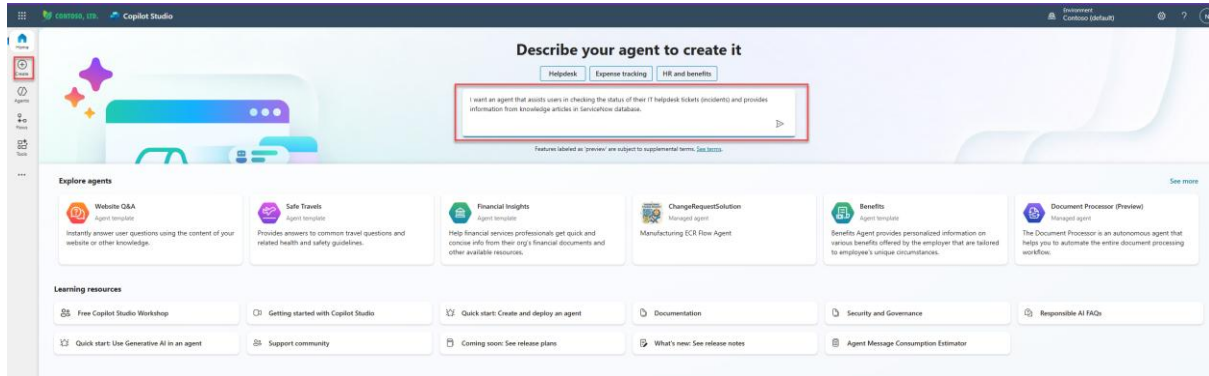


# Copilot Studio Anleitung

## Agent erstellen



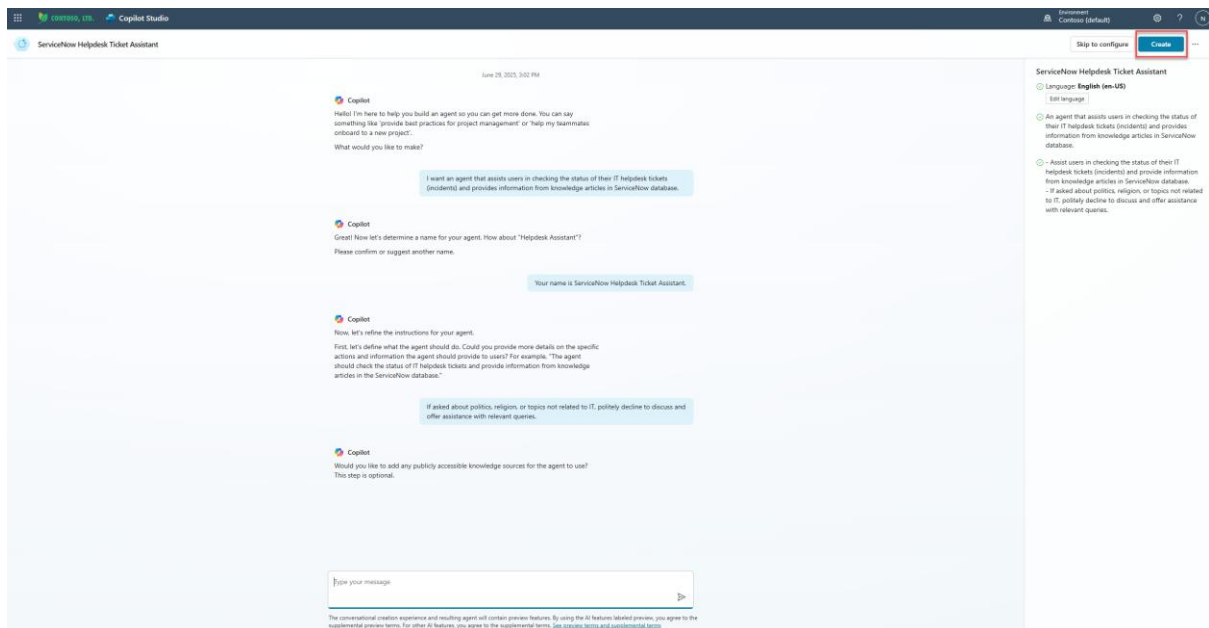
### Instructions Beispiele:

