Synergy Unleashed: Crafting the Better Together Story of Copilot and SharePoint with SSO
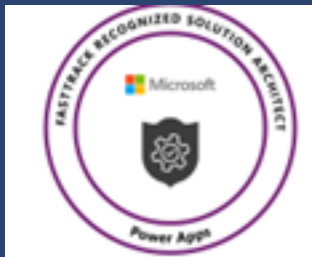
Sumit Kumar

er.sumitkumar@gmail.com

Sumit Kumar

2x Fast track Architect

Engagement Director ,HCLTECH

18+ Years working with Dynamics
and the Power Platform

UK, South west User Group
Chapter Leader

- Er.sumitkumar@gmail.com

- linkedin.com/in/ersumitkumar/

**Dynamics 365 &
Power Platform**
UK User Groups

Agenda

- Introduction to Copilot Studio
- Agents in Sharepoint
- Publishing Custom Agents to SharePoint
- **Demo #1**: Agent with Enterprise data source – ServiceNow, SharePoint, Dataverse
- Q&A

Microsoft Copilot Studio

Your agent, your way

Copilot Studio is an end-to-end conversational AI product for building your own agent or extending Microsoft Copilot with generative AI ,large language models and your data.
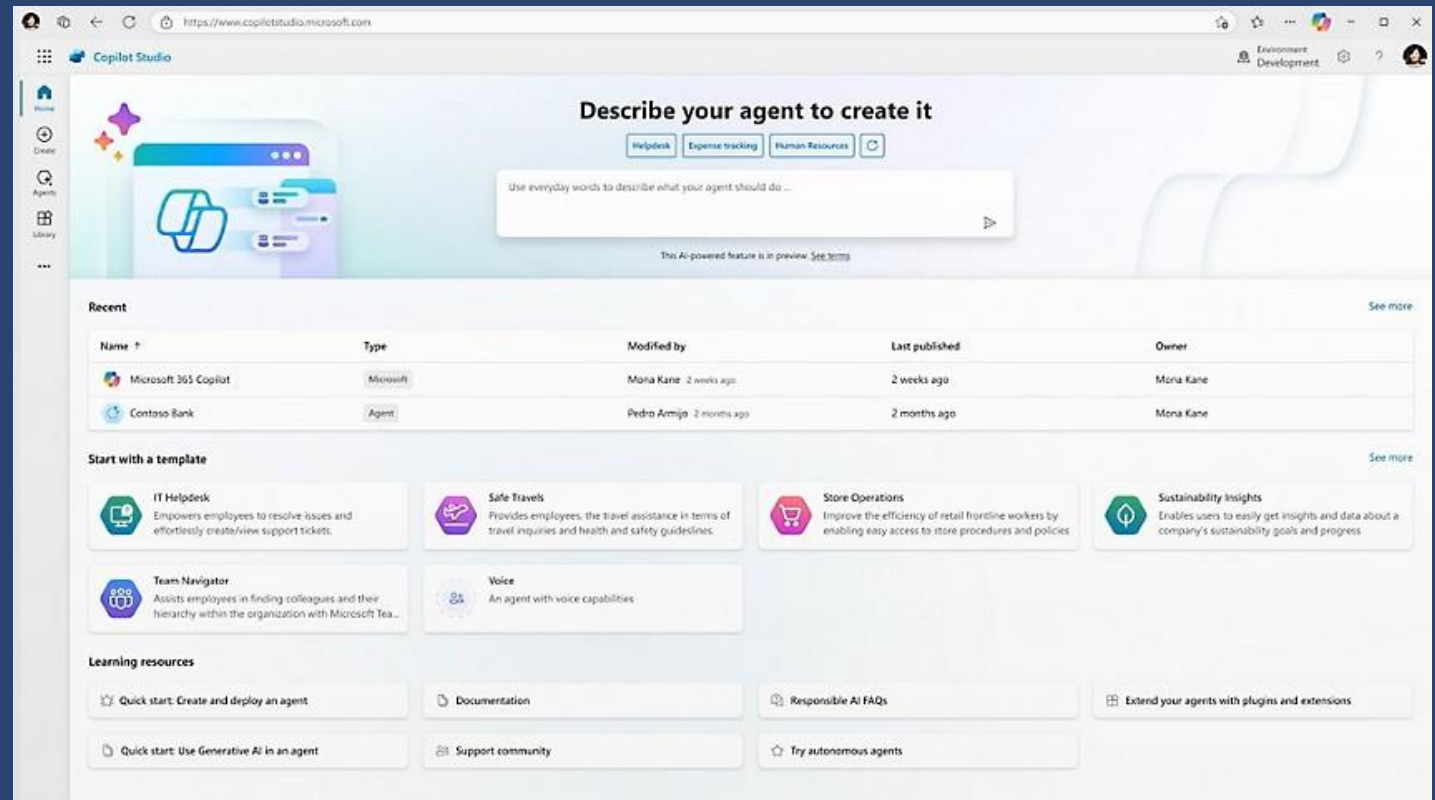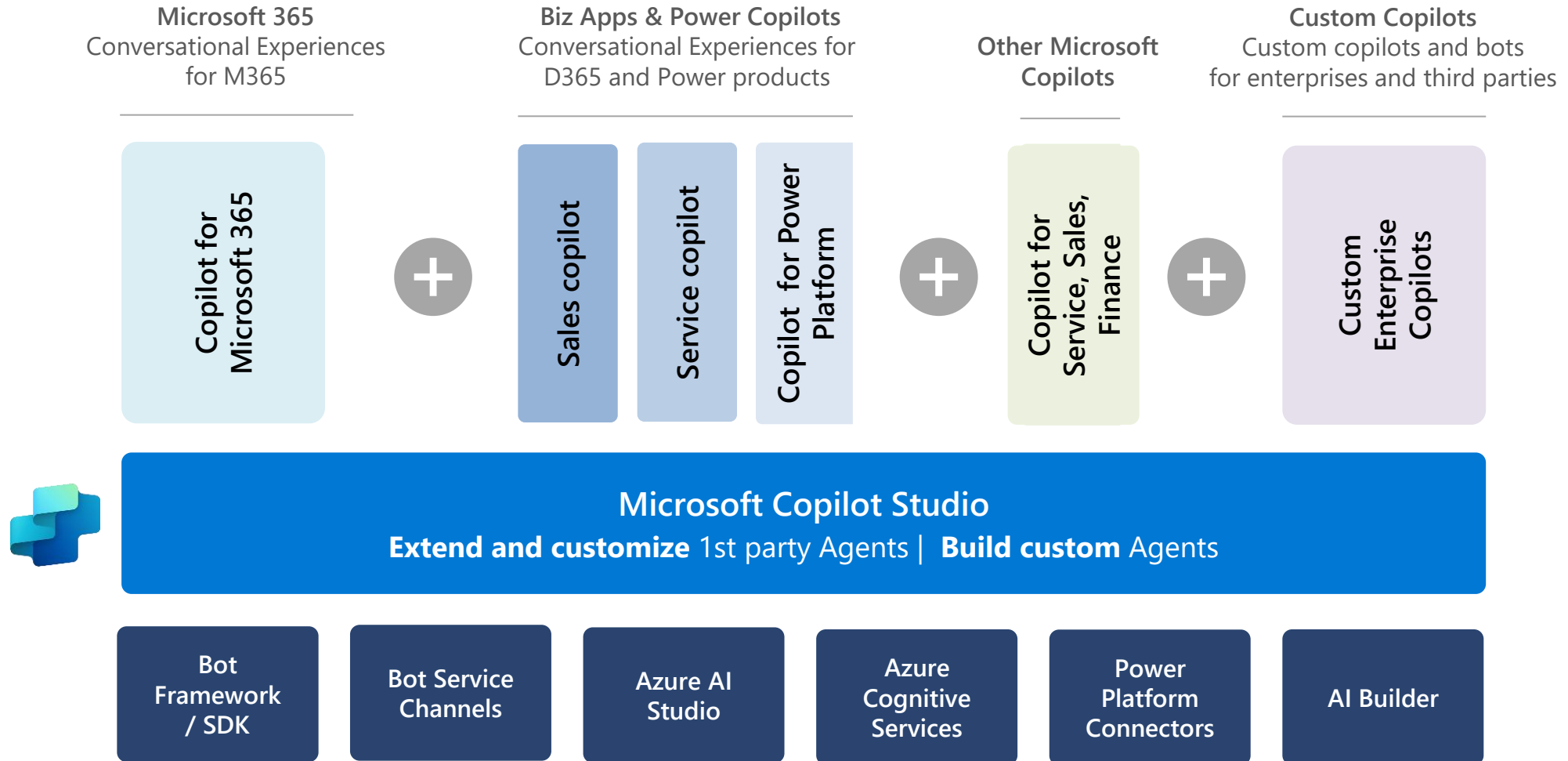
What is an agent?

