Power Platform + AI: Get Future-Ready & Accelerate Innovation

Business Use Case: IT Help Desk Solution

In this workshop, we'll develop an AI-powered Help Desk Service solution designed to streamline IT support, automate ticket routing/troubleshooting, and enhance user experiences through predictive insights and intelligent automation. This solution will incorporate Power Apps for user interactions, AI Builder for automating ticket classification & routing, Copilot Studio for creating a sophisticated AI-driven support assistant, Azure OpenAI for natural language processing and AI Search powered custom connector for quick information retrieval.

Lab 3: Enhancing end-user support with a Copilot-Powered Assistant & Gen AI (30 mins)

- **Objective:** Enhance the Help Desk Service with an AI-driven chatbot that can assist users with common issues and guide them through troubleshooting steps.
- **Tasks:**
    - Use Copilot Studio to design and deploy a chatbot that can handle common IT support queries.
    - Integrate Gen AI, knowledge source documents and public website knowledge to enable the chatbot to understand and respond to natural language queries.
- **Outcome:** Attendees will deploy a secure AI-powered chatbot that interacts with users and provides instant support.

Create the Copilot Studio Bot

1. Go to https://copilotstudio.microsoft.com and confirm that you are in your trial environment that you created at the beginning of the lab.
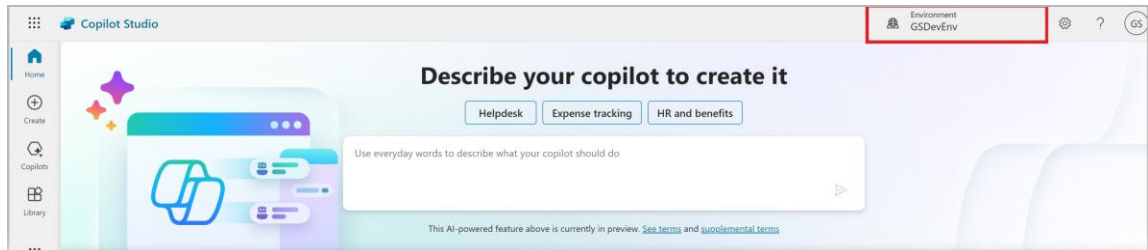
2. You land on the **Home** page. Select **Create** on the left navigation.
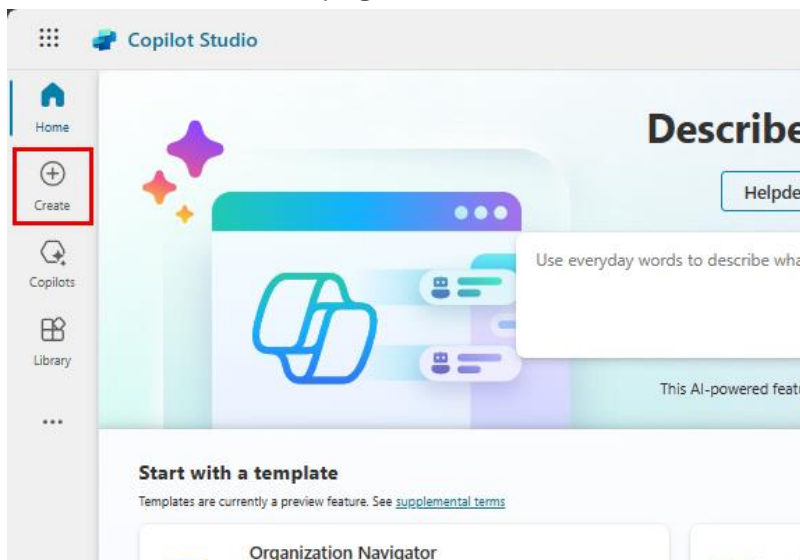
3. On the **Create** page, select **New copilot** > Select **'Skip to Configure'** to set it up manually.

4. Provide a **Name**: HelpDeskCopilot. Add the following description:
   Assists users with PC related hardware & software issues

5. Provide the following **Instructions**
   Your name is HelpDeskCopilot. You help users troubleshoot common PC hardware and software issues with detailed step by step instructions.

