

- 30 -

Extend Microsoft 365 Copilot
with Connectors



MONTHLY MASTERY

FEATURE-A-DAY

with Copilot Studio



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Katerina Chernevskaya



Connectors for Microsoft 365 Copilot

In a nutshell, extending Microsoft 365 Copilot with connectors allows you to:

- Integrate custom and **third-party services** into Copilot workflows.
- Enhance **automation** by enabling Copilot to take actions outside the Microsoft ecosystem.
- **Streamline** workflows tailored to your unique business requirements.

By leveraging connectors, you can turn Microsoft 365 Copilot into a hub for managing diverse tasks across multiple platforms.



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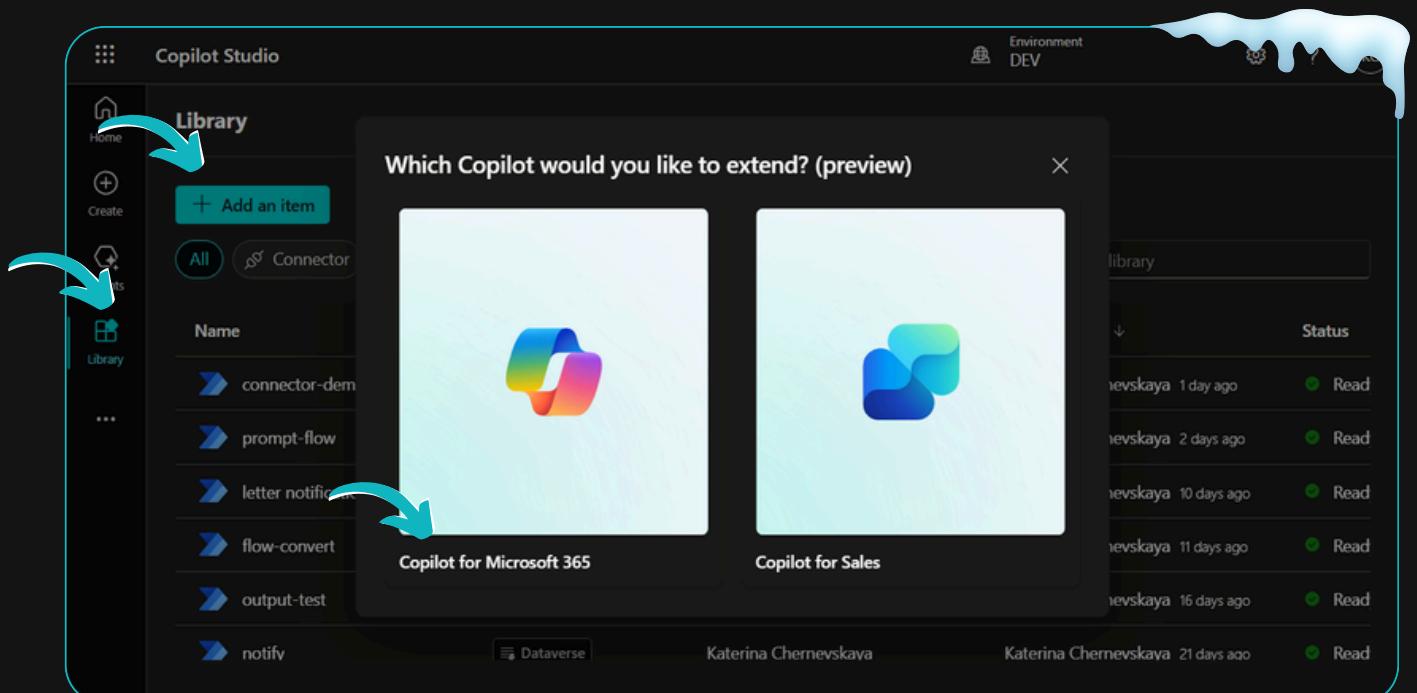
Connectors for Microsoft 365 Copilot

Open the wizard

in Copilot Studio, navigate to [Library](#) and select [+ Add an item](#).

Select [Copilot for Microsoft 365](#) option.

In the opened window select [New action](#) option as we are going to create an action not an agent.



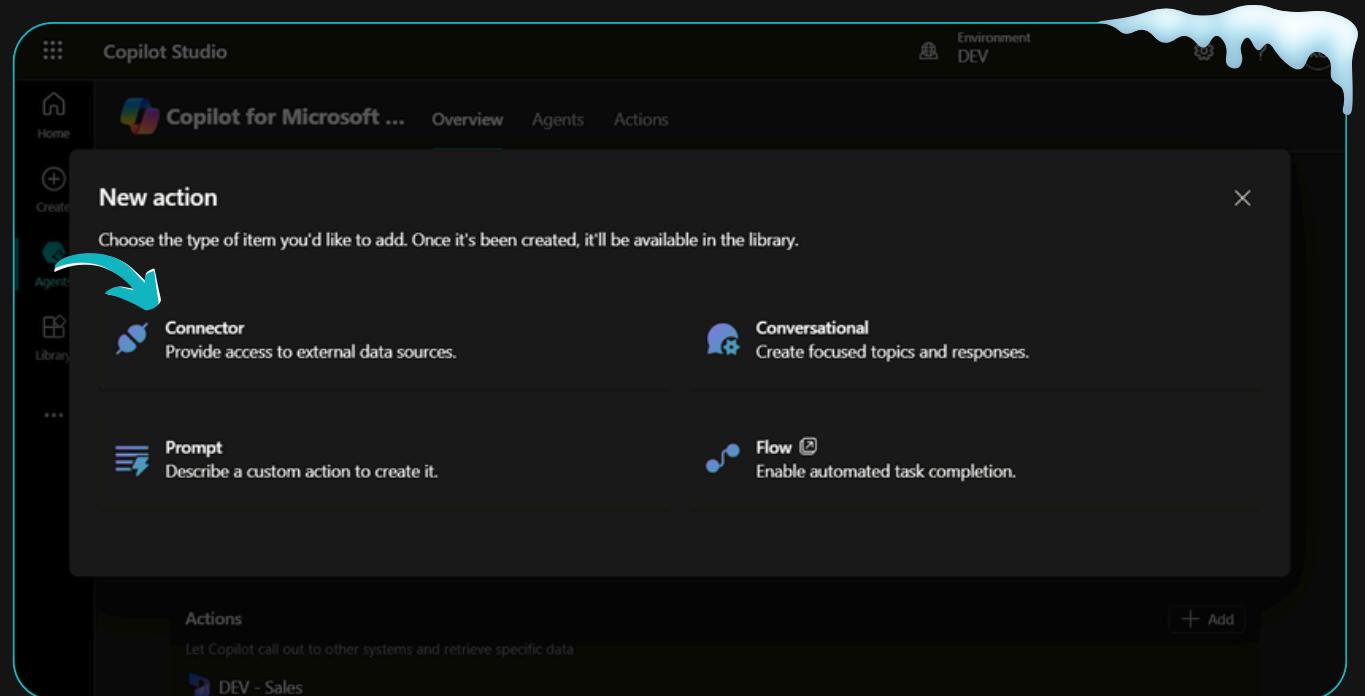
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Open the wizard