An experience using generative AI to assist humans with complex cognitive task

Spectrum of agents

- Retrieval(GA)

- Task(GA)

- Automation (Preview)

~~Copilots~~ Agents and Conversational AI

Microsoft 365
Conversational Experiences for M365

Biz Apps & Power Copilots
Conversational Experiences for D365 and Power products

Other Microsoft Copilots

Custom Copilots
Custom copilots and bots for enterprises and third parties

Copilot for Microsoft 365

+

Sales copilot

Service copilot

Copilot for Power Platform

+

Copilot for Service, Sales, Finance

+

Custom Enterprise Copilots

Microsoft Copilot Studio
Extend and customize 1st party Agents | **Build custom** Agents

| Bot Framework / SDK | Bot Service Channels | Azure AI Studio | Azure Cognitive Services | Power Platform Connectors | AI Builder |

Copilot and Sharepoint = Better together

Organizational Knowledge
Recent and accurate

Ex: 2 billion pieces of information everyday in Sharepoint be it specific sites, document library, Videos, loop components (B2E) – Human resources
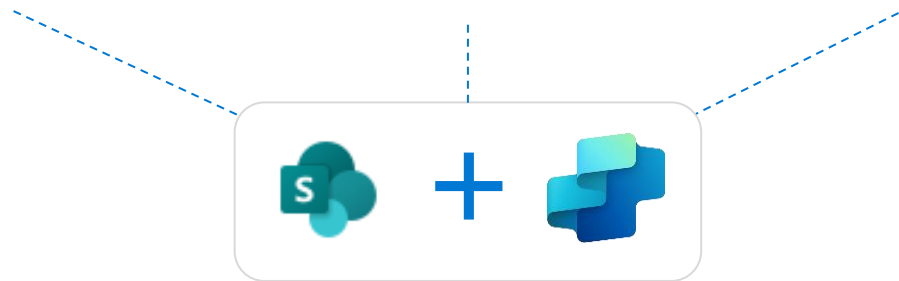
Collaboration
Help with a specific purpose, used repeatedly

