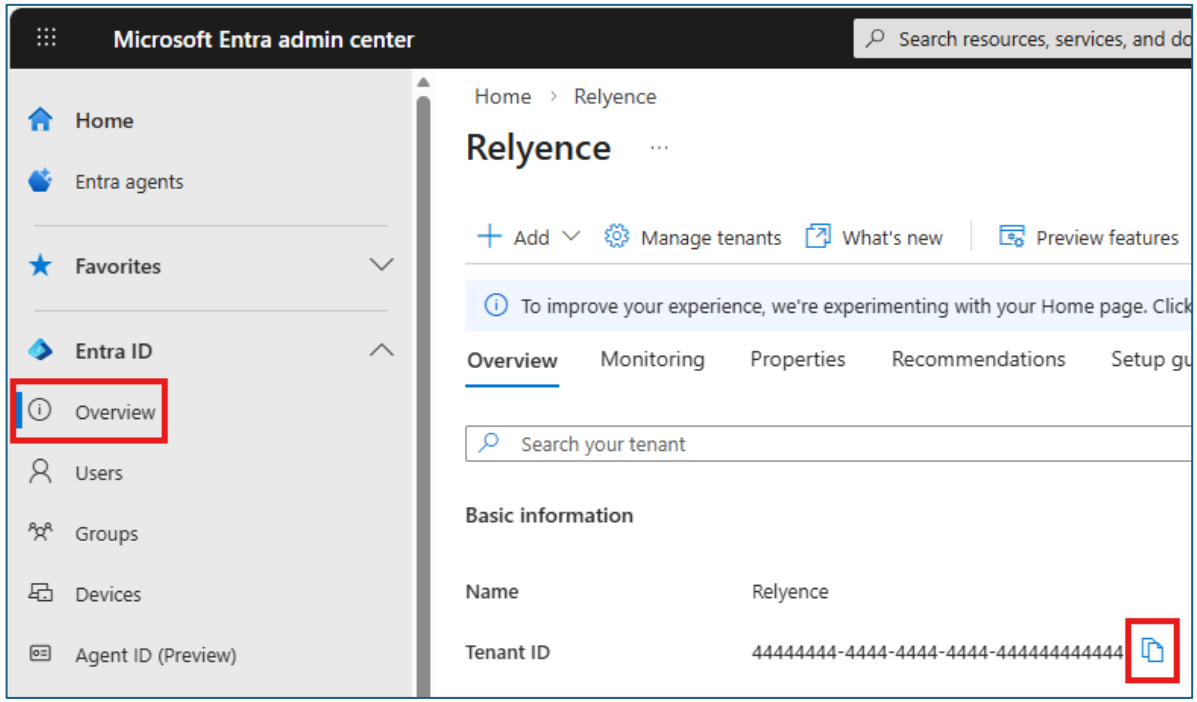
Microsoft Copilot Integration Setup Guide

1. **Get the Tenant ID for your Entra Identity tenant**
    a. In the **Microsoft Entra admin center**, open the **Overview** tab
        i. **Copy** your **Tenant ID** by clicking the copy button

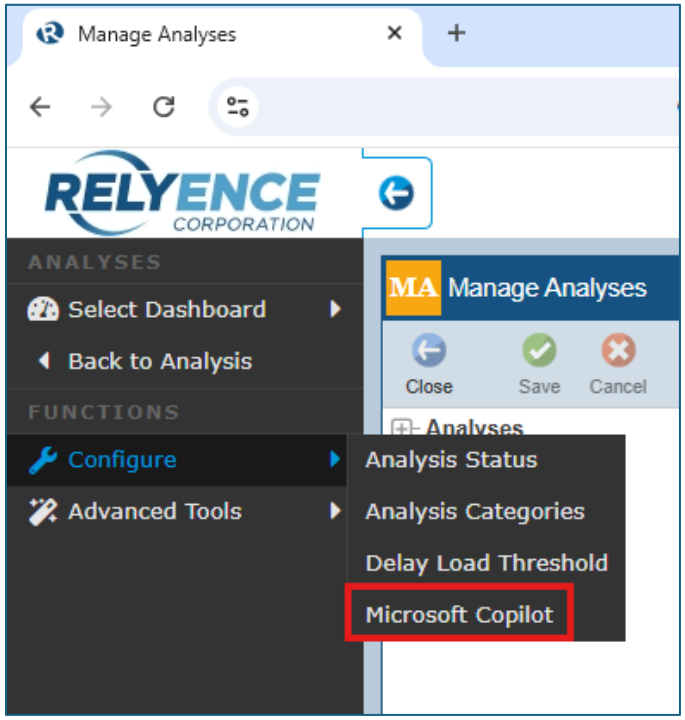


540 Pellis Road • Greensburg, PA 15601 USA
724.832.1900 • info@relyence.com
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

