

Build Your First Scheduled Agent

Turn Research, PDF, and Email System Skills into a repeatable Agent, verify a manual run, then enable scheduled execution.

This lesson walks through the first complete Axon getting-started path: confirm the build goal, fill the form with AI Build, run manually, and schedule safely.

You will create an Agent named `Public Research Report Delivery`. It takes a public research topic, creates a Markdown report, exports the report as a PDF, and sends the PDF as an email attachment.

1 Build the Agent

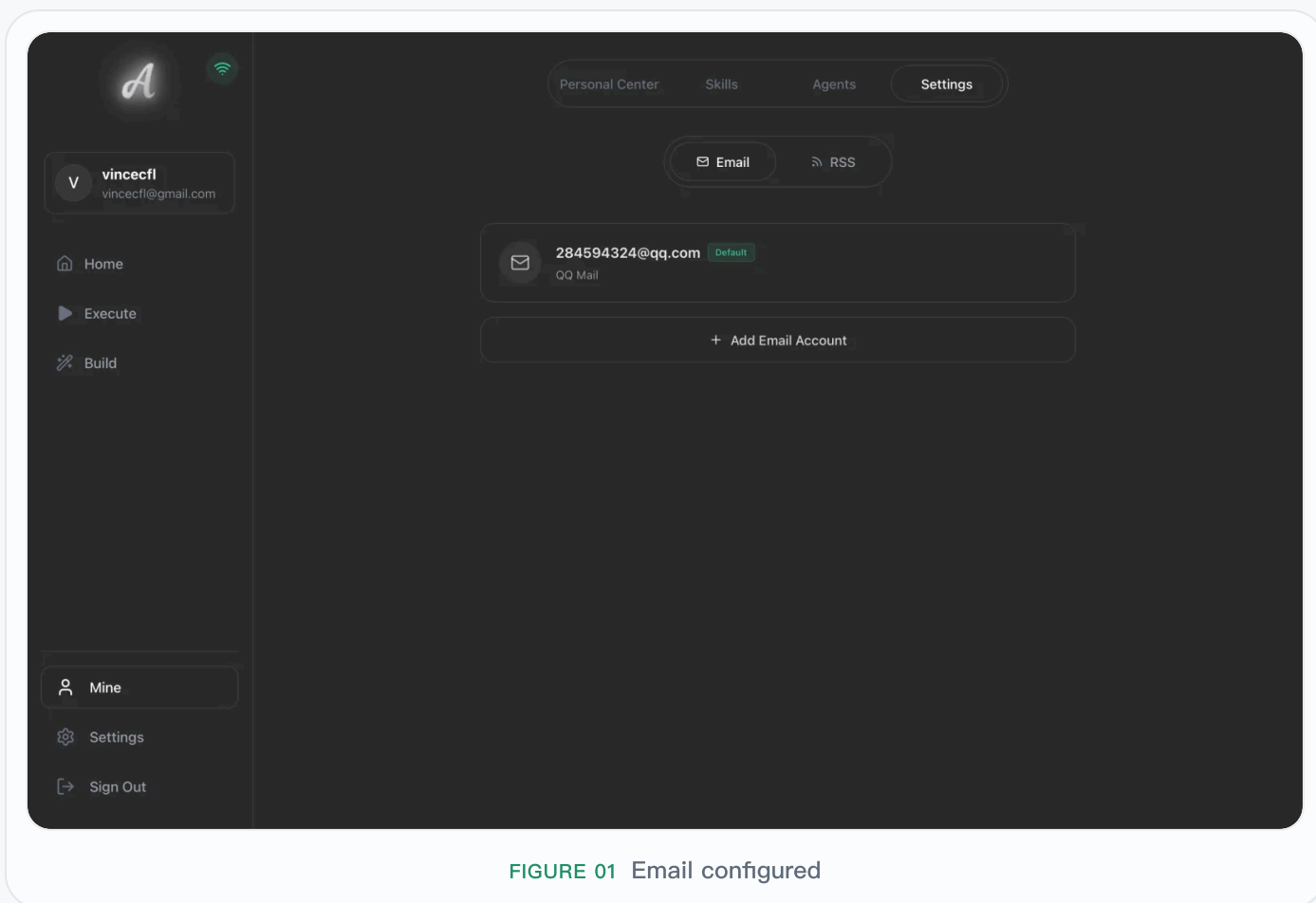
1.1 What You Will Complete

Outcome	What it means
A saved Agent	Role, task, instruction, Skills chain, and source data are configured.
A verified manual run	You can inspect the research result, PDF card, email confirmation card, and sent result.
A controlled schedule setup	You know when Trust Mode and scheduled execution are appropriate.

This lesson follows one path only. It does not try to explain every System Skill at once. First finish one real workflow, then continue with individual Skills, User Skills, monitoring, and advanced scheduling.

1.2 Before You Start

Confirm that your Axon account already has an email account configured. Email sending uses the configured account; you do not need to add an email password or authorization code inside the Agent.



Use a recipient inbox you are comfortable testing with. Do not put passwords, keys, private files, local absolute paths, or customer data in prompts, forms, or screenshots.

1.3 Understand the Workflow

The Axon getting-started model has three practical layers:

Concept	Role in this lesson
System Skills	Built-in capabilities. This lesson uses Research, PDF, and Email.
Agent	A repeatable workflow that chains multiple Skills.
Memory	Shown on the home overview; this lesson does not depend on it.

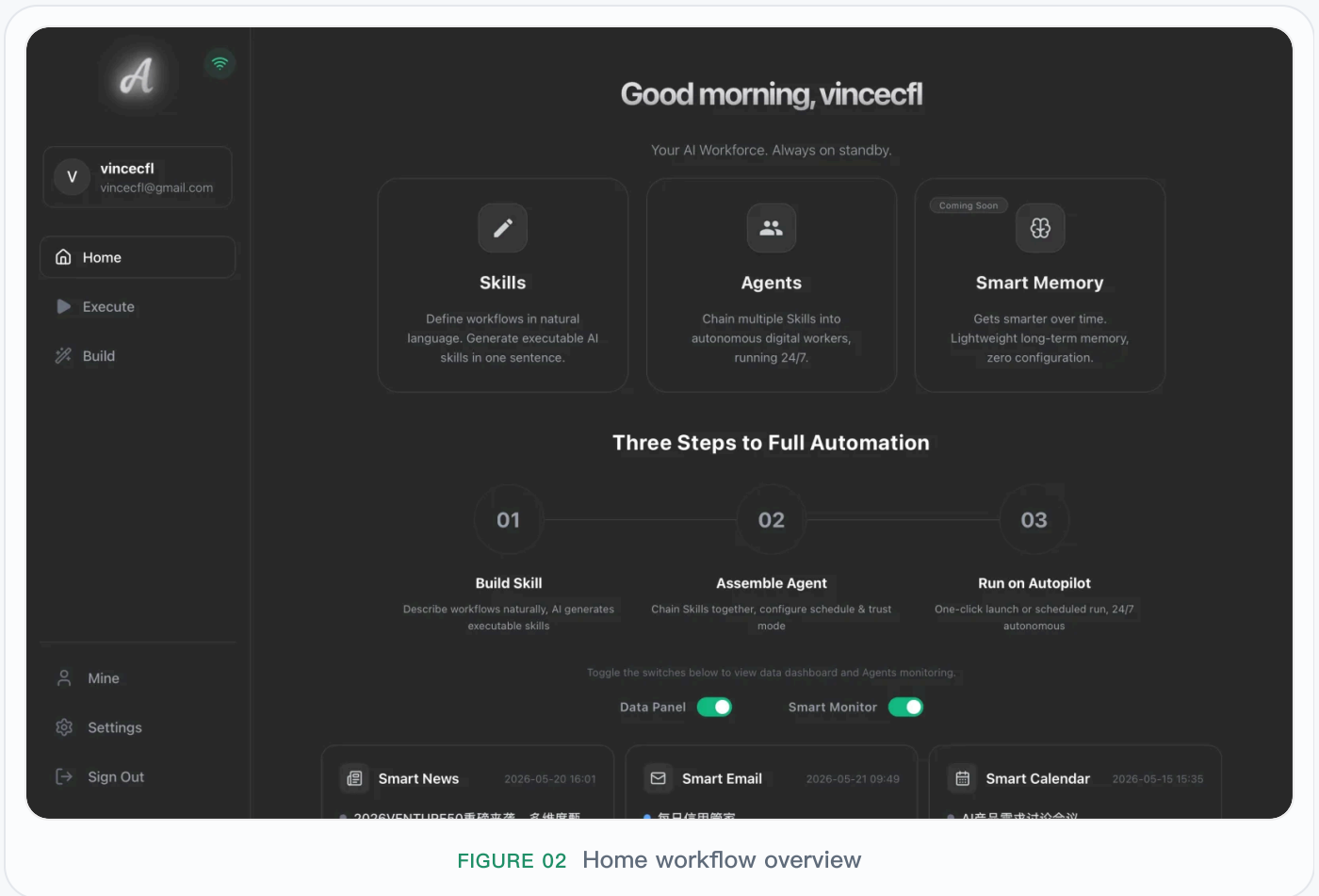


FIGURE 02 Home workflow overview

The Agent chain is short, but complete: Research creates Markdown, PDF exports the report, and Email sends the attachment.

Email sending is an external action. A manual run must show a confirmation card, and scheduled execution should be enabled only after you verify the recipient, subject, attachment, and body.

1.4 Open the Agent Builder

Open **Build** -> **Agent** . You will see an empty Agent form with role, summary, task, instruction, Skills, source data, Trust Mode, and schedule settings.