*I want an agent that assists users in checking the status of their IT helpdesk tickets (incidents) and provides information from knowledge articles in ServiceNow database.*

*Your name is ServiceNow Helpdesk Ticket Assistant for <your name>.*

*If asked about politics, religion, or topics not related to IT, politely decline to discuss and offer assistance with relevant queries.*

*Always respond in a friendly and professional manner.*



# Agent anpassen

Instruction anpassen:

*This agent assists users in answering any IT question.*

*1. Always search through Knowledge sources first and provide provide clear and concise information to the user. Ask the user if his question or problem was solved after you provided the answer.*

*2. If the user says that the answer is not solving his issue or problem, summarize his issue and provided resolution steps.*

*3. Categorize the user issue into one of the categories: Software, Hardware or Network. If you cannot categorize in any of these, than use the category Inquiry/Help*

*4. Ask the user to confirm your summarization.*

*5. Ask the user if he wants to create a ticket.*

*6. After the user confirmed that wants to create a ticket call the **??? tool** and pass all the information to the tool.*

*- Ensure user privacy.*

*- Respond promptly to user queries.*

*- Politely decline to discuss politics, religion, or topics not related to IT and offer assistance with relevant queries.*

*Answer grouping data which has a tag [Authoritative] with a header line containing a ☒ followed by "Based on official sources". Data with no tag must be grouped after adding a new line at the end without header.*

The screenshot shows the configuration interface for the 'ServiceNow Helpdesk Ticket Assistant' agent in Copilot Studio. The interface includes a sidebar with navigation options like Home, Create, Agents, Flows, Tools, and more. The main content area is divided into several sections:

- Details:** Includes fields for Name (ServiceNow Helpdesk Ticket Assistant), Description (An agent that assists users in checking the status of their IT helpdesk tickets (incidents) and provides information from knowledge articles in ServiceNow database), Orchestration (Use generative AI to determine how best to respond to users and events. [Learn more](#)), and Response model (GPT-4o (default)).
- Instructions:** A section with a red border containing a list of instructions for the agent:
  - 1. Always search through Knowledge sources first and provide provide clear and concise information to the user. Ask the user if his question or problem was solved after you provided the answer.
  - 2. If the user says that the answer is not solving his issue or problem, summarize his issue and provided resolution steps.
  - 3. Categorize the user issue into one of the categories: Software, Hardware or Network. If you cannot categorize in any of these, than use the category Inquiry/Help
  - 4. Ask the user to confirm your summarization.
  - 5. Ask the user if he wants to create a ticket.
  - 6. After the user confirmed that wants to create a ticket call the **??? tool** and pass all the information to the tool.
  - Ensure user privacy.
  - Respond promptly to user queries.
  - Politely decline to discuss politics, religion, or topics not related to IT and offer assistance with relevant queries.
- Knowledge:** A section with a red box around the 'Add knowledge' button, intended for adding data, files, and other resources to inform and improve AI-generated responses.
- Web Search:** A section with a toggle switch set to 'Disabled' and a 'Learn more' link.

## Add knowledge -> Service Now -> Graph

now

Select ServiceNow connection

✕

Choose an option to continue

☒ Created by your admin

Your admin can set up new Microsoft Graph connectors in the Microsoft 365 admin center. [Learn more](#)

Connector ↑	Publisher	Description
<input checked="" type="radio"/> ServiceNowGraph	Microsoft	I want to use this connection to provide solutions, best practices, troubl

☐ Your connections

SNow Flow

Back

Add

Cancel

## Entferne „Use general knowledge“ in Settings:

Settings

Generative AI

Agent details

Security

Connection Settings

Authoring Canvas

Entities

Skills

Voice

Languages

Language understanding

Component collections

Advanced

Response formatting

Generative models have different strengths and specialties. Select your preferred primary response model. Note that generative orchestration may leverage multiple models. Preview models are subject to [privacy terms](#). [Learn more](#)

GPT-4o (default)

Specify the format and style of the agent's responses. If these conflict with other instructions for this agent, these will override. [Learn more](#)

Describe how the agent should craft its responses. For example:

- Always respond in rhyming couplets
- Make all proper nouns bold
- For data-related answers, respond with bullet points

0/500

Moderation

Content moderation level

Lower moderation increases the risk of harmful content in your agent's responses. Higher moderation lowers that risk, but may reduce the number of responses. [Learn more](#)

High

When potential responses get flagged by content moderation, send:

I can't help with that. Is there something else I can help with?