Ex: New team onboarding, product specification

No specialized or technical skills needed
Easy to create, can share it with colleagues on team

Different building journeys for Sharepoint Agents

Built in Agent In Sharepoint

Agent for every Sharepoint Site

Built-in Agents for your site

Quick start grounded on site content

Can be customized

Responds using your content permission

Site owner controls the agents on their site

Private preview

Custom Agent

Custom Agent from your content

Create a custom agent for your site

Grounded on your selected content

Can be customized

Responds using your content permission

Share the Agent with others via teams and emails

Private preview

Private preview registration

https://aka.ms/trycopilotsharepoint

Our Focus today

Extend Custom Agent using SPFX SSO Component (Generally Available)

Built in Agent (Grounded with Sharepoint contents)
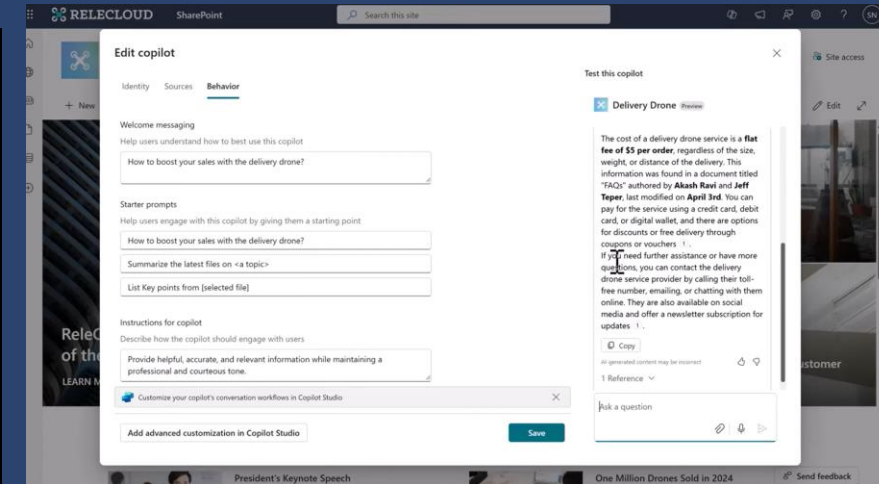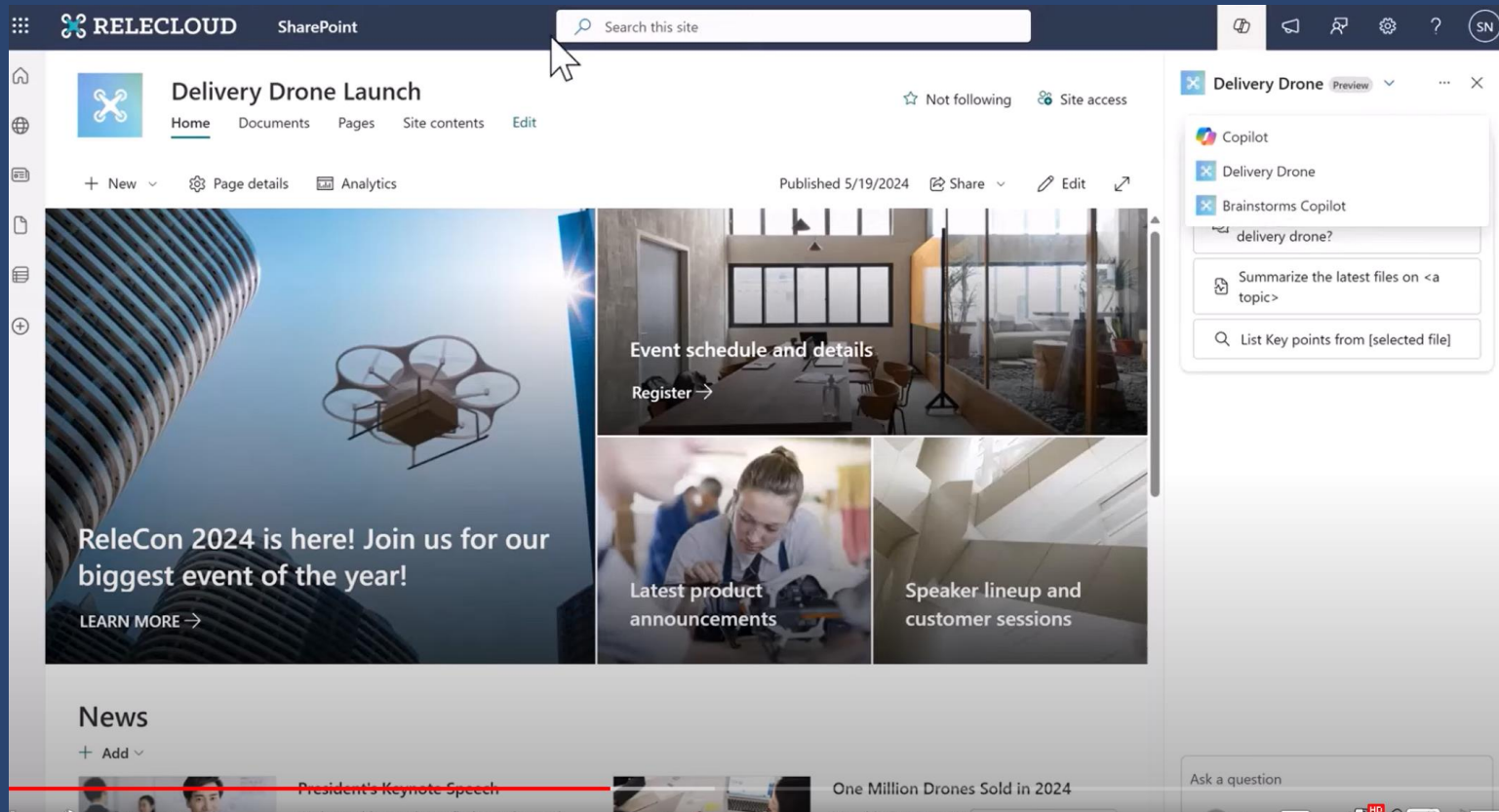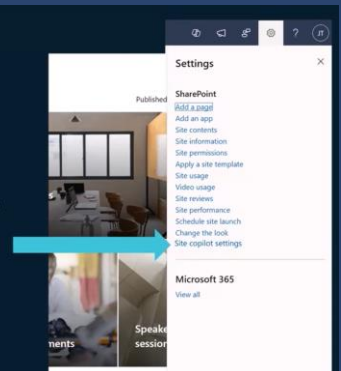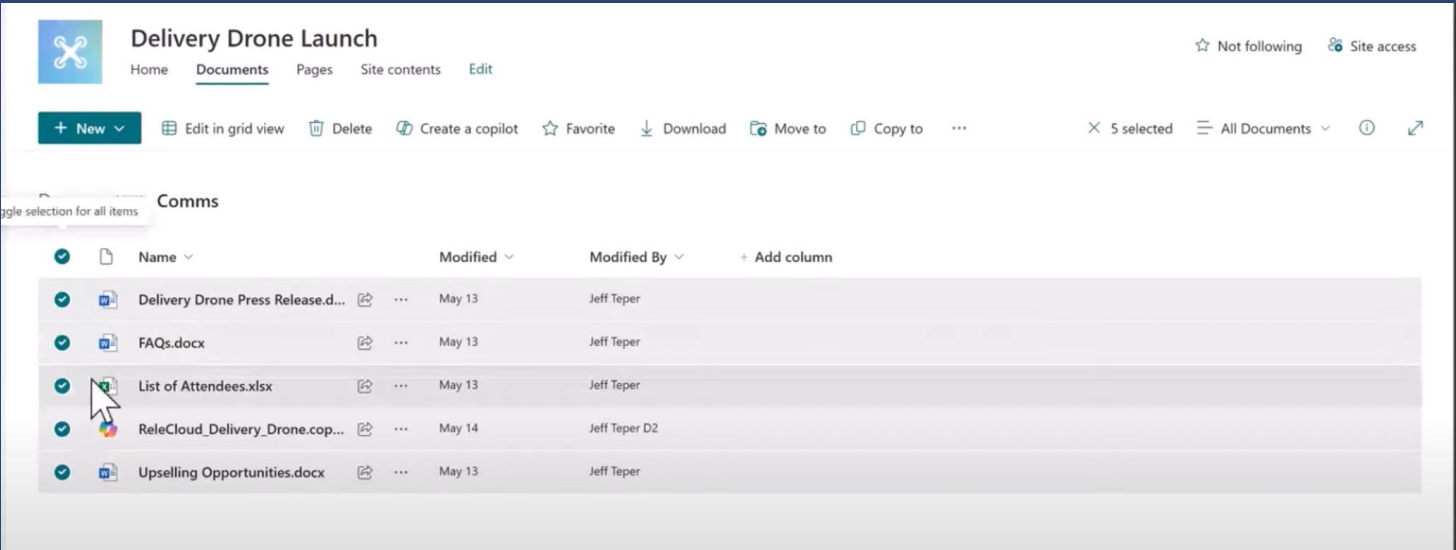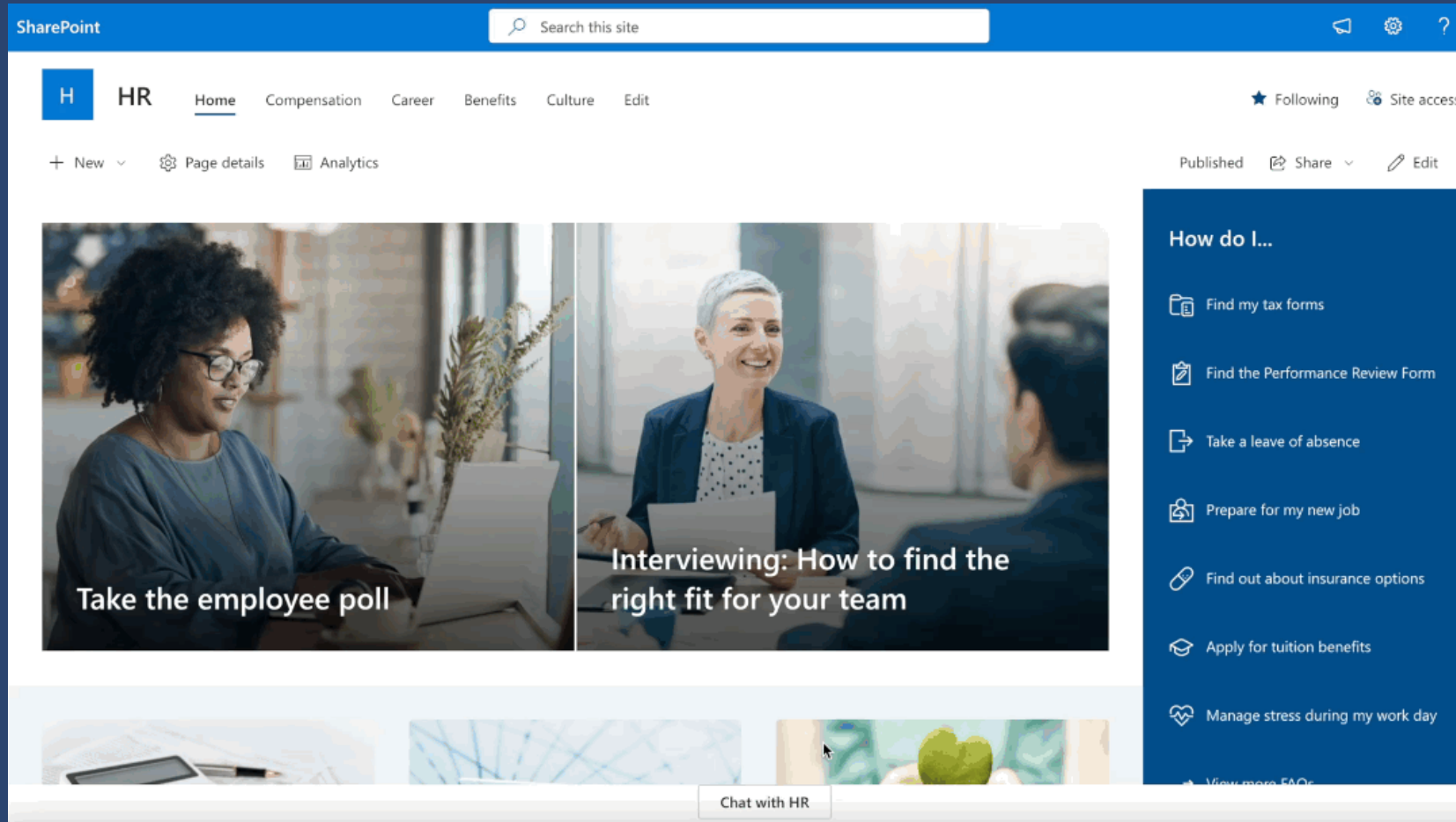
Create Custom Agents