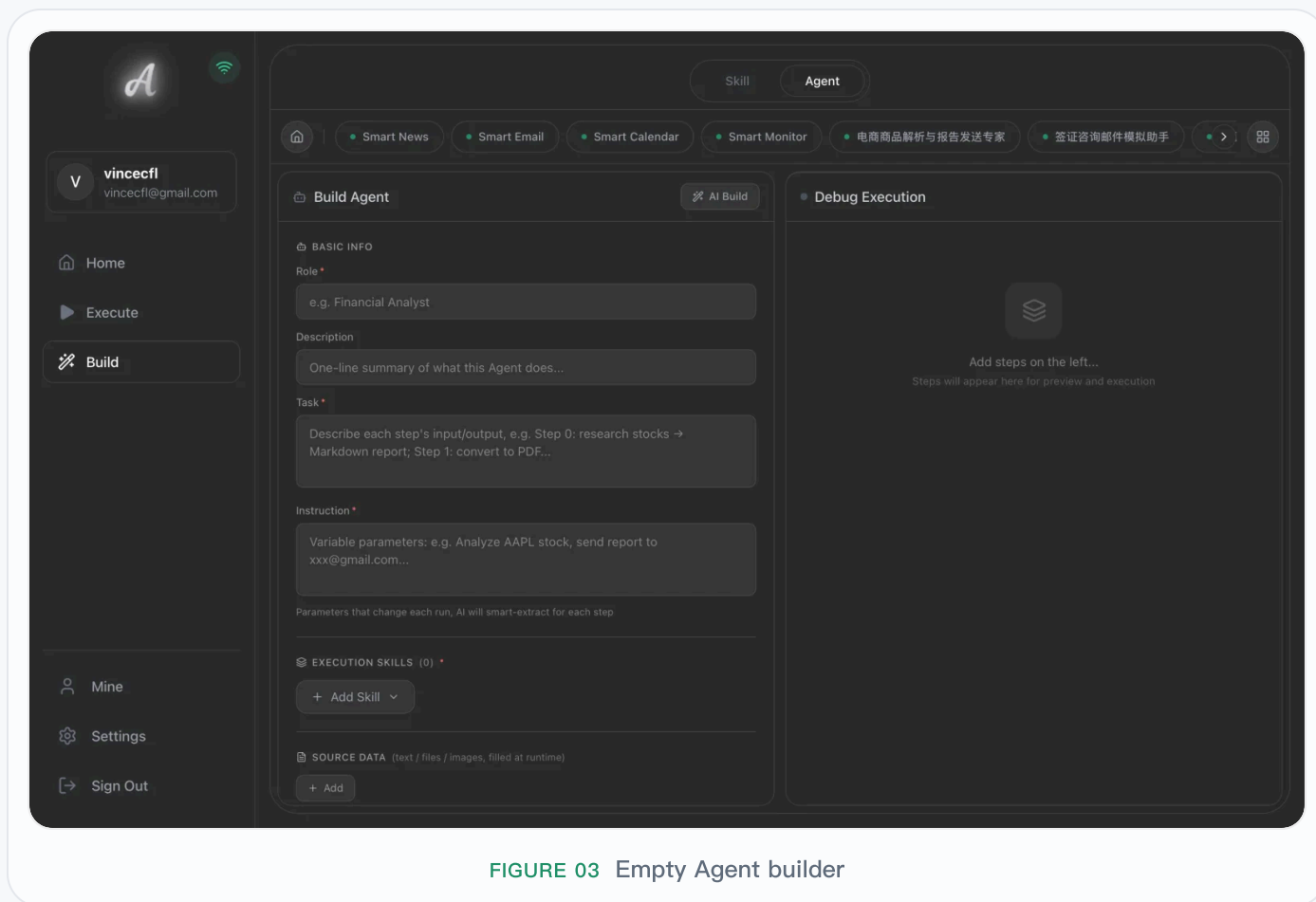


FIGURE 03 Empty Agent builder

An Agent is not just a larger chat box. Think of it as a repeatable business workflow: every run reads inputs, calls Skills in order, and passes each result to the following step.

1.5 Confirm the Build Goal

Click **Smart Build** and start in the **AI Assistant** tab. Enter a concrete business goal:

I want to automatically generate a public research report, export it as a PDF, and send it to a specific email address. How should I build the Agent?

The **AI Assistant** tab first shows the supported capability modules. After you submit the business goal, it helps turn the goal into a build instruction that can be passed to **AI Build**. You are not expected to memorize a complex prompt. The purpose is to confirm what the Agent should do, which capabilities it should use, and where the risk boundary is.

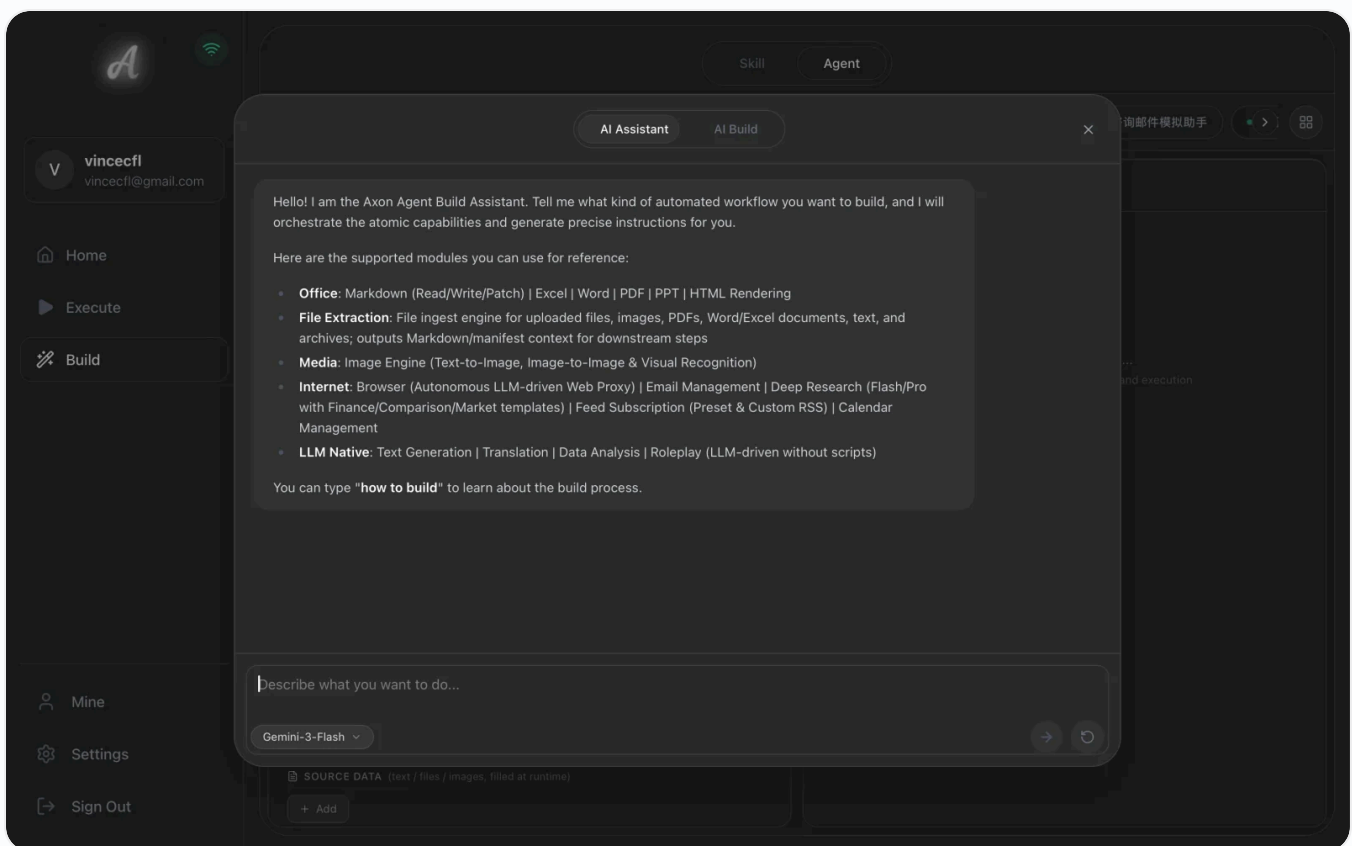


FIGURE 04 AI Assistant tab and supported modules

For this lesson, confirm this chain:

Step	Skill	Action	Output
1	std-internet-research	deep-research-flash	Markdown research report
2	std-office-pdf	generate	PDF file card
3	std-internet-email	send_email	Email confirmation and sent result

1.6 Fill the Form with AI Build

Switch to the **AI Build** tab and paste the build instruction prepared from the previous step. For the English version, use the role name **Public Research Report Delivery**.

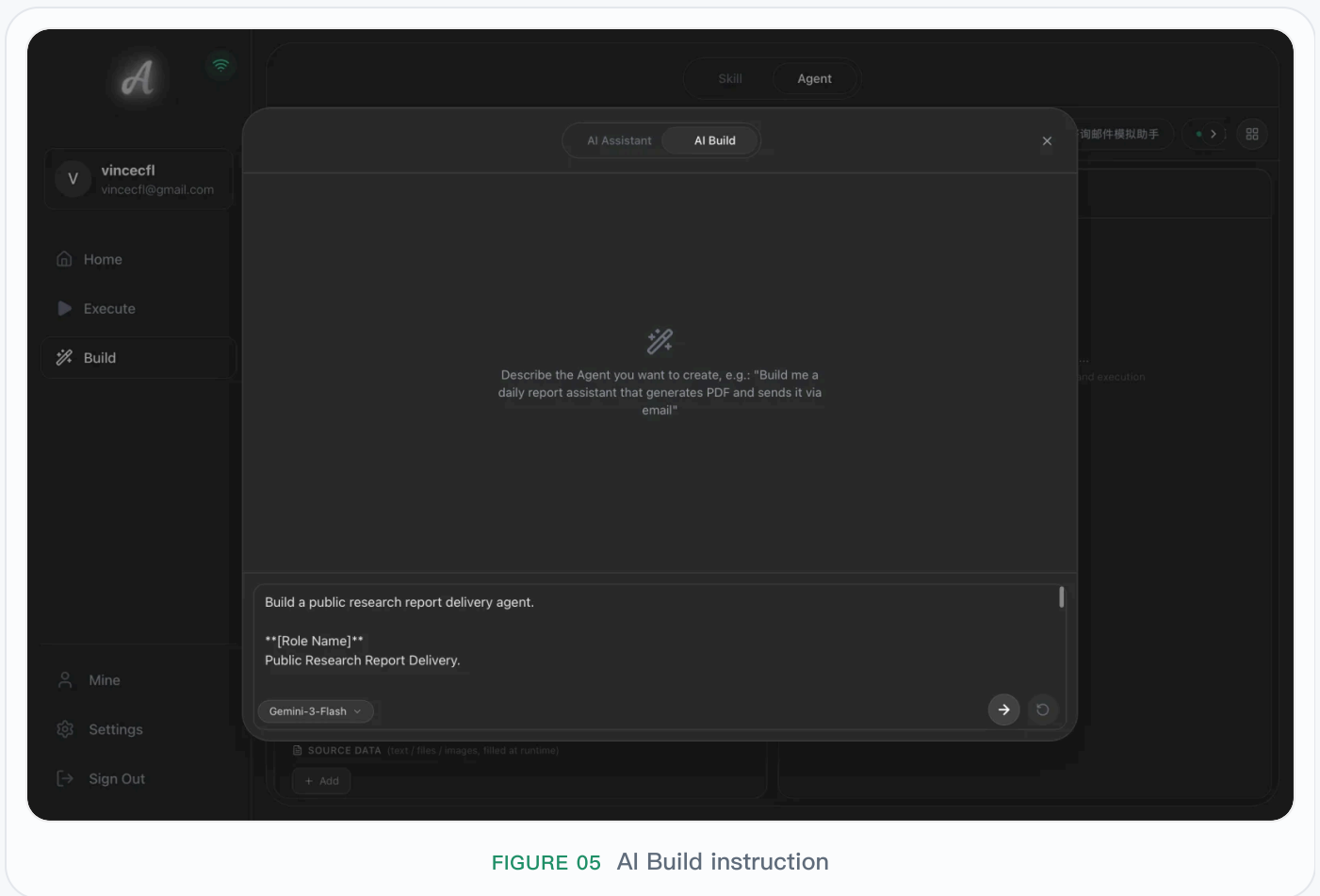


FIGURE 05 AI Build instruction

Wait for **AI Build** to generate the structured configuration. When the result is ready, you will see **Fill Form**.