6. Select **Create** to create your first copilot in the environment.
7. On the landing page, click '+ Add Knowledge' under the Knowledge section > Select **Files** to upload the following docs from the 'Knowledge Source' folder provided to you as part of the Lab modules zipped content and Select **Add**
   a. PC_HardwareFAQs.pdf
   b. MS_SoftwareFAQS.doc

8. Copilot studio will index the content on the uploaded files for a few minutes. Select 'See all' to view status. The Status column will change from Unknown > In Progress > Ready. Select the 'Last Refreshed now' button at the top right corner to view updated status. Status of 'Ready' indicates the content is ready for usage.

9. Select the 'Overview' Tab on the top navigation menu to go back to the home page. On the landing page, click '+ Add Knowledge' under the Knowledge section > Select **Public Websites and** to add the following URL from Microsoft support to troubleshoot password/account issues:

    a. https://support.microsoft.com/en-us/account-billing

10. Select the 'Overview' Tab on the top navigation menu to go back to the home page by default, copilots start with access to general knowledge. In the knowledge panel of Copilot Studio's **Overview** tab, you can see **Allow the AI to use its own general knowledge (preview)** is **Enabled**. Turn off **Allow the AI to use its own general knowledge**.

11. In the testing chat, try asking another question about something not related to your copilot's knowledge source. Your copilot should respond that it can't help you with the question, because the copilot no longer has the general knowledge to answer it.
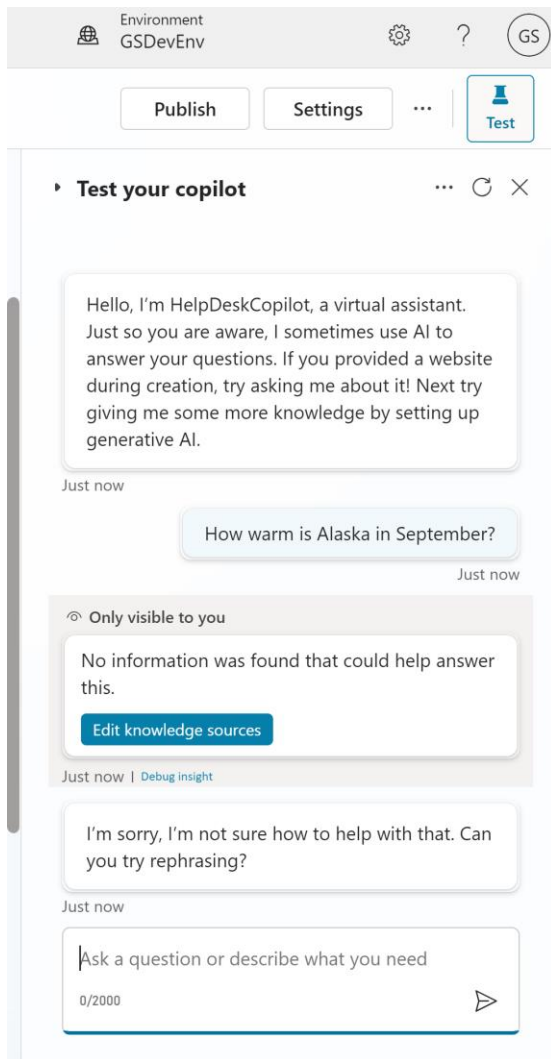
12. Help your copilot make a great first impression with a new introductory message. This first message lets users know what your copilot does and encourages them to interact with your copilot. Select the 'Topics' tab > Select 'All' > Select 'Conversation Start' topic. In the **Message** box, select the text of the message. Delete the default message and add the following and click **Save** to save the changes to the topic.

