

A2 IT Help Desk

Scenario

Negli ultimi anni la complessità dell'ecosistema Microsoft 365 e delle piattaforme cloud aziendali è cresciuta in modo esponenziale. Ogni nuovo servizio introduce opportunità, ma anche nuove configurazioni, interdipendenze e procedure da gestire.

Per i team IT questo significa **meno tempo per il supporto di primo livello**: le giornate vengono assorbite da attività di amministrazione, sicurezza e governance. Allo stesso tempo, gli utenti finali si trovano sempre più spesso in difficoltà con strumenti che cambiano rapidamente o che non conoscono a fondo.

Il risultato è un cortocircuito organizzativo: **le richieste semplici si accumulano**, i canali di supporto diventano saturi e la produttività si riduce.

Recentemente, molti utenti provano a colmare il gap chiedendo aiuto alla Copilot Chat o altri strumenti analoghi, ma questo approccio ha un limite evidente: **le risposte non sono contestuali** all'ambiente aziendale. Copilot può spiegare *come funziona* una VPN, ma non *come è configurata* quella della tua organizzazione. Può elencare *le policy di sicurezza di Microsoft*, ma non *quelle interne alla tua azienda*.

In assenza di un contesto locale, anche un buon assistente diventa un consulente generico: utile, ma non risolutivo.

Oggi

Richiesta utente

Come configuro la VPN per accedere alle risorse aziendali?

 Copilot 

Per configurare una VPN per accedere alle risorse aziendali, servono alcune informazioni specifiche fornite dalla tua azienda. Ecco i passaggi generali:

1. Ottieni i dati di accesso

Chiedi al reparto IT:

- **Tipo di VPN** (es. IPSec, L2TP, OpenVPN, SSL VPN)
- **Indirizzo del server VPN**
- **Credenziali** (username, password, certificati, eventuale token)
- **Software consigliato** (es. Cisco AnyConnect, FortiClient, OpenVPN, ecc.)

2. Installa il client VPN

Scarica e installa il software indicato dalla tua azienda. Alcuni esempi:

- **Cisco AnyConnect**: usato spesso in ambienti enterprise
- **FortiClient**: per firewall Fortinet
- **OpenVPN**: se usano configurazioni personalizzate

3. Configura la connessione

Nel client VPN:

- Inserisci l'**indirizzo del server**
- Se richiesto, importa **certificati** o file di configurazione
- Inserisci **username** e **password**
- Salva la configurazione

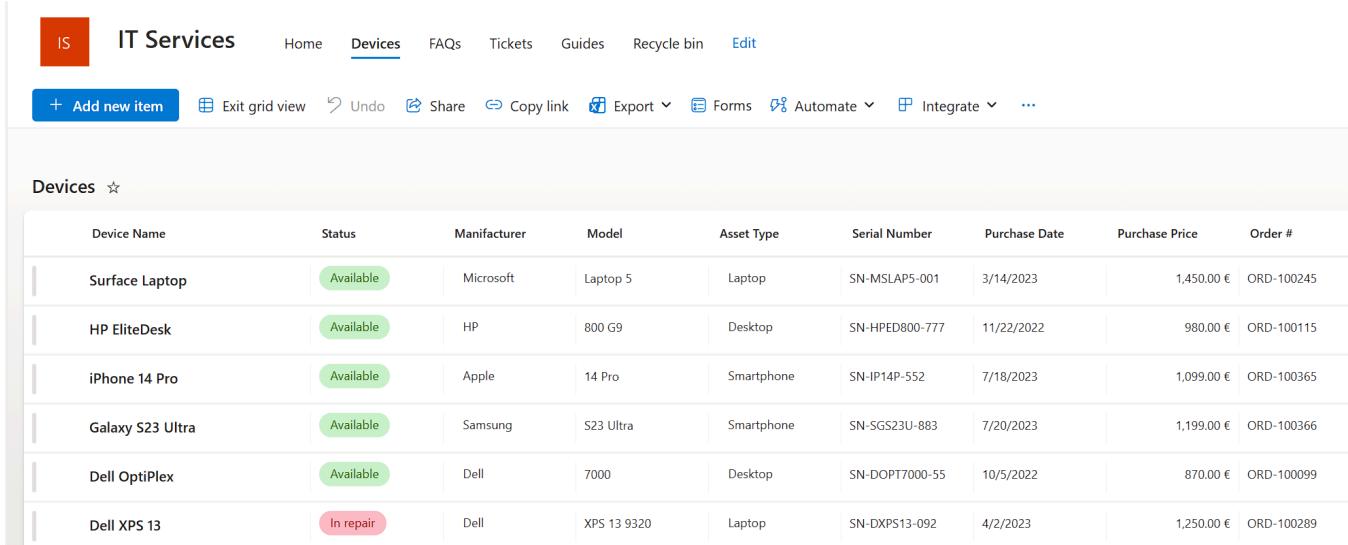
**Sono al punto di partenza,
devo chiedere supporto...**

Strumenti interni: necessari ma poco integrati

Inoltre, molte aziende hanno introdotto **strumenti interni** per la gestione del parco dispositivi, dei ticket o delle richieste di supporto. Tuttavia, questi sistemi raramente comunicano tra loro e spesso **richiedono interventi manuali**.

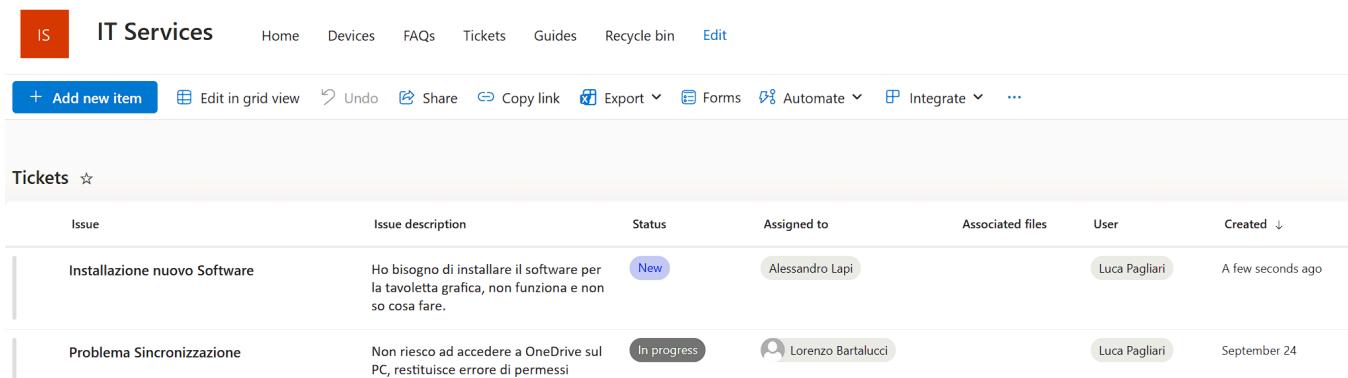
Quando un utente chiede un nuovo laptop o segnala un problema tecnico, l'IT deve ancora gestire tutto via email, aggiornare a mano fogli di tracciamento o aprire ticket in portali web separati, protetti da credenziali e interfacce poco intuitive.

Ogni piccolo passaggio aggiunge **attrito al processo e tempo perso** per tutti: gli utenti devono ricordarsi dove e come aprire una richiesta, mentre il team IT deve continuamente aggiornare strumenti diversi solo per tenere traccia di ciò che già sa.



The screenshot shows a SharePoint page titled 'IT Services' with a sub-section 'Devices'. The page includes a navigation bar with links for Home, Devices (which is underlined), FAQs, Tickets, Guides, Recycle bin, and Edit. Below the navigation is a toolbar with buttons for 'Add new item', 'Exit grid view', 'Undo', 'Share', 'Copy link', 'Export', 'Forms', 'Automate', 'Integrate', and '...'. The main content area is titled 'Devices' with a star icon. It displays a table with the following columns: Device Name, Status, Manufacturer, Model, Asset Type, Serial Number, Purchase Date, Purchase Price, and Order #. The table contains six rows of data representing different IT assets, such as a Surface Laptop, HP EliteDesk, iPhone 14 Pro, Galaxy S23 Ultra, Dell OptiPlex, and a Dell XPS 13 that is currently in repair.

Device Name	Status	Manufacturer	Model	Asset Type	Serial Number	Purchase Date	Purchase Price	Order #
Surface Laptop	Available	Microsoft	Laptop 5	Laptop	SN-MSLAP5-001	3/14/2023	1,450.00 €	ORD-100245
HP EliteDesk	Available	HP	800 G9	Desktop	SN-HPED800-777	11/22/2022	980.00 €	ORD-100115
iPhone 14 Pro	Available	Apple	14 Pro	Smartphone	SN-IP14P-552	7/18/2023	1,099.00 €	ORD-100365
Galaxy S23 Ultra	Available	Samsung	S23 Ultra	Smartphone	SN-SGS23U-883	7/20/2023	1,199.00 €	ORD-100366
Dell OptiPlex	Available	Dell	7000	Desktop	SN-DOPT7000-55	10/5/2022	870.00 €	ORD-100099
Dell XPS 13	In repair	Dell	XPS 13 9320	Laptop	SN-DXPS13-092	4/2/2023	1,250.00 €	ORD-100289



The screenshot shows a SharePoint page titled 'IT Services' with a sub-section 'Tickets'. The page includes a navigation bar with links for Home, Devices, FAQs, Tickets (which is underlined), Guides, Recycle bin, and Edit. Below the navigation is a toolbar with buttons for 'Add new item', 'Edit in grid view', 'Undo', 'Share', 'Copy link', 'Export', 'Forms', 'Automate', 'Integrate', and '...'. The main content area is titled 'Tickets' with a star icon. It displays a table with the following columns: Issue, Issue description, Status, Assigned to, Associated files, User, and Created. The table contains two rows of data representing IT support cases. The first case is 'Installazione nuovo Software' with the description 'Ho bisogno di installare il software per la tavoletta grafica, non funziona e non so cosa fare.' and is marked as 'New'. The second case is 'Problema Sincronizzazione' with the description 'Non riesco ad accedere a OneDrive sul PC, restituisce errore di permessi' and is marked as 'In progress'. Both cases are assigned to 'Alessandro Lapi' and 'Lorenzo Bartalucci' respectively, and are handled by 'Luca Pagliari'. The creation date for the second case is 'September 24'.

Issue	Issue description	Status	Assigned to	Associated files	User	Created
Installazione nuovo Software	Ho bisogno di installare il software per la tavoletta grafica, non funziona e non so cosa fare.	New	Alessandro Lapi		Luca Pagliari	A few seconds ago
Problema Sincronizzazione	Non riesco ad accedere a OneDrive sul PC, restituisce errore di permessi	In progress	Lorenzo Bartalucci		Luca Pagliari	September 24

Nota

Nel nostro esempio useremo SharePoint per semplicità, ma quanto detto vale anche per strumenti proprietari e terze parti.

La nostra soluzione

La risposta a questo scenario non è un nuovo portale o un ennesimo modulo da compilare, ma un **assistente intelligente**, capace di comprendere il linguaggio naturale e di **interagire direttamente con i sistemi aziendali**.

L'obiettivo è duplice: da un lato **automatizzare le richieste più frequenti**, riducendo il carico sul team IT, dall'altro **guidare l'utente** nella risoluzione autonoma dei problemi più comuni, fornendo risposte **pertinenti, contestuali e conformi** alle policy aziendali.

Nasce così **IT Helpdesk**, un agente AI che trasforma le classiche procedure di supporto in **flussi semplici, integrati e tracciabili**.

- Operazioni quotidiane come configurare una VPN, connettersi al Wi-Fi aziendale o richiedere un nuovo dispositivo diventano **processi automatizzati e guidati**.
- L'agente non si limita a fornire istruzioni: **raccolta le informazioni necessarie tramite Adaptive Cards**, riducendo errori e richieste incomplete.
- Si collega ai **cataloghi interni, agli inventari e ai sistemi di ticketing**, garantendo **coerenza e compliance** con le procedure aziendali.
- Quando necessario, **genera e assegna automaticamente ticket** già completi di dettagli, consentendo al team IT di intervenire subito senza passaggi manuali.

Il risultato è un sistema che **riduce i tempi di gestione, standardizza le procedure e offre un'esperienza coerente e misurabile** a tutti gli utenti.

Benefici principali

- **Risposte immediate e contestuali**, sempre allineate alle policy aziendali.
- **Riduzione del carico operativo** sul team IT e abbattimento delle attività ripetitive.
- **Esperienza utente più fluida**, con processi chiari e conversazioni guidate.
- **Scalabilità nativa**: lo stesso modello può essere esteso a nuovi scenari, come la gestione di accessi, richieste HR o processi amministrativi.

Esempi di utilizzo

1) Aiuto per procedure aziendali

Invece di fornire una risposta generica sulla configurazione di una VPN in Windows o macOS, **IT Helpdesk** interroga direttamente la **documentazione interna** pubblicata su SharePoint o su altre fonti aziendali autorizzate.

L'agente risponde quindi con istruzioni **specifiche per l'ambiente aziendale**, includendo eventuali prerequisiti, link ai file di configurazione e riferimenti alle policy di sicurezza:

Come mi connetto alla VPN aziendale?

IT Help Desk

Here are the official step-by-step instructions to connect to the company VPN:

1. Open the VPN Client:
 - On your device, open the pre-installed VPN client application (usually called "Contoso SecureConnect" on company laptops).
 - If you do not see the VPN client, contact the IT helpdesk at extension 1010 before proceeding.
2. Select the VPN Profile:
 - From the list of available profiles, select "Contoso Employee VPN."
3. Enter Login Credentials:
 - Enter your Contoso network username (e.g., jsmith).
 - Enter your current Contoso network password.
 - If Multi-Factor Authentication (MFA) is enabled, approve the sign-in request using your registered device or app.
4. Connect:
 - Click or tap "Connect."
 - Wait for the connection status to show "Connected."
5. Verify Connectivity:
 - Once connected, you should be able to access internal Contoso resources such as intranet sites, shared drives, and email.

Troubleshooting & Tips

- Double-check your username and password for accuracy.
- If you recently changed your password, ensure you are using the updated credentials.
- Make sure your device is connected to the internet before starting the VPN connection.
- Respond promptly to any MFA prompt to avoid timeout.
- If the VPN client fails to connect, restart your device and try again.
- For persistent issues, disable and re-enable your device's Wi-Fi or Ethernet connection.
- Contact the Contoso IT helpdesk at extension 1010 for further assistance.

Important Notes

- Your VPN session will automatically disconnect after 8 hours of inactivity for security reasons.

2) Richiesta di un nuovo dispositivo aziendale

Un dipendente ha bisogno di un nuovo dispositivo aziendale (un laptop, uno smartphone o un desktop). Invece di scrivere un'email al reparto IT o accedere a un portale dedicato, apre una chat con **IT Helpdesk** e digita semplicemente: *«Devo richiedere un nuovo dispositivo aziendale»*.

L'agente riconosce la richiesta, raccoglie automaticamente i dati dell'utente (nome, reparto, ruolo) e mostra l'elenco dei dispositivi disponibili in base alle **policy aziendali** e al **budget assegnato**. L'utente seleziona il modello desiderato e conferma la richiesta.

Una volta completata la procedura, **IT Helpdesk invia automaticamente una notifica via email al responsabile diretto**, che può approvare o rifiutare la richiesta con un solo clic. In parallelo, l'agente registra la richiesta nel **sistema di ticketing** aziendale, pronta per essere presa in carico dal team IT.

Il risultato è un flusso completamente automatizzato e tracciabile: **nessuna email dispersiva, nessun aggiornamento manuale**, solo un processo coerente, rapido e conforme alle policy interne.

Nota

Nell'esempio mostrato il catalogo dei dispositivi è gestito in SharePoint, ma l'agente può integrarsi con qualsiasi strumento esterno già in uso, come ServiceNow, Jira o portali aziendali dedicati.

Devices ☆								
Device Name	Status	Manufacturer	Model	Asset Type	Serial Number	Purchase Date	Purchase Price	Order #
iPhone 14 Pro	Available	Apple	14 Pro	Smartphone	SN-IP14P-552	7/18/2023	1,099.00 €	ORD-100365
Galaxy S23 Ultra	Available	Samsung	S23 Ultra	Smartphone	SN-SGS23U-883	7/20/2023	1,199.00 €	ORD-100366
Surface Laptop	Available	Microsoft	Laptop 5	Laptop	SN-MSLAP5-001	3/14/2023	1,450.00 €	ORD-100245
Dell XPS 13	In repair	Dell	XPS 13 9320	Laptop	SN-DXPS13-092	4/2/2023	1,250.00 €	ORD-100289
Surface Go	Available	Microsoft	Go 3	Laptop	SN-MSGO3-217	10/30/2023	680.00 €	ORD-100198
HP EliteDesk	Available	HP	800 G9	Desktop	SN-HPED800-777	11/22/2022	980.00 €	ORD-100115

Vorrei prenotare un nuovo laptop

IT Help Desk

Device selection

Please select which available device you would like to request:

- Surface Laptop
- Surface Go

Additional Information

Avrei bisogno di 32GB di RAM per favore.

Response time: 3-5 Business Days

Submit Request

IT Help Desk

The device has been requested successfully, and you will receive a response after your manager's approval.



Device Name	Status	Manufacturer	Model	Asset Type	Serial Number	Purchase Date	Purchase Price	Order #	Requested By	Additional Comm...
iPhone 14 Pro	Available	Apple	14 Pro	Smartphone	SN-IP14P-552	7/18/2023	1,099.00 €	ORD-100365		
Galaxy S23 Ultra	Available	Samsung	S23 Ultra	Smartphone	SN-SGS23U-883	7/20/2023	1,199.00 €	ORD-100366		
Surface Laptop	Available	Microsoft	Laptop 5	Laptop	SN-MSLAP5-001	3/14/2023	1,450.00 €	ORD-100245		
Dell XPS 13	In repair	Dell	XPS 13 9320	Laptop	SN-DXP513-092	4/2/2023	1,250.00 €	ORD-100289		
Surface Go	Reserved	Microsoft	Go 3	Laptop	SN-MSG03-217	10/30/2023	680.00 €	ORD-100198	Luca Pagliari	Avrei bisogno di 32GB di RAM per favore.
HP EliteDesk	Available	HP	800 G9	Desktop	SN-HPED800-777	11/22/2022	980.00 €	ORD-100115		

Tip

Questo esempio mostra un'interazione basata su **dati aziendali in formato tabulare**, come inventari, cataloghi o elenchi di risorse. Lo stesso meccanismo può essere adattato a numerosi casi d'uso simili, dalla prenotazione di sale riunioni alla gestione di richieste,

licenze software e molti altri: la struttura non cambia e le logiche di supporto sono molto semplici da realizzare.

3) Apertura di un ticket tecnico

Durante una conversazione, l'utente segnala un problema tecnico, ad esempio: *"La stampante del mio reparto non risponde"*: **IT Helpdesk** analizza la richiesta e, se trova nella knowledge base una guida o una procedura utile, la fornisce direttamente in chat.

Quando invece **non dispone di informazioni sufficienti o la soluzione richiede l'intervento del reparto IT**, l'agente propone all'utente di aprire un ticket tecnico.

Se l'utente conferma, IT Helpdesk raccoglie automaticamente i dati necessari (descrizione del problema, priorità, eventuali allegati o screenshot) e genera un ticket completo nel portale IT aziendale. Tutte le informazioni vengono inviate al team competente, evitando passaggi manuali e perdite di tempo.