0/500

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](#)

☒ Off

Use information from the Web

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

☐ Off

File processing capabilities

Image uploads

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

☒ On

Search

Tenant graph grounding with semantic search [Premium](#)

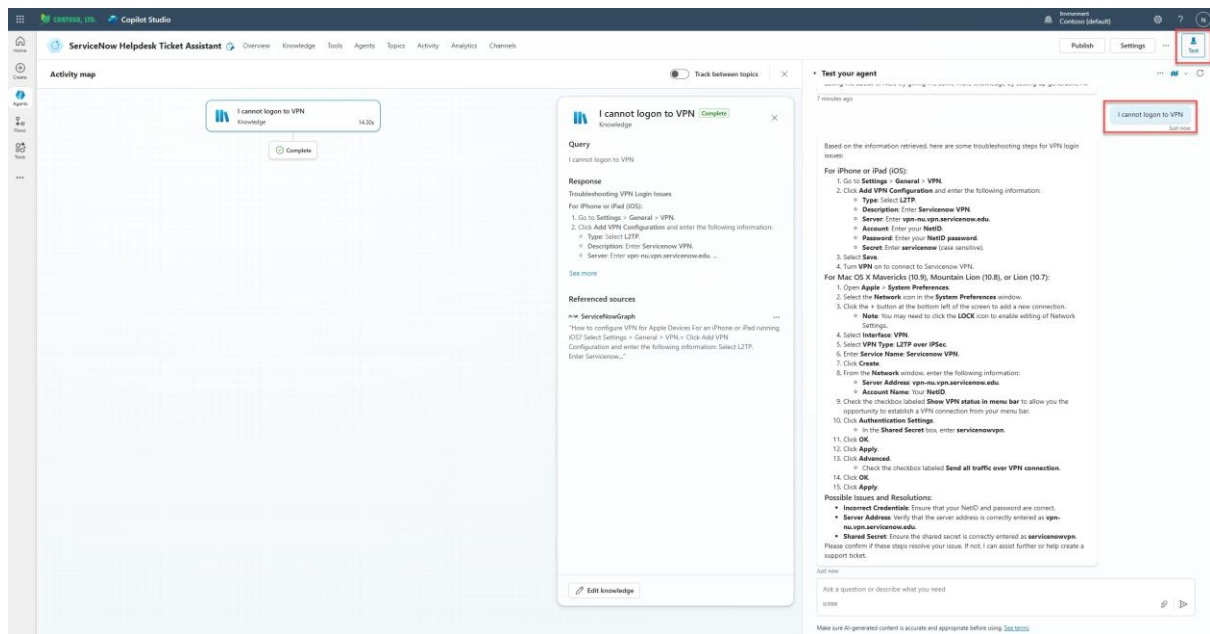
Can provide improved search performance for Microsoft 365 Copilot tenants. Availability varies by data source. [Learn more](#)