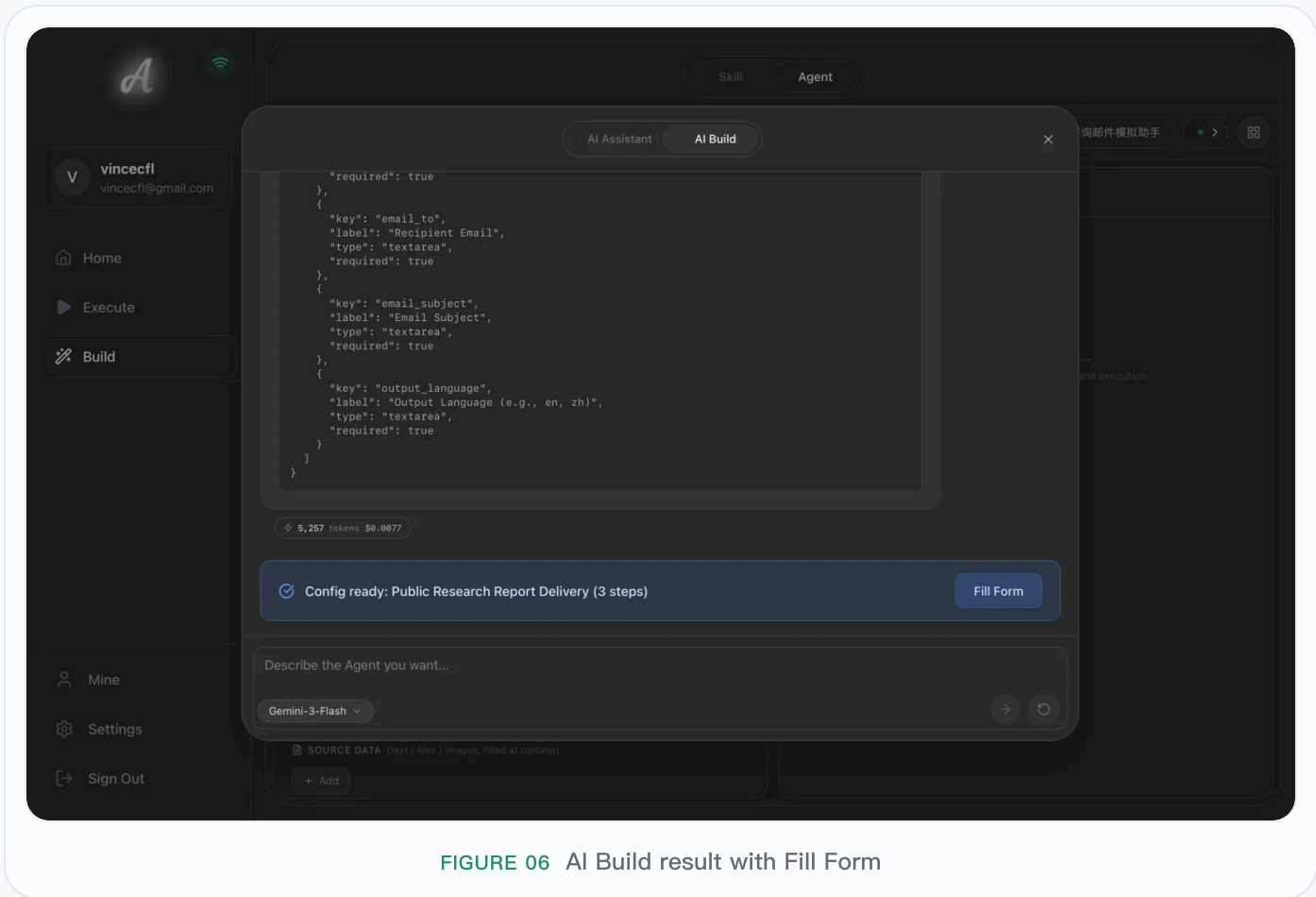


FIGURE 06 AI Build result with Fill Form

Click **Fill Form**. Axon fills the role, task, instruction, Skills, and source data into the Agent form. When the save prompt appears, review the form before running anything.

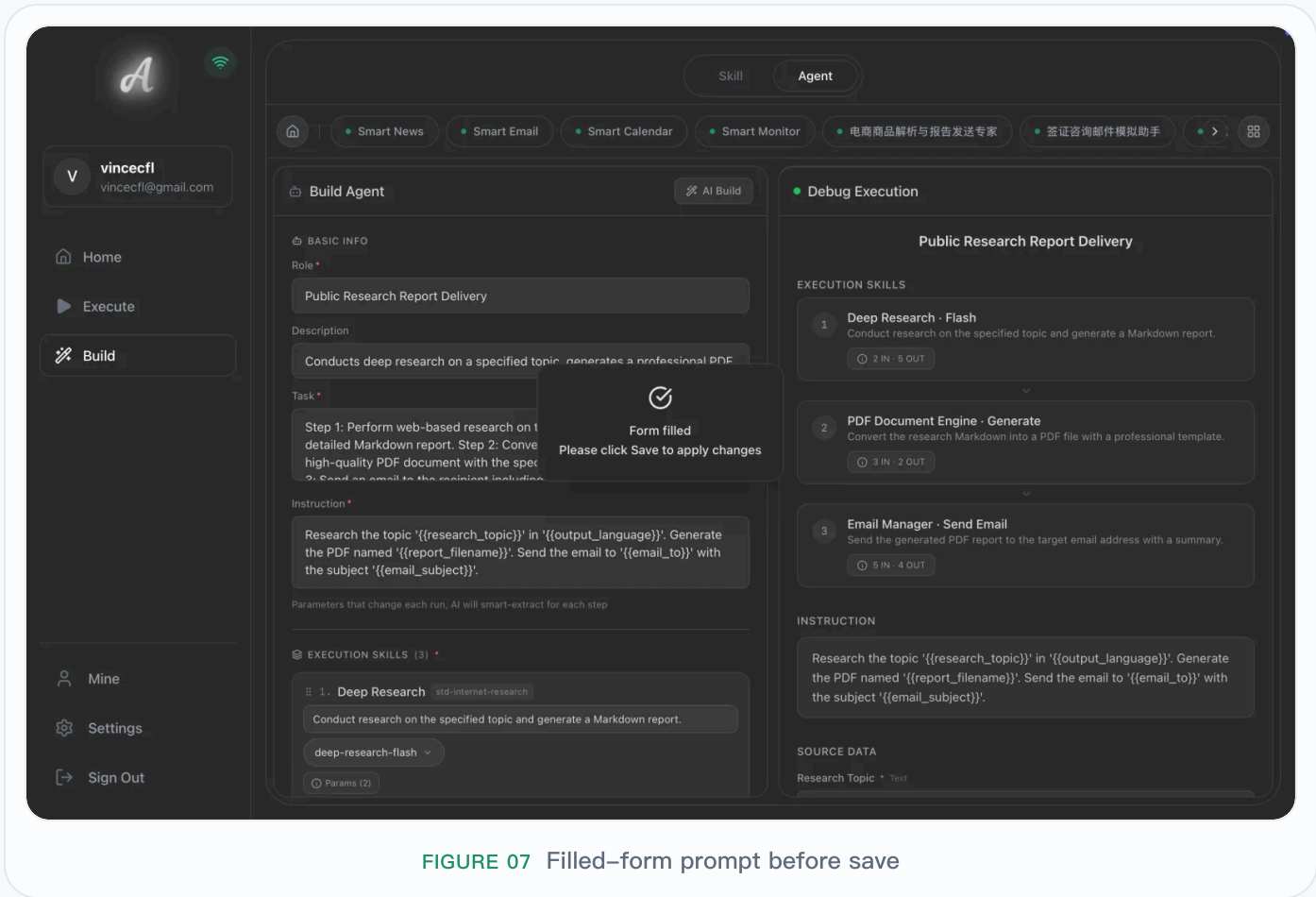


FIGURE 07 Filled-form prompt before save

1.7 Review the Agent Basics

The top part of the form should answer four questions:

Field	What to check
Role	Use Public Research Report Delivery.
Summary	It should mention Markdown research, PDF export, and email delivery.
Task	It should describe how each run completes research, report creation, and delivery.
Instruction	It should avoid fabricated sources, avoid deleting or moving data, and treat email sending as a confirmation action.

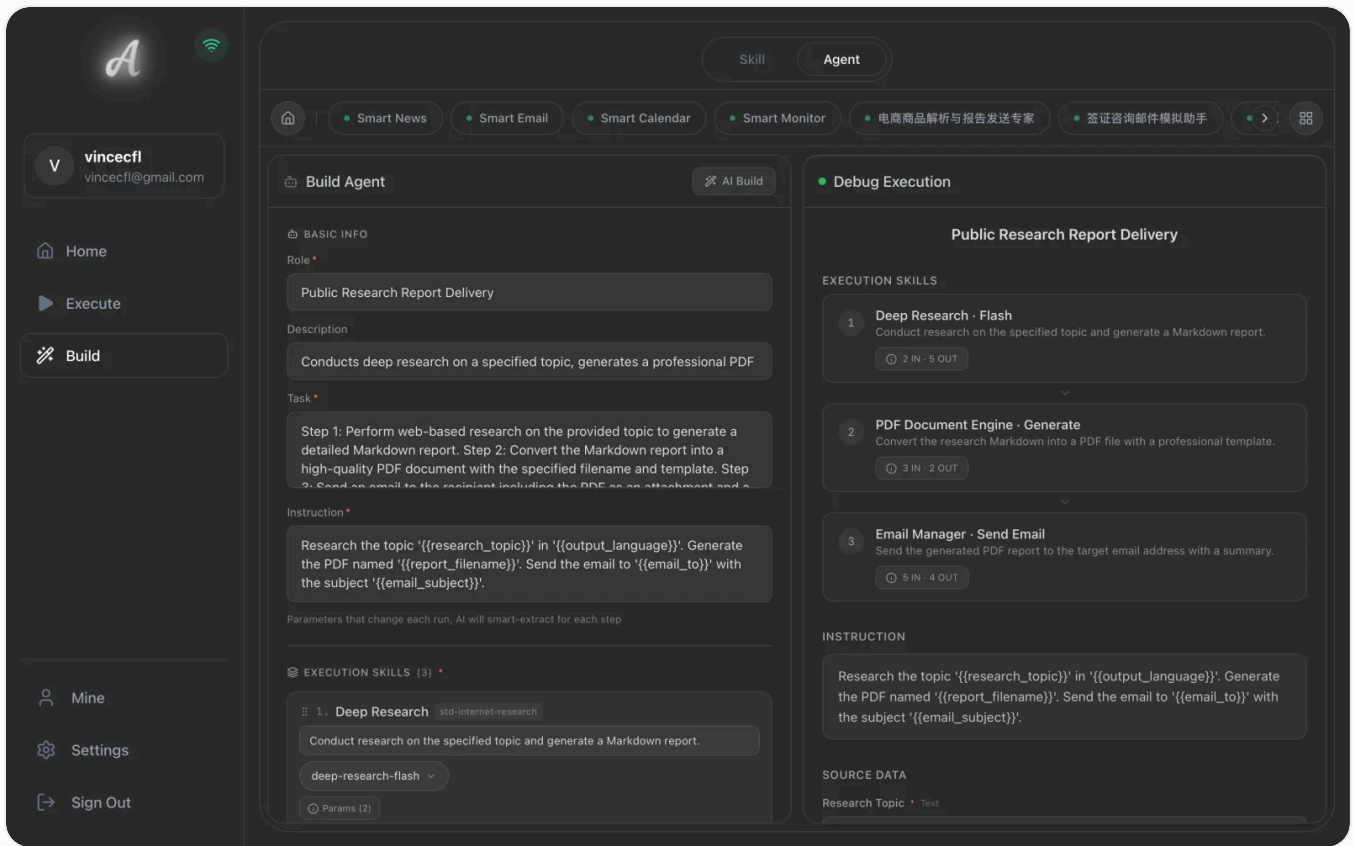


FIGURE 08 Agent basic form

A good Agent name should describe a business capability. It should not feel like a generic product label.