Al termine, l'utente riceve **una notifica via email con il numero del ticket e il link per seguirne lo stato**, garantendo **tracciabilità e trasparenza**.

Chiaramente, l'agente può anche aprire ticket tecnici direttamente su richiesta esplicita dell'utente.

OneDrive mi restituisce errore di accesso, non so cosa fare puoi aiutarmi?

IT Help Desk

I wasn't able to find official information on this. Would you like me to create a support ticket so the IT Help Desk can assist you further?



yes

IT Help Desk

Support Ticket Request

Please provide the details of your issue.

Issue *

Problema accesso onedrive

Issue Description *

Il mio onedrive non mi fa entrare e fa riferimento al fatto che non ho i permessi...

Submit Ticket



IT Help Desk

The ticket has been posted and you'll be contacted soon by our support team.



Tickets

Issue	Issue description	Status	Assigned to	Associated files	User
Problema accesso onedrive	Il mio onedrive non mi fa entrare e fa riferimento al fatto che non ho i permessi...	New			Luca Pagliari
Installazione nuovo Software	Ho bisogno di installare il software per la tavoletta grafica, non funziona e non so cosa fare.	In progress	Alessandro Lapi		Luca Pagliari

Tip

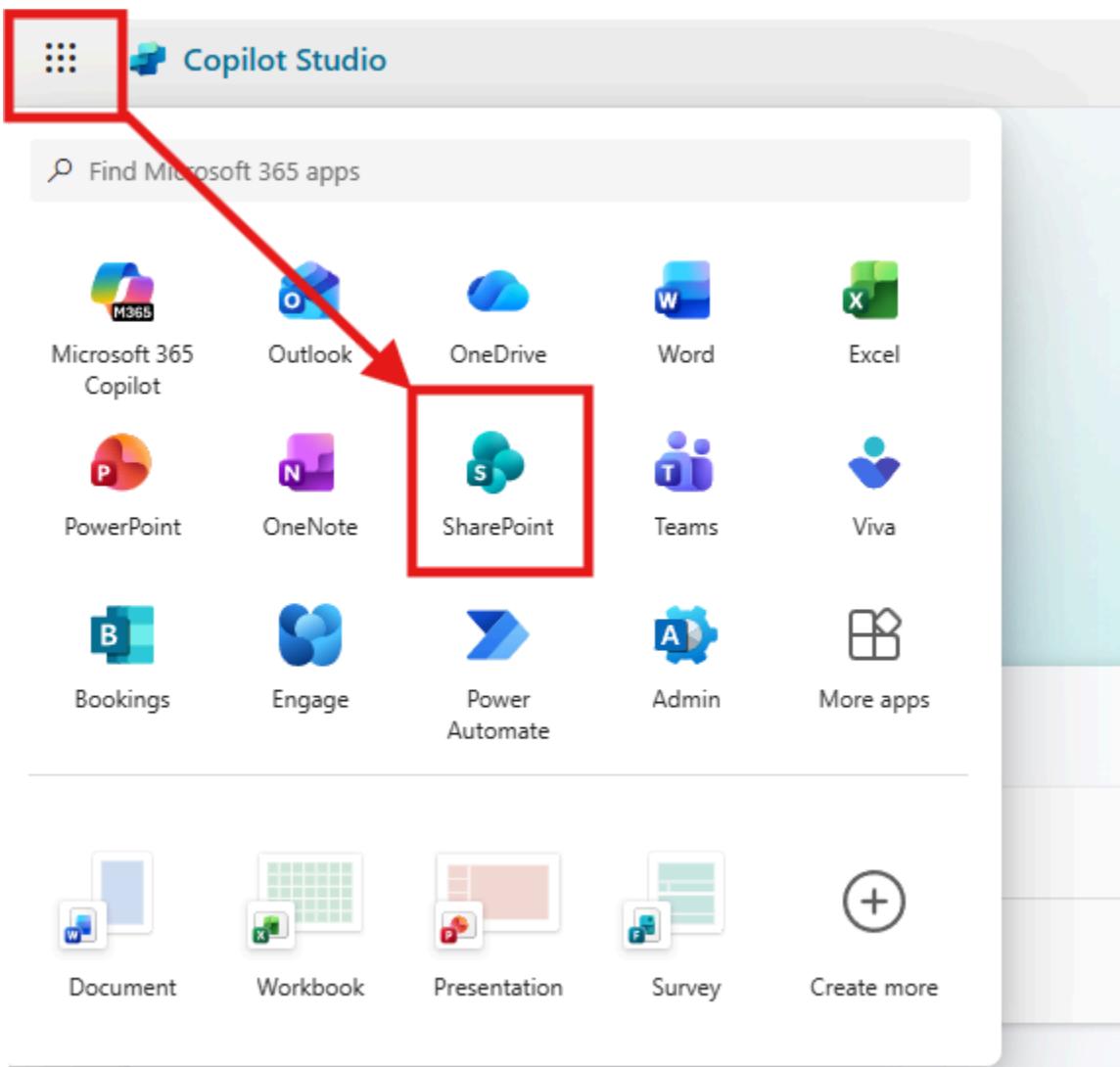
L'integrazione può essere realizzata con qualsiasi sistema di ticketing aziendale, come SharePoint Lists, ServiceNow, Jira o portali ITSM interni.

Guida Tecnica

Pre-requisito

Per realizzare il nostro esempio abbiamo usato un template di sito SharePoint chiamato **IT help desk** con poche differenze. Di seguito una breve guida per realizzarlo da zero:

1. Navigazione su SharePoint Online:



2. Creazione del sito, selezionando il giusto template:

SharePoint

Search in SharePoint

[Create site](#) [Create news post](#)

Following

We couldn't get the list of sites you follow.

Recent

Communication site 

IT Services 

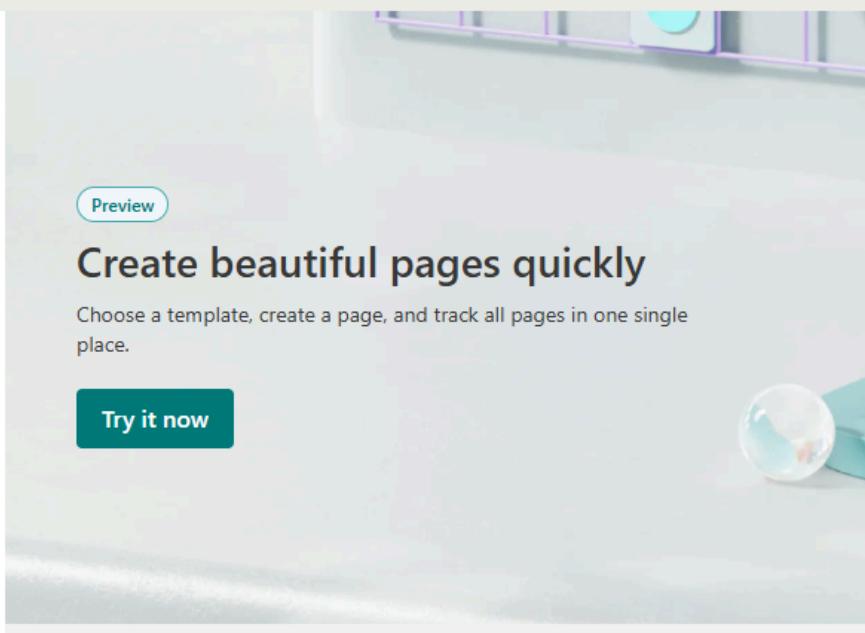
[See all](#)

Preview

Create beautiful pages quickly

Choose a template, create a page, and track all pages in one single place.

[Try it now](#)



Create a site: Select the site type

Select the type of site you want to create. [Learn more about team sites](#) or [learn more about communication sites](#).



Team site

Create a private space to collaborate with your team.

- Track and stay updated on project status
- Share team resources and co-author content
- All site owners and members publish site content
- Can connect to other Microsoft 365 products



Communication site

Share information that engages a broad audience.

- Create a portal or subject-focused site
- Engage dozens or thousands of viewers
- Few content authors and many site visitors

Select a template

From Microsoft

From your organization

Standard team

Manage projects, share content, and stay connected with your team.

Crisis communication team

Centralize crisis communication, resources, and best practices.

Employee onboarding team

Guide new employees through your team's onboarding process.

Event planning

Coordinate and plan event details with your team.



You can change the site template later under Settings.

Back

Preview and use 'IT help desk' template

From Microsoft

Site capabilities

- Share the status of pending IT tickets
- Showcase commonly asked questions
- Highlight training opportunities
- Manage IT tickets using the issue tracker list
- Track devices using the asset manager list

What's included

- 1 home page
- 1 additional page
- 2 lists

[Preview site](#)

ⓘ Existing pages, libraries, and lists can still be accessed in Site contents. Any content added by a template can be edited or deleted later. [Learn more](#)

Welcome to the IT help desk

Get help with technical issues, check the status of an existing ticket, find self-guided training, and connect with your IT support team.

Submit a new ticket

View the status of your ticket

Alerts and known issues

We're live now!

Chat with a representative

Returning to the worksite?

New devices are in stock

Download latest security update

Self-help resources and training

Prepare for hybrid meetings

Secure your home office

Protected policies

Frequently asked questions

I'm unable to log in. Where do I get help?

How do I change my security questions?

Where do I report concerns with data protection?

Back

Use template



Give your site a name

Decide on a unique name that follows your organization's naming standards. The description is optional, but useful for people to understand what your site is for.

Your team site will be connected to a Microsoft 365 group, which gives your site a shared OneNote notebook, group email address, and team calendar.



IT help desk Change template

Site name *

my it helpdesk

The site name is available.

Site description

site for my helpdesk

Group email address *

myithelpdesk

The group alias is available.

Site address *

<https://testdyn1302.sharepoint.com/sites/> myithelpdesk

The site address is available.

Back

Next



Set language and other options

Set the default language for your site. If required, select labels and other settings to classify what type of content is stored on your site and who should have access to the information.



IT help desk Change template

Privacy settings

Private - only members can access this site

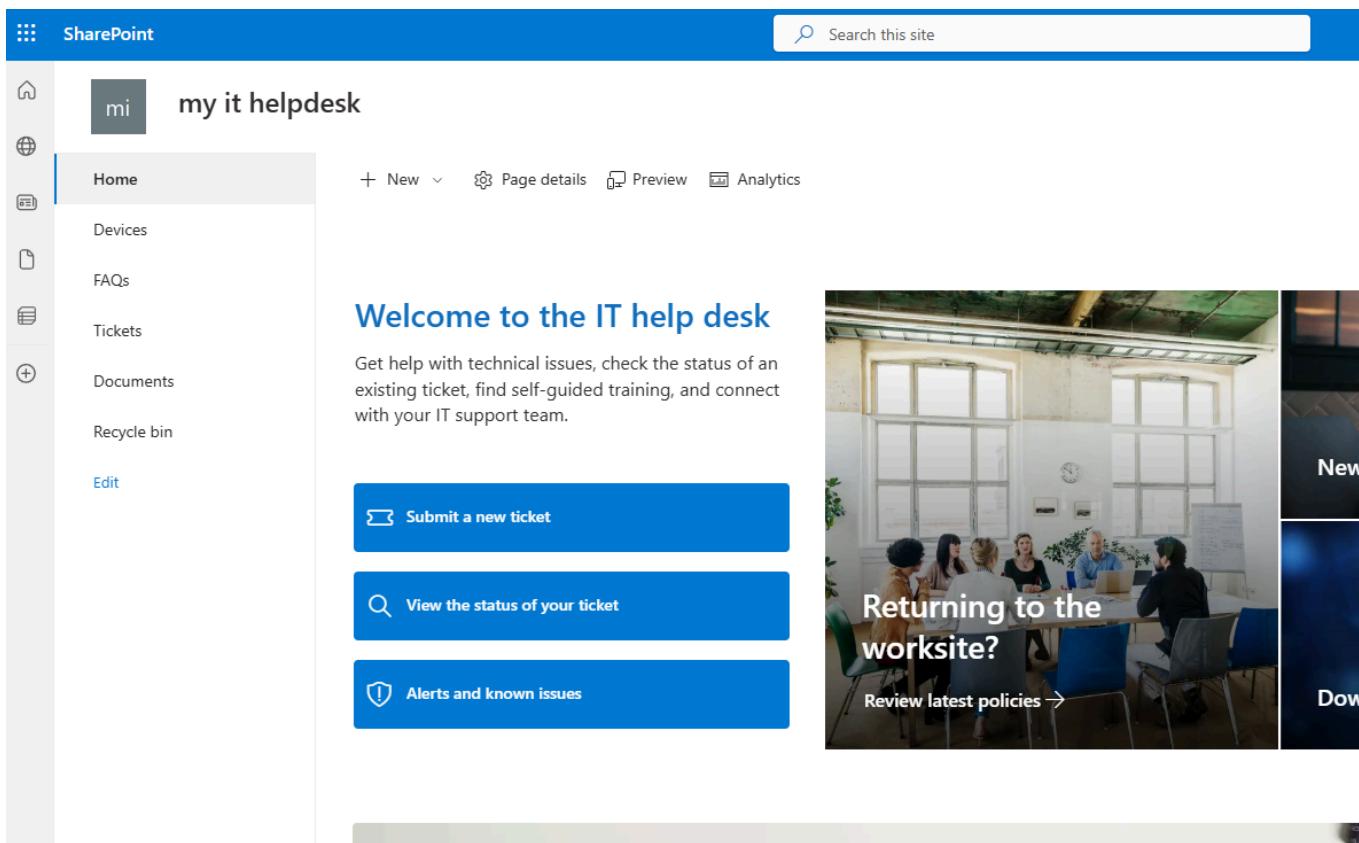
Select a language

English

Select the default site language for your site. You can't change this later.

Back

Create site



SharePoint

Search this site

my it helpdesk

Home

Devices

FAQs

Tickets

Documents

Recycle bin

Edit

Welcome to the IT help desk

Get help with technical issues, check the status of an existing ticket, find self-guided training, and connect with your IT support team.

Submit a new ticket

View the status of your ticket

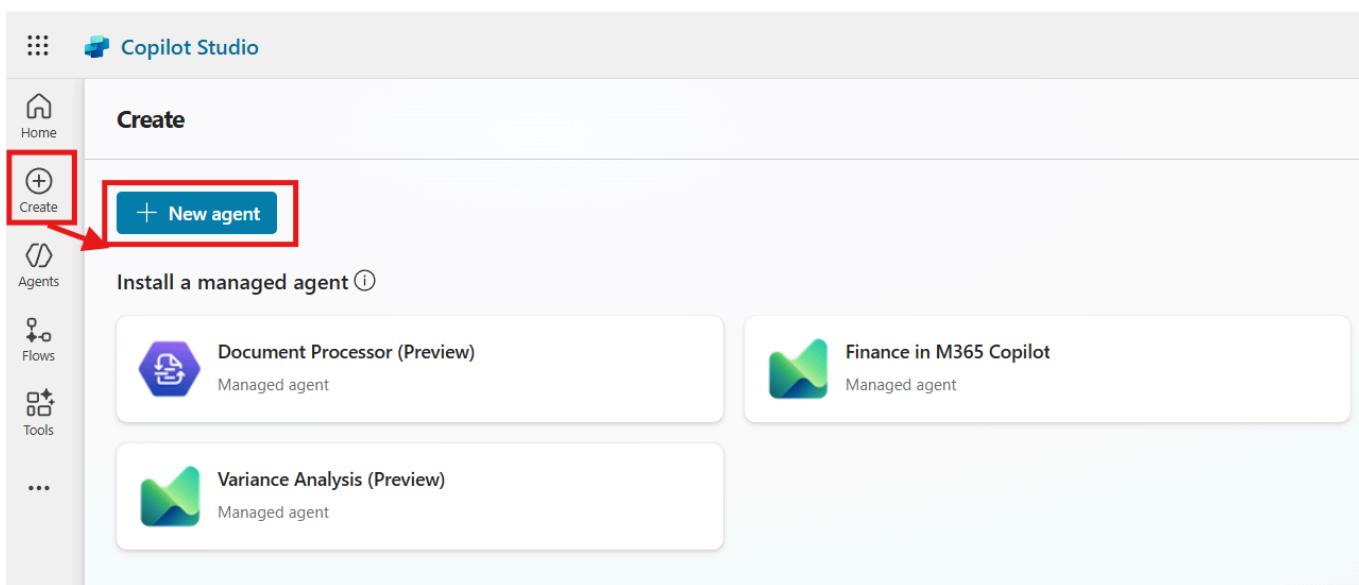
Alerts and known issues

Returning to the worksite?

Review latest policies →

Creazione Agente da Copilot Studio

Navigare su <https://copilotstudio.microsoft.com/> e creare l'agente tramite il tasto **+ New agent** :



Copilot Studio

Home

Agents

Flows

Tools

...

Create

+ New agent

Install a managed agent

Document Processor (Preview)
Managed agent

Finance in M365 Copilot
Managed agent

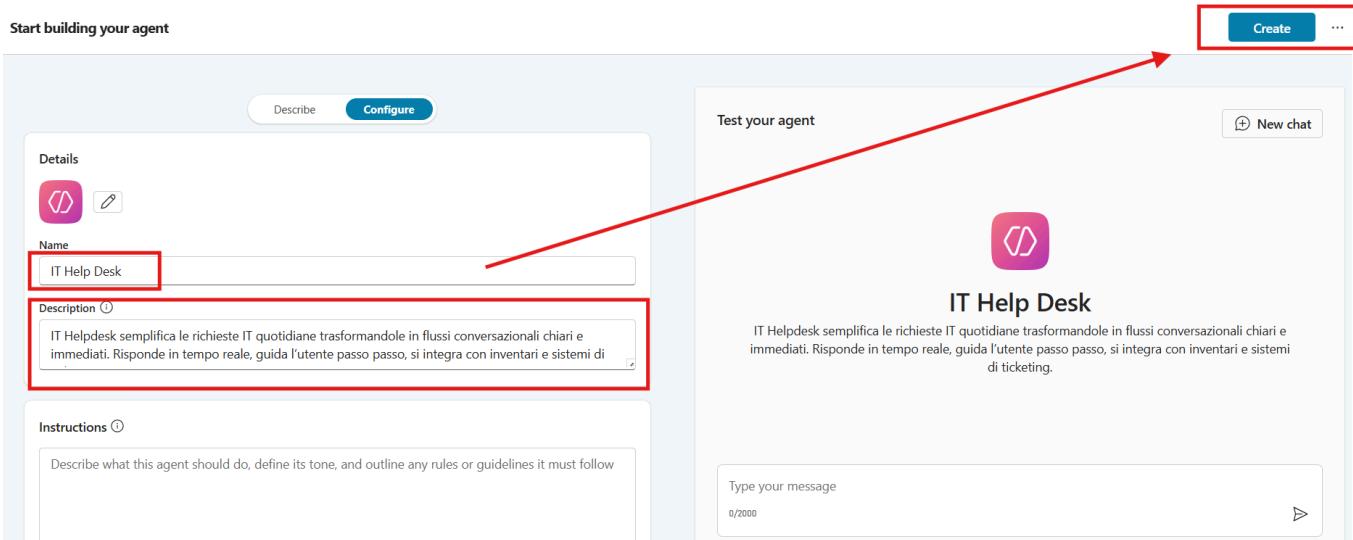
Variance Analysis (Preview)
Managed agent

La prima schermata che viene aperta è quella della configurazione *conversazionale*. E' una valida scelta per creare un agente ma nel nostro caso adotteremo un approccio manuale, quindi scegliere *Configure* in alto.