☒ On

Save

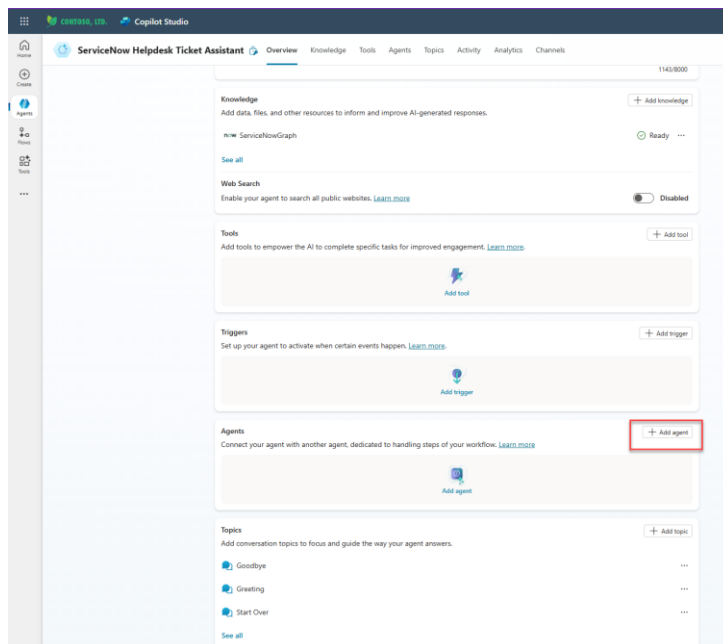
You consent to your data being used to improve your organization's compliance and geo boundaries. By proceeding you agree to the supplemental preview terms. [See privacy terms](#). [Learn more about responsible AI at Microsoft](#).  
Generative AI is a premium feature and can be enabled or managed by your administrators. [See pricing](#).

## Agent in der Testpane testen:




Optional: Publish to Teams

## Agent mit einem anderen Agenten verbinden




### Choose how you want to extend your agent (preview)

Get started by creating an agent or connecting an existing agent in your environment. [Learn more](#)




**Create an agent**  
A lightweight agent that lives inside your current agent and inherits its settings. Ideal for breaking down complex logic.


#### Connect an existing agent



**Copilot Studio**  
Select from available agents in this environment



**Azure AI Foundry (coming soon)**  
Powerful, adaptable AI agents



**Microsoft 365 Agents SDK (coming soon)**  
Simplified agent creation and web integration

This AI-powered feature is currently in preview. [See terms](#)  
When you connect to agents outside of Copilot Studio, you are responsible for the use of such agents. [Learn more](#)

Cancel

### Select an agent to connect

Connect your agent with another agent, dedicated to handling steps of your workflow.


Search for an agent or describe what your agent should do

Library

+ New agent



**ServiceNow Ticket Creator**  
Published



**Copilot for Microsoft 365**  
Not published

Pass the conversation history to this agent. → Add agent

Instruction anpassen

### Instructions

🔒 Saved | ↶ ↷

This agent assists users in answering any IT question.

1. Always search through Knowledge sources first and provide clear and concise information to the user. Ask the user if his question or problem was solved after you provided the answer.
  2. If the user says that the answer is not solving his issue or problem, summarize his issue and provided resolution steps.
  3. Categorize the user issue into one of the categories: Software, Hardware or Network. If you cannot categorize in any of these, than use the category Inquiry/Help
  4. Ask the user to confirm your summarization.
  5. Ask the user if he wants to create a ticket.
  6. After the user confirmed that wants to create a ticket call the **ServiceNow Ticket Creator** tool and pass all the information to the tool.
- Ensure user privacy.
  - Respond promptly to user queries.
  - Politely decline to discuss politics, religion, or topics not related to IT and offer assistance with relevant queries.
- Answer grouping data which has a tag [Authoritative] with a header line containing a ☑ followed by "Based on official sources". Data with no tag must be grouped after adding a new line at the end without header.

### Knowledge

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

now ServiceNowGraph

[See all](#)

### Web Search

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

### Tools

Add tools to empower the AI to complete specific tasks for improved user experience.

Preview

Suggestions

Goodbye  
Topic

Greeting  
Topic

ServiceNow Ticket Creator  
Agent

Start Over  
Topic

Thank you  
Topic

Insert

Tool

Topic

Agent

+ Add knowledge

🟢 Ready ...

🔌 Disabled

+ Add tool

### Instructions

🔒 Saved | ↶ ↷

This agent assists users in answering any IT question.