The last choice is about action type - select **Connector**.



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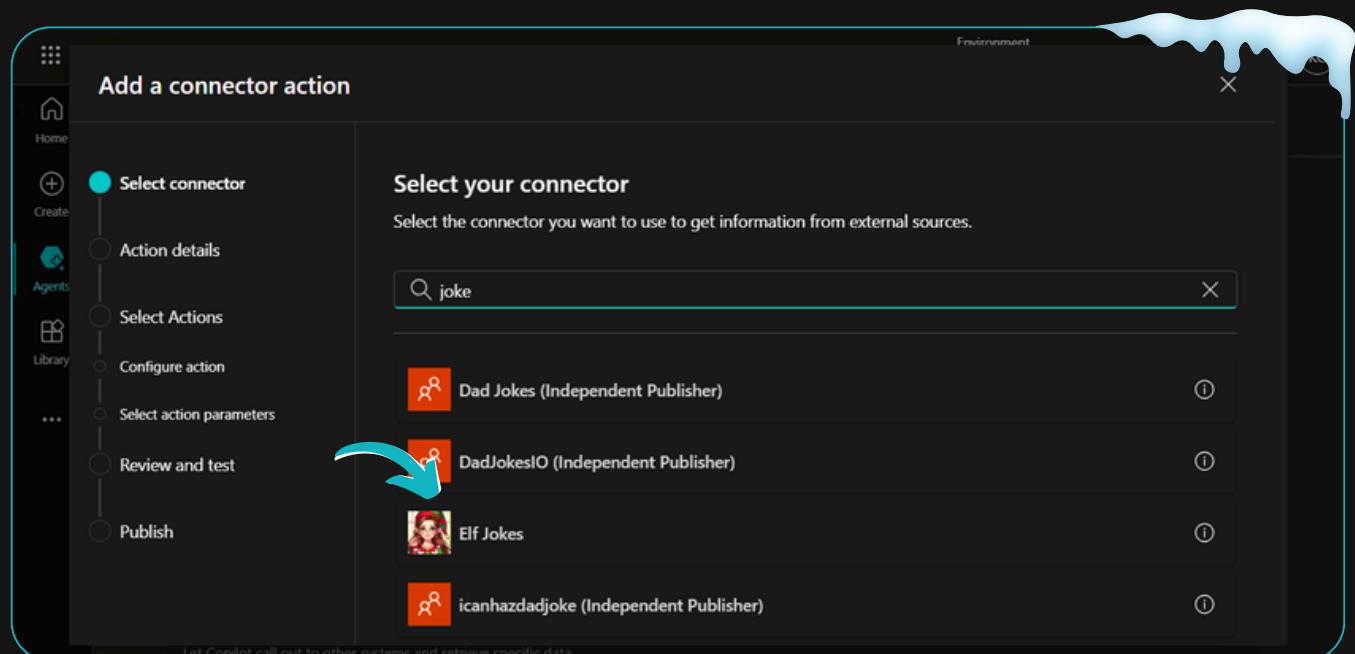


Connectors for Microsoft 365 Copilot

Select connector

Use the search field to find the **preconfigured connector** you want to use for this action.

In this sample we will use a Joke generator, connector that integrated with Azure AI Foundry.