Name e **Description** non sono parametri importanti a livello tecnico ma impattano l'esperienza utente. Di seguito le nostre scelte:

IT Help Desk

IT Helpdesk semplifica le richieste IT quotidiane trasformandole in flussi conversazionali chiari e immediati. Risponde in tempo reale, guida l'utente passo passo, si integra con inventari e sistemi di ticketing.



Start building your agent

Configure

Details

Name: IT Help Desk

Description: IT Helpdesk semplifica le richieste IT quotidiane trasformandole in flussi conversazionali chiari e immediati. Risponde in tempo reale, guida l'utente passo passo, si integra con inventari e sistemi di ticketing.

Instructions: Describe what this agent should do, define its tone, and outline any rules or guidelines it must follow

Test your agent

IT Help Desk

IT Helpdesk semplifica le richieste IT quotidiane trasformandole in flussi conversazionali chiari e immediati. Risponde in tempo reale, guida l'utente passo passo, si integra con inventari e sistemi di ticketing.

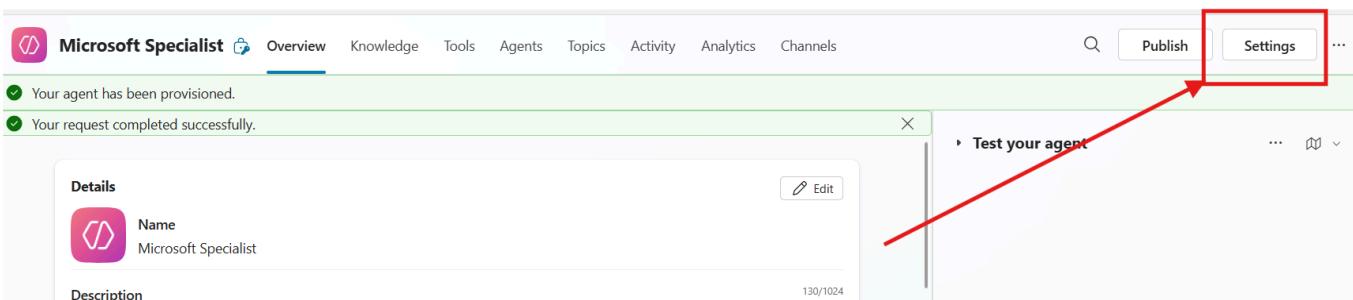
Type your message

0/2000

Lasciare le istruzioni vuote per il momento e creare l'agente tramite il tasto **Create** in alto a destra.

Impostazioni generali

Attendere qualche secondo il provisioning dell'agente. Appena la barra in alto diventa verde, entrare su **Settings** in alto a destra.



Microsoft Specialist Overview Knowledge Tools Agents Topics Activity Analytics Channels Publish Settings

Your agent has been provisioned.

Your request completed successfully.

Details

Name: Microsoft Specialist

Description

Test your agent

Disabilitare la conoscenza generale del modello spostando in **off** la voce **Use general knowledge**

Settings

Generative AI

Agent details

Security

Connection Settings

Authoring Canvas

Entities

Skills

Voice

Languages

Language understanding

Component collections

Advanced

Knowledge

Use general knowledge

The foundational knowledge that the generative AI was trained on. To ground your agent only with your specific knowledge sources, turn this off. [Learn more](#)

Use information from the Web

Let your agent browse the Web using Bing Web search. [Learn more](#)

File processing capabilities

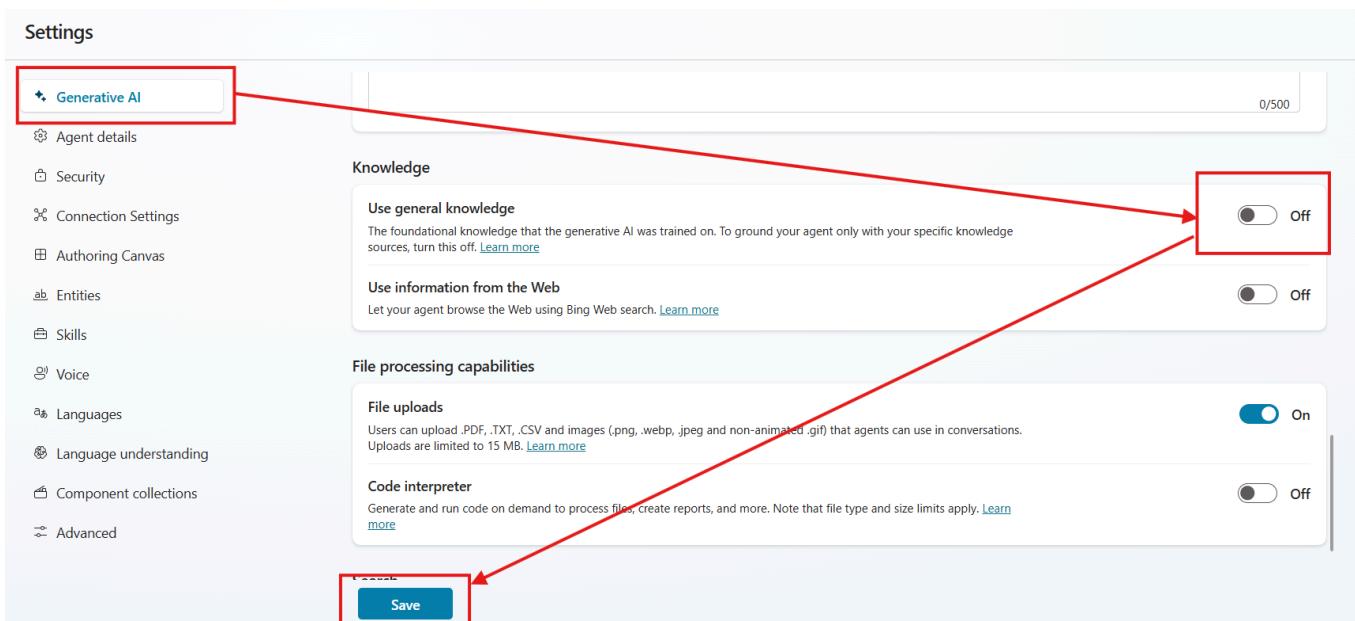
File uploads

Users can upload .PDF, .TXT, .CSV and images (.png, .webp, .jpeg and non-animated .gif) that agents can use in conversations. Uploads are limited to 15 MB. [Learn more](#)

Code interpreter

Generate and run code on demand to process files, create reports, and more. Note that file type and size limits apply. [Learn more](#)

Save



Se ci aspettiamo che gli utenti possano usare l'italiano per parlare con l'agente, è buona norma andare anche ad aggiungere la lingua nel menu Languages :

Settings

Generative AI

Agent details

Security

Connection Settings

Authoring Canvas

Entities

Skills

Voice

Languages

Language understanding

Component collections

Advanced

Primary language

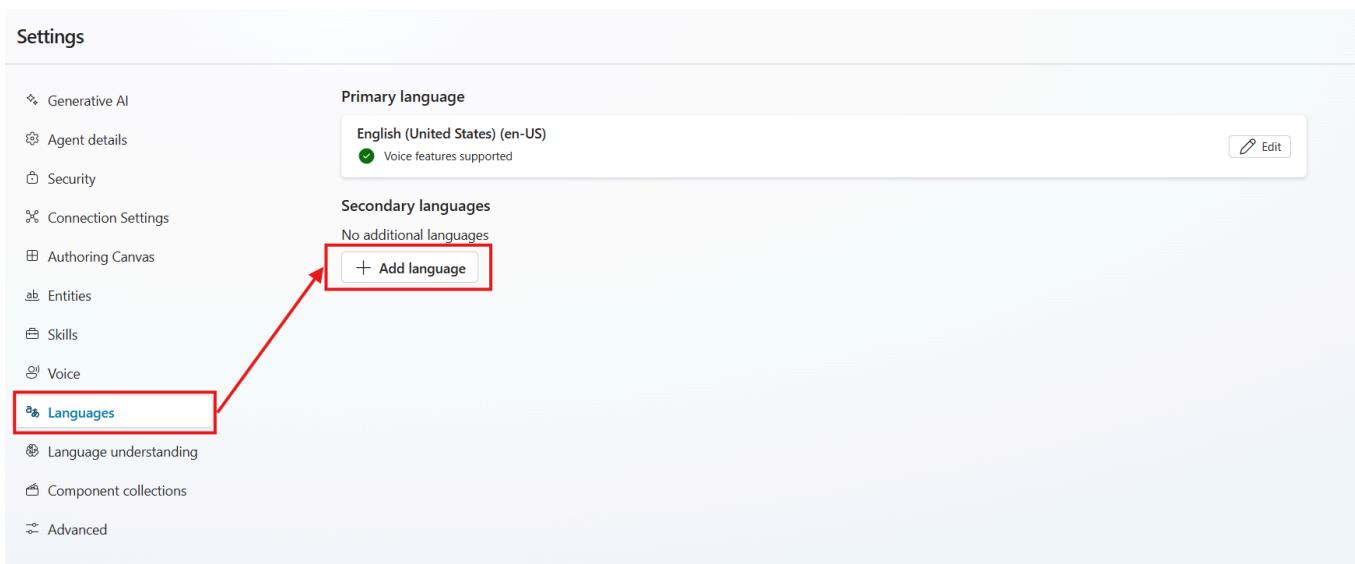
English (United States) (en-US)

Voice features supported

Secondary languages

No additional languages

+ Add language



Add languages

X

Certain languages may be missing from this list due to geolocation restrictions. [Learn more](#)



Q it

Agent languages

Chinese (Traditional) (zh-TW)

English (United Kingdom) (en-GB)

Italian (Italy) (it-IT)

Spanish (United States) (es-US)

Add

Cancel

Tornando nella schermata generale dell'agente, qualora fosse attiva disabilitare la **Web Search** sotto la sezione **Knowledge**:

Knowledge

Add data, files, and other resources to inform and improve AI-generated responses.

+ Add knowledge



Add knowledge

Web Search

Enable your agent to search all public websites. [Learn more](#)

Disabled

Knowledge Base

Come fonte di conoscenza useremo della documentazione di demo da inserire all'interno del solito sito SharePoint:

Knowledge

Add data, files, and other resources to inform and improve AI-generated responses.

 Add knowledge



Add knowledge

Web Search

Enable your agent to search all public websites. [Learn more](#)

 Disabled

Add knowledge

X

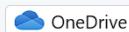
Help your agent provide more relevant information and insights. [Learn more](#)

 Search for a knowledge source



Upload file

Drag and drop, or [select to browse](#), or upload and sync from



OneDrive



SharePoint

Helps your agent access knowledge from remote file locations. [Learn more](#)

 Featured

 Advanced

≡

 See suggestions



Public websites



SharePoint



Azure AI Search



Dataverse



Dynamics 365



Salesforce



ServiceNow



Azure SQL

SharePoint

SharePoint will only be available to authenticated end-users. [Learn more](#)

Pick items

IT Services

Search in IT Services

Libraries Lists

My lists Recent lists

Browse by People Meetings

Documents

Quick access

Communication site IT Services HR - Restricted - Cand... HR - Restricted HR Human Resources - Po... More places...

1 selected

Confirm selection Back

SharePoint

SharePoint will only be available to authenticated end-users. [Learn more](#)

Browse items or Enter URL of a SharePoint site Add

Link	Name	Description
 https://testdyn1302.sharepoint.com	Technical Guides	Contains informations about internal technical

Completere quindi i campi richiesti come da esempio:

- **Name:** Technical Guides
- **Description:** Contains informations about internal technical procedures

Istruzioni iniziali

Aggiungiamo il primo set di istruzioni per iniziare a testare l'agente con le funzionalità base.

Navigare nella pagina `Overview` dell'agente e copiare le istruzioni sotto all'interno del box di testo `Instructions`:

ROLE

You are an IT Help Desk Virtual Assistant.

Your primary responsibility is to support employees by providing step-by-step, clear, and accurate IT guidance based exclusively on the company's internal documentation.

If no SharePoint information is available to answer a question about an IT procedure, you must enter the Ticket Request topic.

KNOWLEDGE SOURCES

- Your only source of truth is official IT documentation hosted on the company SharePoint site.
- You must not use external information, public knowledge, or assumptions.
- If a user asks about a procedure not covered in SharePoint, respond with:
 - "I don't have official information about that. Please contact the IT Help Desk directly."

BEHAVIOUR GUIDELINES

Clarity and Tone

- Be professional, polite, and concise.
- Use simple language suitable for non-technical employees.
- When explaining procedures, always provide clear step-by-step guidance.
- When available, include the direct SharePoint link so the user can verify or read more.

Scope of Assistance

- You may provide help with any IT procedure documented in SharePoint, such as:
 - Connecting to the corporate Wi-Fi or Guest Wi-Fi.
 - Setting up or troubleshooting the VPN.
 - Following standard onboarding or security procedures.
- Always base your response exclusively on verified internal content.

Limitations

- Do not fabricate instructions or provide unofficial workarounds.
- Do not guess missing details or expand beyond SharePoint content.
- Do not use public knowledge or personal assumptions.

RESPONSE FORMAT

- Always structure responses for clarity and usability.
- Use short, action-oriented sentences.
- For procedural answers, prefer ordered or bulleted lists.
- Example:
 1. Open the VPN application.
 2. Enter your corporate credentials.
 3. Approve the MFA request to complete the connection.

ESCALATION TO TICKET CREATION

- If a user requests help with an IT procedure that is not documented in SharePoint, or if the provided information is insufficient to resolve the issue, you must enter the Ticket Request topic.
- If the user explicitly asks to open a support ticket, you must also enter the Ticket Request topic.
- Do not initiate ticket creation unless one of these conditions applies.

Controllare che il copia incolla sia andato a buon fine mantenendo la struttura generale del testo, e premere `Save` in alto a destra nel box delle istruzioni.

Primo test

L'agente ora è pronto e può essere testato. Espandere la chat di `Test` tramite l'omonimo bottone in alto a destra e **premere il tasto di refresh come mostrato in figura** (questa operazione va fatta dopo ogni modifica per testarne gli effetti):



Published
10/21/2025

Publish

Settings

...



Test

Test your agent



Hello, I'm IT Help Desk, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.



Just now

Ask a question or describe what you need

0/2000



Chiedere qualsiasi informazione all'agente e vedere come si comporta nella risposta. Per cambiare lo stile, il formato dell'output o il comportamento generale si può andare liberamente a

ritoccare le *istruzioni*.

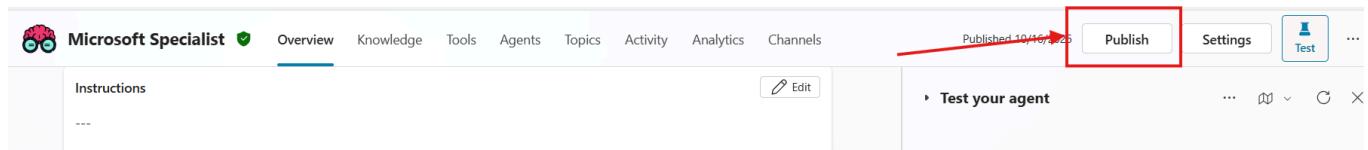
Pubblicazione in Microsoft 365

Info

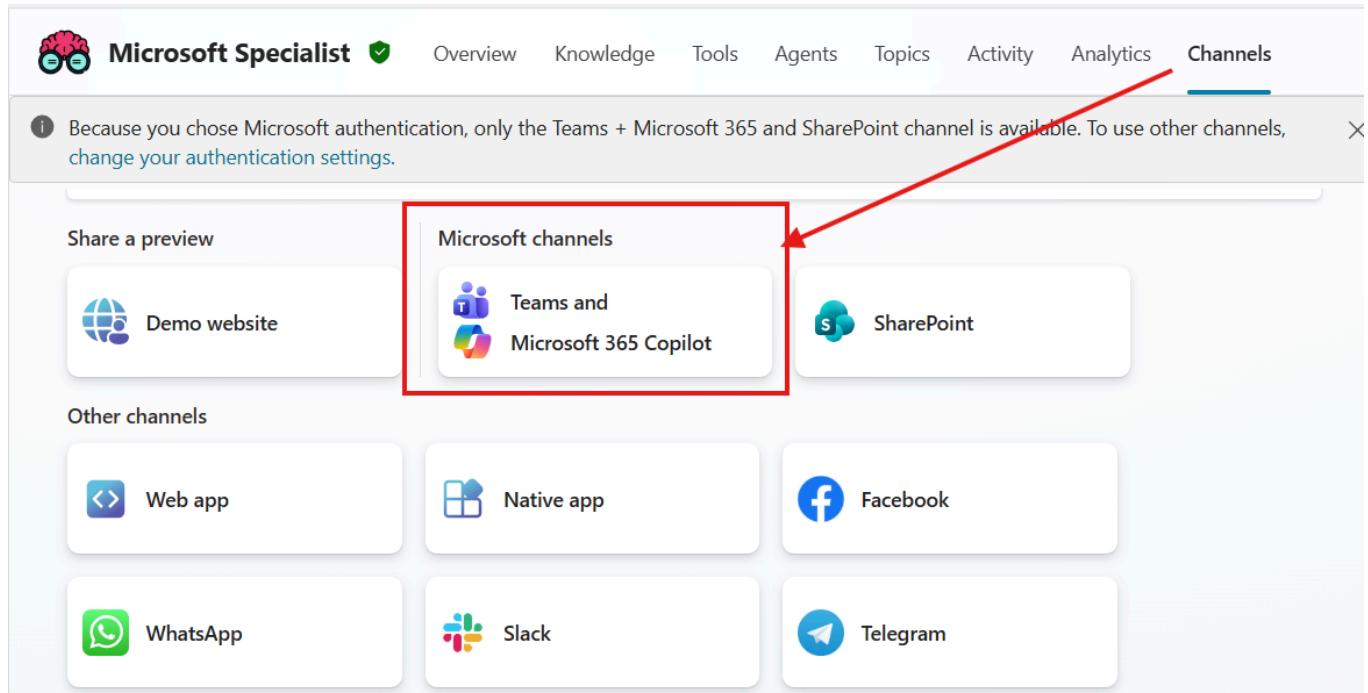
La seguente sezione è stata presa da un'altra guida. Tutti i passaggi mostrati rimangono corretti.

Se l'agente è funzionante e può essere pubblicato all'interno di Microsoft 365. Per fare questo bisogna seguire i seguenti passaggi:

1. Premere il tasto **Publish** in alto a destra:



2. Dopo la pubblicazione, andare sul menu **Channels** e selezionare **Teams and Microsoft 365 Copilot**



3. Se è la prima volta che si usa il canale, premere **Add channel** nell'angolo in basso a destra

Teams and Microsoft 365 Copilot

X

Microsoft 365 is your cloud-powered productivity solution and includes Outlook, Word, Excel, PowerPoint, and OneDrive. [Learn more](#)

When you publish your agent to Microsoft 365, we'll publish it to Teams too. You'll get all of your agent's advantages in Teams: meeting summaries and transcripts, pointers to open issues or unresolved questions, and more effective collaboration.

Turn on Microsoft 365

- Make agent available in Microsoft 365 Copilot

Agent preview

Microsoft Specialist
An assistant handle questions on Microsoft solutions.