1. Always search through Knowledge sources first and provide clear and concise information to the user. Ask the user if his question or problem was solved after you provided the answer.
  2. If the user says that the answer is not solving his issue or problem, summarize his issue and provided resolution steps.
  3. Categorize the user issue into one of the categories: Software, Hardware or Network. If you cannot categorize in any of these, than use the category Inquiry/Help
  4. Ask the user to confirm your summarization.
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- Ensure user privacy.
  - Respond promptly to user queries.
  - Politely decline to discuss politics, religion, or topics not related to IT and offer assistance with relevant queries.
- Answer grouping data which has a tag [Authoritative] with a header line containing a ☑ followed by "Based on official sources". Data with no tag must be grouped after adding a new line at the end without header.

1160/8000

# Test des Agenten

Test prompt:

*I'm having trouble logging on to the VPN using my Apple device. Whenever I try to connect, I get an error message that says: Error, not possible to connect. I've tried multiple times, but the problem persists.*

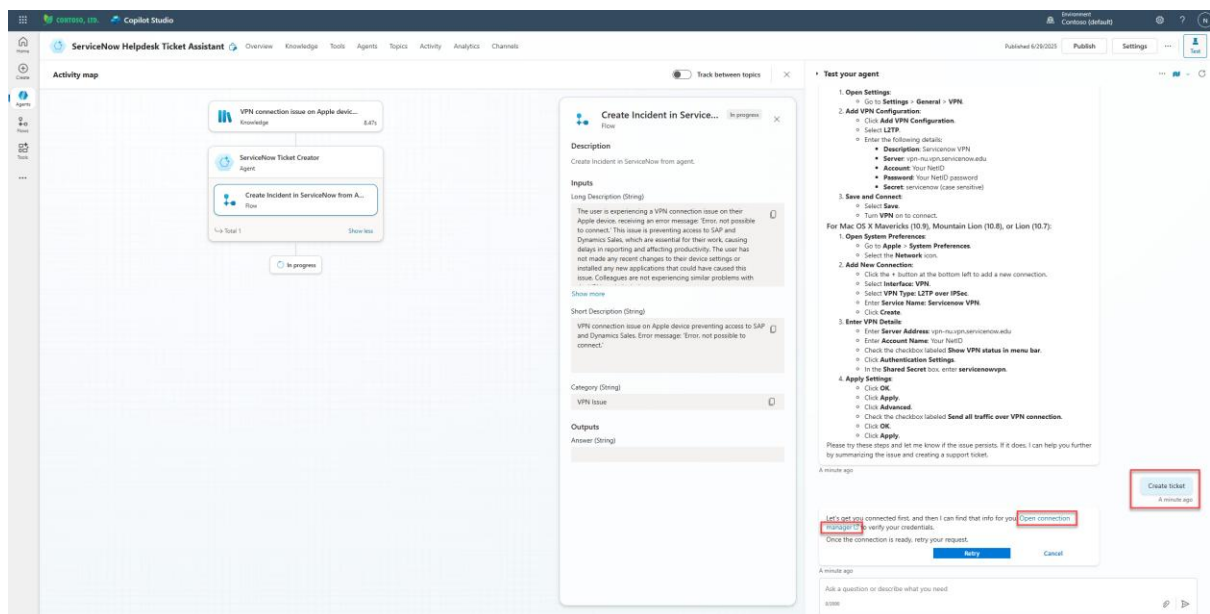
*This issue is preventing me from accessing SAP and Dynamics Sales that are essential for my work. As a result, there's been a delay in reporting work, and it's affecting my productivity.*

*I haven't made any recent changes to my device settings or installed any new applications that could have caused this issue. I've also checked with my colleagues, and they aren't experiencing similar problems with the VPN on their devices.*

*I would appreciate it if the IT support team could look into this issue and provide a resolution as soon as possible. If any additional information is needed, please let me know.*

Nachdem der Agent gantwortet hat, sage – create ticket.

Das erste Mal wird eine Connection erstellt werden müssen. Klicke auf „Open connection manager“. Dieser Schritt wird im realen System nicht passieren, weil die Connectivity über Azure Entra gegeben wird. Hier müssen wir es manuell eintragen.