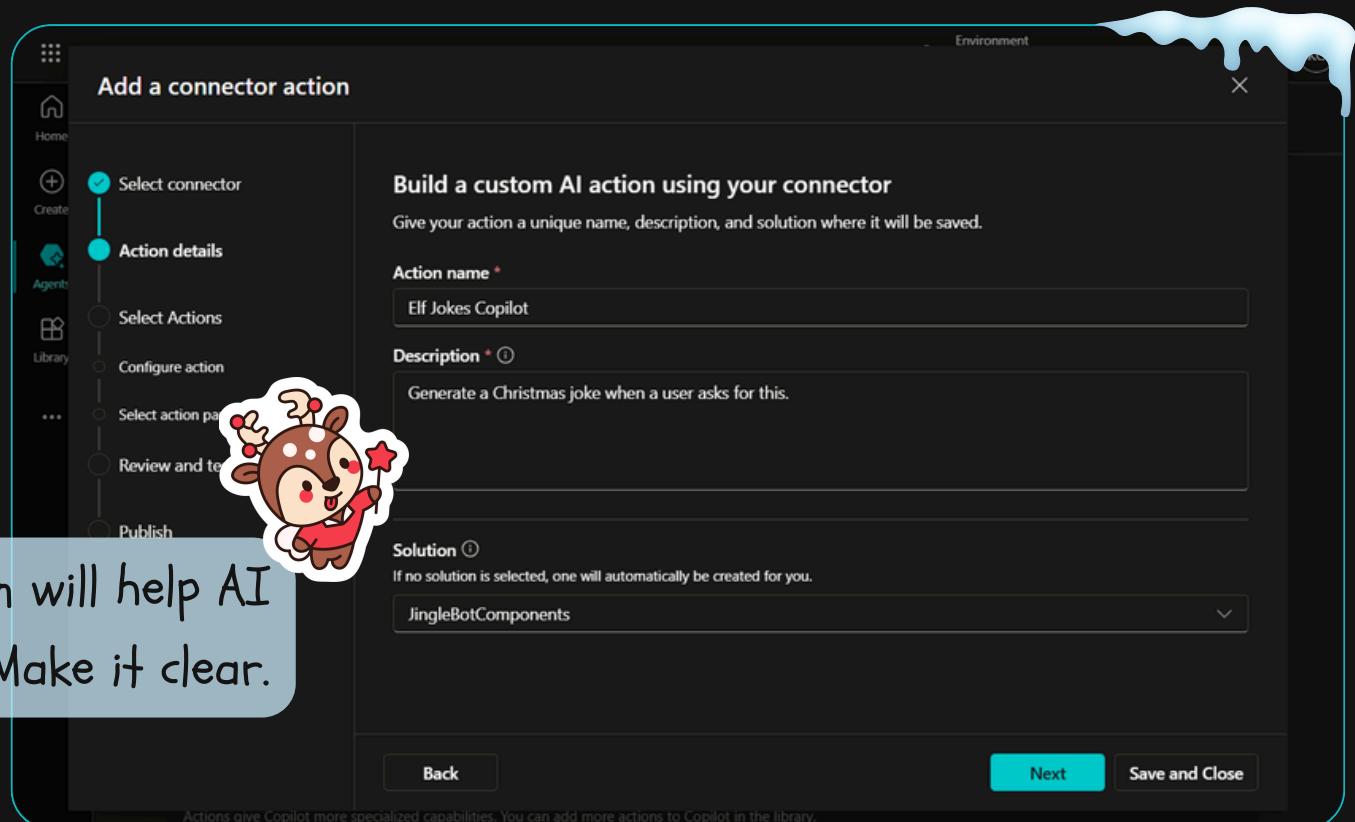
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Connectors for Microsoft 365 Copilot

Action details

Provide a **name** and clear **description**. Description should be clear so the AI knows when to trigger this action.
Ensure you selected the **solution** for all action components.



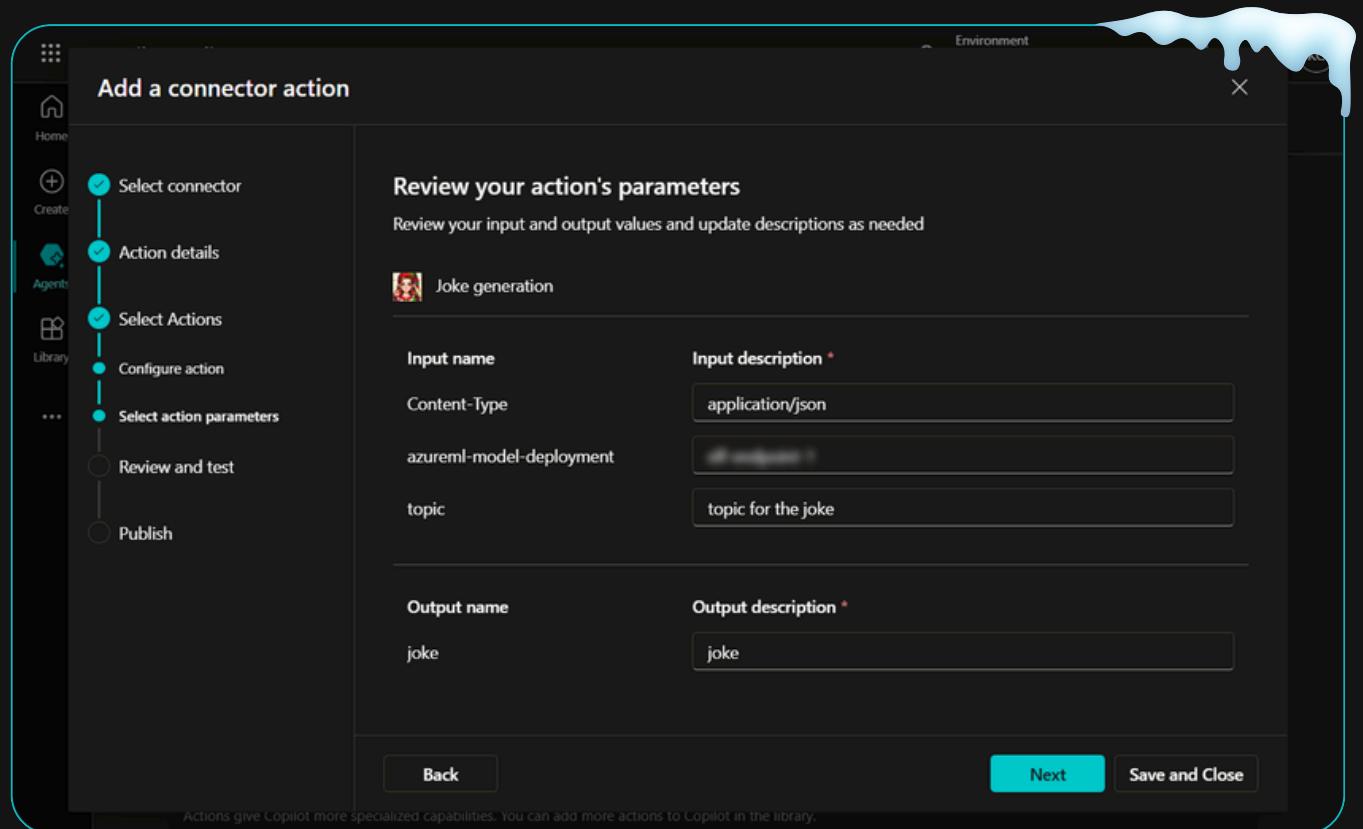
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Configure action