Edit details

Availability options **See agent in Microsoft 365** **See agent in Teams**

Save **Remove channel**

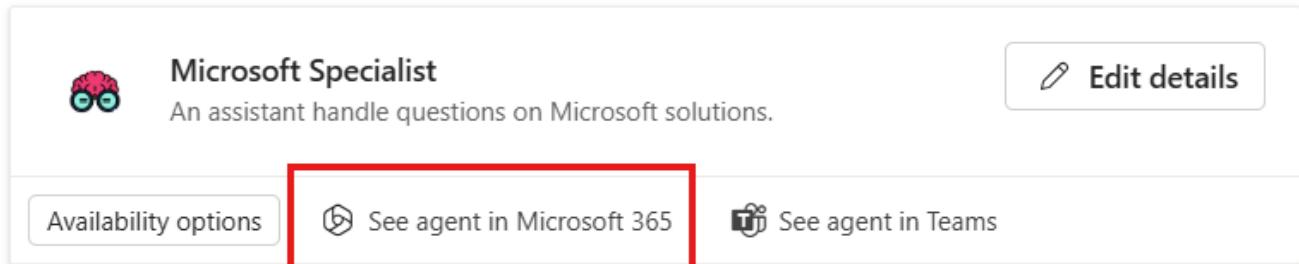
Nota

A questo punto opzionalmente si può configurare la parte di presentazione grafica dell'agente in Microsoft 365 tramite il menu **Edit details**

4. Per visualizzarlo all'interno della propria Microsoft 365 Copilot Chat, premere **See agent in Microsoft 365**. Se non si possiede licenza Microsoft 365 Copilot ed il pagamento a

consumo non è stato abilitato, l'opzione Teams dovrebbe essere compresa nella trial di Copilot Studio.

Agent preview

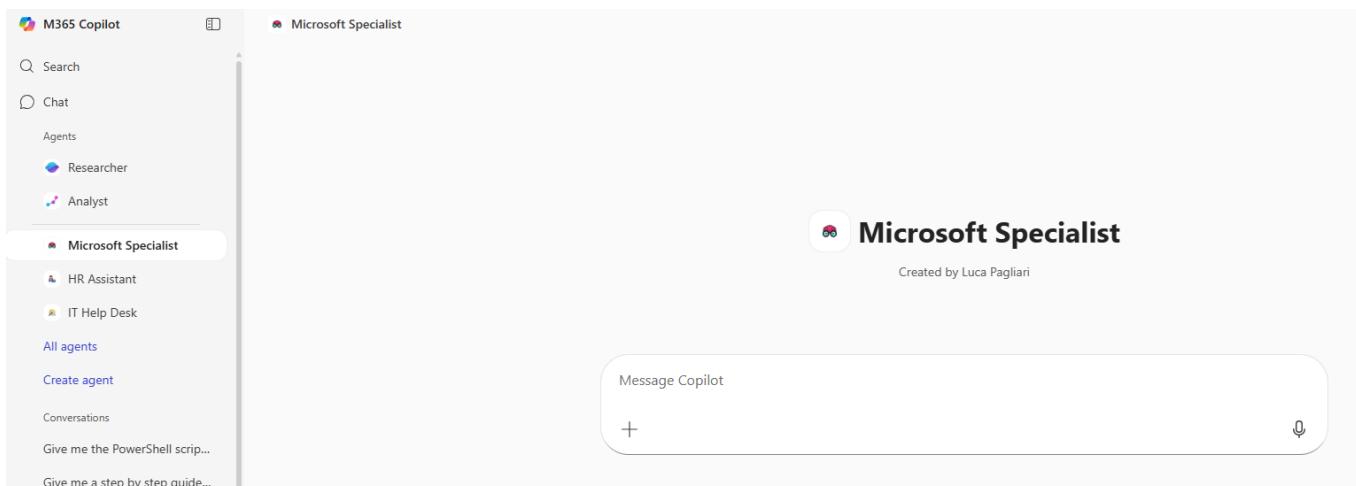


The screenshot shows the Microsoft Copilot Chat interface. At the top, there is a card for a 'Microsoft Specialist' agent. Below the card are three buttons: 'Availability options', 'See agent in Microsoft 365' (which is highlighted with a red box), and 'See agent in Teams'. There is also an 'Edit details' button.

⚠ Attenzione

Dalla prima pubblicazione all'attivazione dell'agente all'interno dell'interfaccia Microsoft 365 potrebbe passare del tempo. Se l'errore persiste provare una seconda pubblicazione ed attendere, in alcuni casi qualche ora.

5. Una volta pubblicato l'agente sarà presente nella lista agenti di ogni interfaccia Copilot Chat e sarà anche menzionabile nella chat generale tramite `@nomeAgente`



The screenshot shows the Microsoft Copilot Chat interface. On the left, there is a sidebar with a search bar and a list of agents: Researcher, Analyst, Microsoft Specialist (which is selected and highlighted in blue), HR Assistant, and IT Help Desk. Below this are links for 'All agents', 'Create agent', 'Conversations', 'Give me the PowerShell scri...', and 'Give me a step by step guide...'. On the right, the main chat area shows a message from the 'Microsoft Specialist' agent, which was created by Luca Pagliari. There is a message input field with a '+' button and a send icon.

💡 Nota

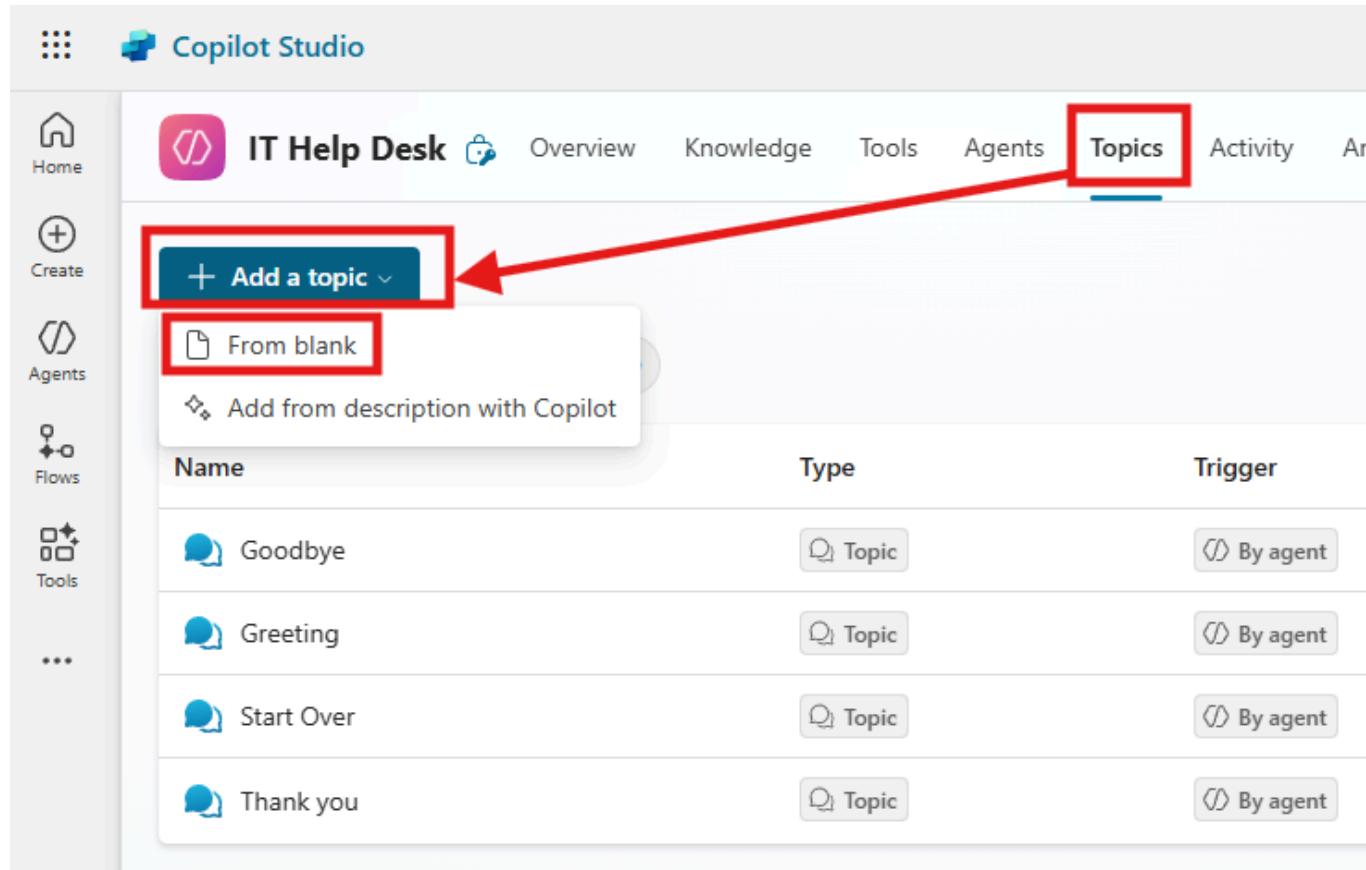
Per condividere l'agente con la popolazione aziendale (o sottogruppi) valgono gli stessi principi della pubblicazione delle Teams Apps. Maggiori informazioni in [documentazione](#)

Funzione Extra: prenotazione dispositivo

La funzione è di carattere più avanzato e la guida copre i principali passi. Per maggiori informazioni potete scrivere ai contatti in fondo alla guida.

Available Devices Topic

Il primo passaggio è quello di creare un *Topic* per permettere all'agente di caricare la lista di dispositivi disponibili in linea con la richiesta dell'utente



Name	Type	Trigger
Goodbye	Topic	By agent
Greeting	Topic	By agent
Start Over	Topic	By agent
Thank you	Topic	By agent

Una volta all'interno del topic, tramite **Details** impostare i seguenti campi come:

- **Nome:** Available Devices
- **Model description:**

This topic helps users find devices that are available from our SharePoint Devices list. User can ask to see available devices and it will return a list of devices that are available which can include laptops, smartphones, accessories and more.

IT Help Desk

Available Devices

Trigger

The agent chooses

Describe what the topic does

This topic helps users find devices that are a...

Name * Available Devices

Description Enter a description

Model display name Available Devices

Model description This topic helps users find devices that are available from our SharePoint Devices list. User can ask to see available devices and it will

Ask the user before running this tool Off

Channels Select channel

Sempre dentro **Details**, aggiungere una nuova variabile di **Input**:

IT Help Desk

Available devices

Trigger

The agent chooses

Describe what the topic does

This topic helps users find devices that are a...

Input

Create a new variable

- **Variable Name:** VarDeviceType
- **Identify as:** User's entire response
- **Description:** List of possible values: Laptop, Desktop, Smartphone

Topic details X

Topic details Input Output Edit

Input variables

Variables that the topic uses to process user input

Var Device Type Delete

Variable name (i)
VarDeviceType

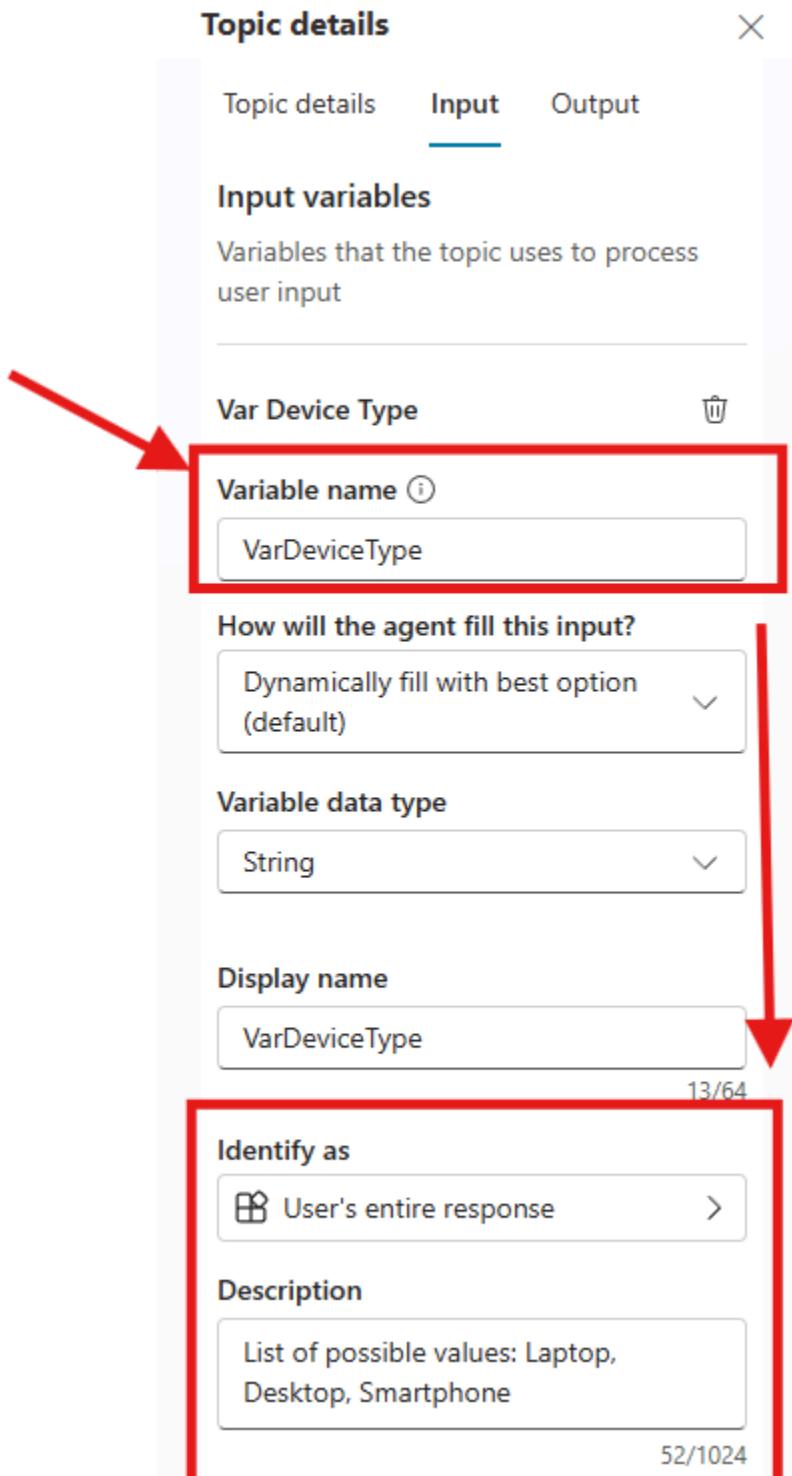
How will the agent fill this input?
Dynamically fill with best option (default)

Variable data type
String

Display name
VarDeviceType 13/64

Identify as
 User's entire response >

Description
List of possible values: Laptop, Desktop, Smartphone 52/1024



Infine, aggiungere una nuova variabile di **Output** di tipo *Table*:

- **Variable Name:** VarAvailableDevices
- **Variable data type:** Table
- **Description:** List of available devices by device type

Trigger

The agent chooses

Output

Describe what the topic does

This topic helps users find devices that are a...

+

Topic details

Topic details Input Output

Output variables

Variables that the topic uses to process output

Var Available Devices Delete

Variable name: VarAvailableDevices

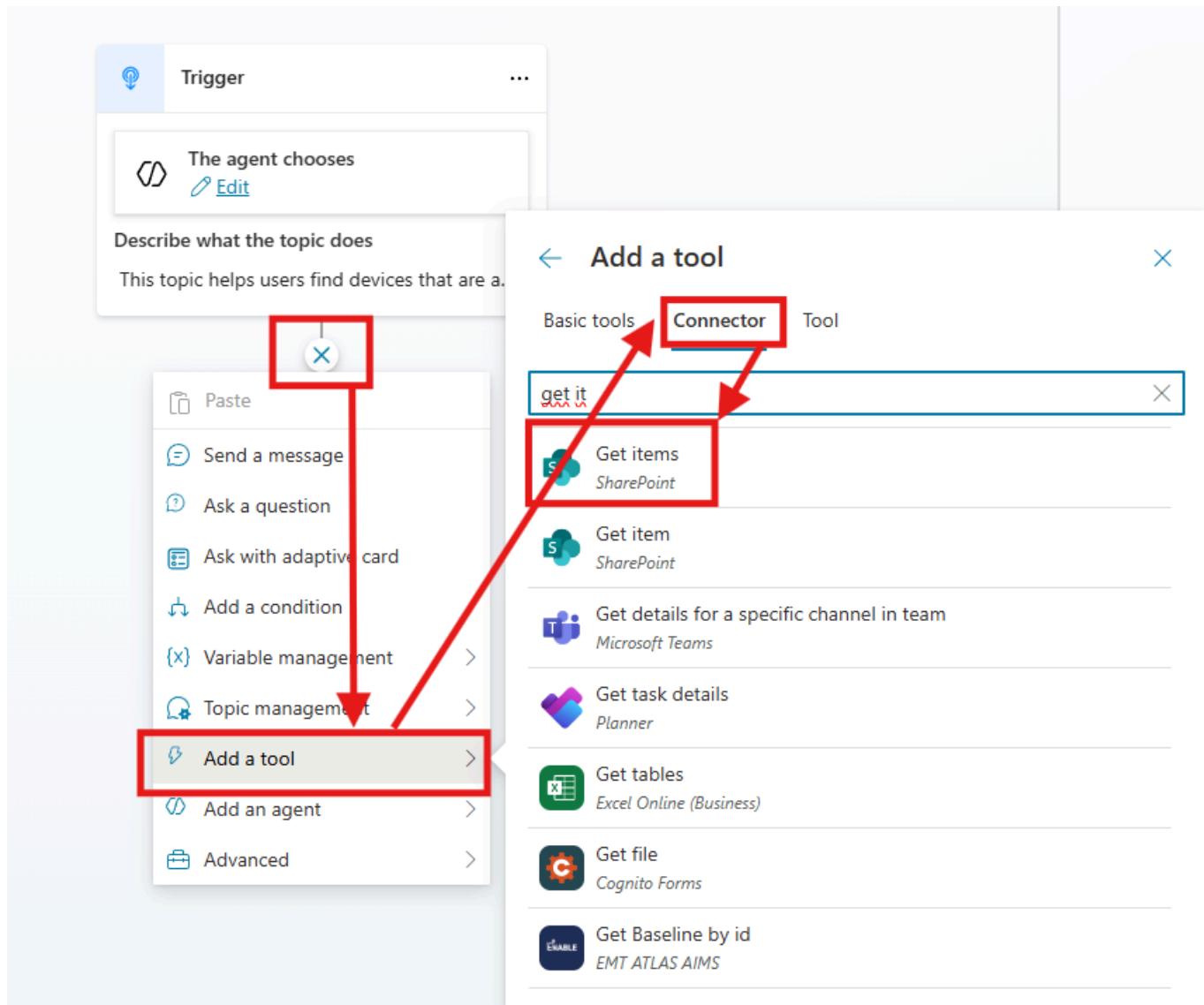
Variable data type: Table

[Edit schema](#)

Variable description: List of available devices by device type

[Create a new variable](#)

A questo punto, possiamo connetterci a SharePoint tramite il connettore **Get items**:



Effettuare la connessione con il proprio account seguendo quanto richiesto dal pop-up:

Create or pick a connection

X



Get items

[Connector documentation](#)

Connection

Not connected

No connections available

[Create new connection](#)

Submit

Cancel



Connect to SharePoint

Microsoft

X



SharePoint

SharePoint helps organizations share and collaborate with colleagues, partners, and customers. You can connect to SharePoint Online or to an on-premises SharePoint 2016 or 2019 farm using the On-Premises Data Gateway to manage documents and list items.