1.8 Review the Skills Chain

Next, review the execution Skills. You should see these three steps in order:

1. std-internet-research / deep-research-flash
2. std-office-pdf / generate
3. std-internet-email / send_email

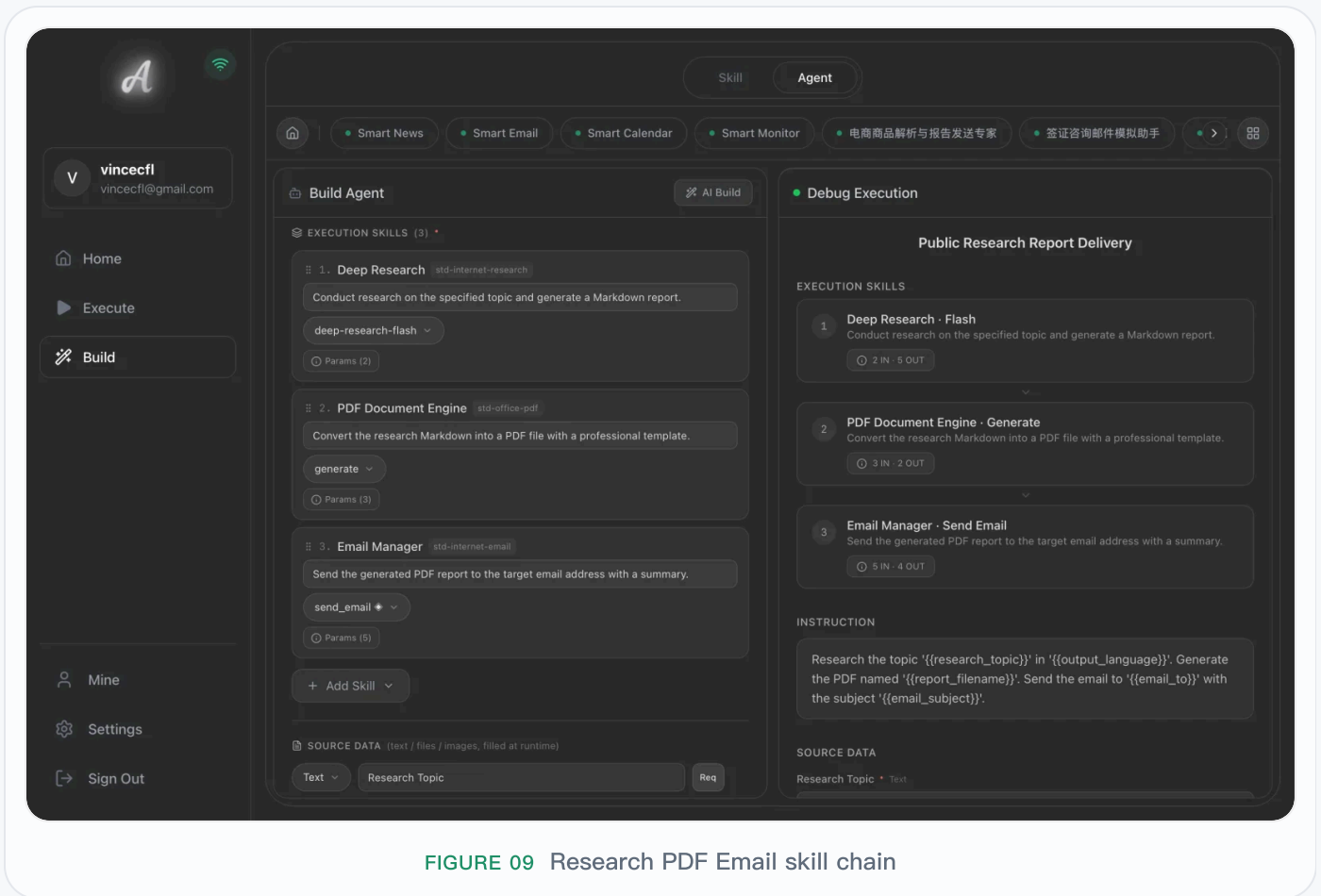


FIGURE 09 Research PDF Email skill chain

Keep the first version stable around these three steps. Do not add private–file–reading or higher–risk actions.

1.9 Configure Source Data

Source data defines what the user fills in each time the Agent runs. Keep the first version to five fields:

Key	Example
research_topic	AI office automation trends for white-collar teams
report_filename	ai-office-automation-report-en
email_to	Enter the inbox you will use for review.
email_subject	Axon generated research report
output_language	en

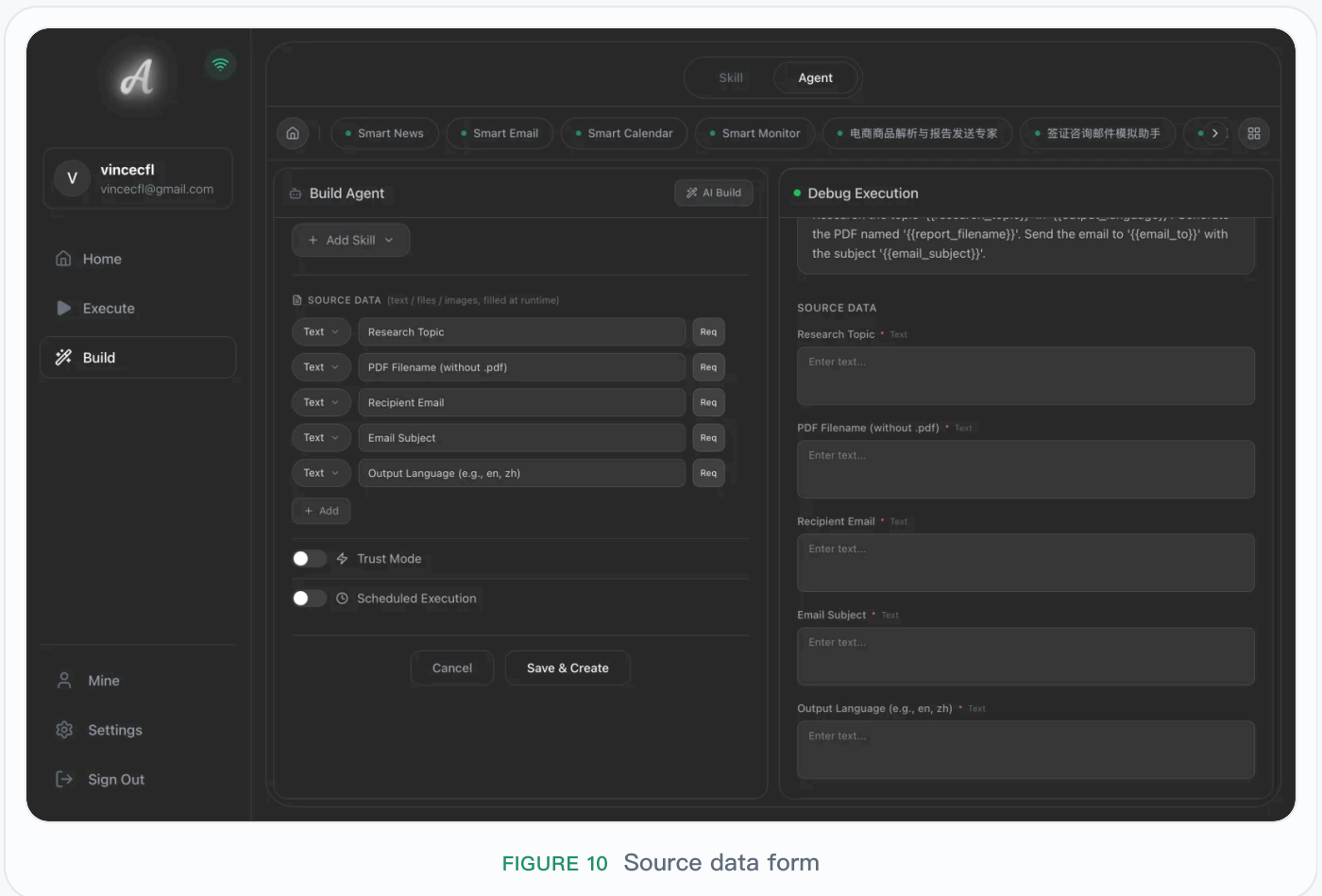


FIGURE 10 Source data form

Stable inputs make scheduled execution easier to review. Keep the first tutorial focused.

1.10 Review Trust Mode and Schedule Settings

Keep Trust Mode off before the first manual run. When the workflow reaches the email step, Axon should show a confirmation card so the user can review the external send action.

The screenshot below shows the scheduled execution area after it has been turned on, so you can recognize the controls and warning message. If you are following the lesson for the first time, do not save an automatically triggered schedule before the manual test run passes.