b. In **Relyence**, open **Manage Analyses**

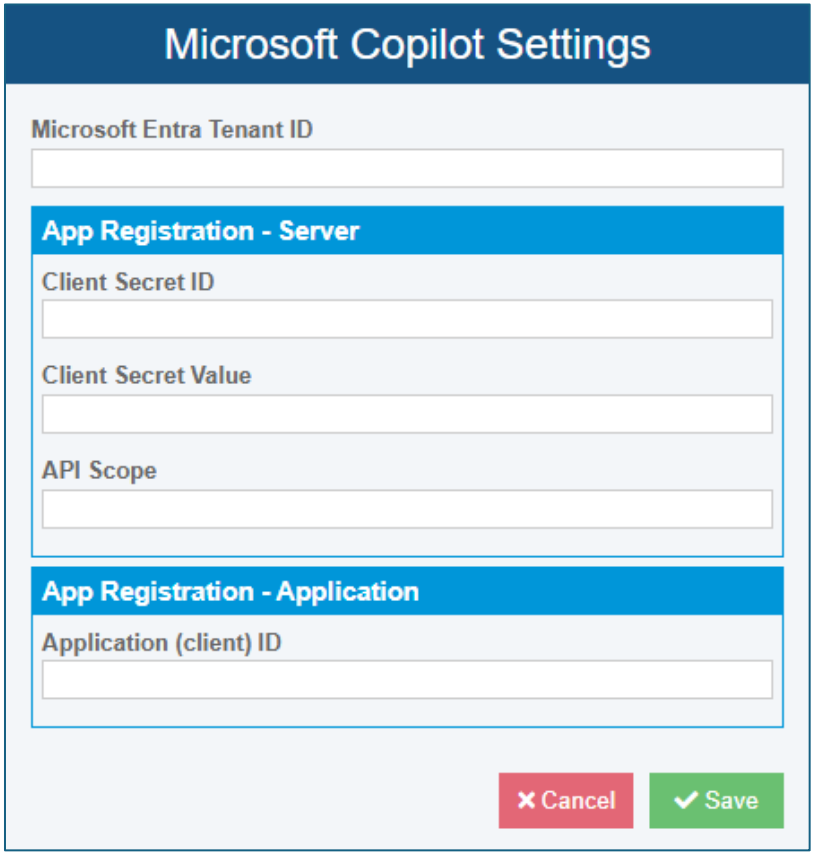
i. Open the Microsoft Copilot Settings

1. **Configure → Microsoft Copilot**



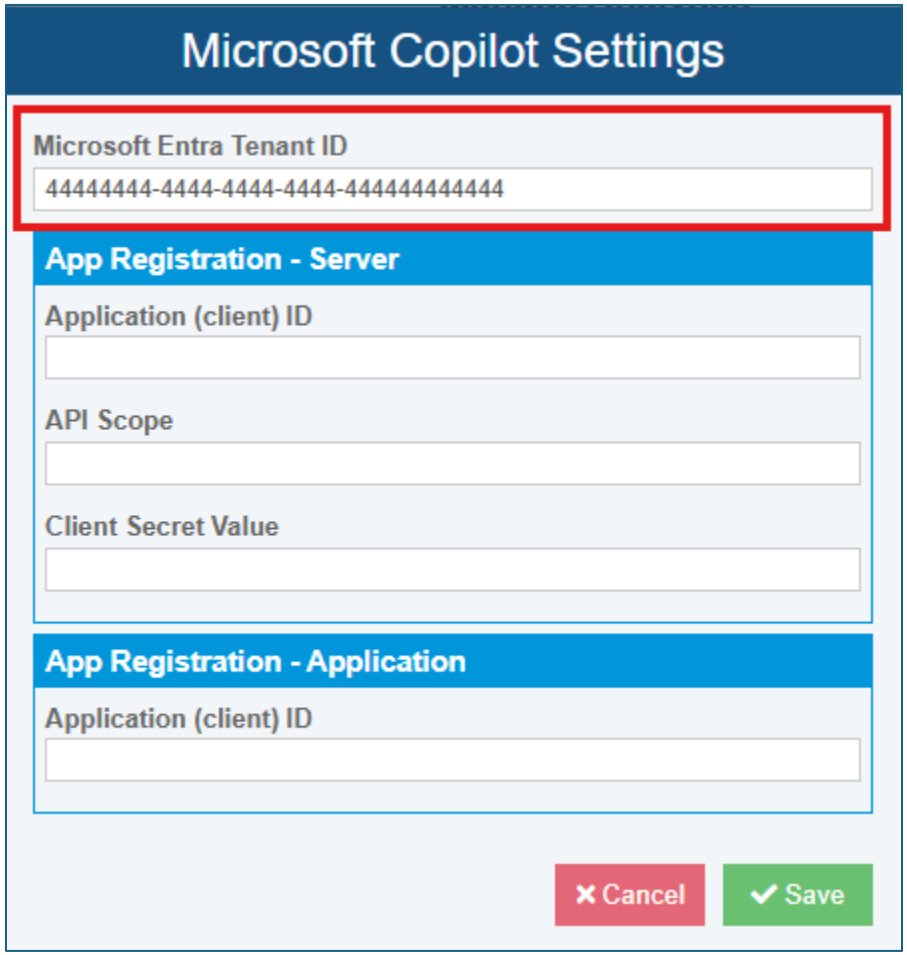