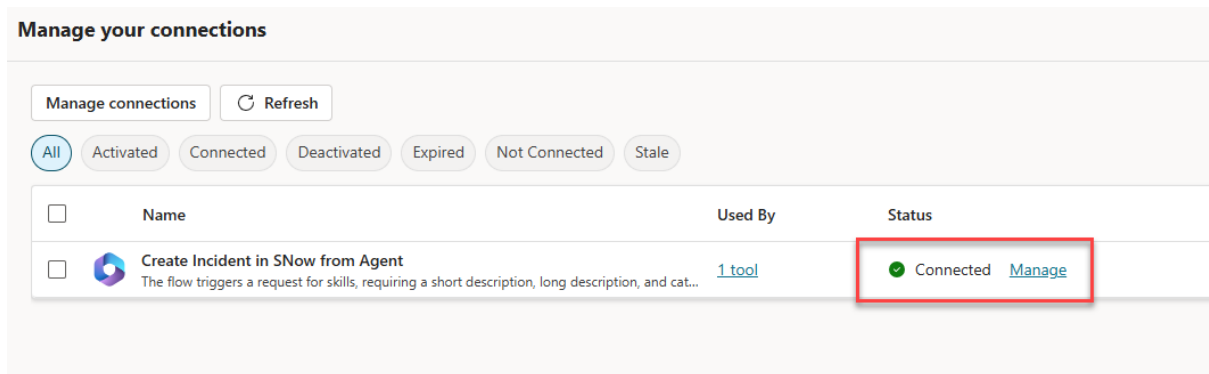
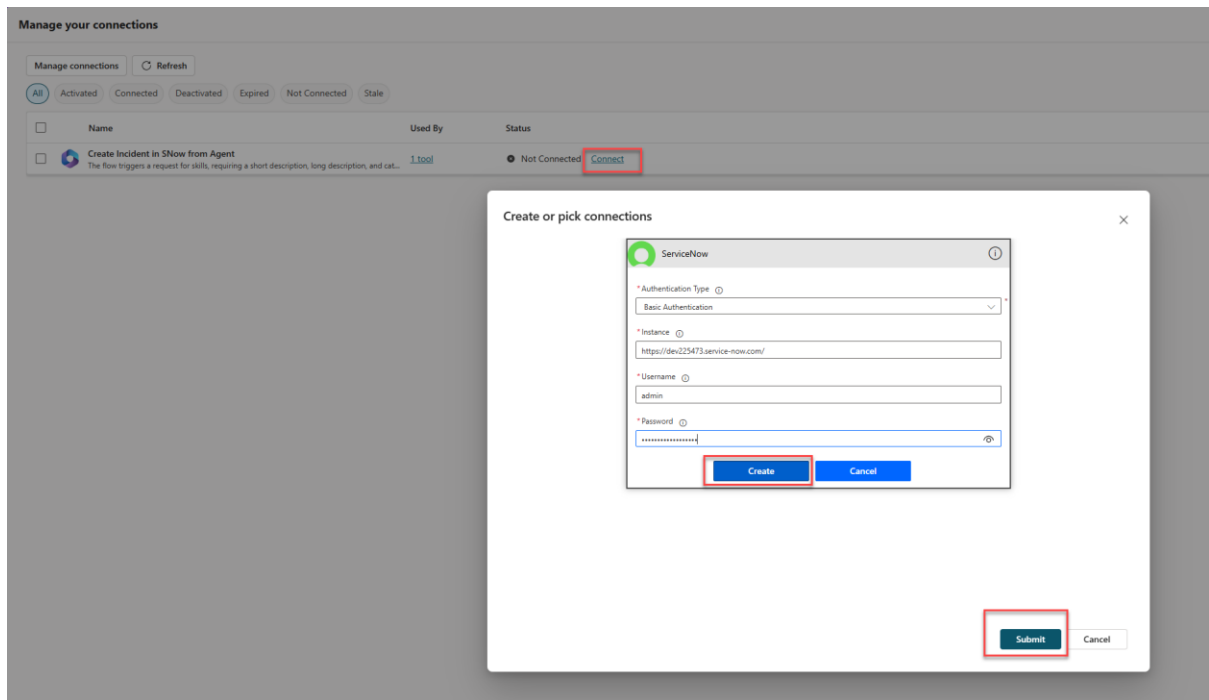


