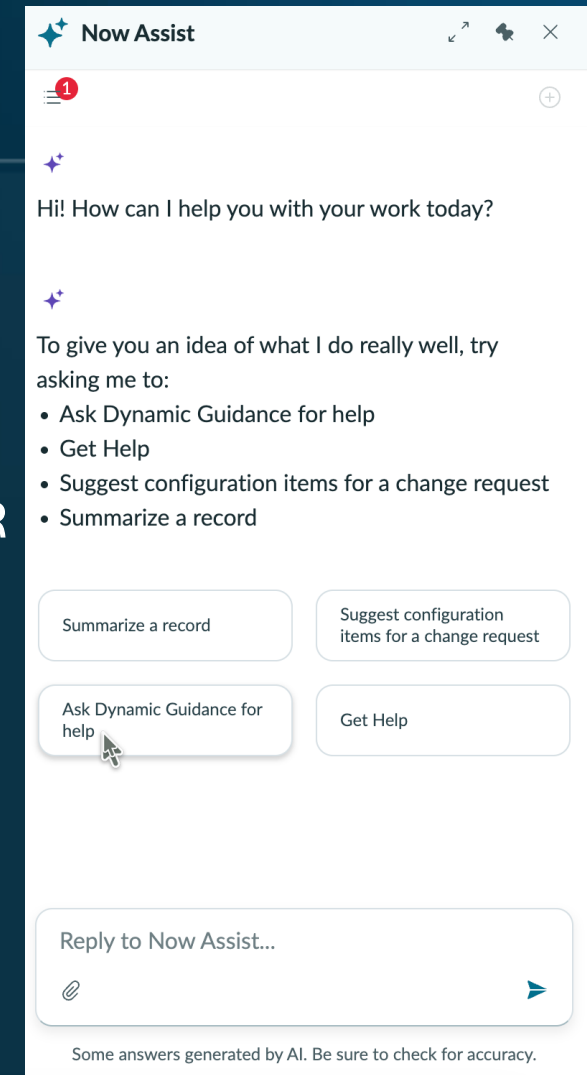
- 1) Navigate to Now Assist Panel on your instance
- 2) Select Dynamic Guidance. Invoke the help agent from the Now Assist panel via skill named 'Ask Dynamic Guidance for help'
- 3) Select Open Dynamic Guidance

3) Select Start to enable

- 1) Authorize the users' content modal for screen sharing and microphone access. This modal appears for first time users only.
- 2) Select Allow to enable access to the browser tab.
- 3) Allow & enable voice & screen sharing in browser tabs, when prompted.
- 4) Ask your question verbally to hear a conversational response
- 5) End conversation when you need and provide feedback as prompted.



OR



Pluggable External Content Sources

Extend Dynamic Guidance beyond ServiceNow Docs — connect any knowledge source



OUT OF THE BOX



ServiceNow Docs
Instance release
documentation



Knowledge Base
Org-specific articles



Custom Guides
Internal SOPs & docs

Plug in any source.
Zero code changes.

Otto queries across all registered
sources automatically



via XCC Configuration



Release Notes
Changelogs & updates



Third-Party Repos
External documentation



Any Source
Your content, plugged in

Demo



Knowledge Center

KB0110152 v1.0



Details

Monitoring Assists

KB0110152 v2.0

KB0110152 v2.0

Checkout

Save

View Article



Details

Affected Products

Feedback

Feedback Tasks

Approvals

Article Versions (4)

Departments

More ▾

> 230 words

Monitoring Assists Usage

This dashboard provides a high-level view of Now Assist adoption and utilization across the organization. It includes a daily KPI showing the total number of tracked assists, a forecast daily trend chart to monitor usage patterns and predict future activity, and a departmental breakdown highlighting which teams generate the most assists. Together, these visualizations help stakeholders track adoption, identify growth trends, and understand where AI assistance is delivering the greatest impact.

> Monitoring Assists Usage ▾

🔄 ⌚ Insights Edit ⋮

Overview Departments

Assists usage

22178

— 0 (0.0%) since August 2

Data from August 3

Daily Forecasted Assists



> Monitoring Assists Usage ▾

🔄 ⌚ Insights Edit ⋮

Overview Departments

Article Optimization

Save to apply changes from card suggestions.

Article Length

This article is less than the minimum length that search providers will use for SEO and it may not appear in search results. Consider lengthening the article length to more than 300 words.