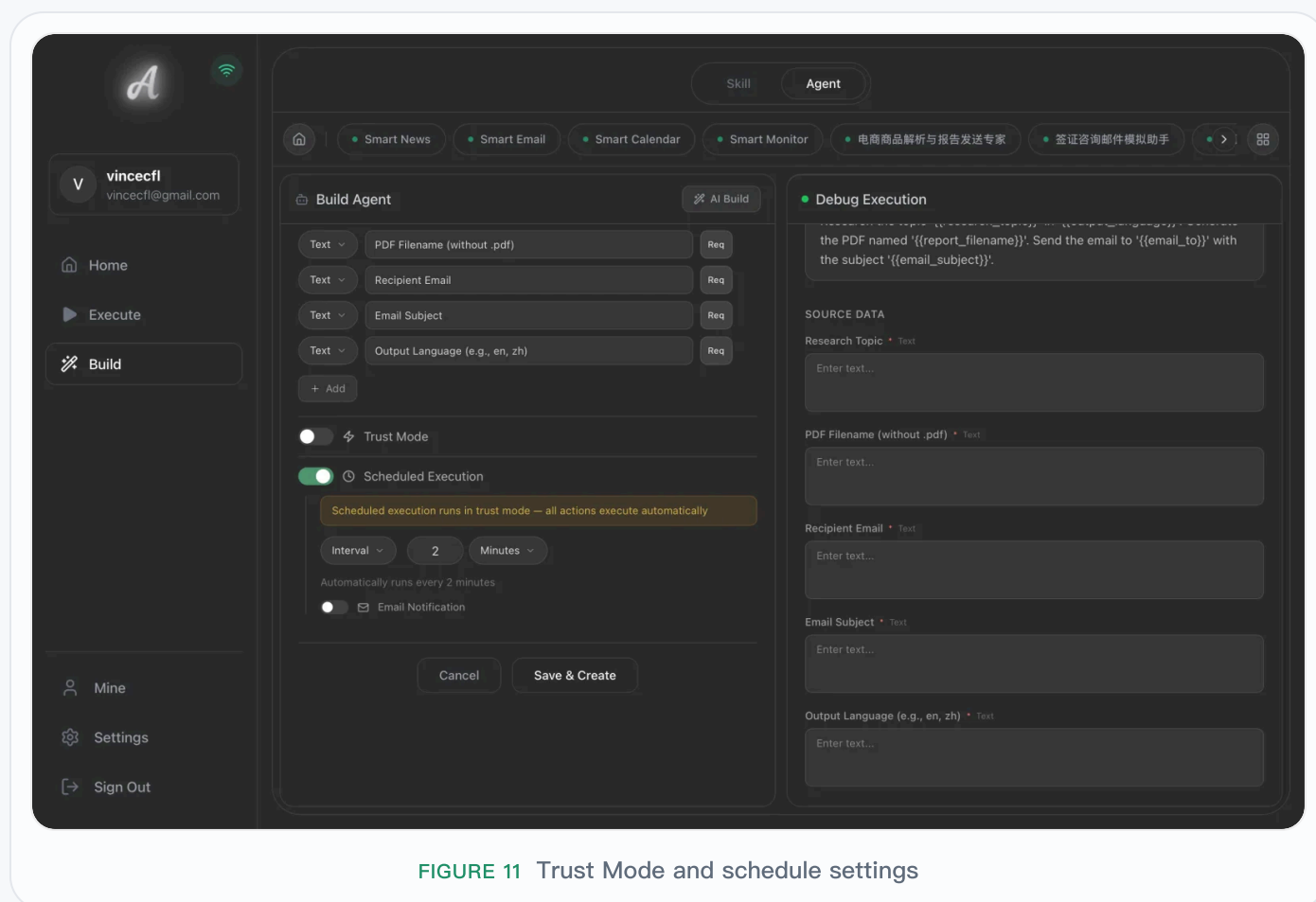


FIGURE 11 Trust Mode and schedule settings

Scheduled execution is for workflows that have already been verified. Because this Agent sends email, complete at least one manual run before turning scheduling on:

Mode	Best use
Interval	Test whether automation is working, for example every 10 minutes.
Daily	Use a stable workflow, for example every day at 09:00.

Scheduled runs execute in trust mode, so use them only when the recipient, topic, attachment, and body format are stable and reviewed.

1.11 Save the Agent

After review, save the Agent. For the first walkthrough, confirm again that Trust Mode is off and that no schedule will trigger before manual verification. Once saved, the Agent is ready for a manual test run.

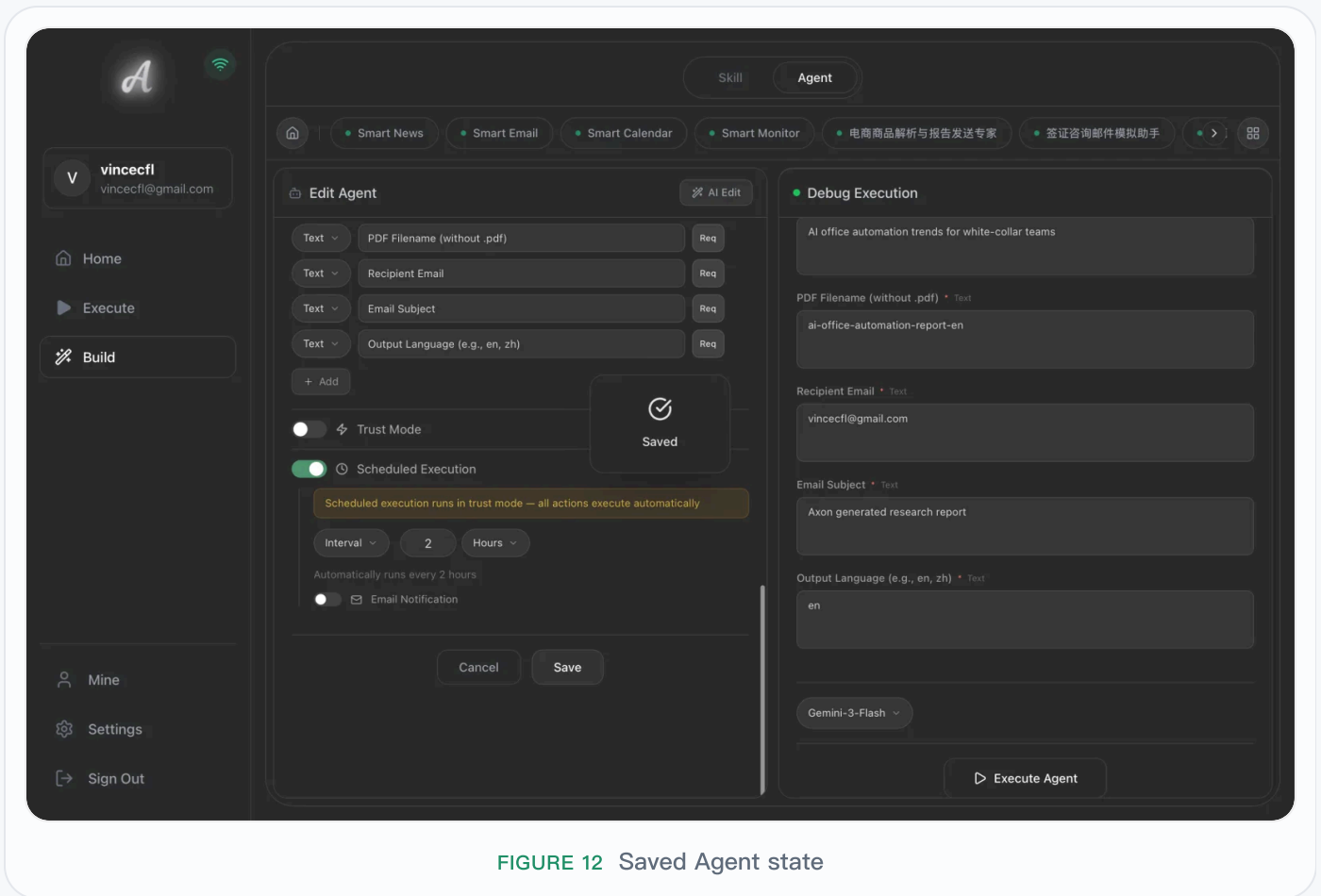


FIGURE 12 Saved Agent state

Saving is not the finish line. The real acceptance check starts with the first manual run.

2 Run and Automate

2.1 Run the Agent Manually

Go to **Execute** → **Agent**, open the **Public Research Report Delivery** form, and fill in the research topic, PDF filename, recipient, email subject, and output language.

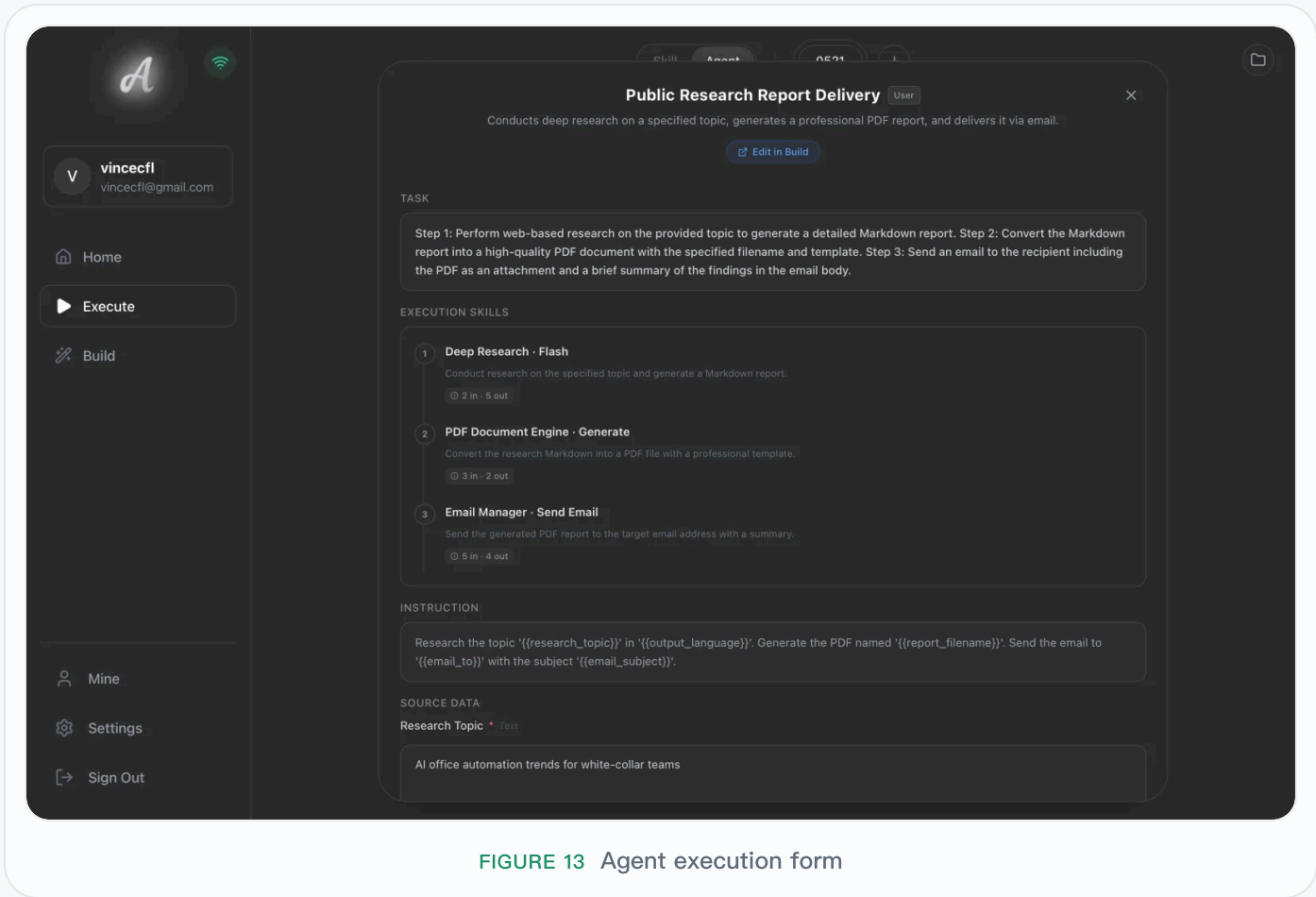


FIGURE 13 Agent execution form

After you start the run, watch the progress card. The first Research step should begin.