Easy to Create

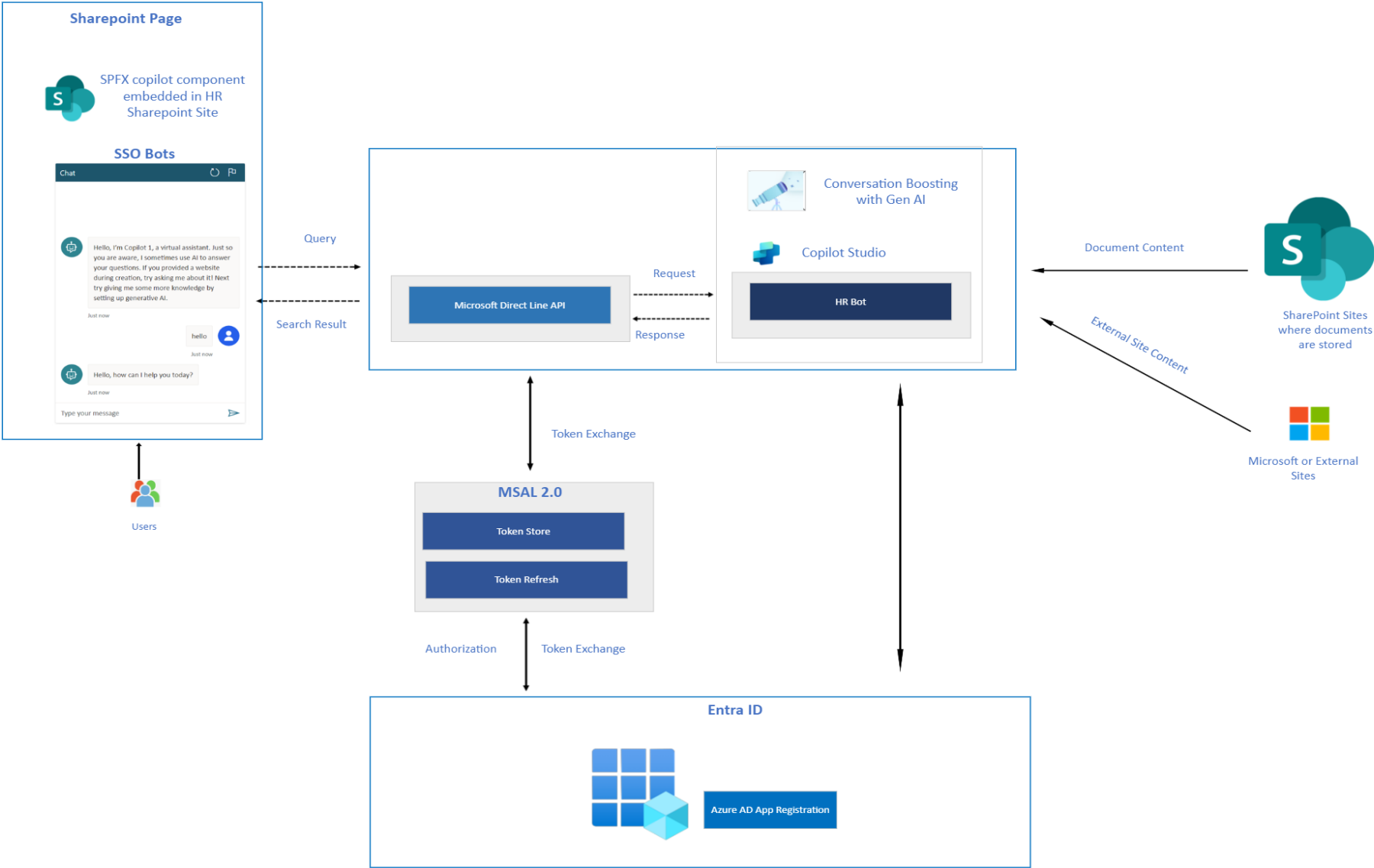**Simple to use**

Saves you time
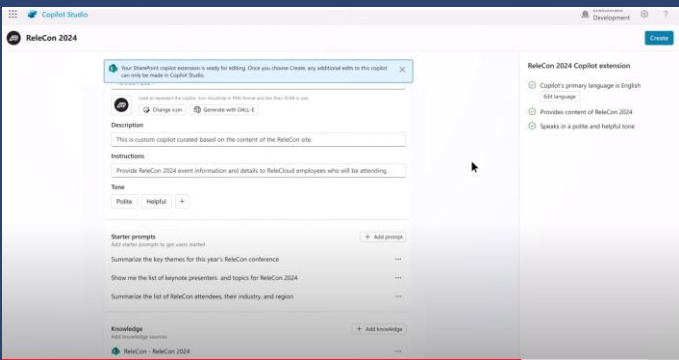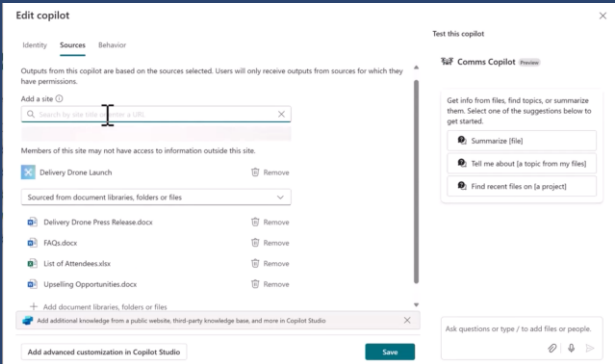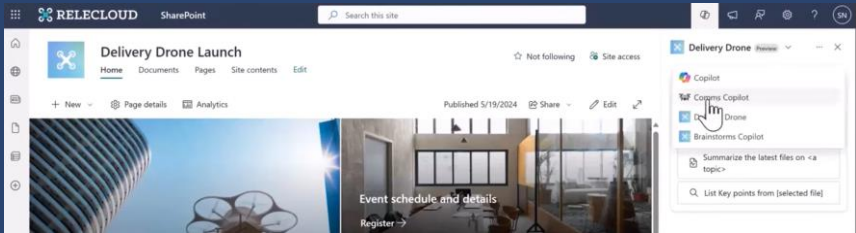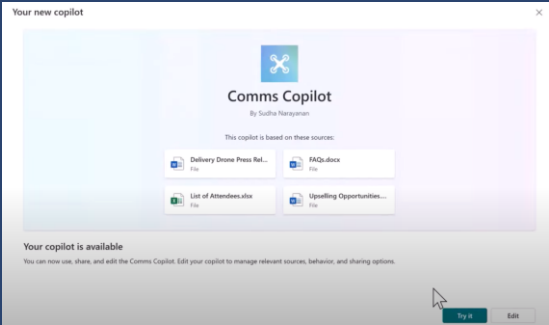
Custom Agents with SSO

Copilot Studio Links (qr.codes)

Deploy a custom copilot to SharePoint, with a seamless single sign-on experience | Microsoft Copilot Blog – Adi Leibowitz

Dewain Robinson - The Copilot Studio Dude - YouTube

High Level Architecture Diagram – SSO

Sharepoint Page

SPFX copilot component embedded in HR Sharepoint Site

SSO Bots

Chat

Hello, I'm Copilot 1, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

Just now

hello

Just now

Hello, how can I help you today?

Just now

Type your message

Users

Query

Search Result

Conversation Boosting with Gen AI

Copilot Studio

Microsoft Direct Line API

Request

Response

HR Bot

Document Content

External Site Content

SharePoint Sites where documents are stored

Microsoft or External Sites

Token Exchange

MSAL 2.0

Token Store

Token Refresh

Authorization   Token Exchange

Entra ID

Azure AD App Registration

High level Implementation Steps

Configure Microsoft Entra ID authentication for your Agents.

Register your Sharepoint Site as a custom canvas.

Download and configure the Sharepoint SPFx Component.

Upload the component to Sharepoint.

https://github.com/microsoft/CopilotStudioSamples/blob/master/SharePointSSOComponent/SETUP.md

Prerequisites

- Node.JS (either v16 or 18)
- Visual studio code
- Administrative access to a SharePoint environment.
- An instance of Copilot Studio.
- An Azure Active Directory (Azure AD) setup for authentication.