Hello, I'm a Helpdesk virtual assistant that can help you troubleshoot common issues related to PC hardware and software. What can I help you with today?
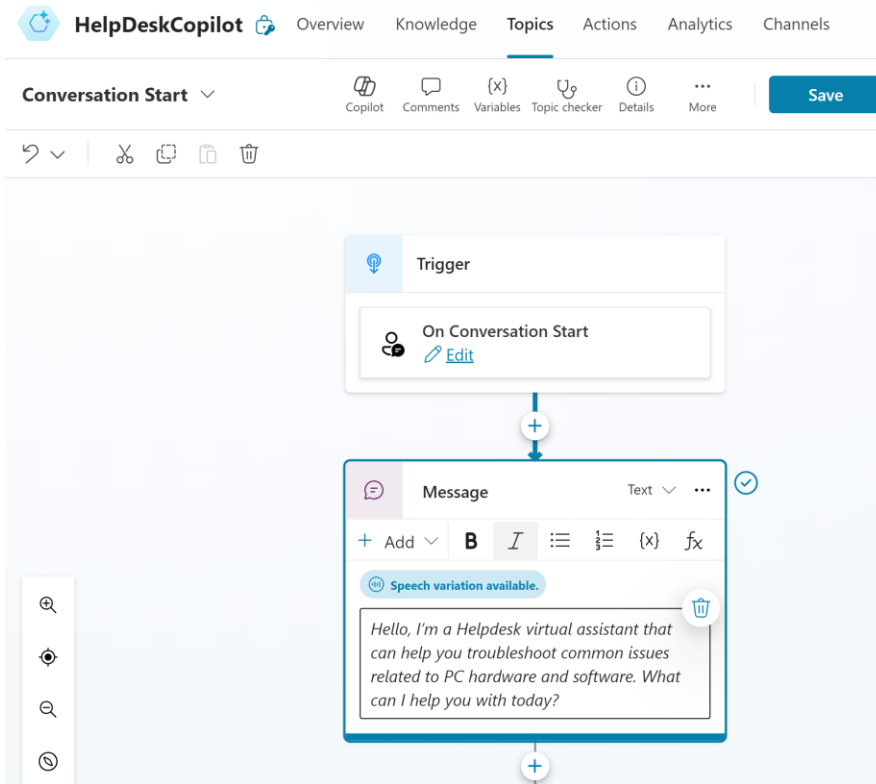
13. To test this change, select **Refresh** in the **Test your copilot** chat panel.
14. Click on Settings on the top right corner of the page next to Publish to manage your copilot configurations (advanced settings, security, language, etc.)
    Below are details on the Settings interface and the configuration details for reference.
    a. **Copilot details** – Where you can update the copilot display name, icon, and modify advanced settings (e.g. configure the Azure Application Insights integration)
    b. **Generative AI** – Where you can choose to replace the more classic natural language understanding approach for topic triggering and entity extraction with one that's based on a large language model to do multi-intent detection and more complex entity extraction. This is also where you can configure content moderation setting for knowledge sources (to reduce risks of hallucinations).
    c. **Security** – This is also where you configure end-user authentication settings (the type of authentication and whether it is enforced or not). Authentication allows users to sign in, giving your copilot access to a restricted resource or information. Users can sign in with Microsoft Entra ID, or with any OAuth2 identity provider such as Google or Facebook.

d. **Entities** – Copilot Studio comes with a lot of pre-built entities to help identify key information in a user utterance (e.g. a city, date, number, etc.). This menu is also where you can define your own closed-list entities or regular expression entities.

e. **Skills** – Where you register external Bot Framework skills that your Copilot Studio copilot can call, or where you can configure how existing Azure Service Bot can use your Copilot Studio copilot as a skill.

f. **Languages** – Where you can configure additional languages your copilot can be used in and localized into.

g. **Language understanding** – Where you can configure custom language models developed and trained on Azure AI Language, in Azure Conversational Language Understanding (CLU). When configured, this effectively replaces the out-of-the-box natural language understanding model (NLU) for intent detection and can also replace entity detection and extraction.

15. Click on **Security** and choose **'No Authentication'** for the purposes of this lab module and **Save.** It will prompt you to save the configuration again, go ahead to click **Save.**
(Note: No authentication means your copilot doesn't require your users to sign in when interacting with the copilot. Will allow anyone who has the link to chat and interact with your bot or copilot. Recommendation is for you to apply authentication, especially if you are using your bot or copilot within your organization or for specific users.)