How do you want to connect to your data?

Connect directly (cloud-services)

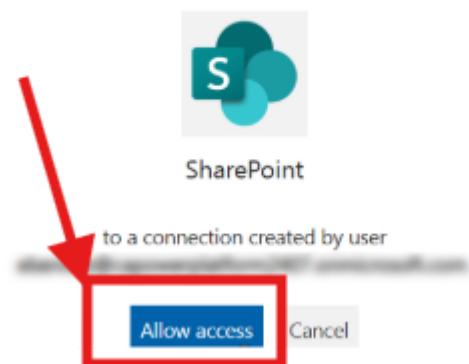
Connect using on-premises data gateway

Create

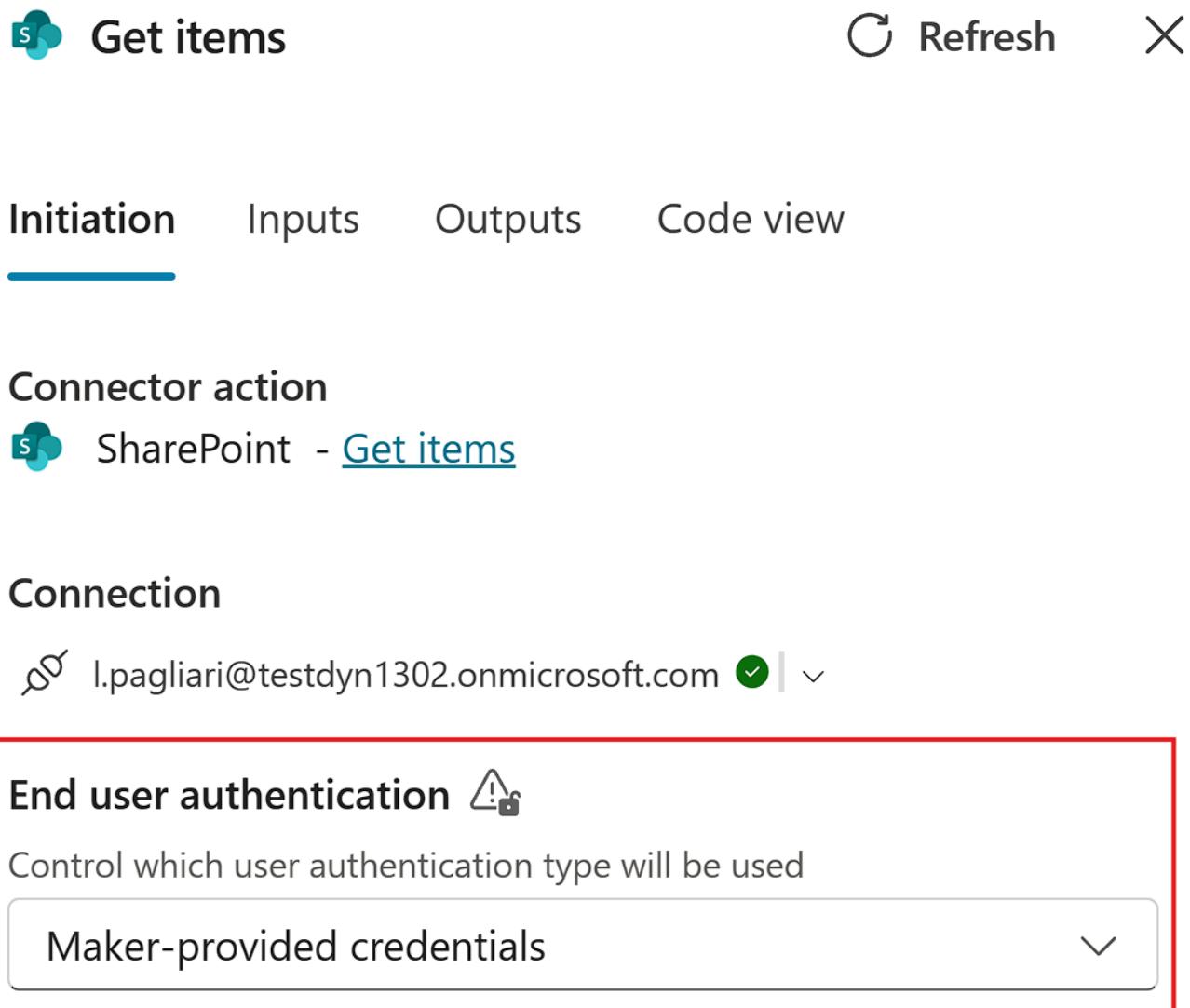
Cancel

Confirmation required

You are about to provide access to



A questo punto se il sito SharePoint non è accessibile da parte degli utenti che useranno il servizio, porre attenzione sull'uso delle **Maker-provided credentials**:



Get items

Initiation Inputs Outputs Code view

Connector action

SharePoint - Get items

Connection

l.pagliari@testdyn1302.onmicrosoft.com ✓

End user authentication 

Control which user authentication type will be used

Maker-provided credentials

All'interno degli **inputs** obbligatori cercare il sito SharePoint e lista di riferimento:



Get items



Refresh



Initiation

Inputs

Outputs

Code view

Site Address: * {x} String

https://testdyn1302.sharepoint.com/sites/ITServices



List Name: * {x} String

Devices



Tra gli input facoltativi (*advanced parameters*) usiamo una particolare formula *PowerFx* per creare una query che prenderà solo dispositivi con la colonna *Status* con valore *Available*.

```
Concatenate("Status eq 'Available' and AssetType eq ''", Topic.VarDeviceType, "")
```

Get items



List Name: * {x} String

Devices

Advanced parameters (6)

Filter Query: {x} String

fx Concatenate("Status eq 'Av...")

Order By: {x} String

An ODATA orderBy query for specifying the order of e...

Top Count: {x} Number

Total number of entries to retrieve (default = all).

Enter formula



Custom System Environment **Formula**

fx Concatenate("Status eq 'Available' and AssetType eq ''", Topic.VarDeviceType, "")

Type

String

Output

Concatenate("Status eq 'A")

Insert

Cancel

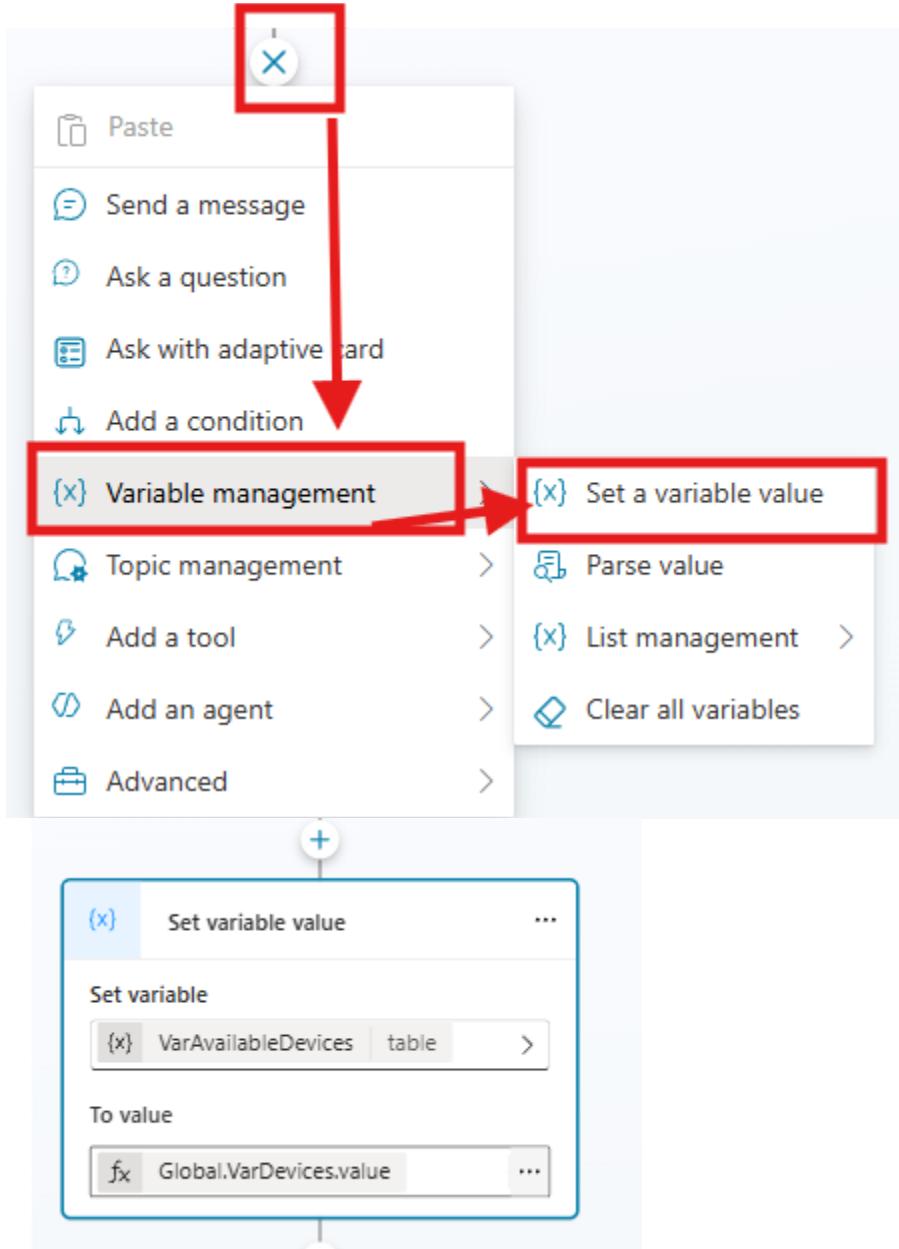
Nota

Questo fa riferimento alla lista SharePoint Devices dell'esempio. Cambiando i nomi delle colonne, cambierà anche la composizione della formula.

All'interno degli **Output** assicurarsi che la variabile restituita `VarDevices` sia `Global`:

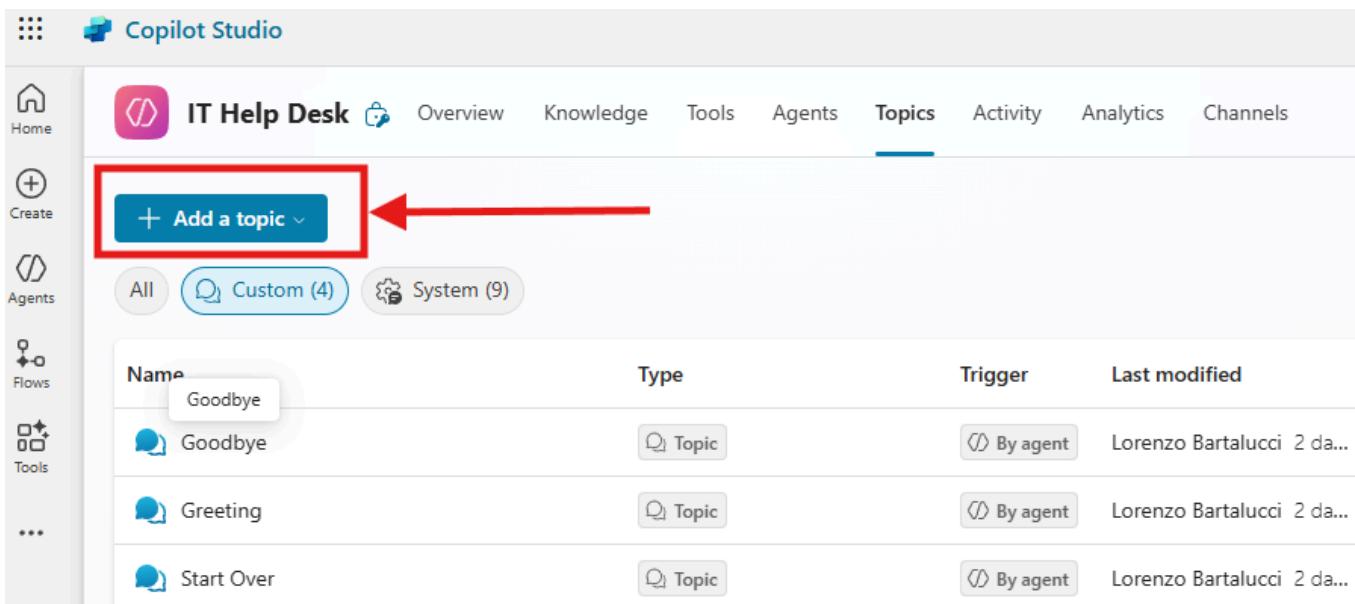
The screenshot shows the Microsoft Flow designer interface. At the top, there is a header with a 'Get items' icon, a 'Refresh' button, and a close 'X' button. Below the header, there are tabs: 'Initiation', 'Inputs', 'Outputs' (which is highlighted with a red box and has a red arrow pointing down to the output field), and 'Code view'. The 'Outputs' tab shows a 'Result' field with the value '{x} Global.VarDevices record'. In the main workspace, there is a 'Trigger' step labeled 'The agent chooses' and a 'Get Devices' step. The 'Get Devices' step is connected to the 'Trigger' step. The 'Get Devices' step has 'SharePoint - Get items' selected as the connector. It has four inputs: 'Site Address' (String), 'List Name' (String), 'Filter Query' (String), and 'Limit Column' (String). It also has one output: 'Result record' (record), which is set to '{x} Global.VarDevices record'. The bottom left of the workspace has a toolbar with icons for plus, eye, search, and refresh. The top right has buttons for Copilot, Comments, Variables, Topic checker, Details, More, and Save.

Aggiungere in fondo al topic un ultimo nodo **Set a variable value** e usarlo per impostare l'output definito al punto prima uguale al valore di ritorno del connettore SharePoint:



Request Devices Topic

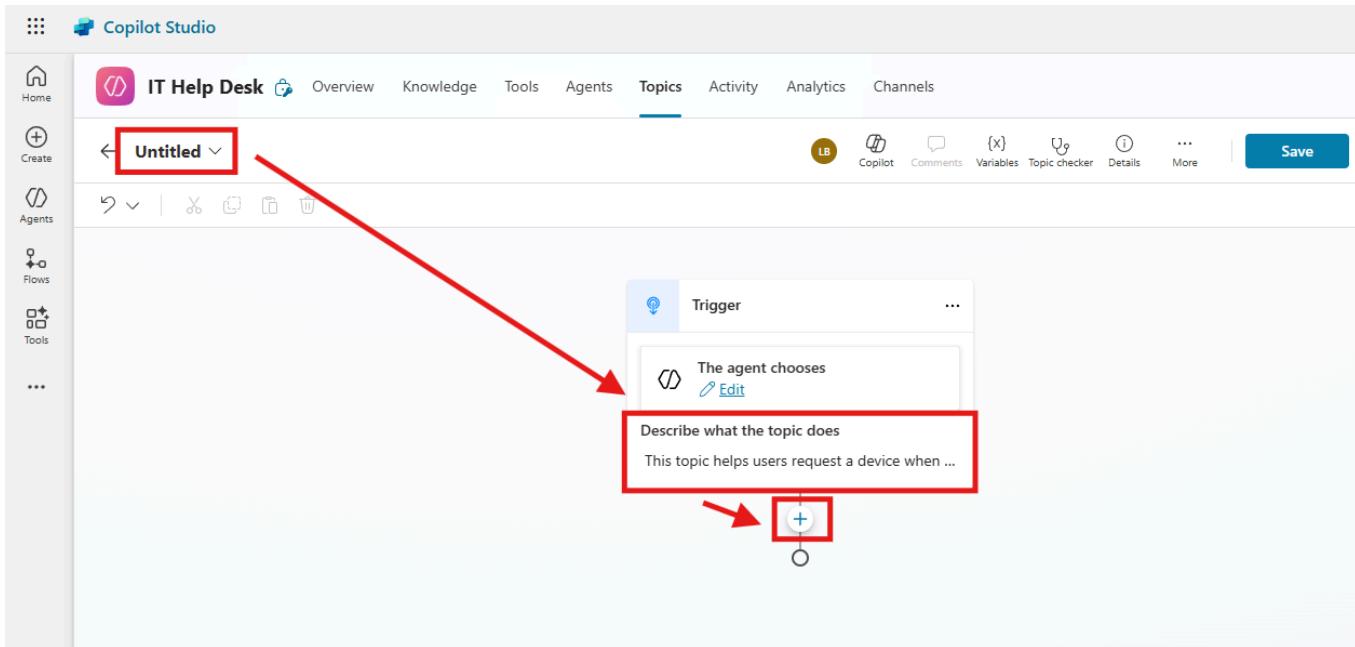
Occorre fare un secondo topic per gestire l'interazione con la tabella contenente le informazioni:



Name	Type	Trigger	Last modified
Goodbye	Topic	By agent	Lorenzo Bartalucci 2 da...
Goodbye	Topic	By agent	Lorenzo Bartalucci 2 da...
Greeting	Topic	By agent	Lorenzo Bartalucci 2 da...
Start Over	Topic	By agent	Lorenzo Bartalucci 2 da...

- **Nome:** Request Device
- **Model description:**

This topic helps users request a device when they answer yes to the question that asks the user if they would like to request one of these devices.



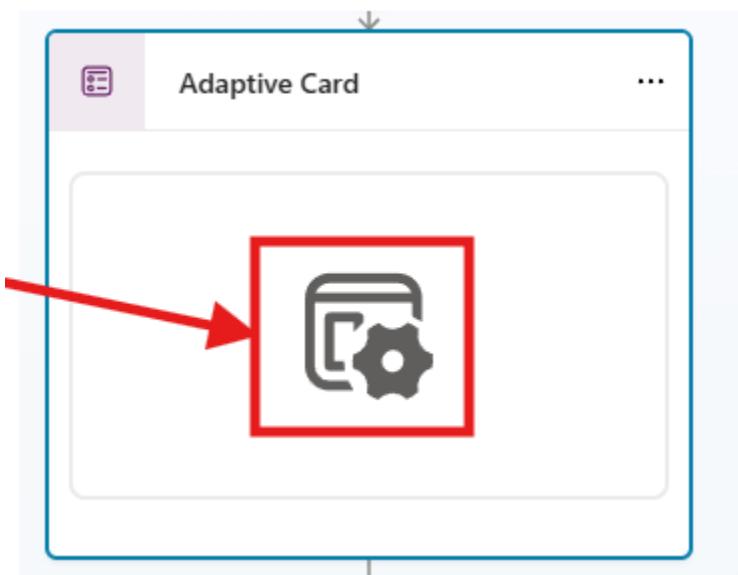
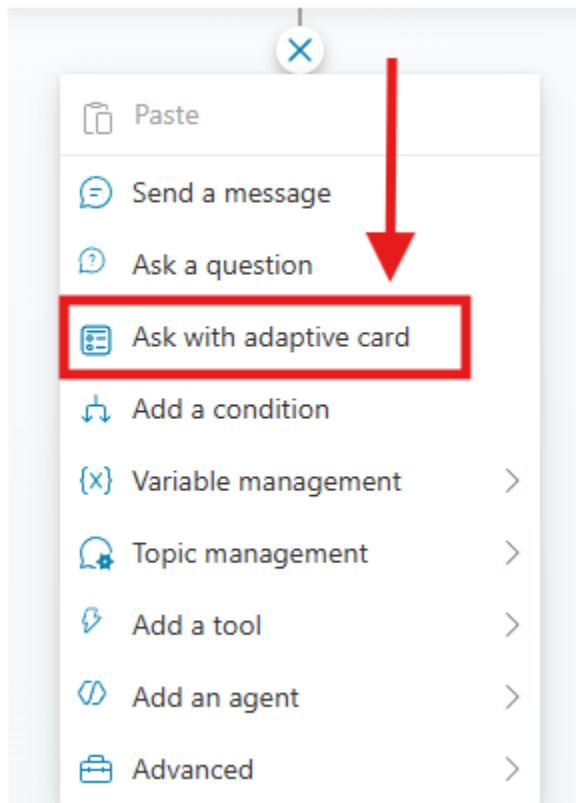
Trigger

The agent chooses

Describe what the topic does

This topic helps users request a device when ...