Configure user authentication with Entra ID

[Use SharePoint content for generative answers - Microsoft Copilot Studio | Microsoft Learn](#)

[Configure user authentication with Microsoft Entra ID - Microsoft Copilot Studio | Microsoft Learn](#)

Configure user authentication with Entra ID

Configure Secrets

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

Certificates & secrets

Token configuration

API permissions

Expose an API

App roles

+ New client secret

Description	Expires	Value ⓘ	Secret ID
SharepointSSOAppSecret	7/23/2025	A3q*****************	8d25ad70-bfe6-495b-8cc8-69efd59e91f7

Configure API permissions

∨ Manage

Branding & properties

Authentication

Certificates & secrets

Token configuration

API permissions

Expose an API

App roles

Owners

Roles and administrators

Manifest

> Support + Troubleshooting

ⓘ The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organization

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. Learn more about permissions and consent

+ Add a permission   ✓ Grant admin consent for np8t

API / Permissions name	Type	Description	Admin consent requ...	Status	
∨ Microsoft Graph (5)					...
Files.Read.All	Delegated	Read all files that user can access	No		...
openid	Delegated	Sign users in	No		...
profile	Delegated	View users' basic profile	No		...
Sites.Read.All	Delegated	Read items in all site collections	No		...
User.Read	Delegated	Sign in and read user profile	No		...

To view and manage consented permissions for individual apps, as well as your tenant's consent settings, try Enterprise applications

Configure user authentication with Entra ID

Define Custom Scope

Authentication -Copilot Studio

Service provider	Select **Microsoft Entra ID**
Client ID	Enter the application (client) ID that you copied earlier in the Azure portal
Client secret	Enter the client secret you generated earlier in the Azure portal
Scopes	Enter profile openid

Register your Sharepoint Site as Custom Canvas

Register a new application

Add Platform Configuration as SPA

Configure API Permission with API from my organisation (Copilot App registration)

Download and Configure SPFX component

Start by cloning the repository from Microsoft's GitHub

Link to Repository: [microsoft/CopilotStudioSamples (github.com)](github.com)

Update Elements.XML with actual values either manual or python or powershell script

Bot URL	The token endpoint for MCS from Mobile App channel
Custom Scope	Enter the scope defined for Custom API in the SSO copilot Canvas app registration
Client ID	Enter the client ID from the canvas app registration configured you generated earlier in the Azure portal
Authority	The login URL for your tenant.
Chat buttonLabel|	The label for the button opening the chat dialog
Bot Name	The title for the copilot dialog

Build the component

```
npm install
gulp bundle –ship
gulp package-solution --ship
```

Update Component to Sharepoint Site

Upload the latest app package built to sharepoint
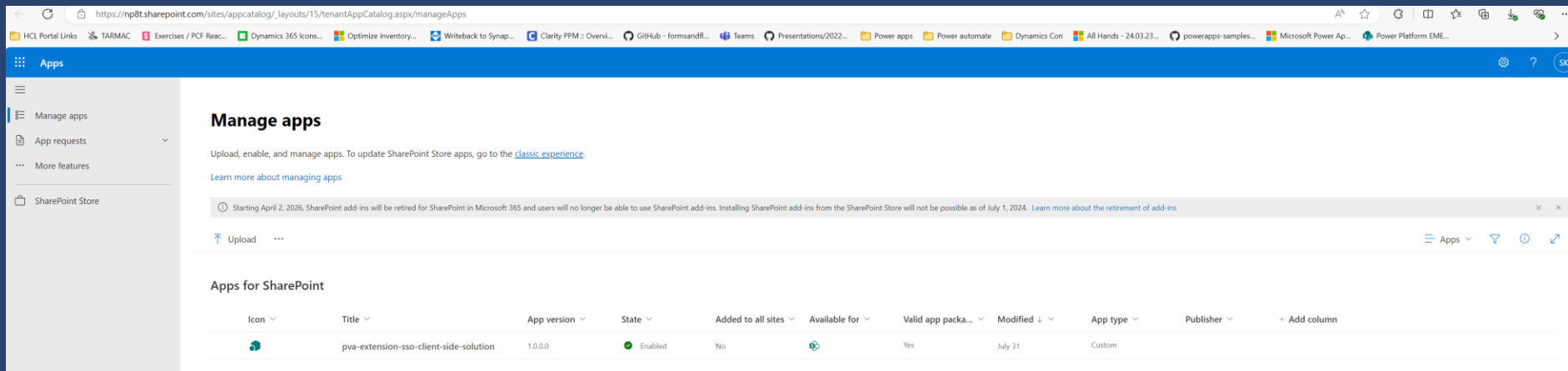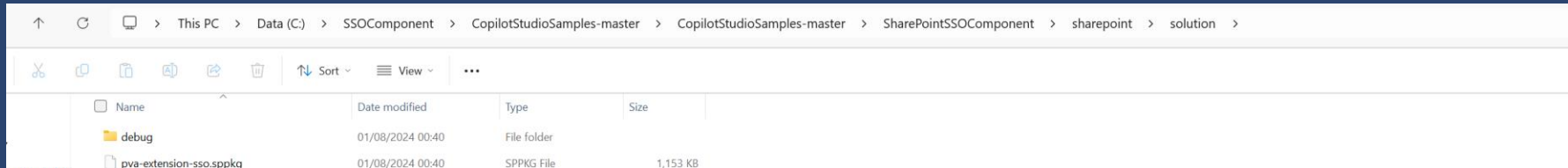
Test Sharepoint Site

Validate the app has been added to Site

In this scenario, the business has uploaded employee benefits documents to a SharePoint library.