In the same way as we configured action when created a REST API connector, configure actions now. Provide **descriptions** for input and output values.

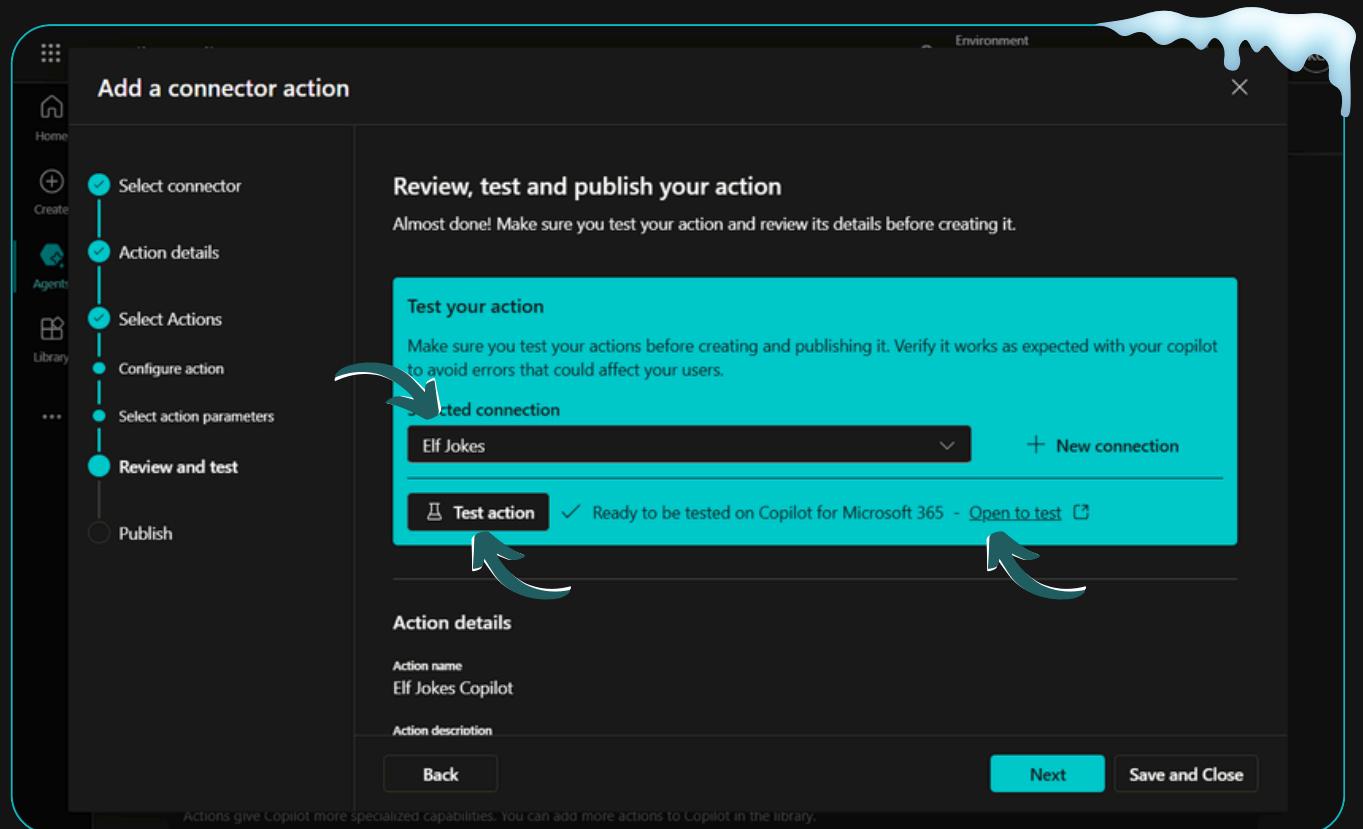


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Connectors for Microsoft 365 Copilot Review and test

Select or create a new **connection**, and click **Test action**.
Your action will be loaded on Copilot for Microsoft 365.
Once it is ready, hit **Open to test** link.