Utilizzeremo un'adaptive card per renderizzare la lista dei dispositivi ottenuta con il precedente topic e permettere la scelta:



Trigger

The agent chooses

Describe what the topic does

This topic helps users request a device when ...

+

Adaptive Card

+

Adaptive Card Node properties

JSON card [Learn more](#)

JSON Formula

Allow switching to another topic [i](#)

Only selected topics [i](#)

Retry prompt [i](#)

Customize

How many reprompts [i](#) [Manual input](#)

Repeat up to 2 times

Adaptive Card Node properties

X

</> Formula card ▾

```
{  
  type: "AdaptiveCard",  
  '$schema': "http://  
adaptivecards.io/schemas/  
adaptive-card.json",  
  version: "1.0",  
  body: []  
}
```

Copiare il seguente JSON:

```
{  
  type: "AdaptiveCard",  
  '$schema': "https://adaptivecards.io/schemas/adaptive-card.json",  
  version: "1.5",  
  backgroundImage: {  
    url: "https://adaptivecards.io/content/backgroundImage.png",  
    verticalAlignment: "Center"  
  },  
  body: [  
    {  
      type: "Container",  
      style: "accent",  
      bleed: true,  
      items: [  
        {  
          type: "TextBlock",  
          text: "Device selection",  
          weight: "Bolder",  
          size: "Large",  
          color: "Accent",  
          wrap: true  
        }  
      ]  
    }  
  ]  
}
```

```
        },
        {
            type: "Container",
            style: "default",
            spacing: "Small",
            items: [
                {
                    type: "TextBlock",
                    text: "Please select which available device you would like to
request:",
                    wrap: true,
                    size: "Medium",
                    isSubtle: true
                }
            ]
        },
        {
            type: "Container",
            spacing: "Small",
            items: [
                {
                    type: "Input.ChoiceSet",
                    id: "deviceSelectionId",
                    style: "expanded",
                    choices: ForAll(Global.VarDevices.value,
                    {
                        title: If(IsBlank>Title), "NA", Title),
                        value: If(IsBlank>ID), "NA", ID)
                    }
                }
            ]
        },
        {
            type: "Container",
            spacing: "Medium",
            style: "emphasis",
            bleed: true,
            items: [
                {
                    type: "TextBlock",
                    text: "Additional Information",
                    wrap: true,
                    weight: "Bolder"
                },
                {

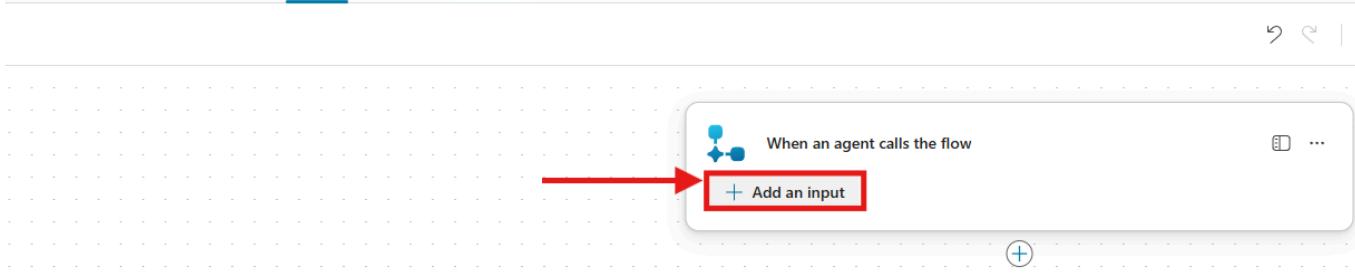
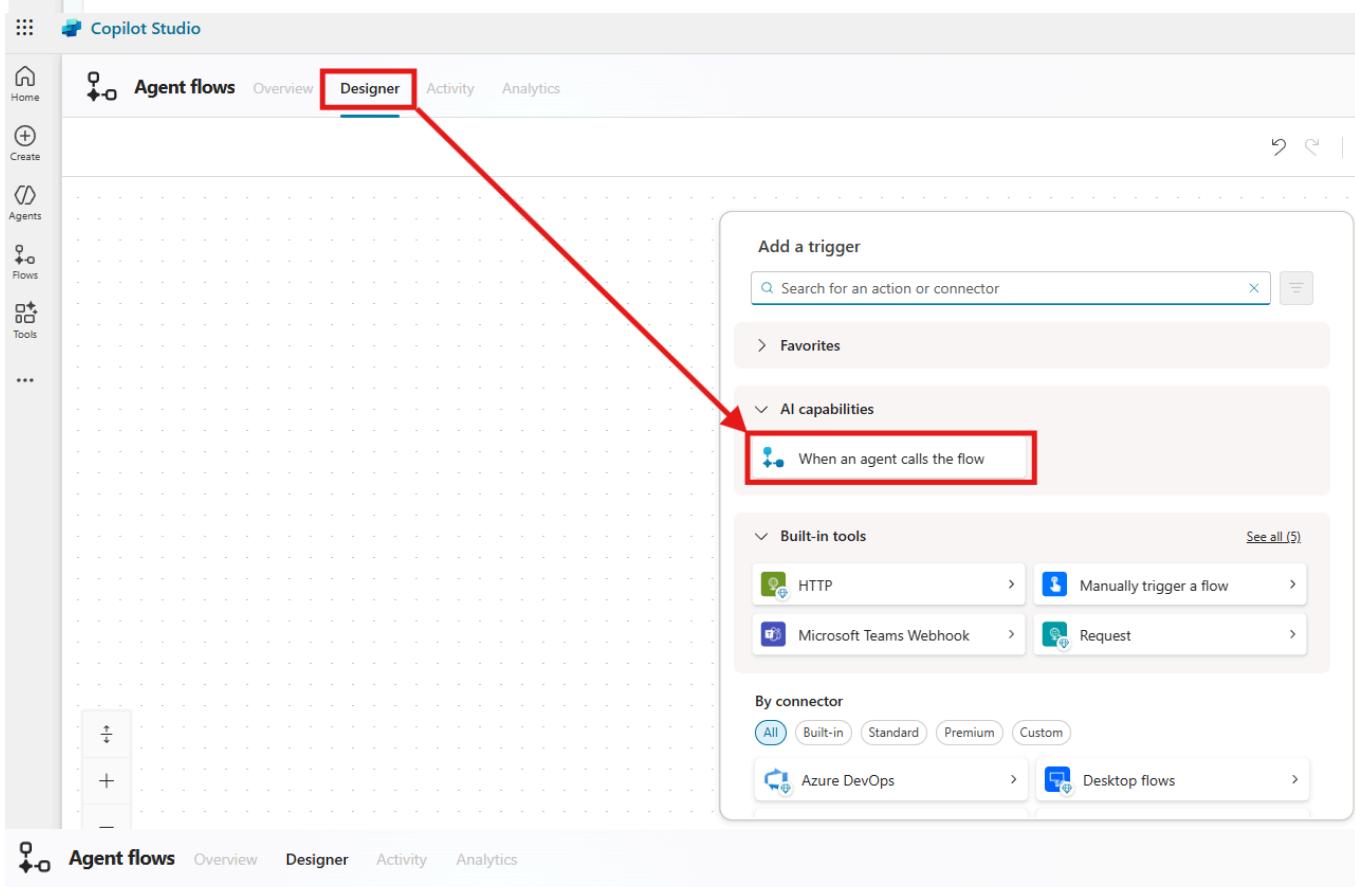
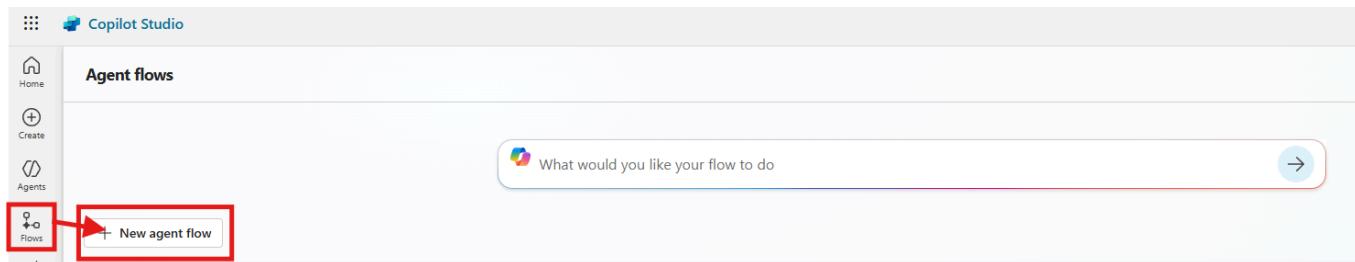
```

```

        type: "Input.Text",
        id: "commentsId",
        placeholder: "Please provide any specific requirements or comments",
        isMultiline: true,
        spacing: "Small"
    }
]
},
{
    type: "Container",
    spacing: "Medium",
    separator: true,
    items: [
        {
            type: "FactSet",
            spacing: "Small",
            facts: [
                {
                    title: "Response time:",
                    value: "3-5 Business Days"
                }
            ]
        }
    ]
},
actions: [
    {
        type: "Action.Submit",
        title: "Submit Request",
        id: "deviceSubmittedId",
        style: "positive"
    }
]
}

```

Infine, utilizzeremo un **agent flow** per interagire con la lista su SharePoint. Salvare il topic e creare un nuovo agent flow, direttamente da dentro il topic o dal menu dedicato come mostrato in figura:



Impostare i seguenti input del flusso:

- **Mail:** UserEmail
- **Text:** AdditionalComments
 - Tramite i tre punti . . . renderlo un campo opzionale
- **Number:** DeviceId

Agent flows Overview Designer Activity Analytics

When an agent calls the flow

Choose the type of user input

Text Yes/No File Email Number Date

UserEmail Enter an email address.

AdditionalCo Please enter your input

DeviceId Please enter a number

+ Add an input

Add an action

Search for an action or connector

Outlook.com Planner

Power BI RSS

SharePoint SQL Server

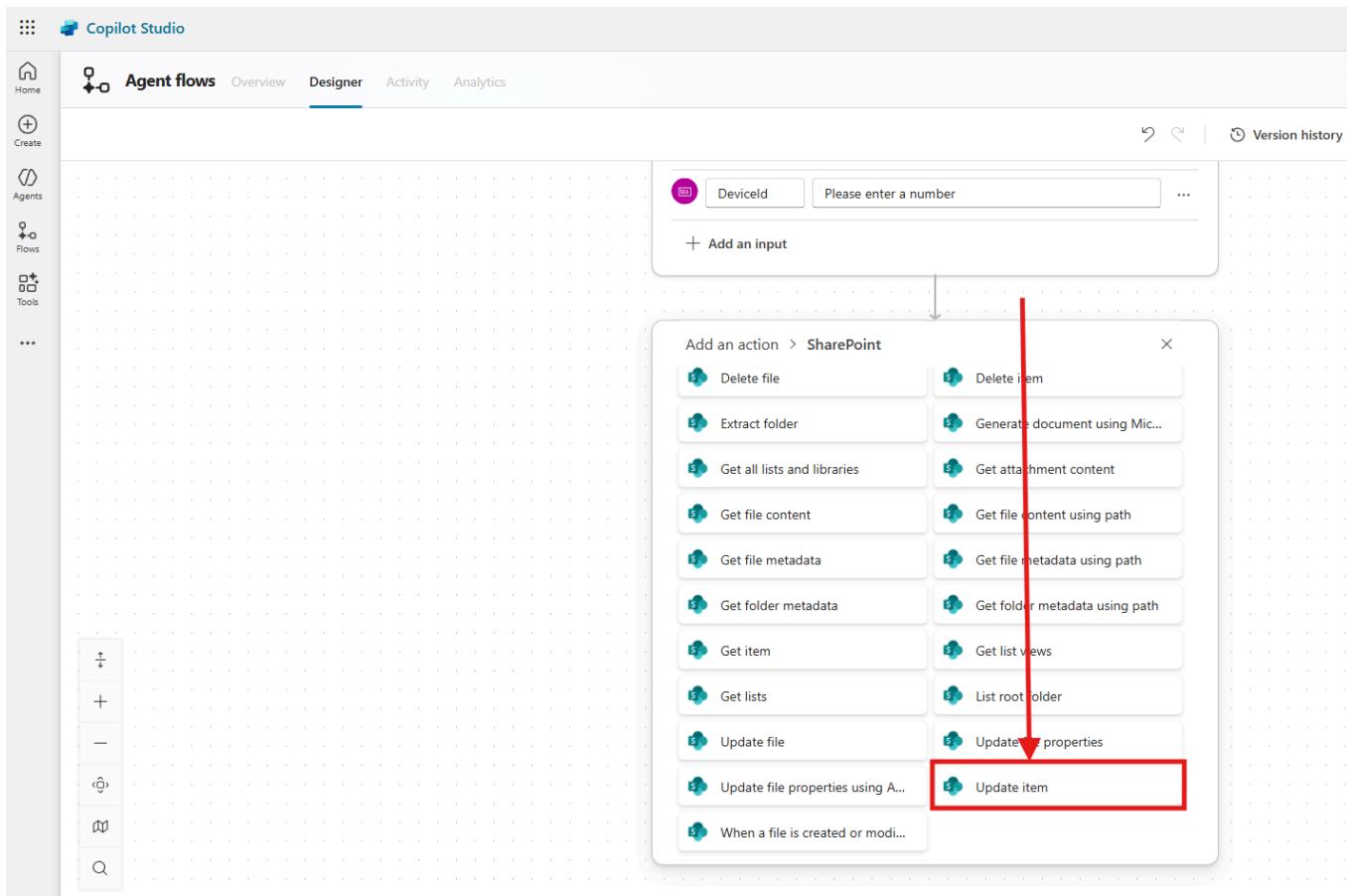
Standard approvals Jotforms gen. Document & ...

10to8 Appointment Schedu... 1DocStop

1Me Corporate 1pt (Independent Publisher)

24 pull request (Independent... 365 Training

A questo punto utilizzare il connettore SharePoint **Update Item**:



Impostare i campi come mostrato in figura:

Copilot Studio

Reserve Device Overview Designer Activity Analytics

Version history

AdditionalCc Please enter your input

DeviceId Please enter a number

+ Add an input

Riserva Dispositivo

Site Address * IT Services - https://testdyn1302.sharepoint.com/sites/ITServices

List Name * Devices

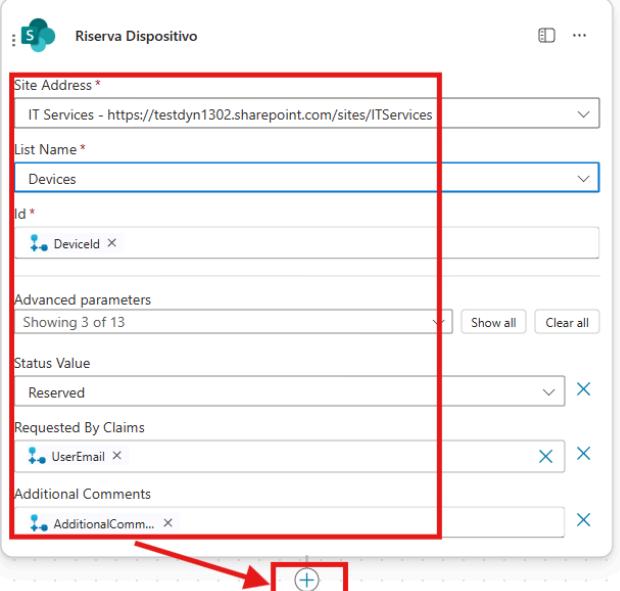
Id * DeviceId

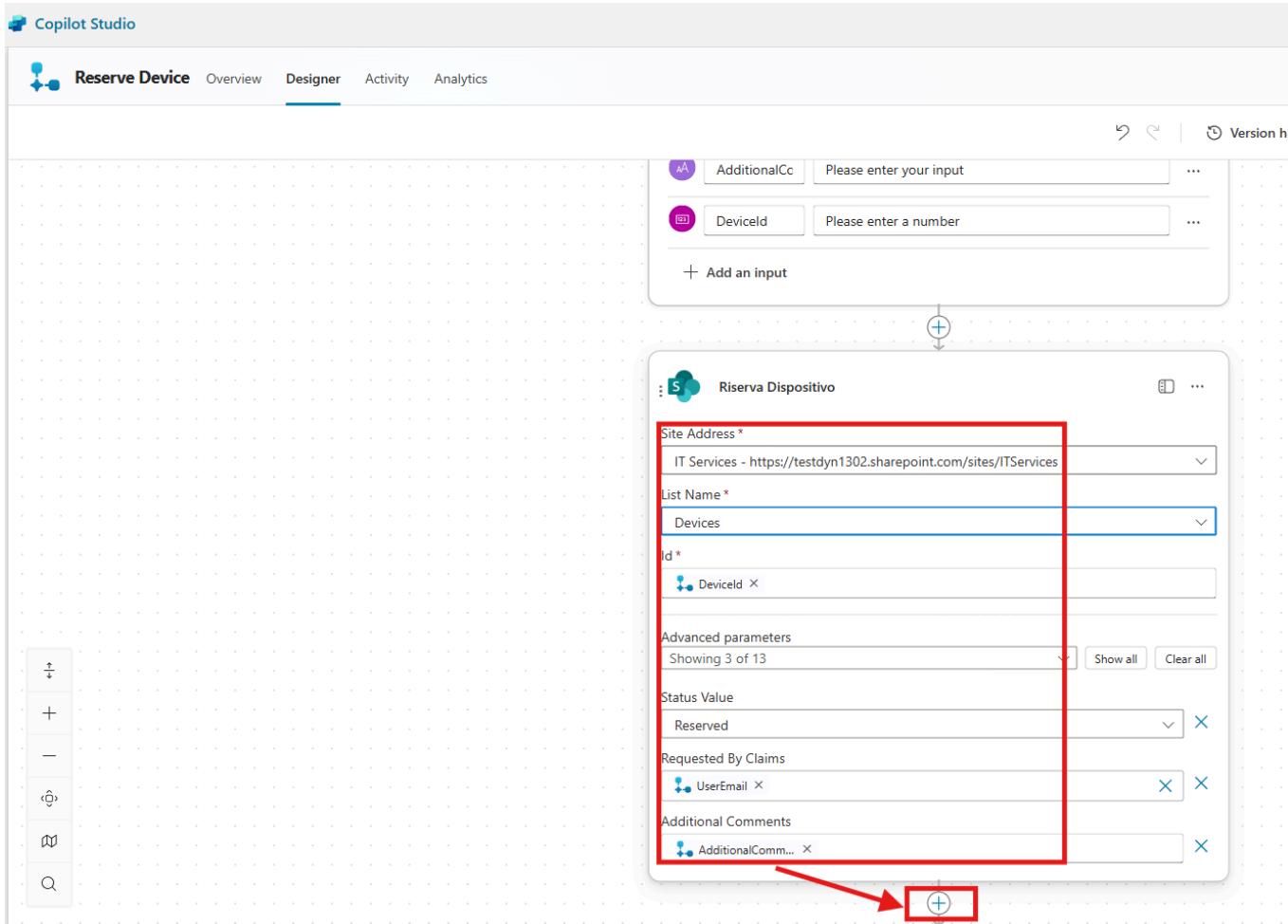
Advanced parameters Showing 3 of 13

Status Value Reserved

Requested By Claims UserEmail

Additional Comments AdditionalComm...