16. Exit the settings pages with 'X' on the top right corner.

17. Back on the **Topics** page > Select the topic '**Conversation Boosting**' to enhance responses with generative answers. This topic triggers when the copilot can't find a match for the user query. We don't have trigger phrases defined so we will use this topic to fine tune our responses.

18. Click on **Edit** on the 'Create Generative answers' node. Add the following system prompt to define expected response format and **Save**
(**Note**: Generative answers in Copilot Studio allow your copilot to find and present information from multiple sources, internal or external, without created topics. Generative answers can be used to boost your copilot's conversations by using multiple internal and external information sources within individual topics. Within a

copilot's topic, you can add a Generative answers node. This node allows you to specify more sources that the node searches based on your inputs.)

You are an IT help desk assistant. Provide detailed, step-by-step answers that break down issues and offer clear resolutions. Highlight key troubleshooting tips to make them stand out. Ensure the instructions are simple and easy for an end user to understand and follow.
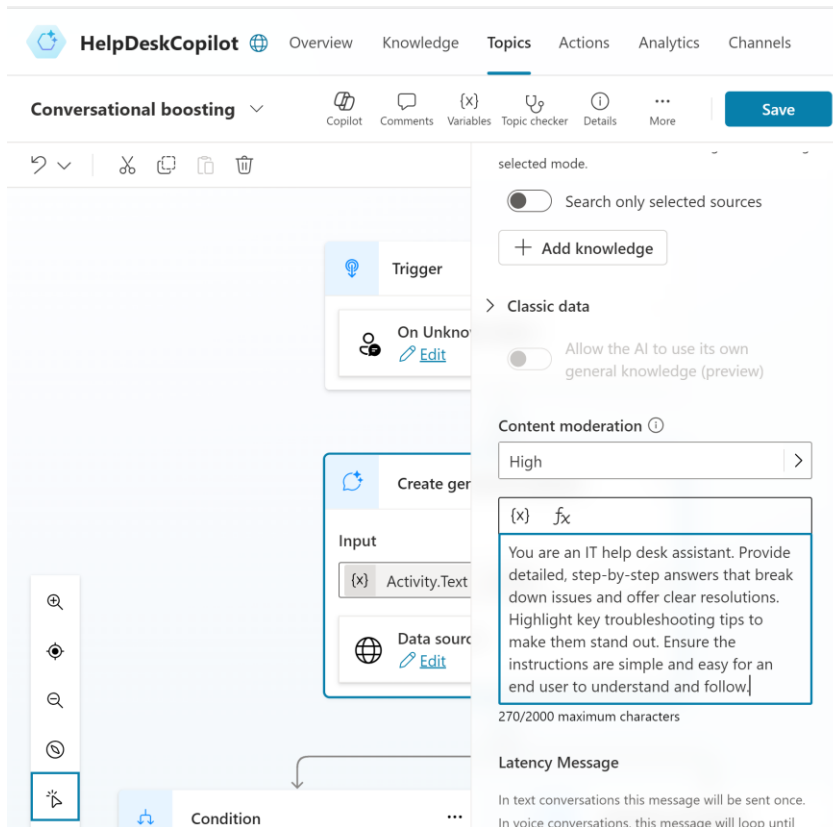

19. Publish the bot using the **Publish** button at the top right corner. It will take a few seconds to publish. Once published, select **Channels** and Click on **'Demo Website'** link to open a new browser tab to access your published external facing bot. (**Note**: Anyone who has the link to demo website can interact with your bot. Best practice is to secure the bot with Entra ID or Manual Auth setup via the bot's security settings.)
(Note: You can select the **Demo website** tile on the channels tab to configure settings for the page. Under **Welcome message**, enter the message you want your teammates to see. Under **Conversation starters**, enter a list of trigger phrases.