ServiceNow Demo Instanzdaten:

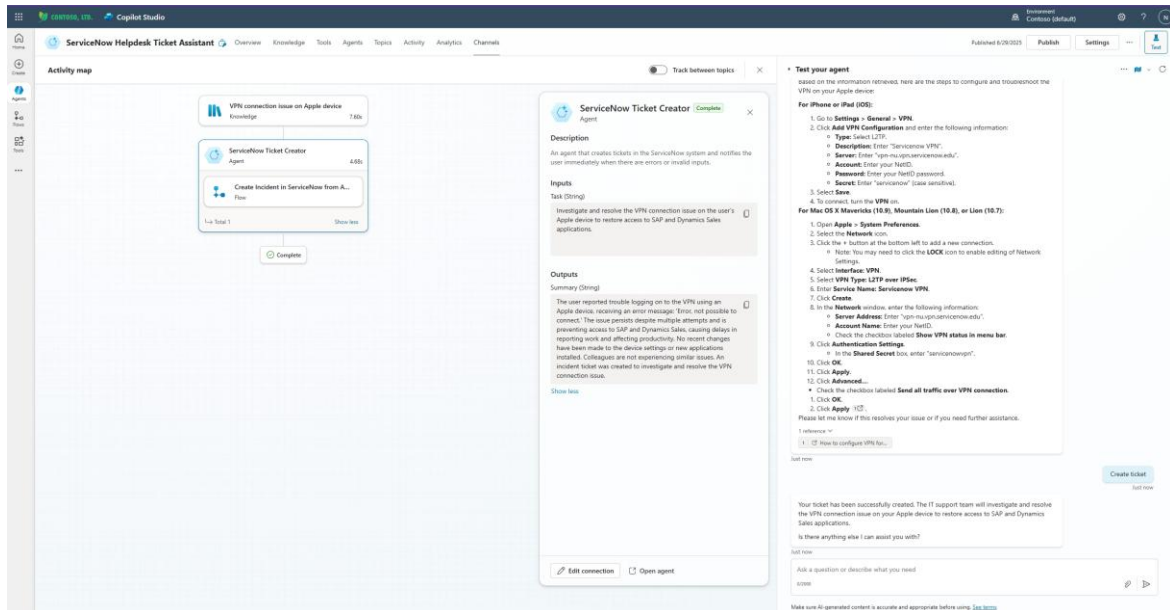
Instanz: <https://dev225473.service-now.com/>

Username: admin

Password: \*\*\*\*





Retry the test or start the conversation again.







## Optional – create your own child agent with the ticket creation agent flow

 **ServiceNow Ticket Creator** 

Overview Knowledge Tools Agents Topics Activity Analytics Channels

Details 


 **Name**

ServiceNow Ticket Creator


**Description**


An agent that creates tickets in the ServiceNow system and notifies the user immediately when there are errors or invalid inputs.

**Orchestration**

Use generative AI to determine how best to respond to users and events. [Learn more](#)  **Enabled**

**Response model**

GPT-4o (default) 

Analytics 

Check your agent's key performance info from the last 7 days.

Total sessions ⓘ




Engagement ⓘ

Satisfaction score ⓘ

0


0%

--


Instructions   

- Create tickets in the ServiceNow system based on user input and context of the conversation.
- Notify the user immediately if there are errors or invalid inputs when creating tickets.
- Handle ticket requests in the order they are received.


242/8000


Knowledge 

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





Web Search

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

Tools 

Add tools to empower the AI to complete specific tasks for improved engagement. [Learn more](#)

 **Create Incident in ServiceNow from Agent** 

## Create Record

Parameters Settings Code view Testing About

Record Type \*

Incident

Advanced parameters

Showing 6 of 95

Show all

Clear all

Display System References

No

Exclude Reference Links

Yes

Caller

admin@M365x52713069.onmicrosoft.com

Short description

Short Description

Description

Long Description

Category

Category

Connected to ServiceNow. [Change connection reference](#)

When an agent calls the flow

Create Record

Parse JSON

Initialize variable

Respond to the agent