

AUTOMATE **Advanced** 60 MIN · UPDATED 2026-09-30

Deploy a Tier-1 IT triage agent.

Stand up a Copilot Studio agent that opens and categorizes IT tickets, runs first-line diagnostics, and resets passwords through Entra without a technician.

MICROSOFT 365

Teams

SharePoint

WORKS WITH

Copilot Studio

Business Outcome

Fewer routine tickets reaching Tier-1 technicians, freeing them for issues that actually need a person.

Workflow Steps

Step 1: Scope the agent to your top ticket categories

SharePoint

Export your last quarter of ticket data into Excel and pivot by category to rank them by volume, then separately flag which of the top categories are genuinely low-risk to automate (password resets, standard access requests) versus ones that only look routine but carry real consequences if mishandled.

Launch with just that low-risk, high-volume intersection — not every ticket type at once.

Step 2: Build the triage and diagnostics logic

Copilot Studio

In Copilot Studio, build the agent with your KB articles as grounding sources, and configure it to ask clarifying questions before acting — device name, error message, last known working state — rather than guessing at a fix.

Step 3: Connect the Entra ID self-service action

Copilot Studio

Wire up the password-reset connector so the agent can trigger it directly for verified users, with multi-factor verification enforced before any reset executes.

PROMPT

A user reports they can't sign in to Outlook and get an "account locked" error. Walk them through verifying their identity, then reset their password through the standard self-service flow and confirm the reset succeeded.

Step 4: Set the escalation boundary

Teams

Define exactly what gets escalated to a human technician – anything outside the scoped categories, any failed verification, and any diagnostic that doesn't match a known fix – and route those to your existing ticket queue with full context attached.

✓ Check the work

- Review the agent's action log weekly for any reset or fix performed on an unverified or ambiguous identity.
- Sample resolved tickets and confirm the issue was actually fixed, not just marked closed.
- Track the escalation rate – a rate that's too low is a red flag the agent is closing tickets it shouldn't.

Expected Outcome

A live agent in Teams that resolves or correctly categorizes a defined set of common ticket types, with an audit log of every action it took.

Want help rolling this out across your team? [Go to Liminals.Tech](#) 📄