Welcome to Contoso Electronics! We are excited to offer our employees two comprehensive health insurance plans through Northwind Health.
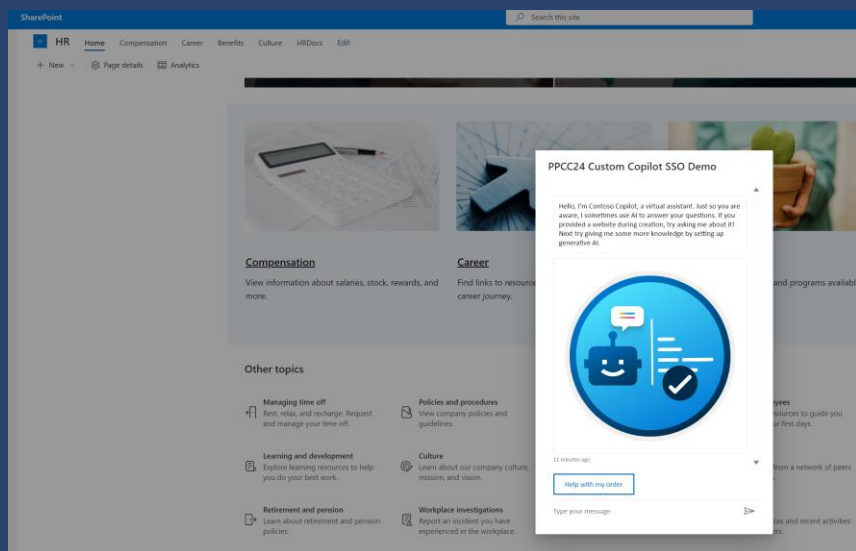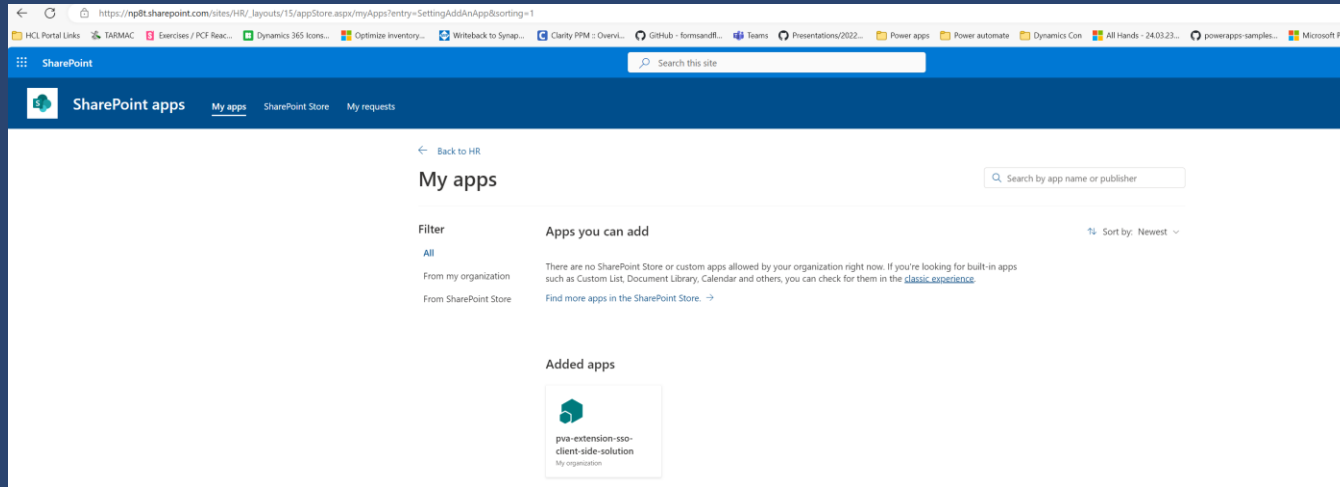
Northwind Health Plus

Northwind Health Plus is a comprehensive plan that provides comprehensive coverage for medical, vision, and dental services. This plan also offers prescription drug coverage, mental health and substance abuse coverage, and coverage for preventive care services. With Northwind Health Plus, you can choose from a variety of in-network providers, including primary care physicians, specialists, hospitals, and pharmacies. This plan also offers coverage for emergency services, both in-network and out-of-network.

Northwind Standard

Northwind Standard is a basic plan that provides coverage for medical, vision, and dental services. This plan also offers coverage for preventive care services, as well as prescription drug coverage. With Northwind Standard, you can choose from a variety of in-network providers, including primary care physicians, specialists, hospitals, and pharmacies. This plan does not offer coverage for emergency services, mental health and substance abuse coverage, or out-of-network services.

Comparison of Plans

Both plans offer coverage for routine physicals, well-child visits, immunizations, and other preventive care services. The plans also cover preventive care services such as mammograms, colonoscopies, and other cancer screenings.

Northwind Health Plus offers more comprehensive coverage than Northwind Standard. This plan offers coverage for emergency services, both in-network and out-of-network, as well as mental health and substance abuse coverage. Northwind Standard doe[s] health and substance abuse coverage, or out-of-net[work]

Both plans offer coverage for prescription drugs. N[orthwind] prescription drug coverage than Northwind Standa[rd] name, and specialty drugs, while Northwind Standa[rd]

Both plans offer coverage for vision and dental serv[ices] exams, glasses, and contact lenses, as well as denta[l] only offers coverage for vision exams and glasses.

Both plans offer coverage for medical services. No[rthwind] doctor visits, lab tests, and X-rays. Northwind Stand[ard] tests.

Northwind Health Plus is a comprehensive plan that o[ffers more coverage than Northwind Standard.] Northwind Health Plus offers coverage for emergency services, mental health and substance abuse coverage, and out-of-network services, while Northwind Standard does not. Northwind Health Plus also

Demo PPCC 2024 Agent

Q&A

Microsoft Power Platform

Thank You