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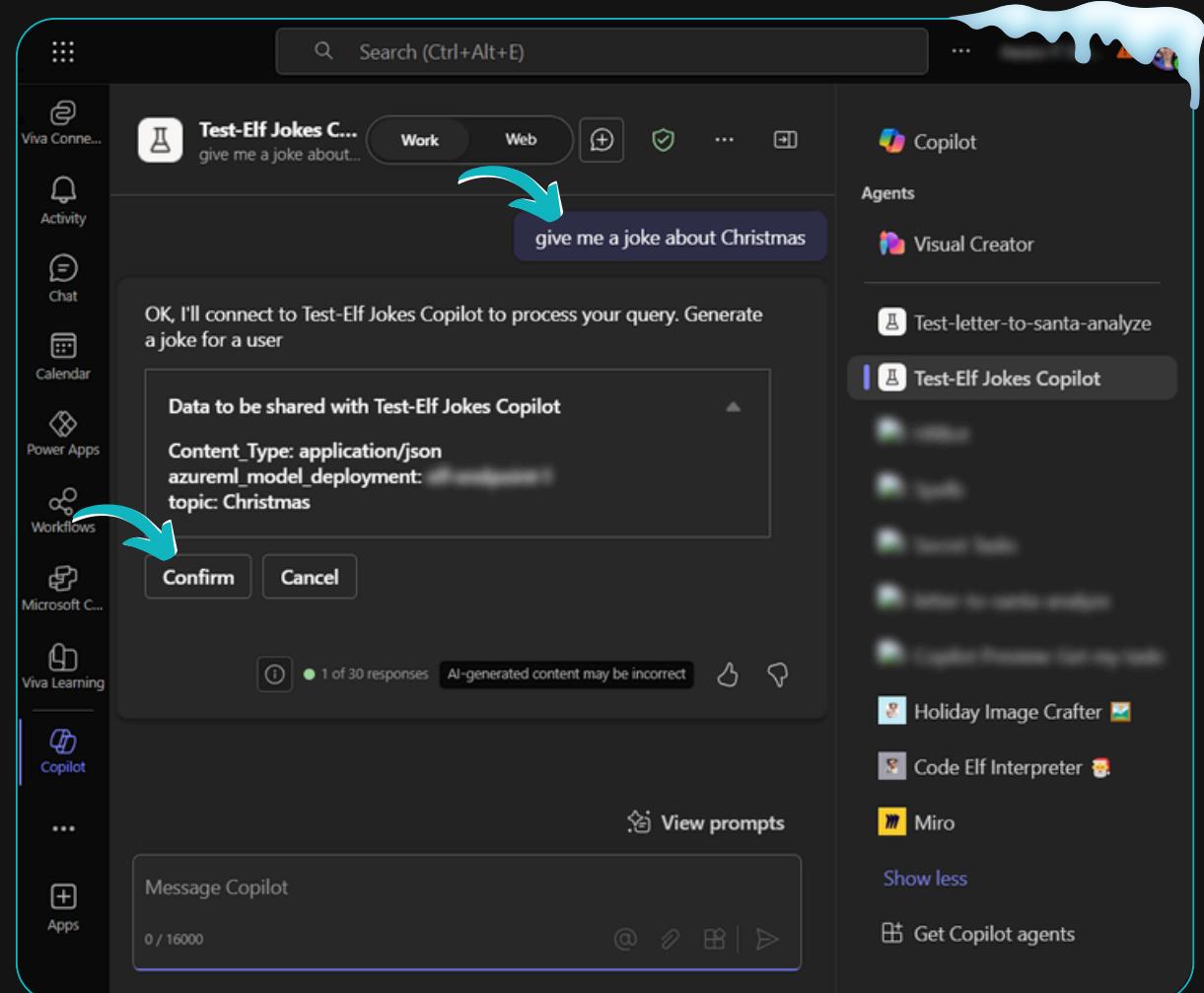


Connectors for Microsoft 365 Copilot Review and test

The test UI will be opened in Teams.

Send a message to test the action.

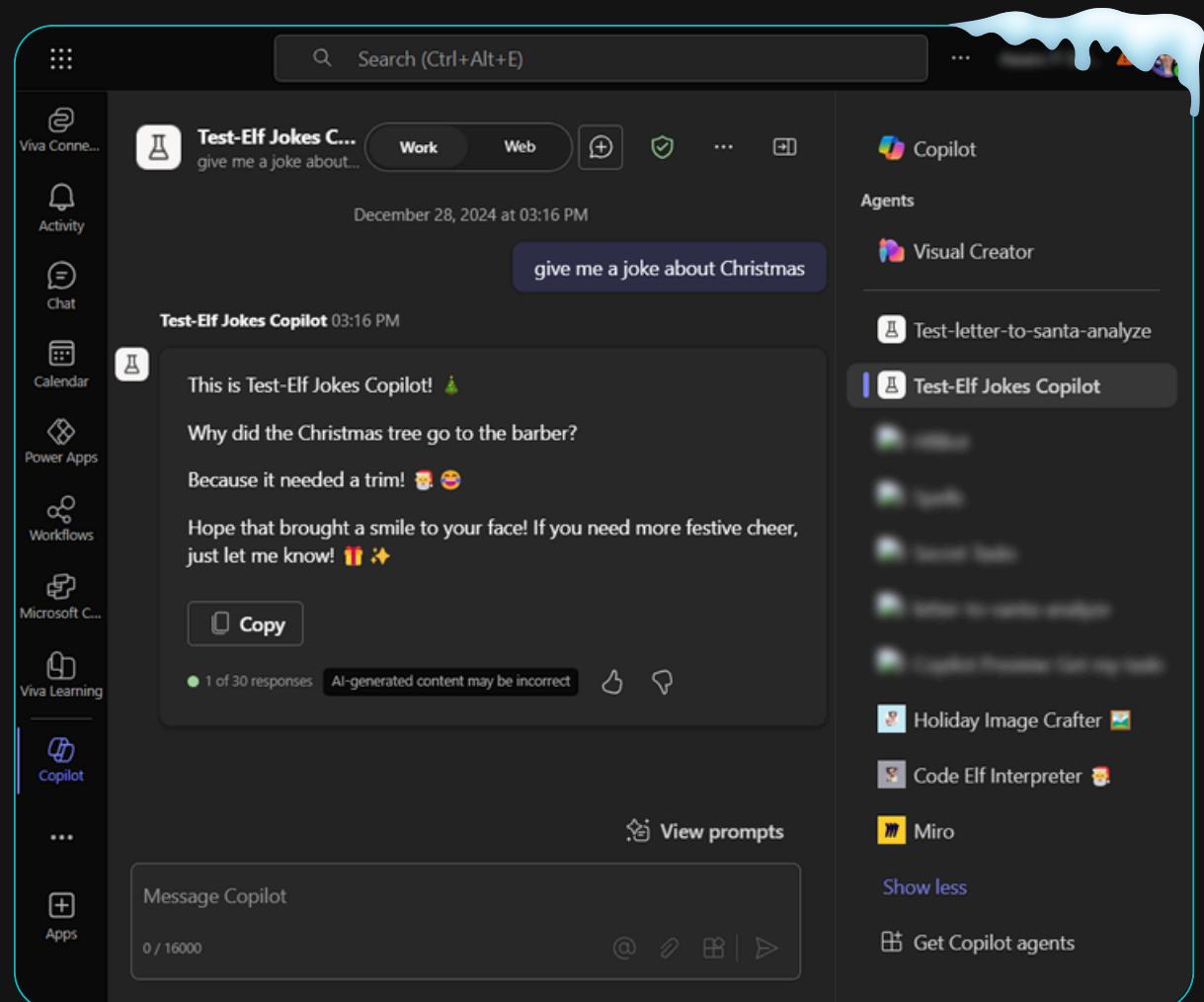
In the test mode
you will need
to **confirm** values
that will be sent
to the action.