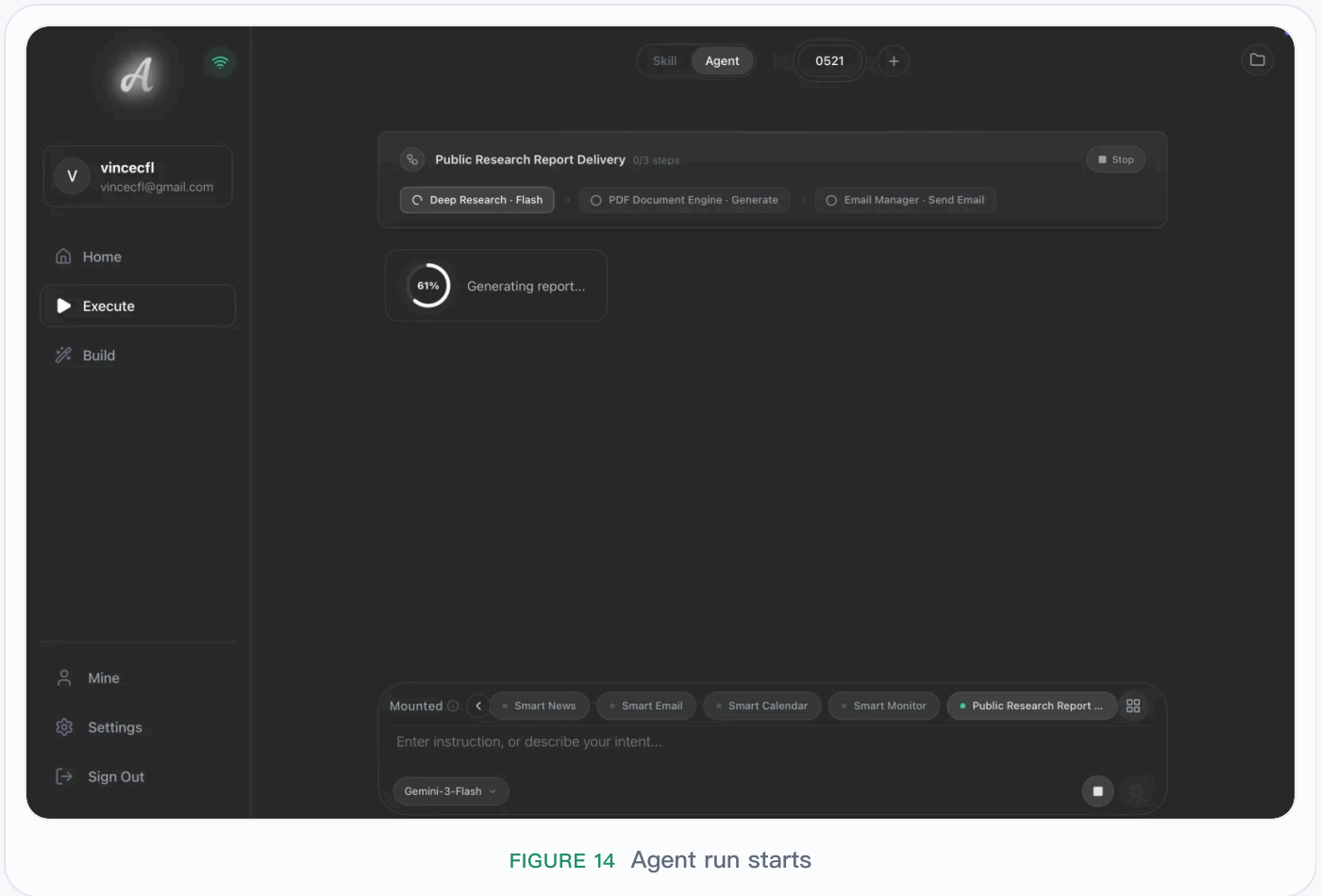


FIGURE 14 Agent run starts

When the Research step completes, check whether the Markdown content stays on topic. If evidence is limited, the report should state the limitation instead of inventing sources.

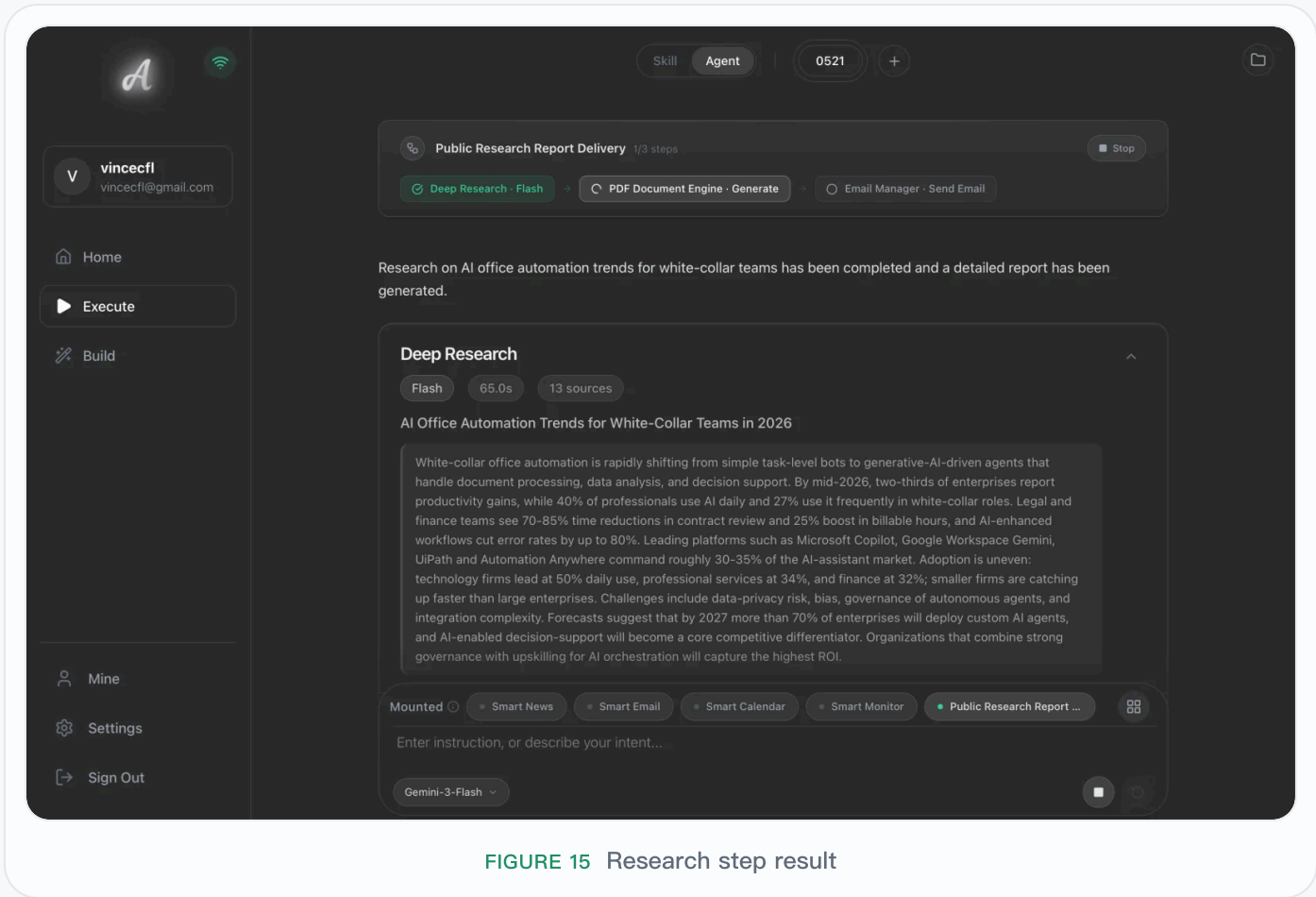


FIGURE 15 Research step result

Next, check the PDF file card. The card means the Markdown output has been passed to the PDF engine and exported as a report file.

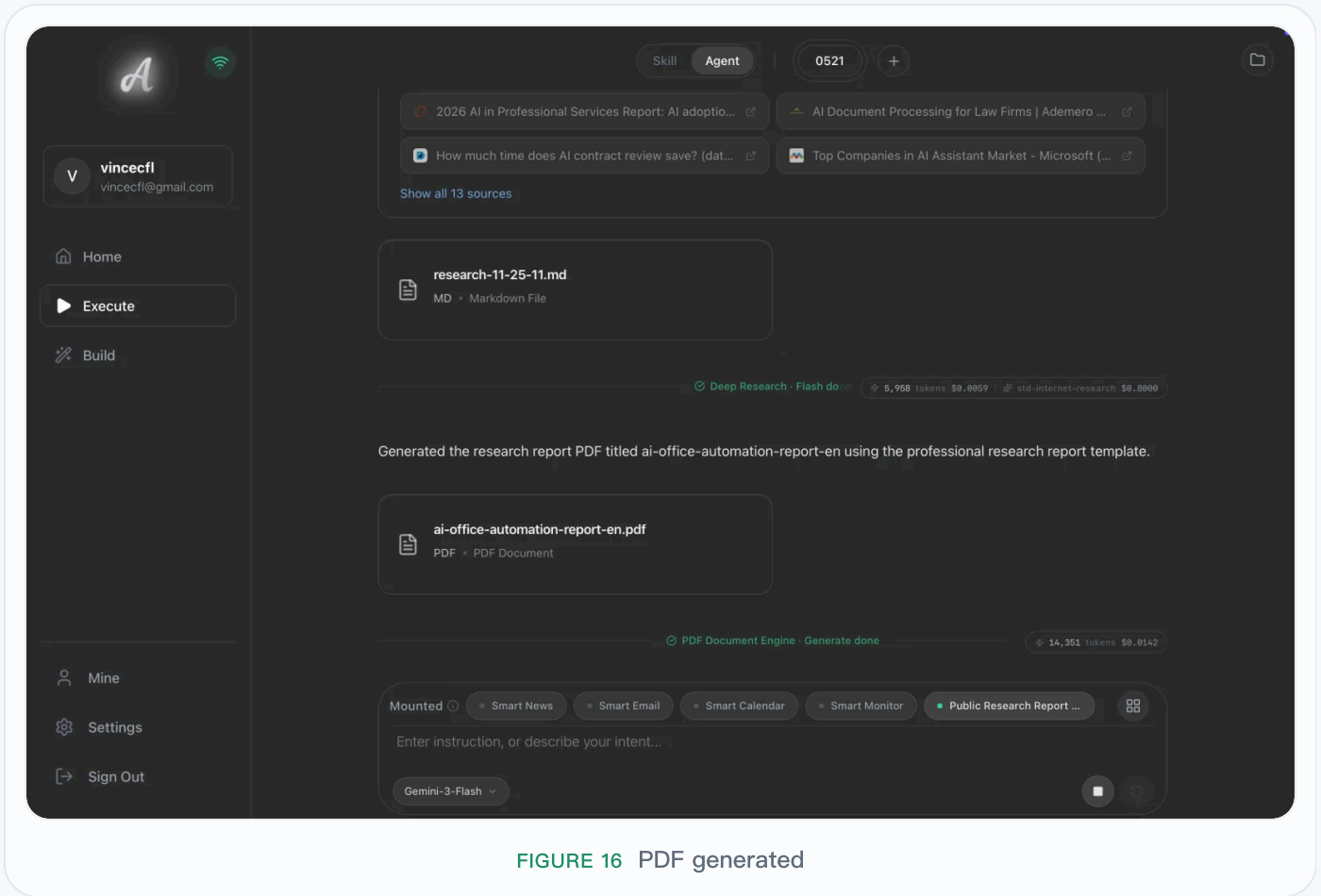


FIGURE 16 PDF generated

2.2 Confirm Email Sending

When the workflow reaches `send_email`, you should see an email confirmation card. Review the recipient, subject, body summary, and attachment before confirming.