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

2. Microsoft Copilot Settings window



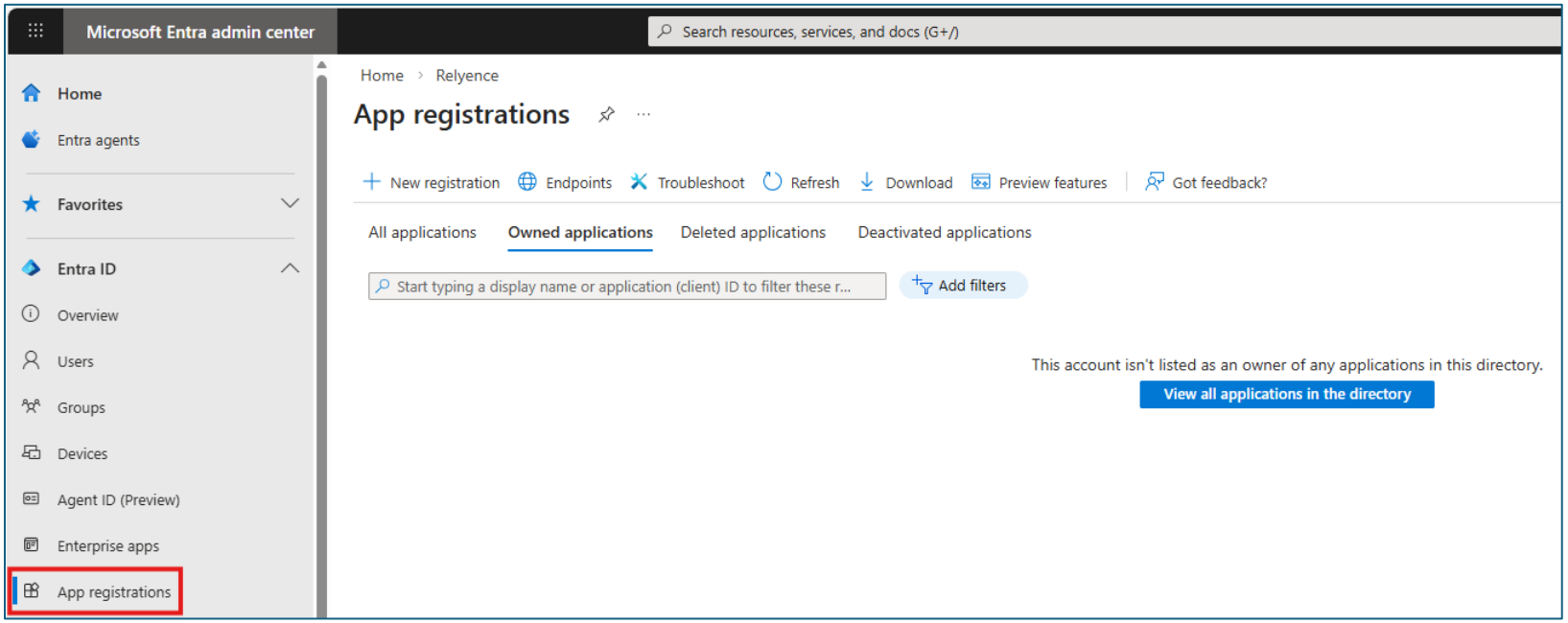
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