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Connectors for Microsoft 365 Copilot Review and test

Once confirmed, the AI generated response will be displayed.

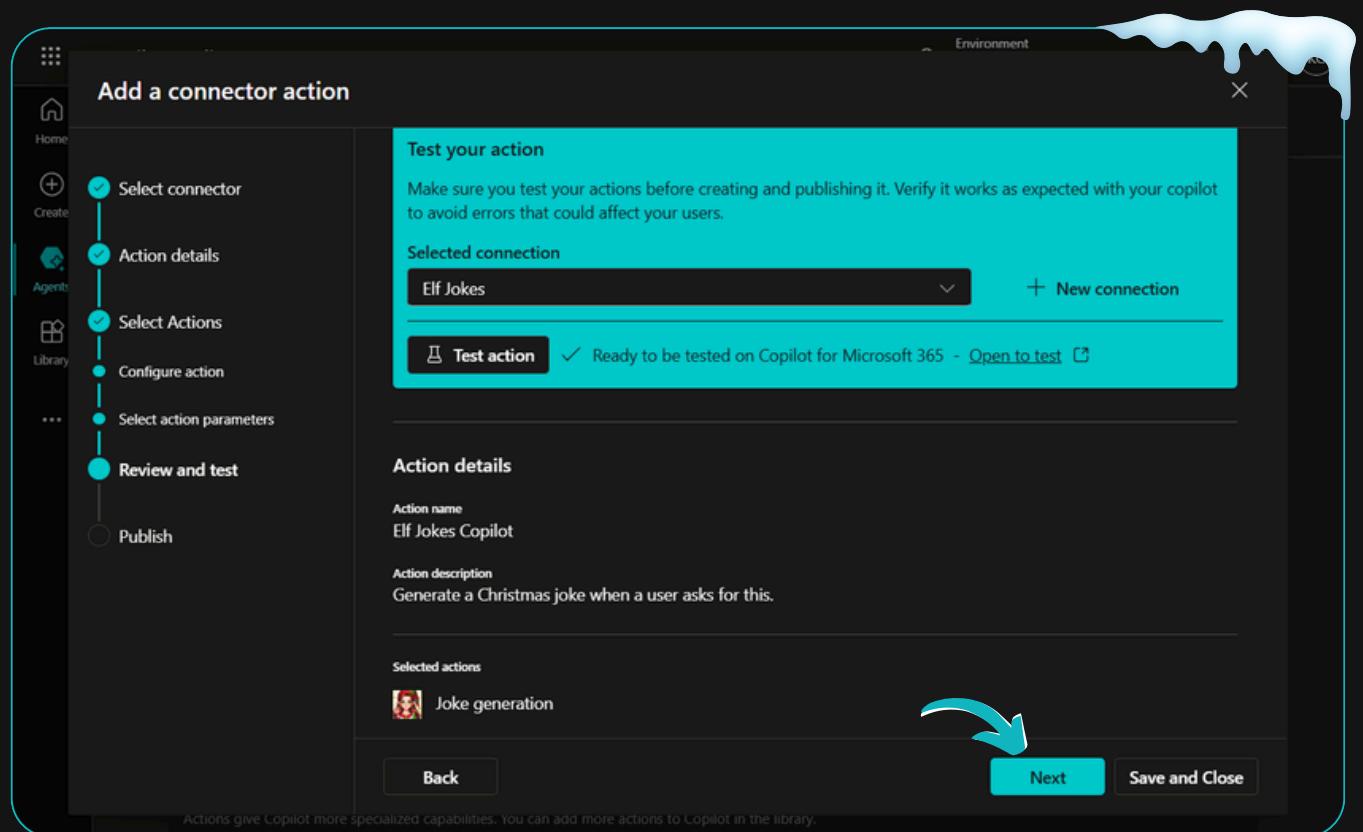


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Connectors for Microsoft 365 Copilot Publish

If you satisfied with the test outcomes, it's time to publish the action. Go back to the Copilot Studio and click **Next** in the action wizard.