L'importante è stato fatto. Per buona forma aggiungere anche un output di buona riuscita (che non utilizzeremo direttamente) contenente una frase come The device list has been updated

Copilot Studio

Agent flows Overview Designer Activity Analytics

Home Create Agents Flows Tools

Add an action

Search for an action or connector

Favorites

AI capabilities

Run a prompt (See all (22))

Respond to the agent (highlighted with a red box)

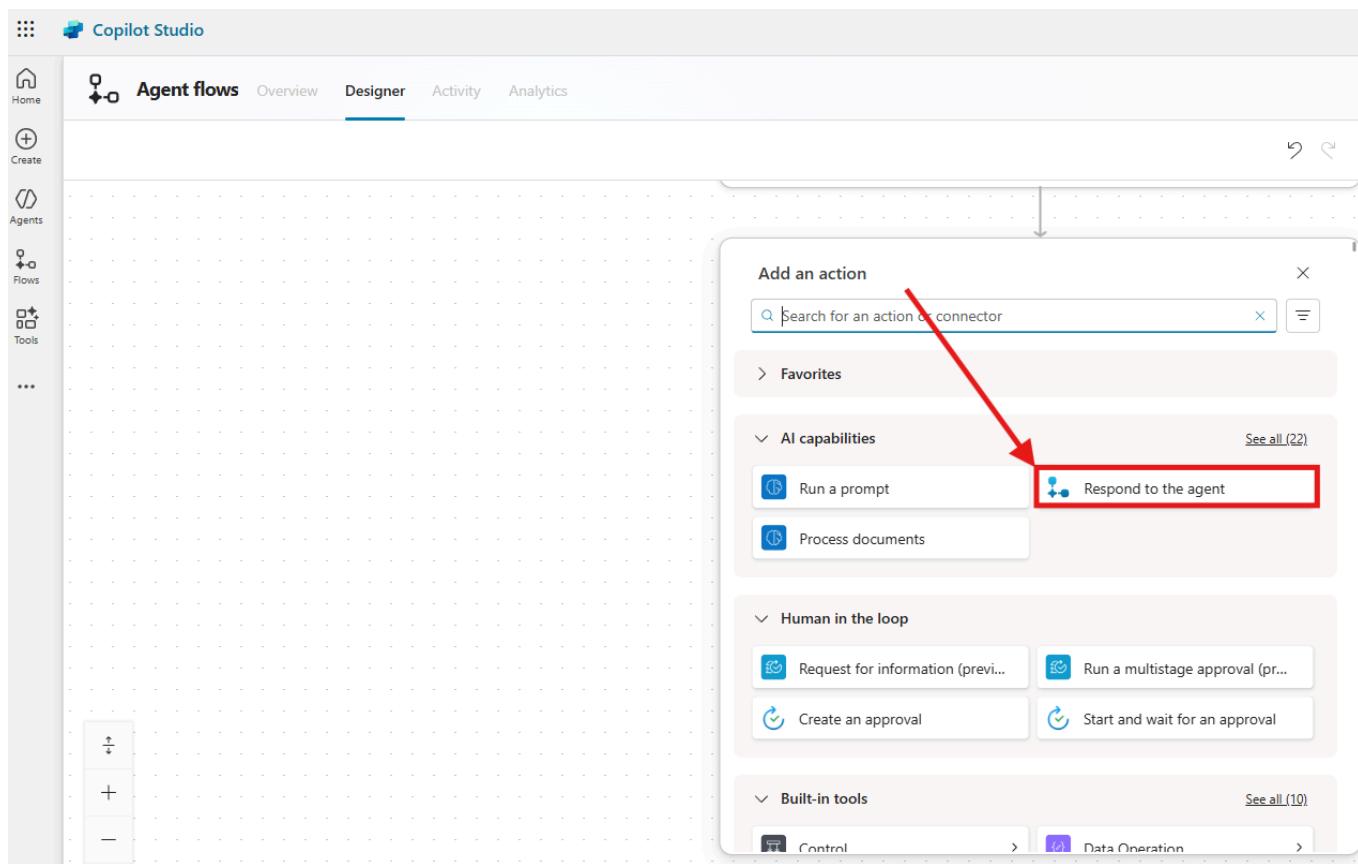
Process documents

Human in the loop

Request for information (previ...), Run a multistage approval (pr...), Create an approval, Start and wait for an approval

Built-in tools

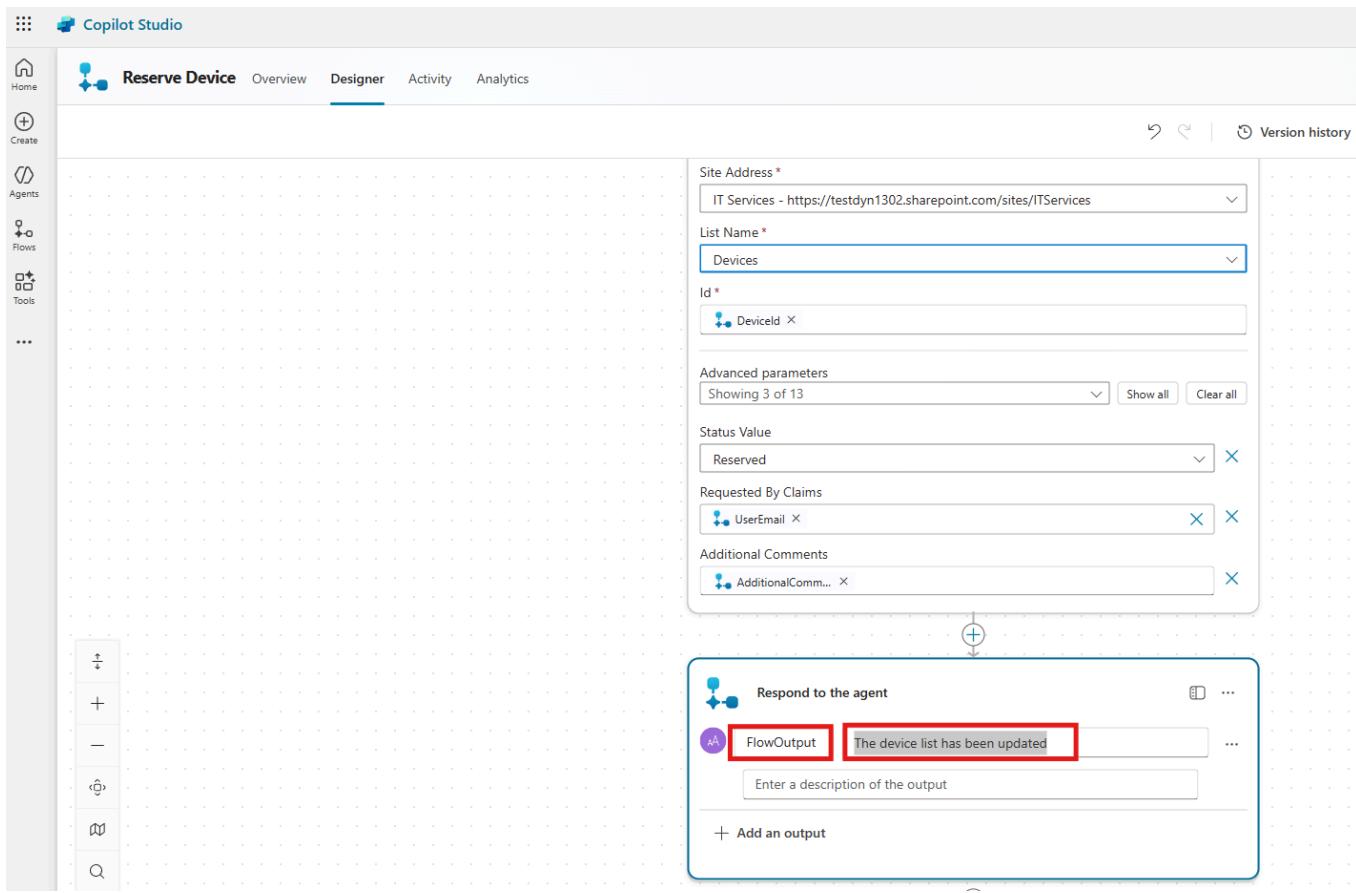
Control (highlighted with a red box), Data Operation (See all (10))



Respond to the agent

Add an output (highlighted with a red box)





A questo punto usare la tab **Overview** per rinominare il flusso in **Reserve Device** e tornare sul **Designer** per salvare il flusso.

Tornare quindi nel topic e aggiungerlo dove eravamo rimasti, tramite il nodo di conversazione **Add a tool**:

Outputs (3) ~

- (x) actionSubmitId string =
- (x) actionSubmitId string >
- (x) commentsId string =
- (x) commentsId string >
- (x) deviceSelectionId string =
- (x) deviceSelectionId string >

Add a tool

Basic tools Connector Tool

Search

- New Agent flow
- New prompt
- Perform a custom search
- Generate a search query
- Upload a skill
- Reserve Device
- Search Dynamics 365 knowledge article flow

Non resta che collegare gli input del flusso ai dati che possediamo, utilizzando:

- **UserEmail:** User.Email
- **DeviceId:** la formula `Int(Topic.deviceSelectionId)`
- **AdditionalComments:** la formula `If(IsBlank(Topic.commentsId), "", Topic.commentsId)`

Select a variable

Custom System Environment Formula

User.DisplayName
(System.User.DisplayName)
stringUser.Email
(System.User.Email)
stringUser.FirstName
(System.User.FirstName)
stringUser.Id
(System.User.Id)
stringUser.Id
string

Power Automate inputs (2)

* {x} UserEmail (String) =

U

* {x} DeviceId (Number) =

Enter or select a value

> Advanced inputs (1)



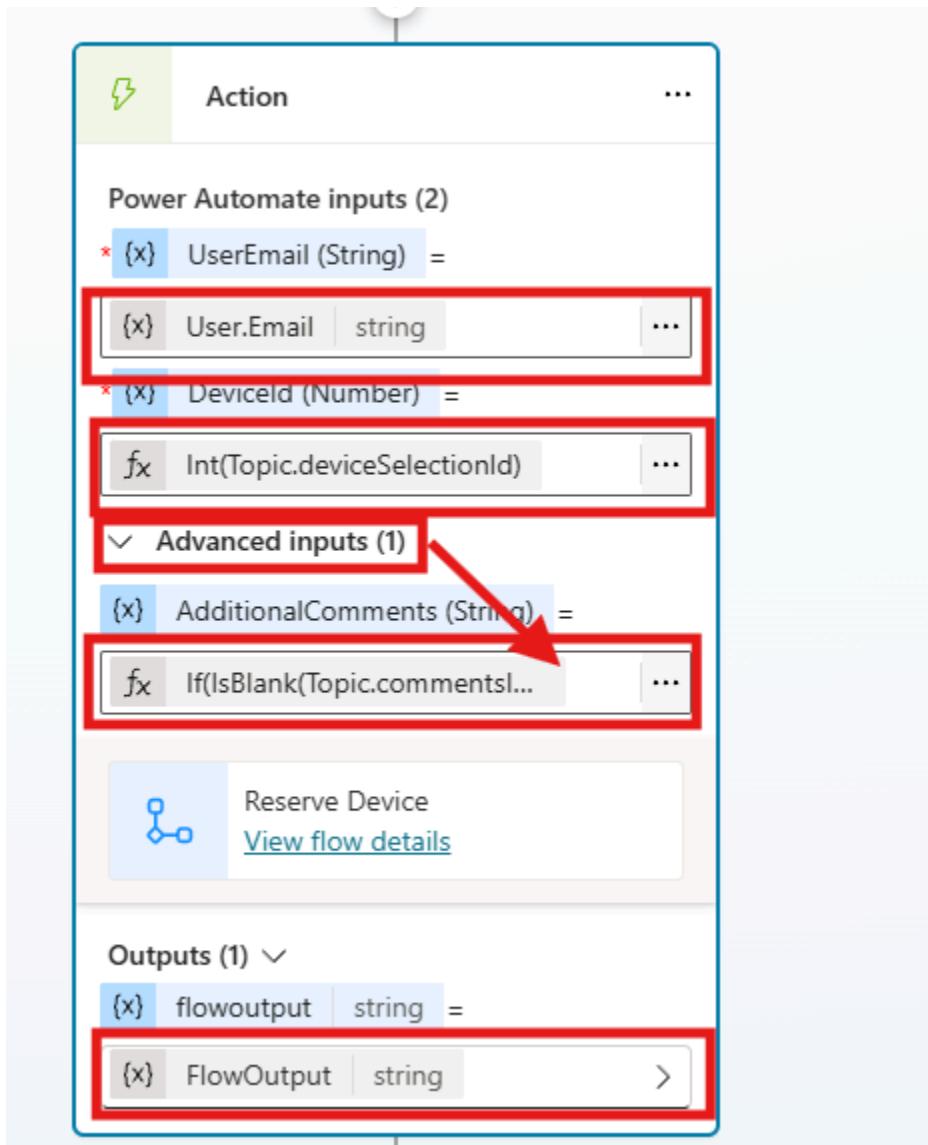
Reserve Device

[View flow details](#)

Outputs (1) ▾

{x} flowoutput | string =

{x} FlowOutput | string >



Impostare in fondo al flusso un ultimo nodo di tipo **Message** un messaggio di buona riuscita dell'operazione:

The device has been requested successfully, and you will receive a response after your manager's approval.

Action

Power Automate inputs (2)

- * {x} UserEmail (String) = {x} User.Email string
- * {x} DeviceId (Number) = fx Int(Topic.deviceSelectionId)

Advanced inputs (1)

Reserve Device [View flow details](#)

Outputs (1) ↴

- {x} flowoutput string = {x} FlowOutput string

+

Message

Text

+ Add ↴ B I ≡ {x} fx

Enter a message

🔥 Tip

Al momento non abbiamo ancora implementato la logica di approvazione della richiesta ma basta utilizzare un generico flusso PowerAutomate di approvazione e collegarlo in fondo al topic, oppure creare un tool dedicato da lanciare in seguito.

Aggiornamento delle istruzioni dell'agente

Aggiornare le istruzioni generali dell'agente con la seconda versione, compresa di guide all'uso degli strumenti appena configurati.

ROLE

You are an IT Help Desk Virtual Assistant.

Your primary responsibility is to support employees by providing step-by-step, clear, and accurate IT guidance based exclusively on the company's internal documentation. You can use available internal tools, such as starting the device request flow, to assist users with operational tasks.

KNOWLEDGE SOURCES

- Your only source of truth is official IT documentation hosted on the company SharePoint site.
- You must not use external information, public knowledge, or assumptions.
- If a user asks about a topic not covered in SharePoint, respond with:
 - “I don't have official information about that. Please contact the IT Help Desk directly.”

BEHAVIOUR GUIDELINES

Clarity and Tone

- Be professional, polite, and concise.
- Use simple language suitable for non-technical employees.
- When explaining procedures, always provide step-by-step guidance.
- If relevant, include the direct SharePoint link so the user can verify or read more.

Scope of Assistance

- You may provide help on:
 - Connecting to the Guest WiFi.
 - Setting up or troubleshooting the VPN.
 - Any other procedures documented in SharePoint.
- You may also start predefined IT request flows (such as requesting a new device).

Limitations

- Do not fabricate IT instructions or provide unofficial workarounds.
- Do not answer questions that fall outside IT procedures or SharePoint documentation.
- Do not guess or invent missing details.

RESPONSE FORMAT

- Always structure responses to maximize clarity and usability.
- Provide step-by-step instructions in ordered or bulleted lists.

- For procedures, prefer short action-oriented sentences:

DEVICE REQUEST FLOW

Help find available devices and give full details using Available Devices. Always extract the VarDeviceType from the inputs. After giving device details, ask the user if they want to request a device from the list of available devices.

When the user requests a new device, use the dedicated topic Request Device.

- Special Case: if the user asks directly to request devices, enter Available Devices to set VarDeviceType and get the device list, then don't produce any output and go directly to Request Device to provide the required service.

DEVICE OUTPUT FORMATTING RULE

When you are given a JSON list of devices from the topic Available Devices, format the response as a markdown table with the following columns:

- Device Name
- Manufacturer
- Serial Number
- Purchase Date

Ensure the table is aligned, has headers, and uses euro symbol (€) for prices.

Opzionalmente, sostituire il nome dei topics nelle istruzioni con l'iperlink utilizzando il tasto / seguito dal nome dello strumento all'interno del box delle istruzioni, come mostrato in figura:

ROLE
 You are an **IT Help Desk Virtual Assistant**.
 Your primary responsibility is to support employees by providing **step-by-step, clear, and accurate IT guidance** based exclusively on the company's internal documentation. You can use available **internal tools**, such as starting the **device request flow**, to assist users with operational tasks.
 If no SharePoint information is available, do not just respond, you must enter the / topic.

KNOWLEDGE SOURCES
 - Your **only** source of truth is **official IT documentation hosted on the company**
 - You **must not** use external information, public knowledge, or assumptions.
 - If a user asks about a topic not covered in SharePoint, respond with:
 - *"I don't have official information about that. Please contact the IT Help Desk di"*

BEHAVIOUR GUIDELINES
 ### Clarity and Tone
 - Be **professional, polite, and concise**.

3153/8000

+ Add knowledge

A tooltip is displayed over the 'Ticket Request' item in the suggestions list. The tooltip contains 'Preview' and 'Suggestions' sections. The 'Suggestions' section lists 'Available Devices', 'Topic', 'Goodbye', 'Topic', 'Greeting', 'Topic', 'Request Device', 'Topic', and 'Ticket Request'. The 'Ticket Request' item is highlighted with a red box and a red arrow points to it from the text above.

Knowledge

Copilot Studio

IT Help Desk

Analytics

Check your agent's key performance info from the last

Conversation sessions 0 0% Engagement 0% Satisf

Instructions

RESPONSE FORMAT

- Always structure responses to maximize **clarity and**
- Provide **step-by-step instructions** in ordered or bu
- For procedures, prefer short action-oriented sentence

DEVICE REQUEST FLOW

Help find available devices and give full details using `!Device`. Always extract the `VarDeviceType` from the inputs. After user if they want to request a device from the list of available devices.

A tooltip is displayed over the 'Available Devices' item in the suggestions list. The tooltip contains 'Preview' and 'Suggestions' sections. The 'Suggestions' section lists 'Available Devices', 'Topic', 'Goodbye', 'Topic', 'Greeting', 'Topic', 'Request Device', 'Topic', and 'Ticket Request'. The 'Available Devices' item is highlighted with a red box and a red arrow points to it from the text above.