3. **Paste** your copied **Tenant ID** into the **Microsoft Entra Tenant ID** box



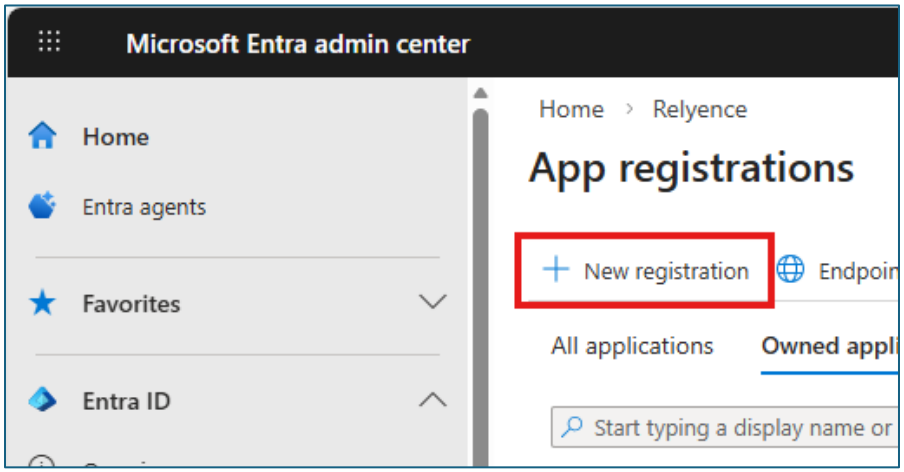
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

2. **Create an App Registration to allow the Relyence server to interact with Entra ID through an API**
    a. Back in the **Microsoft Entra Admin Center**, **click** on **App registrations**



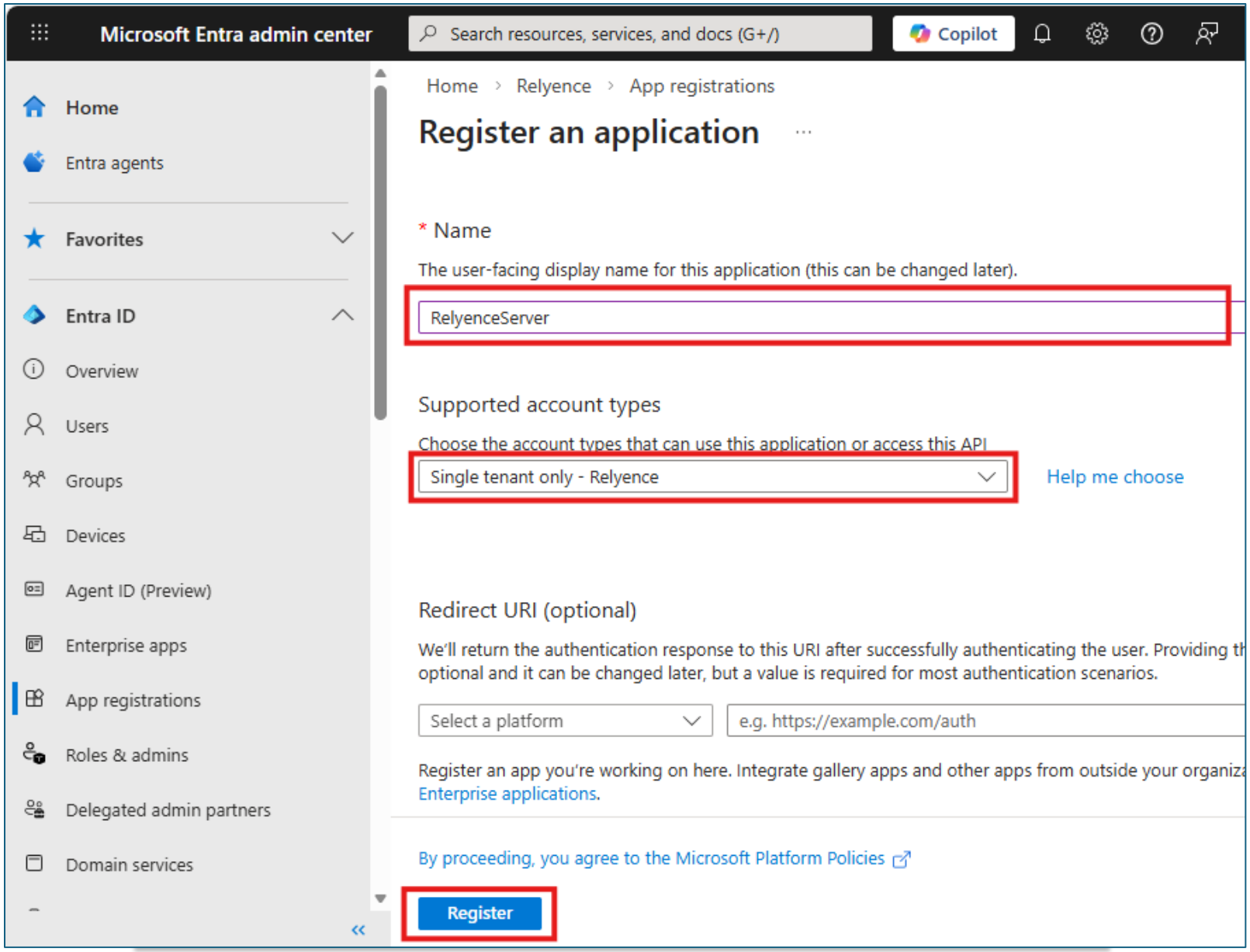
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