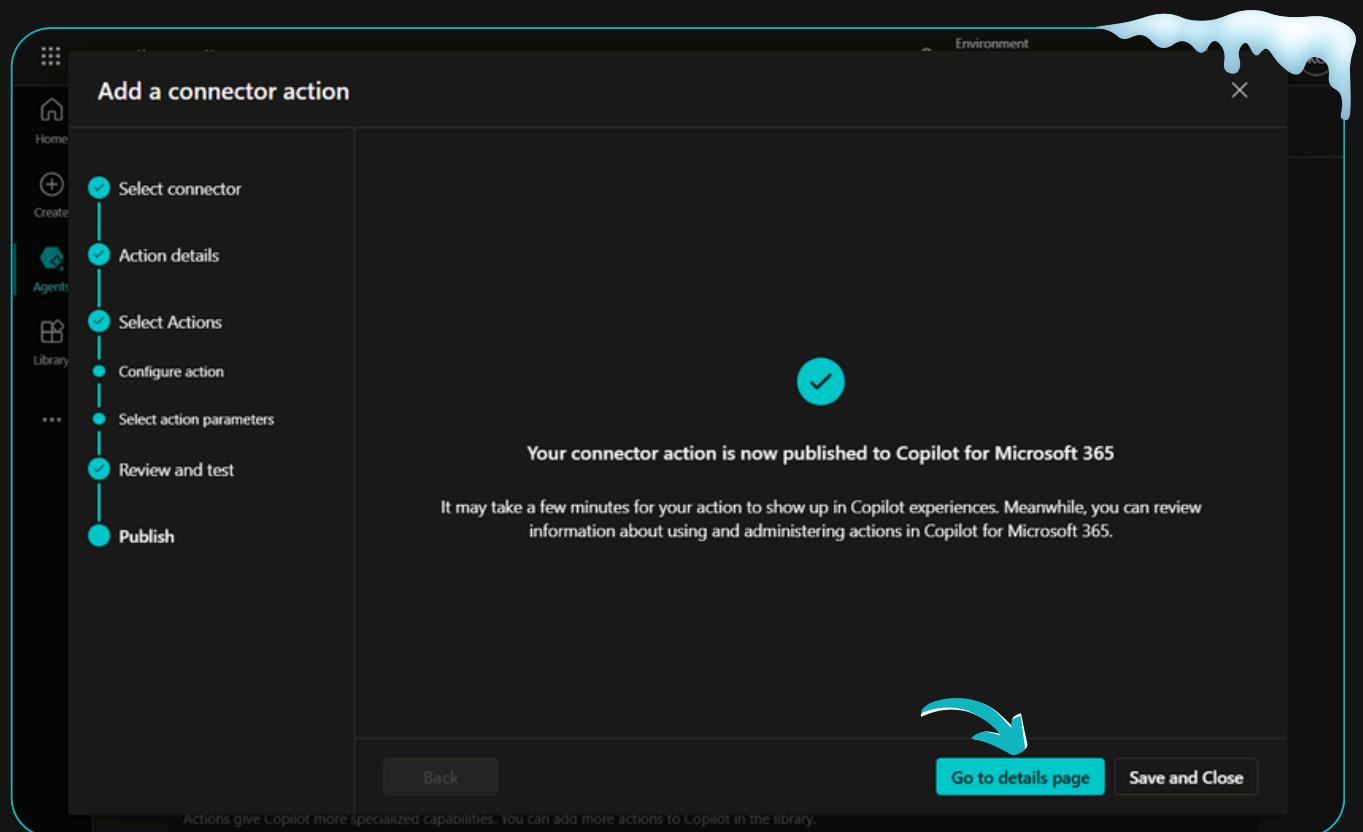


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Connectors for Microsoft 365 Copilot Publish

Publishing will take a few seconds. Once the process is completed, click [Go to details page](#).



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Connectors for Microsoft 365 Copilot

Review details

Ensure that everything was configured correctly.

The screenshot shows the Copilot Studio interface with the 'Actions' tab selected. A large blue callout points to the 'Published In' section of the 'Copilot for Microsoft 365' card. The 'Copilot' card lists the connector's name, description, type, and operations. The 'Published In' section shows the connector is published to 'Copilot for Microsoft 365'.

Copilot Studio

Copilot for Microsoft ... Overview Agents Actions

Elf Jokes Copilot

Details Published In

Name
Elf Jokes Copilot

Description
Generate a Christmas joke when a user asks for this.

Type
Custom Connector-Plugin

Solutions JingleBotComponents

Operations
Joke generation

Inputs Outputs

Name	Description
Content-Type	application/json
azurerm-model-deployment	elf-endpoint-1
topic	topic for the joke

Copilot for Microsoft ... Overview Agents Actions

Elf Jokes Copilot

Details Published In

Copilot ↑

Copilot for Microsoft 365



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Connectors for Microsoft 365 Copilot Deploy in Admin Center

Navigate to [Microsoft 365 admin center](#) and open [Integrated app](#). Go to the [Available apps](#) and [find](#) the action you've created. Open this action.

The screenshot shows the Microsoft 365 Admin Center interface with a dark theme. At the top, there's a navigation bar with 'Microsoft 365 admin center' and a search bar. Below it, the 'Integrated apps' section is visible. A red arrow points from the text above to the 'Integrated apps' link in the navigation. Another red arrow points to the 'Available apps' tab, which is highlighted. A third red arrow points to the 'Name' column header in the list of apps. The list contains one item: 'Elf Jokes Copilot'. The details for this item show it's a 'Copilot' host product and is available for all users. There are also filter and search options at the top of the list.

Name	Host products	Availability Status
Elf Jokes Copilot Enhance Copilot with the Elf Jokes Copilot connector plugin from Power Platform.	Copilot	All users in the organization can install



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Connectors for Microsoft 365 Copilot Deploy in Admin Center

Select **Deploy app** to proceed.