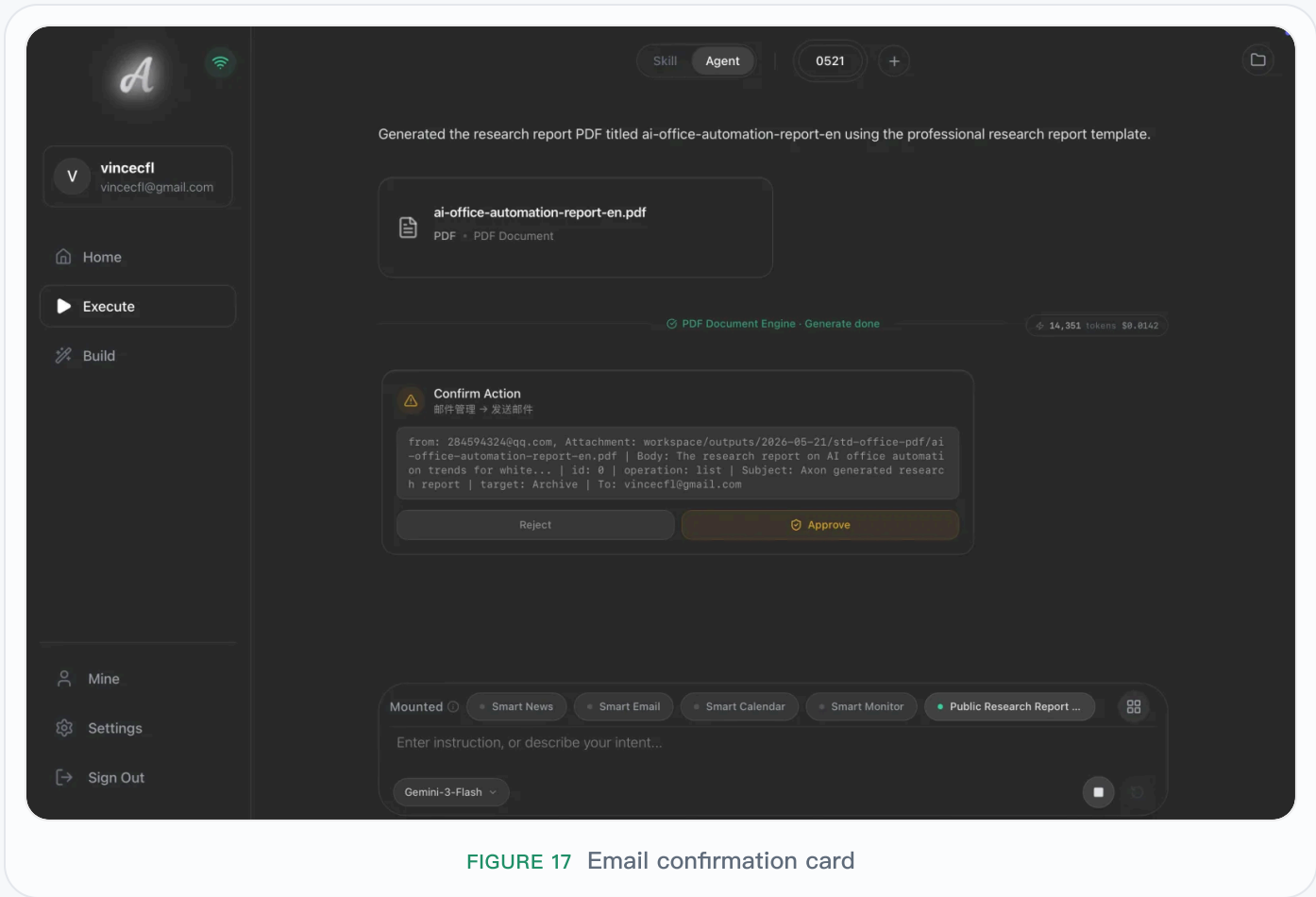


FIGURE 17 Email confirmation card

After confirmation, Axon continues the send action and shows the result.

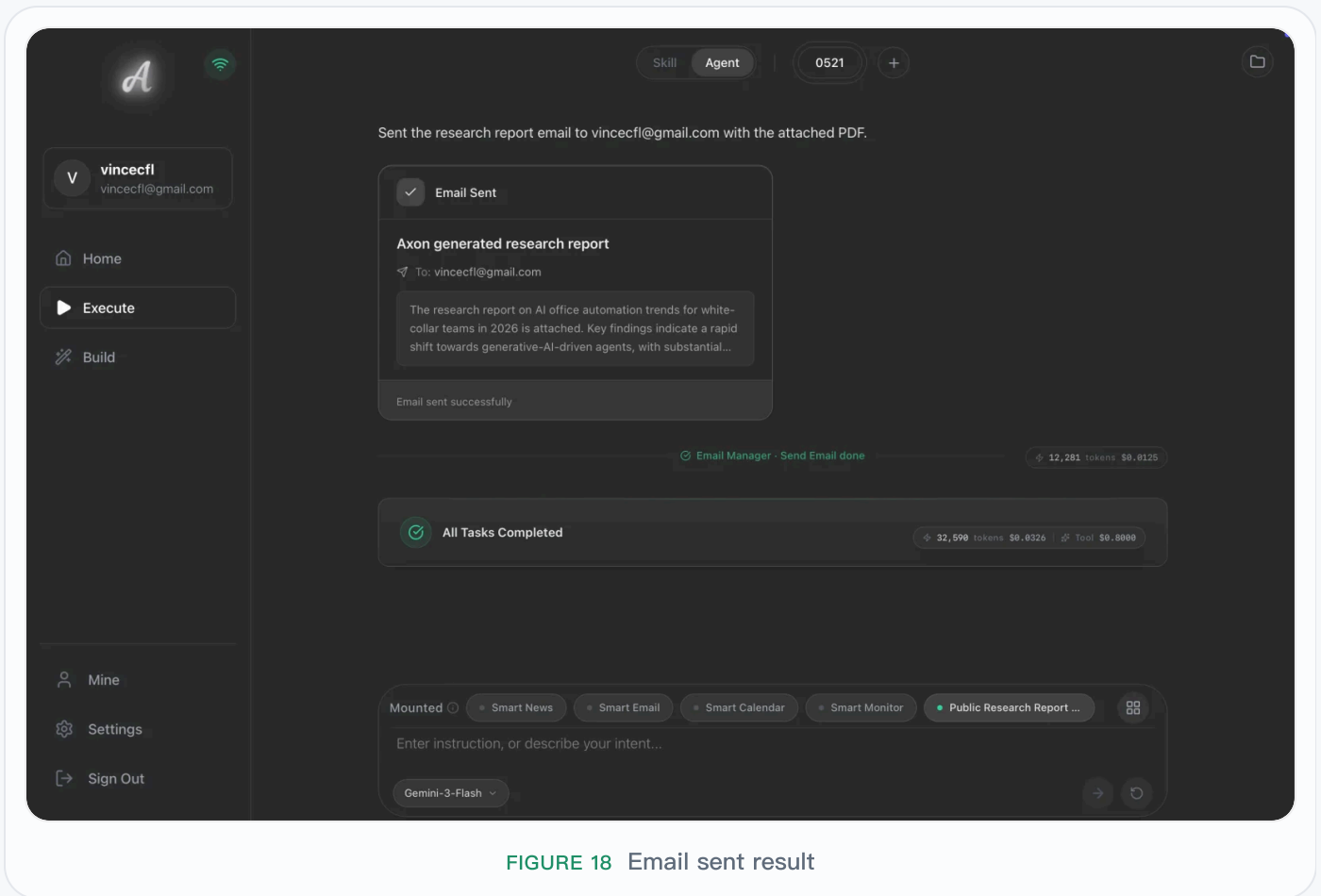


FIGURE 18 Email sent result

This confirmation card is an important boundary in the tutorial. External send actions are not the same as text generation. Scheduled execution should not be enabled until this step has been verified.

2.3 Check the Outputs

Open the PDF file card in the built-in preview. Check the title, outline, and body.

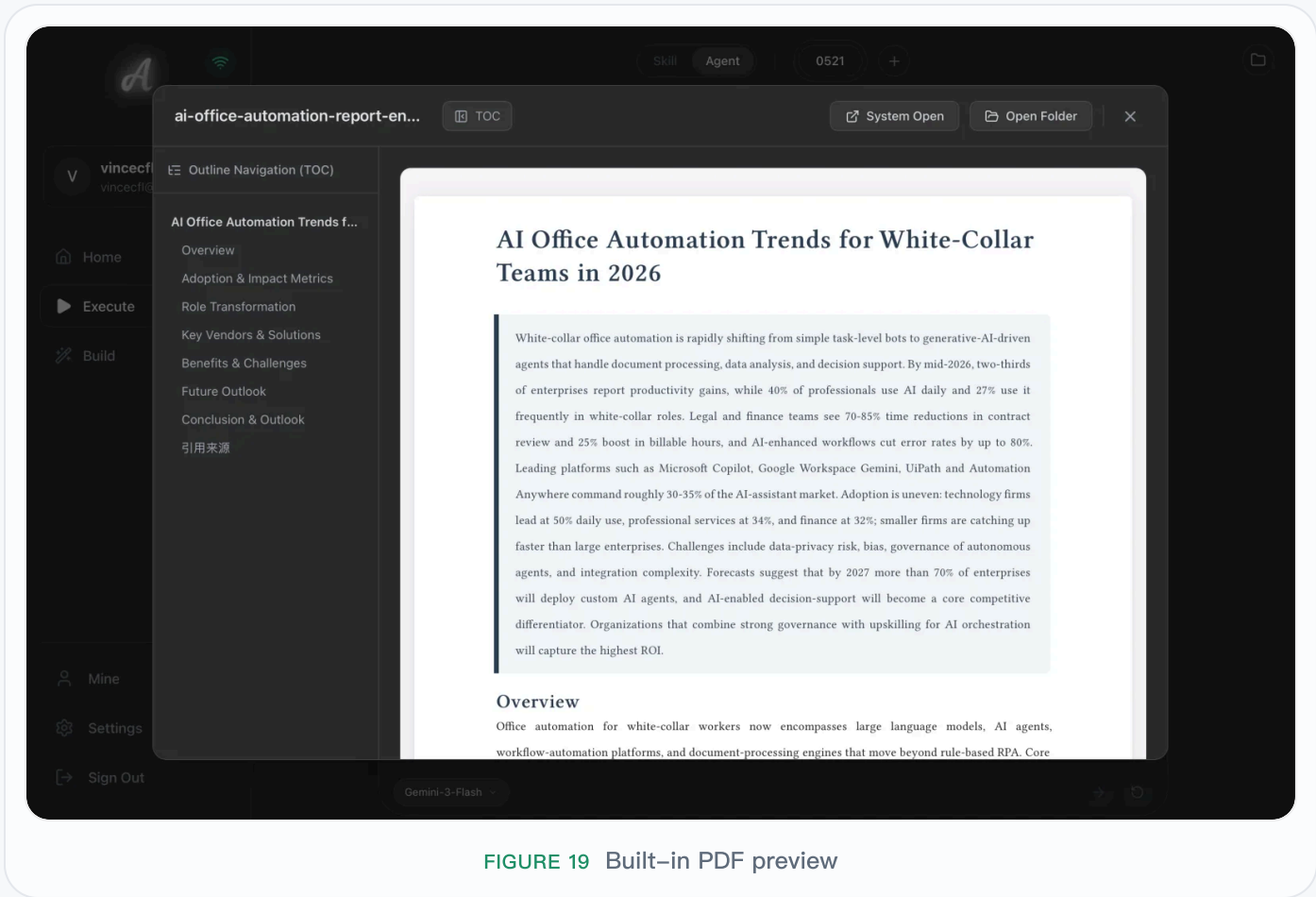


FIGURE 19 Built-in PDF preview

Then check the recipient mailbox. The email should include a short body summary and the PDF attachment.