Trigger phrases are what initiate specific topics, so you could enter trigger phrases for topics that you want your teammates to test.)
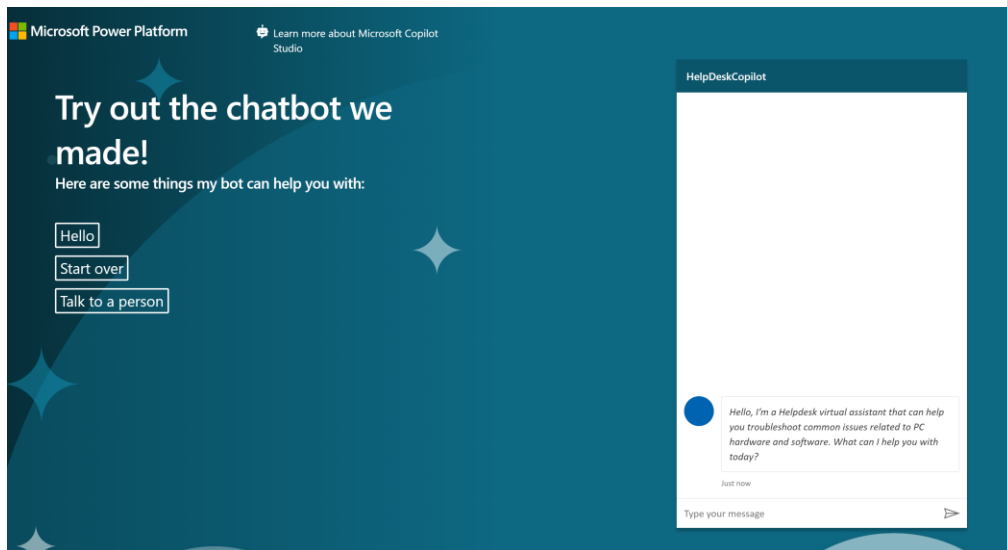
20. Try the following prompts one by one on the publish bot to view Gen AI results citing public site or knowledge source doc. Try prompting with content on FAQs or on the Support website to see a variety of answers.

   a. *Files in OneDrive are not syncing between the cloud and local storage*
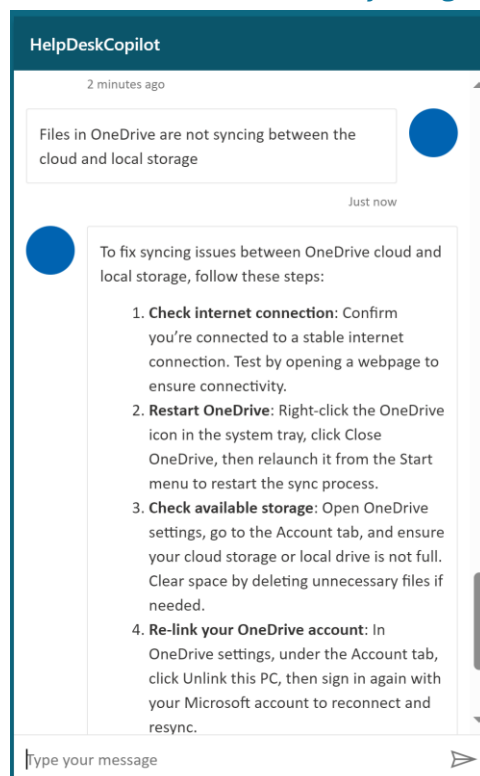
b. I need to change my password. Can you help?

HelpDeskCopilot

resync.

5. **Reset OneDrive**: Press Win + R, type %localappdata%\Microsoft\OneDrive\one drive.exe /reset, and press Enter. This can fix persistent sync issues [1].

1 reference ⌄

| 1 | MS_SoftwareFAQs.docx |

2 minutes ago

I need to change my password. Can you help?

A minute ago

To change your password, go to account.microsoft.com ⧉, sign in with your current username and password, then select Security and choose Change my password. Enter your current password, set a new password, and select Save [1 ⧉].

1 reference ⌄

| 1 | Change your Microsoft account passw... ⧉ |

A minute ago

Type your message