Building an Indicator

A companion as you build/develop

All

	Name ▲	Conditions	Facts table	Valid for frequency
	Search	Search	Search	Search
▶	HLA alerts with incident	Source = Log Analytics .and. Task is not...	Alert [em_alert]	Daily
▶	Active AI Agents	Active = true	AI Agent Config [sn_aia_agent_config]	Daily
▶	Active Entities	Active = true	Entity [sn_grc_profile]	Quarterly
▶	Active entities daily	Active = true .and. Functional domain CO...	Entity [sn_grc_profile]	Daily
▶	Active Now Assist Assistants	Active = true	Now Assist Deployment [sys_now_assist_deployment]	Daily
▶	Active Security Incidents	State not in (Closed, Cancelled)	Security Incident [sn_si_incident]	Daily
▶	Active Skills	Related List condition...	Now Assist Skill Config [sn_nowassist_skill_config]	Daily
▶	Active.Risk	Active = true .and. Created on This quarter	Risk [sn_risk_risk]	Quarterly
▶	Active.Risk.Assessments	Active = true .and. Created <= 2026-09-3...	Risk Assessment [sn_risk_advanced_risk_assessment_instance]	Quarterly
▶	Active.Task.SLA	Start time < 2026-08-02 00:00:00 .and. S...	Task SLA [task_sla]	Daily
▶	ActiveGRCEntities	Active = true .and. Updated <= 2026-09-3...	Entity [sn_grc_profile]	Quarterly
▶	ActiveGRCMonthlyEntities	Active = true .and. Updated <= 2026-08-3...	Entity [sn_grc_profile]	Monthly
▶	ActiveGRCMonthlyRiskStatement	Updated <= 2026-08-31 23:59:59 .and. Act...	Risk Statement [sn_risk_definition]	Monthly
▶	ActiveGRCRiskEvents	State != Rejected .and. Updated <= 2026-...	Risk Event [sn_risk_advanced_event]	Monthly
▶	ActiveGRCRiskStatements	Active = true .and. Updated <= 2026-09-3...	Risk Statement [sn_risk_definition]	Quarterly
▶	AEMCApplication		AEMC Applications [sn_aemc_application]	Daily
▶	AEMCDeploymentRequests		Deployment Request [sn_deploy_pipeline_deployment_request]	Daily
▶	AEMCDeveloper		AEMC Developers [sn_aemc_developer]	Daily

Building a dashboard

Walkthrough step by step

- Overview
- Libraries
- Dashboards
- Data visualizations
- Indicators
- Filters
- Scheduled exports
- Additional Links
- Usage insights

Dashboards

Create dashboard

Filter bySelectCategoriesSelect

Not viewed in 1 year0

Not viewed in the last 6 months5

Not viewed in the last 3 months19

Deactivated for more than 3 mont...0

Updated in the last 30 days6

Count 228

Search by dashboard name or owner

Filter

	Name	Description	Active	Views	Viewed	UI version	Certified
	Operator contains	Operator contains	Operator is	Operator is	Operator on	Operator is	Operator is
	Value	Value		Value	yyyy-MM-dd		
☐	Active Lifecycle Event Cases	Created by import script	True	0		Next Experience	
☐	Activity Response Generation	CSM family - Activity Response Generati...	True	0		Next Experience	
☐	Adoption		True	8	2026-07-29 11:47:08	Next Experience	
☐	Agent Feature Matrix	The Agent feature matrix displays the gra...	True	0		Next Experience	
☐	Agent Health Dashboard	Dashboard for Agent Client Collector He...	True	0		Next Experience	
☐	Agile Team Inline Dashboard		True	0		Next Experience	
☐	Agile Team Technical Dashboard		True	0		Next Experience	
☐	Agile Team Velocity Inline Dashboard		True	0		Next Experience	
☐	AI Agent Analytics	This dashboard shows usage and value m...	True	7	2026-06-12 08:46:28	Next Experience	
☐	AI Agent Analytics - Copy		True	1	2026-07-16 06:57:08	Next Experience	