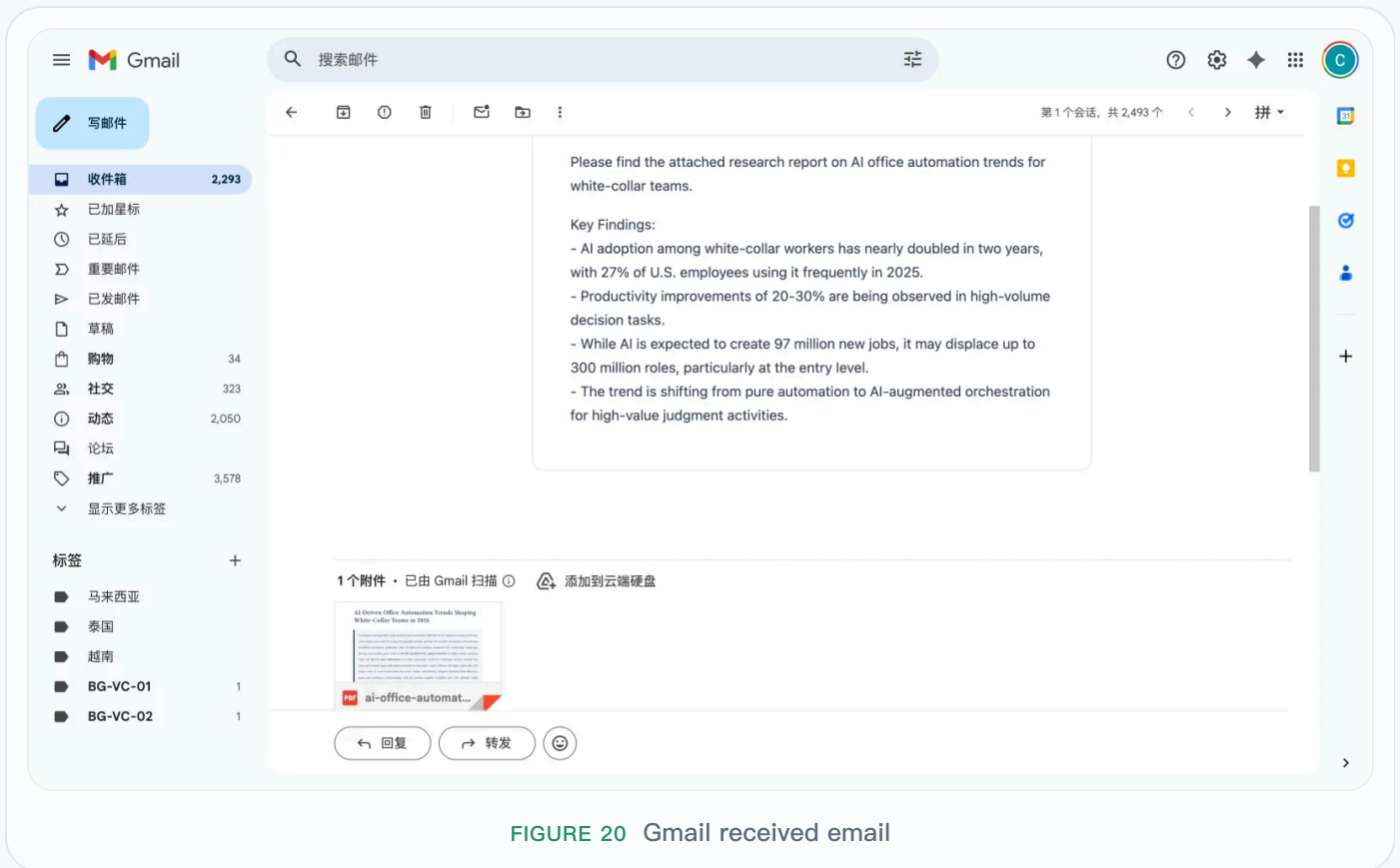


FIGURE 20 Gmail received email

The manual run passes only when the PDF opens, the email arrives, and the attachment is correct.

2.4 Checklist Before Scheduling

Before enabling scheduled execution, verify each item:

Check	Pass standard
Agent configuration	The chain is Research, PDF, Email.
Inputs	Topic, filename, recipient, subject, and output language are clear.
PDF output	The file card opens and the report is readable.
Email confirmation	Manual run shows the confirmation card and the details are correct.
Inbox proof	The mailbox shows the email and PDF attachment.
Risk boundary	The Agent does not read private files, delete data, or move data.

After these checks pass, scheduled execution is appropriate for stable, low-risk, repeatable workflows.

2.5 Enable Scheduled Execution

After every checklist item passes, return to the Trust Mode and schedule area in the Agent configuration. For the first automatic validation, use a short interval schedule; after the workflow is stable, switch to a daily fixed time.

Scenario	Suggested setting
First automatic validation	Use an interval schedule with a controlled test window, keep the recipient fixed, and inspect one complete result.
Stable daily workflow	Use a daily schedule, for example every day at 09:00.

Save the Agent. The next run will be triggered by the schedule. If this is only a test, turn scheduling off or switch to the intended daily cadence after one verified run. Because

this Agent sends email, do not schedule it for recipients, topics, or attachment formats that have not been reviewed.

2.6 Optional: Run from Agent Chat

Outside scheduled execution, you can also trigger the same Agent from the Agent chat entry. It still uses the same Skills chain and source data.

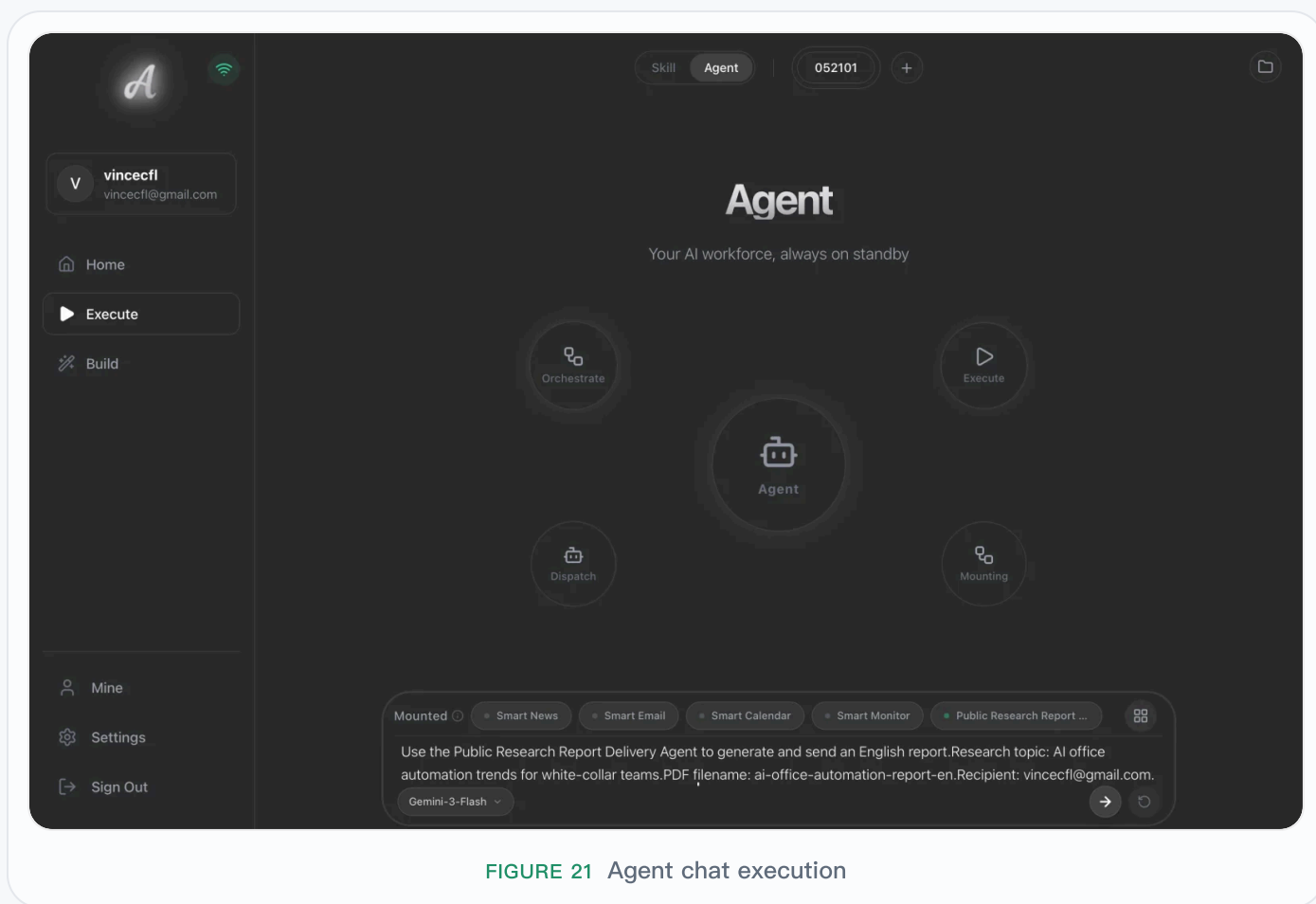


FIGURE 21 Agent chat execution

Example prompt:

Use the Public Research Report Delivery Agent to generate and send an English research report.

Research topic: AI office automation trends for white-collar teams.

PDF filename: ai-office-automation-report-en.
Recipient: enter the inbox you will use for review.
Email subject: Axon generated research report.
Output language: en.

If Axon asks for missing parameters, provide only the missing fields and keep the same scenario.

2.7 Common Issues

Issue	What to do
AI Build did not generate the three-step chain	Return to the AI Assistant tab and restate the goal as Research -> PDF -> Email.
The email step did not show a confirmation card	Check that the Agent uses std-internet-email.send_email, and keep Trust Mode off before the first manual run.
No PDF was generated	Check whether the Research step produced Markdown and whether the PDF step uses generate.
You are not sure whether to schedule it	Do not schedule yet. Complete at least one manual run and verify the recipient and attachment.