Pargesoft Talk to Machine

Maintenance Assistant Agent for Microsoft Teams and Microsoft 365 Copilot — User and Administration Guide

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Parge Yazılım Danışmanlık Tic. A.Ş.
Ihlamurkuyu Mh. Gumussuyu Cd. Meral Plaza No:5/9, 34771 Umraniye, Istanbul – Türkiye
info@pargesoft.com · destek@pargesoft.com · https://pargesoft.com

Document Information

Item	Detail
Product	Pargesoft Talk to Machine — Maintenance Assistant Agent
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Publisher	Pargesoft (prefix: par_)
Solution version	1.0.0.0
Solution type	Managed

Item	Detail
Platform	Microsoft Power Platform / Dataverse / Microsoft Copilot Studio
Channels	Microsoft Teams, Microsoft 365 Copilot
Languages	English, Turkish
Document version	1.0
Document date	[DD.MM.YYYY]
Audience	Power Platform administrators and end users

Note. Parts I and II are written for the person installing and configuring the solution. Part III is written for end users and can be distributed separately. Part IV applies to both audiences.

Part I — Introduction

1. About Pargesoft Talk to Machine

1.1 Overview

Pargesoft Talk to Machine is a maintenance assistant agent for manufacturing plants. Maintenance technicians, operators and engineers ask questions in Microsoft Teams or Microsoft 365 Copilot, in English or Turkish, and get short answers from the plant's own breakdown records, machine notes and machine instructions. Every answer cites its source: the notification number for records and the document code for instructions.

The solution is delivered as a managed Power Platform solution and installed into the customer's own environment. It has no separate application screen; users work only in Microsoft Teams or Microsoft 365 Copilot.

1.2 Key Capabilities

- Answers questions about past breakdowns: whether a breakdown happened before on a machine, what was done, the latest records.
- Counts and ranks records: which machines have the most records for a part group, which machines had the longest downtime.
- Finds the right instruction for a machine in the SharePoint document library and relays only the steps written in it.
- Uses machine notes maintained by administrators, such as alternative machine names or records filed under the wrong machine.
- Answers in English and Turkish and searches the data in both languages, so a question in English finds records written in Turkish.
- Applies strict safety boundaries: it never gives its own intervention steps for hazardous work, refuses requests to bypass safety devices, and answers emergency reports only with a pointer to the site emergency procedure.

1.3 How It Works

1. A user asks a question in Microsoft Teams or Microsoft 365 Copilot.
2. The agent, running in Microsoft Copilot Studio in the customer's tenant, decides which source the question needs.
3. For history and count questions, it queries the **Breakdown Record** table and, when a machine is identified, the **Machine Note** table in Dataverse, with the user's own permissions.
4. For "how to" and "which instruction" questions, it searches the SharePoint locations configured in the environment variables, with the user's own permissions.
5. It answers briefly, cites the source, and offers to narrow down long result lists.

1.4 Where Your Data Is Processed

All processing takes place inside your Microsoft 365 and Power Platform tenant. Records and notes are stored in Dataverse tables in your environment, documents stay in your SharePoint, and conversations

are handled by Microsoft Copilot Studio according to your settings. The solution calls no service outside Microsoft and sends no data to Pargesoft. See the Pargesoft Talk to Machine Privacy Notice.

2. Prerequisites

2.1 Licensing Requirements

Requirement	Purpose
Power Platform environment with Dataverse	Hosts the agent, tables and roles
Microsoft Copilot Studio capacity (Copilot Credits or messages)	Runs the agent's conversations
Microsoft Teams	Main user channel
Microsoft 365 subscription with SharePoint Online	Stores instruction documents
Microsoft 365 Copilot licence (optional)	Only for users who use the agent in Microsoft 365 Copilot

These licences are not part of the solution and must be obtained from Microsoft. Copilot Studio capacity consumption depends on how much the agent is used.

2.2 Permissions Required for Installation

- System Administrator role in the target environment, to import the solution.
- Teams administrator (or an administrator with app management rights) to approve the agent for the organisation in the Teams admin center, according to your tenant's app policies.

2.3 Client Requirements

Users need the Microsoft Teams desktop, web or mobile client, or Microsoft 365 Copilot. No browser extension or local software is required.

Part II — Installation and Configuration

3. Installing the Solution

3.1 Obtaining the Solution

Pargesoft Talk to Machine is listed on Microsoft AppSource with the **Contact me** option. After you contact Pargesoft and agree the licence, Pargesoft provides the managed solution file and supports the installation.

3.2 Installing from a Solution File

1. Sign in to https://make.powerapps.com and select the target environment.
2. Select **Solutions** → **Import solution**, browse to **PargesoftTalkToMachine_1_0_0_0_managed.zip** and select **Next**.
3. On the **Connections** step, select or create a **Microsoft Dataverse** connection for the connection reference **Talk to Machine - Dataverse**.
4. On the **Environment variables** step, enter the SharePoint URLs described in Section 5 (you can also set them later).
5. Select **Import** and wait until the solution shows as installed.