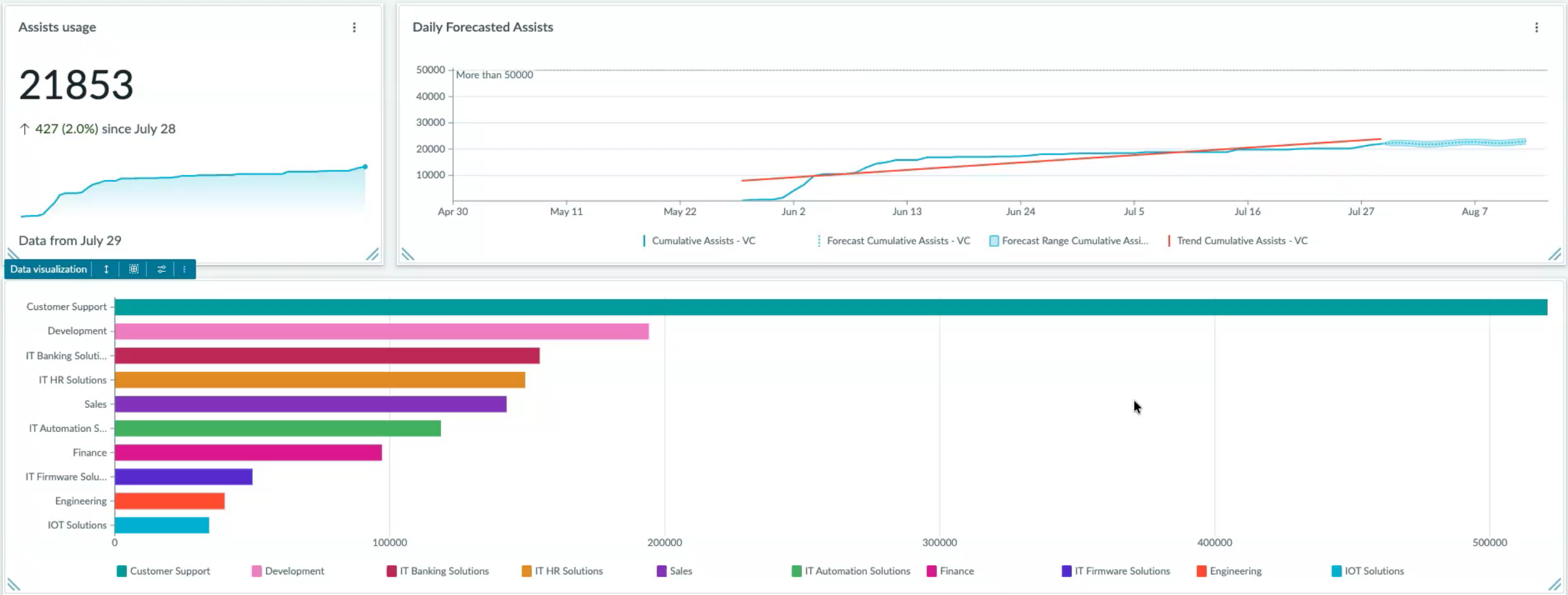
Showing 1-10 of 228

12345

Records per page 10

Help you troubleshoot

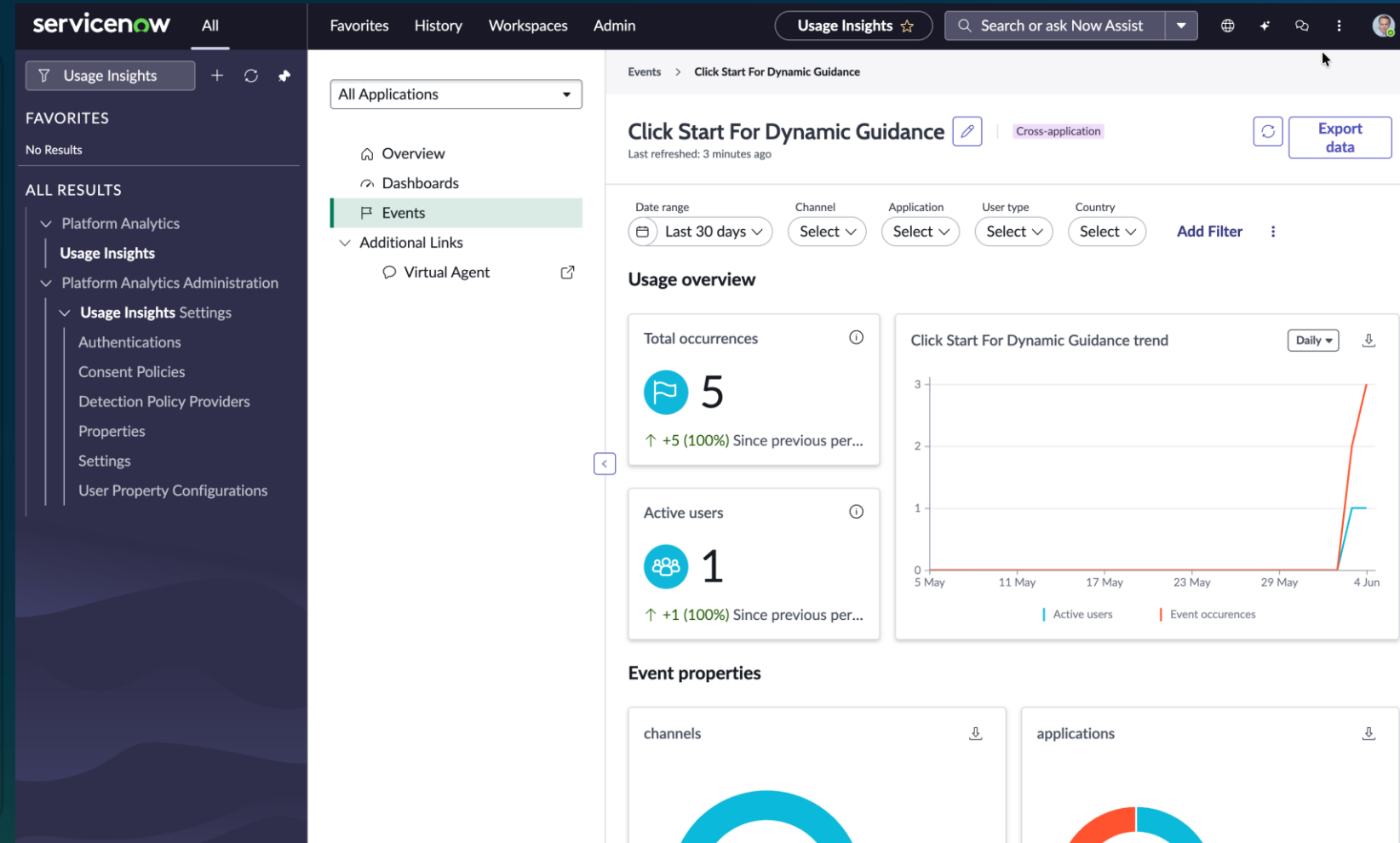
New tab & breakdowns



Accessing the Dynamic Guidance usage on your instance

Find the event in Usage Insights

- Open All → Platform Analytics → Usage Insights (or search it in the filter navigator).
- Open the Events section in the left navigation panel.
- Search or filter by Event Name "Click Start for Dynamic Guidance"
- View counts over time; filter by date, user, or page.
- **Role required:** analytics_admin, analytics_viewer, or specific experience-level viewer (e.g. portal_analytics_viewer, core_ui_analytics_viewer)



Accessing the Dynamic Guidance transcripts

Find the transcripts

- sys_generative_ai_log
- Search for Dynamic Guidance in Definition

Generative AI Logs

Created by

Search

Run

Save Filters

AND

OR

Add Sort

Definition

is

Dynamic Guidance

AND

OR

All > Definition = Dynamic Guidance

	Created by	Completed At	Conversation	Definition	Time Taken	Metadata document	Prompts
	Search	Search	Search	=Dynamic Gui	Search	Search	Search
	cameron.richard	(empty)	(empty)	Dynamic Guidance		(empty)	
	jo	(empty)	(empty)	Dynamic Guidance		(empty)	

Resources

[Product Docs – Dynamic Guidance](#)

[Adding Custom Sources](#)

[Adoption Services Community Hub](#)

[Product Docs - Usage Insights](#)

[Platform Academy – Usage Insights](#)

[ServiceNow University Course](#)

Adoption Services Hub

Welcome!

Whether you're onboarding new employees, navigating the learning curve of ServiceNow products, or working to bring consistency across your organization, you've come to the right place. ServiceNow Adoption Services accelerate time to value by guiding users through setup, onboarding, and everyday tasks directly inside the platform — reducing