Follow the wizard instructions.

Assign the action to the **target audience**.

The screenshot illustrates the deployment process for the "Elf Jokes Copilot" app. It shows two overlapping windows: a smaller one on the left and a larger one on the right.

Left Window (App Overview):

- Title:** Elf Jokes Copilot
- Overview Tab:** Selected.
- Users Tab:** Unselected.
- Basic Info:**
 - Availability Status:** All users in the organization can install.
 - Deployment Status:** Not deployed.
 - Host Product:** Copilot.
 - Description:** Enhance Copilot with the Elf Jokes Copilot connector plugin from Power Platform.
- Actions:**
 - Deploy app (highlighted with a red arrow).
 - Block app.
- Assigned users:** All users in the organization can install.

Right Window (Deploy New App - Add users):

- Header:** Deploy New App
- Left Panel:** Configuration (selected), Users (selected), Deployment.
- Right Panel:**
 - Add users:** Elf Jokes Copilot
 - Assign users:**
 - Just me (Katerina.Chernevskaya@ms-learn.com)
 - Entire organization
 - Specific users/groups (selected)
 - To be added:** Kate Chernevskaya (x), Katerina Chernevskaya (x)
 - Buttons:** Back, Next



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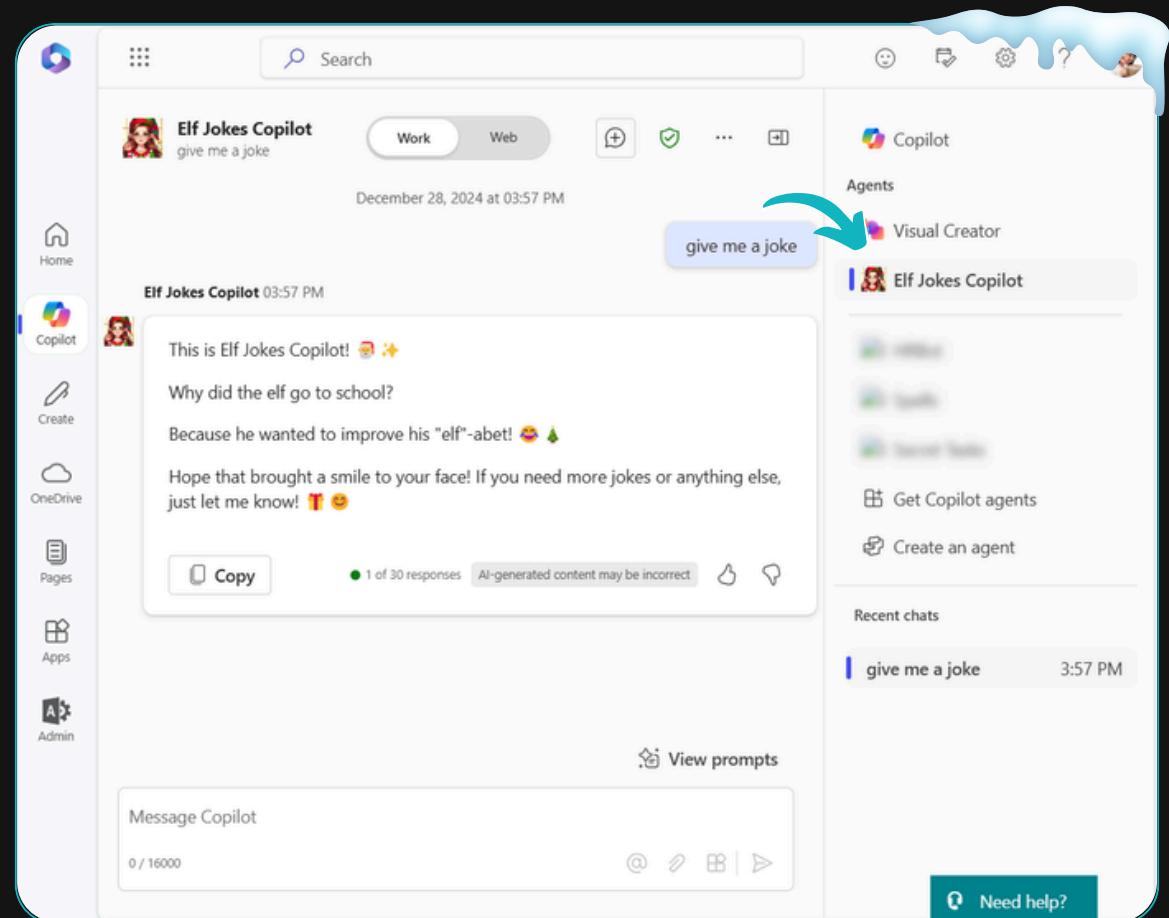


Connectors for Microsoft 365 Copilot

Ask your colleagues to test

Once the action is published, it will appear in Copilot for everyone with whom you've shared it.

Test in the **Copilot** app.



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Connectors for Microsoft 365 Copilot Benefits

Customization

Tailor workflows to suit specific business processes.

Increased efficiency

Automate tasks that would otherwise require manual effort.

Cross-platform integration

Manage tasks from various apps and services in one place.

Scalability

Adapt to changing business needs by adding or modifying connectors.

Enhanced collaboration

Foster smoother team workflows with integrated tools.



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Today's Task: Create a connector for Microsoft 365 Copilot



1. Set up or select a custom connector

Choose an API from a third-party service you use frequently and create a REST API connector in Copilot Studio.

2. Integrate with Copilot

Configure an action based on this connector to extend the Microsoft 365 Copilot. Deploy the app in Microsoft 365 admin center.

3. Test and document

Test your new action and document how it simplifies a workflow for your team.



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