3.3 Solution Components

Type	Display name	Name
Agent	Pargesoft Talk to Machine	par_TalkToMachineBakimAsistani
Agent tool	Query Breakdown Records	Dataverse "list rows" tool on par_arizakaydi
Agent tool	Get Machine Notes	Dataverse "list rows" tool on par_makinenotu
Knowledge source	Instruction documents	SharePoint, URL from par_TTM_InstructionsLibraryUrl

Type	Display name	Name
Knowledge source	Planned maintenance documents	SharePoint, URL from par_TTM_PlannedMaintenanceUrl
Topic	Emergency / Acil durum	Fixed emergency instruction
Topic	Unsafe request / Güvenli olmayan talep	Fixed refusal for safety bypass requests
Table	Breakdown Record	par_arizakaydi
Table	Machine Note	par_makinenotu
Security role	Talk to Machine User	Read both tables
Security role	Talk to Machine Admin	Create, read, update, delete both tables
Environment variable	Talk to Machine - Instruction documents URL	par_TTM_InstructionsLibraryUrl
Environment variable	Talk to Machine - Planned maintenance documents URL	par_TTM_PlannedMaintenanceUrl
Connection reference	Talk to Machine - Dataverse	Microsoft Dataverse connector

The solution contains no cloud flows, plug-ins, web resources, apps or custom connectors.

4. Configuring the Connection

The agent's tools use the **Talk to Machine - Dataverse** connection reference in **user credentials** mode. Queries always run with the permissions of the user who asks the question, never with a shared account. The first time a user asks a question that needs records, Microsoft Teams asks the user to allow the connection. This is a one-time consent per user.

5. Configuring Environment Variables

5.1 par_TTM_InstructionsLibraryUrl

The URL of the SharePoint document library or folder that contains the machine instructions (operating, setup, safety, lockout/tagout, autonomous maintenance). Example: https://contoso.sharepoint.com/sites/Maintenance/Shared Documents/Instructions.

5.2 par_TTM_PlannedMaintenanceUrl

Optional. The URL of the SharePoint library, folder or file that contains planned maintenance documents.

5.3 Setting the Values

1. In https://make.powerapps.com open **Solutions** → **Default Solution** → **Environment variables**.
2. Open each variable and enter its **Current value**.
3. Open the agent in Microsoft Copilot Studio and select **Publish**.

Users only get answers from documents they are allowed to open in SharePoint.

6. Security Roles and User Access

The agent reads Dataverse with each user's own permissions, so every user needs access to the environment and to the tables.

Role	Assign to	Grants
Basic User + **Talk to Machine User**	All users of the agent	Read Breakdown Record and Machine Note
Basic User + **Talk to Machine Admin**	People who load and maintain the data	Create, read, update and delete both tables

We recommend assigning the roles to a **Microsoft Entra security group team** in the Power Platform admin center, so that new users get access when they are added to the group. Administrators who use **Import from Excel** in make.powerapps.com also need the **Environment Maker** role.
System Administrator rights are not required at runtime.

7. Making the Agent Available in Teams and Microsoft 365 Copilot

1. In Microsoft Copilot Studio open the agent → **Channels** → **Teams and Microsoft 365 Copilot**.
2. Select **Availability options**, choose **Show to everyone in my org** (or share with specific users or groups) and submit the agent for admin approval.
3. A Teams administrator approves the agent in the Teams admin center → **Manage apps**.

8. Loading Data

8.1 Breakdown Records

1. Use the template **Template_BreakdownRecords.csv**. Its column headers match the table column names, so they are mapped automatically.
2. Enter one row per maintenance notification or work order line. Write the technical object code exactly as in your maintenance system. **Downtime** is Yes or No. Durations are in minutes. Dates are in the plant's local time.
3. In https://make.powerapps.com open **Tables** → **Breakdown Record** → **Import** → **Import data from Excel** (or CSV), select the file and confirm the column mapping.
4. For recurring loads from a maintenance system (for example SAP PM or a CMMS), use a Power Platform dataflow or a Power Automate flow that writes to the Breakdown Record table.

Do not load personal data. Remove technician or employee names from free-text columns before loading.

8.2 Machine Notes

1. Open **Tables** → **Machine Note** → **Edit data**, or import **Template_MachineNotes.csv**.
2. For each note enter a short title, the technical object code exactly as in the records, optionally the line code, and the note text.
3. Typical notes: alternative names of a machine, records known to be filed under the wrong machine, which instruction applies to a machine, or which instruction must not be used for it.

The agent reads the notes every time a user asks about that machine and follows them.