reliance on manual training and speeding up go-live and feature adoption. And with Dynamic Guidance, our newest modality, users can ask questions and receive real-time, context-aware, voice- or text-based help right as they work — keeping teams on best practices, minimizing errors, and ensuring every role realizes value faster. Explore our articles, expert insights, and practical resources to build a standardized, scalable foundation your people can grow with.

Share with Friends!

We'd love for you to spread the word!

Feedback!

[Give Feedback](#)

Dynamic Guidance

Go From Zero to Hero ServiceNow's AI-Driven Onboarding

[Article →](#)

Dynamic Guidance

Guided Tours + Dynamic Guidance (Together, by Design)

[Article →](#)

Dynamic Guidance

Maximize Your Value from Dynamic Guidance — Platform Academy Recap

[Article →](#)

Interested in more resources?

Looking for more on Adoption Services and Dynamic Guidance? The Adoption Services Hub is your go-to destination for resources, best practices, and the latest updates to help you drive adoption across your ServiceNow platform.

[Visit the Adoption Services Hub](#)

Resources

ServiceNow University Course


[Home](#)
[My Learning](#)
[My University account ▾](#)
[Credential program ▾](#)
[Admin tools ▾](#)
[Help Center](#)
[Tours ▾](#)
[More ▾](#)
[Explore catalog](#)

ON-DEMAND COURSE | LEVEL: BEGINNER ⌚ 10 MINUTES

New

Get Started with Dynamic Guidance

Learn how Dynamic Guidance can help users get up to speed faster.

Start

Achievements

By completing this course you will achieve the following:



Microlearning Complete

Get Started with Dynamic Guidance

10+ Points ⓘ

Points help advance your overall rank. [Learn more](#)

Sign up for 1:1

Deep dive session

Are you on ZP9+ and have Now Assist for Platform?

Interested in trying out Dynamic Guidance?