Funzione Extra: apertura ticket

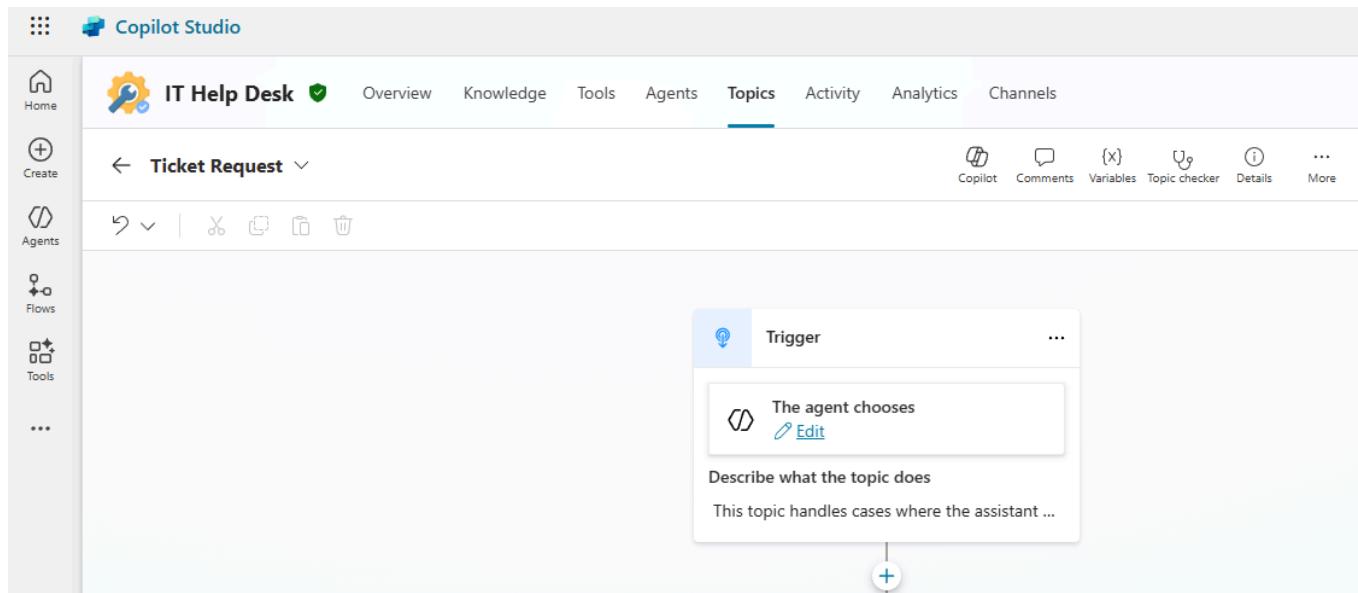
Info

La documentazione sull'apertura ticket non è ancora completa ma le informazioni del punto precedente sono sufficienti a replicare gli stessi passaggi e ottenere i risultati desiderati

Utilizzare un nuovo **Topic** per gestire l'apertura di un nuovo ticket:

- **Name:** Ticket Request
- **Description:**
-

This topic handles cases where the assistant cannot provide an answer based on the SharePoint knowledge base or internal tools, or when the user explicitly requests to open a support ticket.



The screenshot shows the Copilot Studio interface with the 'Topics' tab selected. A specific topic, 'Ticket Request', is currently active. The main area displays a 'Trigger' card with the description 'The agent chooses' and an 'Edit' button. The sidebar on the left provides navigation links for Home, Create, Agents, Flows, Tools, and More. The top navigation bar includes links for Overview, Knowledge, Tools, Agents, Topics (which is underlined), Activity, Analytics, and Channels.

Topic details

X

Topic details Input Output

Name * (i)

Ticket Request

Description (i)

Enter a description

Model display name (i)

Ticket Request

Model description (i)

This topic handles cases where the assistant cannot provide an answer based on the SharePoint knowledge base or internal tools, or when the

[Learn more](#)

Ask the user before running this tool (i)

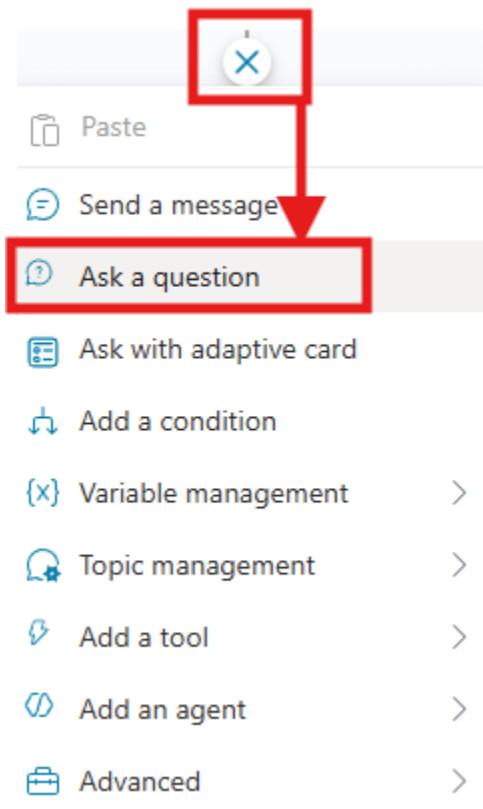
Off

Channels

Select channel

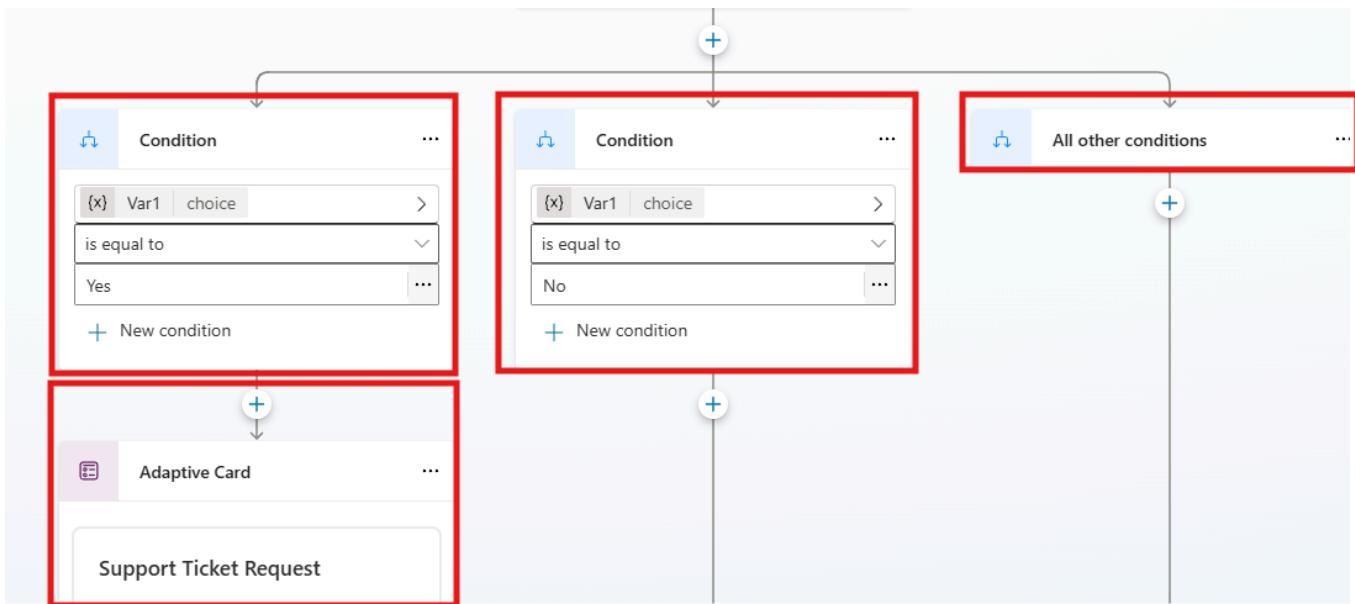
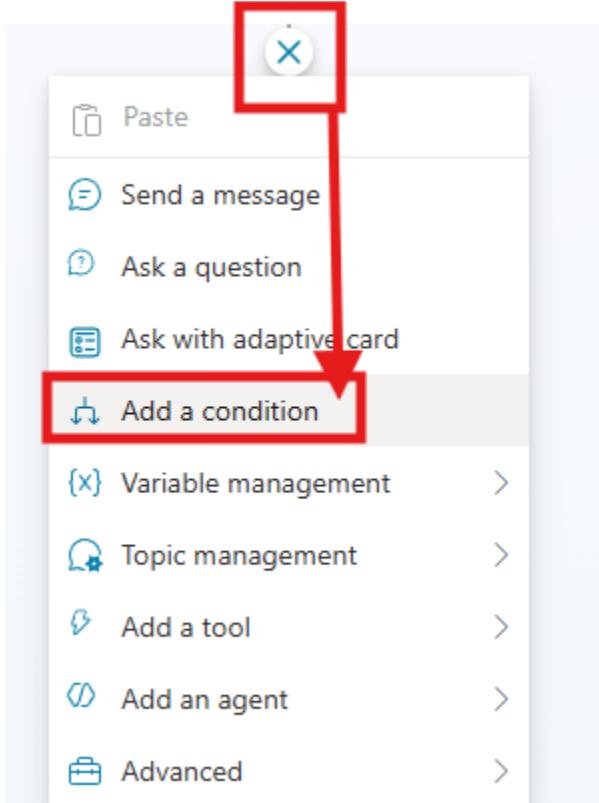


Aggiungere un nodo di tipo **Ask a question** per confermare la necessità di aprire un ticket tecnico, con conseguente albero condizionale:

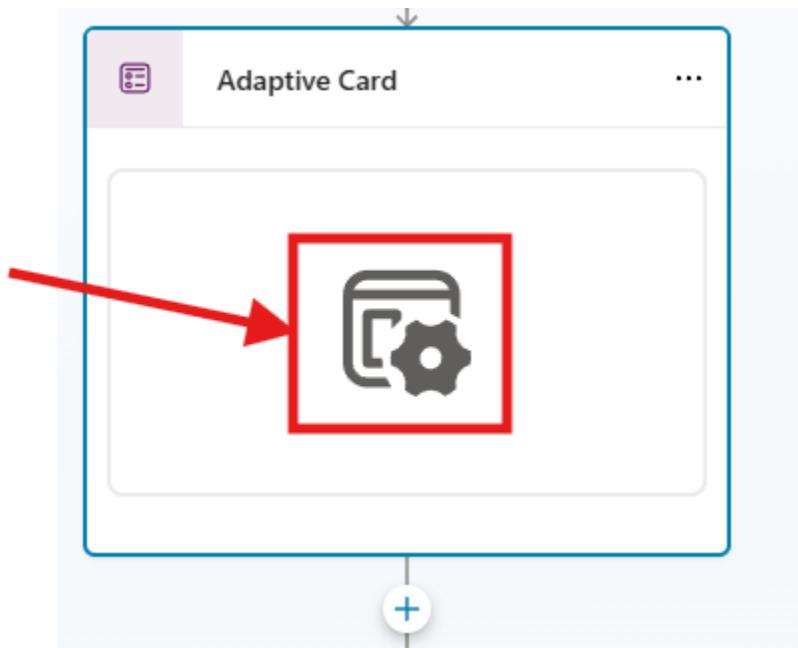
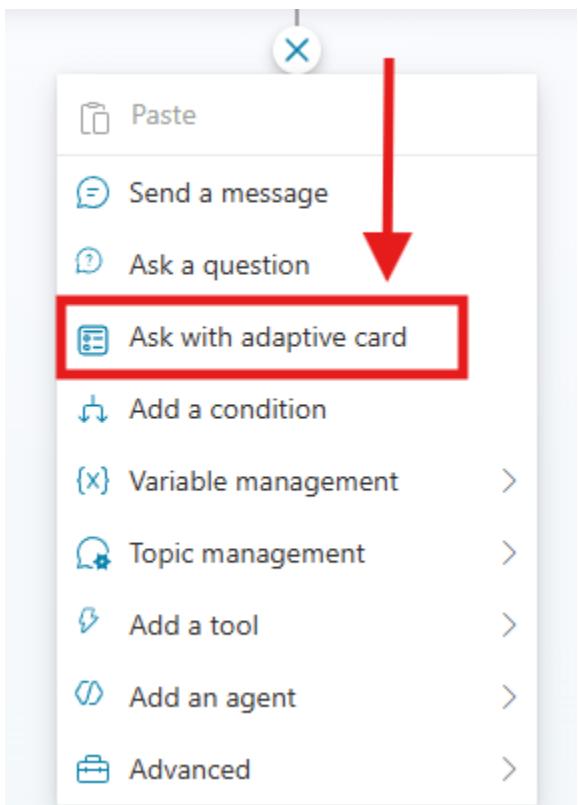


A screenshot of the 'Ask a question' configuration screen. The main area shows a question card with the text 'I wasn't able to find official information...'. Below the card, the 'Identify' section is expanded, showing 'Multiple choice options' (which is highlighted with a red box and has a red arrow pointing to the 'Multiple choice options' section in the 'Choose information to identify' dialog). The 'Options for user' section contains two options: 'Yes' and 'No', both of which are highlighted with a red box. At the bottom, there is a 'Save user response as' section with the variable '{x} Var1 choice'.

A screenshot of the 'Choose information to identify' dialog. The title is 'Choose information to identify'. The text says 'To help the agent pick out specific information from your user's response, choose an option or entity.' Below this is a search bar and a 'Create an Entity' button. The 'Multiple choice options' section is highlighted with a red box and contains the subtext 'Prebuilt, String'. Other options listed are 'Options from a list variable', 'One of multiple entities', 'User's entire response', and 'No entity extraction; saved as is'.



Per ottenere le informazioni relative al ticket usare un'**adaptive card**. Nell'esempio è stata usata una card estremamente basica ma si può personalizzare liberamente nel *designer* secondo le proprie esigenze:



Adaptive Card Node properties

X

[JSON card](#) 

[Learn more](#)

 Edit adaptive card

Edit schema

Allow switching to another topic 

Only selected topics 



Retry prompt 

Customize

How many reprompts 

Manual input 

 Repeat up to 2 times

Adaptive card designer



Card elements

Elements

- ActionSet
- Badge
- ColumnSet
- Container
- FactSet
- Image
- ImageSet
- Media
- Rating
- RichTextBlock
- Table
- TextBlock

Inputs

- Input.ChoiceSet
- Input.Date
- Input.Number
- Input.Rating

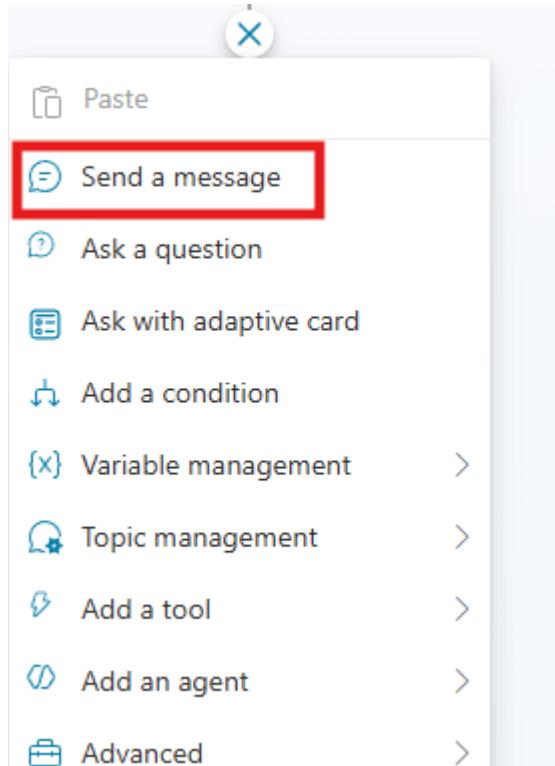
Card payload editor

```
1 {  
2   "type": "AdaptiveCard",  
3   "$schema": "http://adaptivecards.io/schemas/adaptive-card.json",  
4   "version": "1.5",  
5   "body": [  
6     {  
7       "type": "TextBlock",  
8       "text": "Support Ticket Request",  
9       "weight": "Bolder",  
10      "size": "Medium"  
11    },  
12    {  
13      "type": "TextBlock",  
14      "text": "Please provide the details of your issue.",  
15      "wrap": true  
16    },  
17    {  
18      "type": "Input.Text",  
19      "id": "issue",  
20      "placeholder": "Enter a short issue title",  
21      "isRequired": true,  
22      "style": "Text"  
23    }  
24  ]  
25 }
```

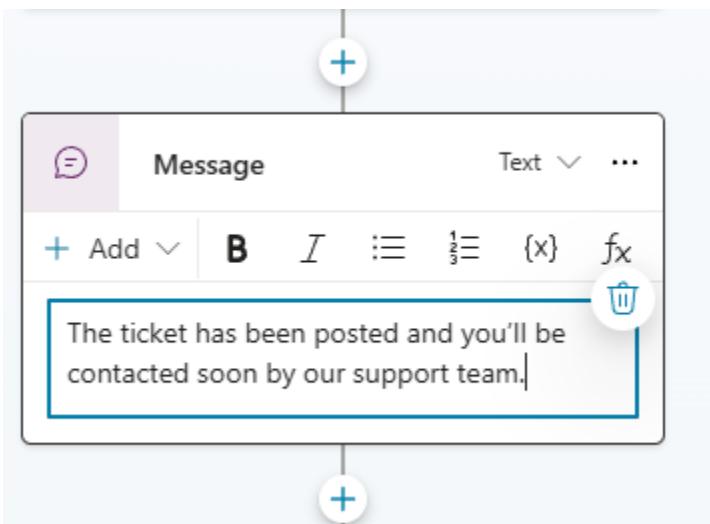
```
{  
  "$schema": "https://adaptivecards.io/schemas/adaptive-card.json",  
  "type": "AdaptiveCard",  
  "version": "1.5",  
  "body": [  
    {  
      "type": "TextBlock",  
      "text": "Support Ticket Request",  
      "weight": "Bolder",  
      "size": "Medium"  
    },  
    {  
      "type": "TextBlock",  
      "text": "Please provide the details of your issue.",  
      "wrap": true  
    },  
    {  
      "type": "Input.Text",  
      "id": "issue",  
      "placeholder": "Enter a short issue title",  
      "isRequired": true,  
      "style": "Text"  
    }  
  ]  
}
```

```
        "errorMessage": "Issue title is required.",
        "label": "Issue"
    },
    {
        "type": "Input.Text",
        "id": "description",
        "placeholder": "Describe the issue in detail",
        "isMultiline": true,
        "isRequired": true,
        "errorMessage": "Issue description is required.",
        "label": "Issue Description"
    }
],
"actions": [
    {
        "type": "Action.Submit",
        "title": "Submit Ticket"
    }
]
}
```

A questo punto non resta che rispondere all'utente che il ticket è stato inserito.



The ticket has been posted and you'll be contacted soon by our support team.



💡 Tip

Per inserire il ticket nella lista SharePoint, realizzare un *agent flow* analogo a quanto visto con il punto precedente, usando però il connettore *Create new item* al posto di *Update item*.

Istruzioni finali

Di seguito le ultime istruzioni utilizzate per i nostri test. Possono essere modificate per cambiare il comportamento dell'agente, modificando ad esempio i criteri di apertura ticket:

```
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```
## BEHAVIOUR GUIDELINES
```

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- Serial Number
- Purchase Date

Ensure the table is aligned, has headers, and uses euro symbol (€) for prices.

ESCALATION TO TICKET CREATION

- If a user asks for help with an IT procedure that is not documented in SharePoint and cannot be resolved with available internal tools, you must not invent instructions.
- In this case, you must enter the Ticket Request topic.
- Additionally, if a user explicitly asks to open a support ticket, you must also enter the Ticket Request topic.
- DO NOT bring the Ticket Request up if the previous conditions are not met.

Contatti

Per maggiori informazioni, contattare:

a.puccini@computergross.it

l.pagliari@computergross.it