9. Post-Installation Verification

1. In Copilot Studio, open the agent and use the test pane to ask: *Show the 5 most recent breakdowns.* The answer must list records from the Breakdown Record table.
2. Ask: *Which instruction applies to autonomous maintenance of D1-26?* (use a machine code from your own data) The answer must cite a document from the configured SharePoint location.
3. Sign in to Teams with a user who has only Basic User and Talk to Machine User, open the agent and repeat step 1.

Part III — Using Pargesoft Talk to Machine

10. Opening the Agent

Open Microsoft Teams or Microsoft 365 Copilot and select **Pargesoft Talk to Machine** from your apps or agents. The welcome page shows suggested questions in English and Turkish.

11. Asking Questions

Type your question in English or Turkish. You can ask, for example:

- *Has the low oil pressure error happened before on D1-26?*
- *What was done in notification 100807577?*
- *Which machines have the most hydraulic breakdown records?*
- *Which 5 machines have the longest total downtime this year?*
- *Which instruction applies to autonomous maintenance of D1-26?*

11.1 Writing Effective Questions

- **Give the machine code when you know it** (for example D1-26). A machine name alone can match machines on several lines; the agent will then ask which one you mean.
- **Name a part or keyword** (hydraulic, sensor, oil pressure) to narrow down records.

- **Give a date range** for long histories (for example *this year* or *since March*).
- **Ask one thing at a time.**

11.2 Reading the Answers

- Records are listed from newest to oldest with date, notification number, machine code and name, description, action note and durations.
- If more than 10 records match, the agent gives the total and the 5 newest, and offers to narrow down.
- Counts are **record counts**, not official failure rates or performance indicators.
- An action written in a past record is **not an approved instruction**.
- For instructions, the agent gives the document code and title and asks you to confirm the current revision.

12. Safety Boundaries

The agent:

- does not give its own steps for electrical, hydraulic, pneumatic, press, robot, die, guard or lockout/tagout work; it relays only steps written in the approved instruction, with its document code;
- does not list locking points or isolation order for lockout/tagout; it gives only the matching lockout/tagout document code and title;
- refuses requests to disable or bypass guards or safety devices;
- answers reports of injury, fire, leaks or other immediate danger only by telling you to follow the site emergency procedure and inform your shift supervisor and maintenance team.

The agent is an information tool, not a safety system. Always follow your approved instructions and your site's safety rules.

13. Languages

- Answers follow the language of your question.
- Fixed messages (welcome, fallback, safety and emergency messages) follow the language of your Teams client.
- Codes, record numbers and machine names are always shown exactly as in the source.

Part IV — Reference

14. Limitations and Known Behaviour

- The agent answers only from the connected records, machine notes and documents; it does not use general knowledge or the web.
- Record lists are limited to 15 records per query; counts and totals are calculated in Dataverse.
- The agent cannot verify the revision or approval status of instructions.
- Suggested questions are shown in both languages on the welcome page.

15. Troubleshooting

15.1 The agent does not appear in Teams

Check that the agent was published, made available in **Channels → Teams and Microsoft 365 Copilot**, and approved in the Teams admin center.

15.2 Record questions return an error or "not found"

- Check that the user has **Basic User** and **Talk to Machine User**.
- Check that the user allowed the Dataverse connection on first use.
- Check that records were loaded and that the machine code in the question exists in the data.

15.3 Instruction questions find nothing

- Check the environment variable values and that the agent was published after they were set.
- Check that the user can open the documents in SharePoint.

15.4 Answers are inaccurate or incomplete

Check the source record or document. Add a machine note for machines with known naming or record issues. Ask with the machine code and a narrower keyword or date range.

16. Uninstalling

In https://make.powerapps.com open **Solutions**, select **Pargesoft Talk to Machine** and select **Delete**. This removes the agent, the two tables **and their data**, the security roles, the environment variables and the connection reference. Export any data you want to keep first. Remove the agent from the Teams admin center if it was approved there.

17. Security and Privacy Summary

- Runs entirely in your tenant; Pargesoft has no access to your data.
- Reads Dataverse and SharePoint with each user's own permissions.
- Two least-privilege roles; no System Administrator rights at runtime.
- No custom code, flows, plug-ins or web resources; no external endpoints.
- Solution Checker (AppSource Certification ruleset): zero findings.

18. Support

Support: **destek@pargesoft.com** · Support page:
https://pargesoft.com/AppsourceHelpDocuments/PargesoftTalkToMachine-Support.pdf

18.1 Information to Include in a Support Request

- Environment URL and solution version.
- The question asked, the time (UTC) and, if shown, the conversation ID and error code.
- Screenshots, with records, document content and personal data **redacted**.

18.2 Outside the Scope of Support

- Issues originating from Microsoft services (contact Microsoft support).
- The content or quality of your own records and documents.
- Objections concerning the content of AI-generated answers.
- Custom development, data integration and consulting requests.