b. **Click** on **New registration**



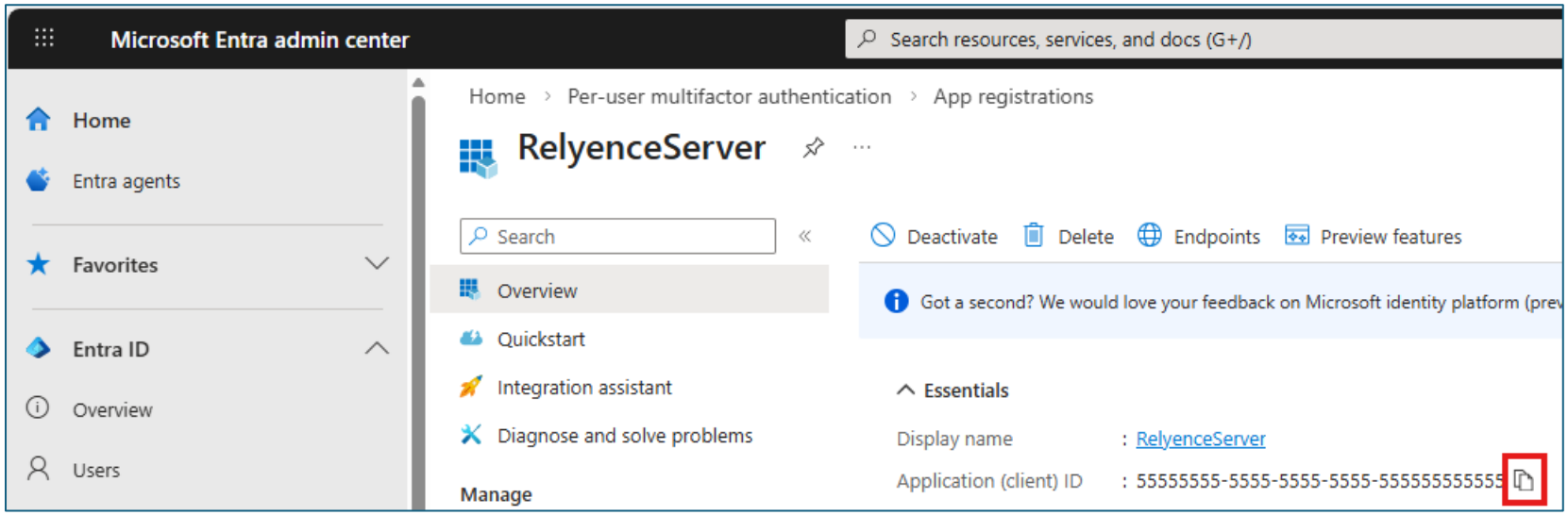
c. On the **Registration** page, fill in the following information and **click Register**
   i. Name
   ii. Supported Account Types

Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.



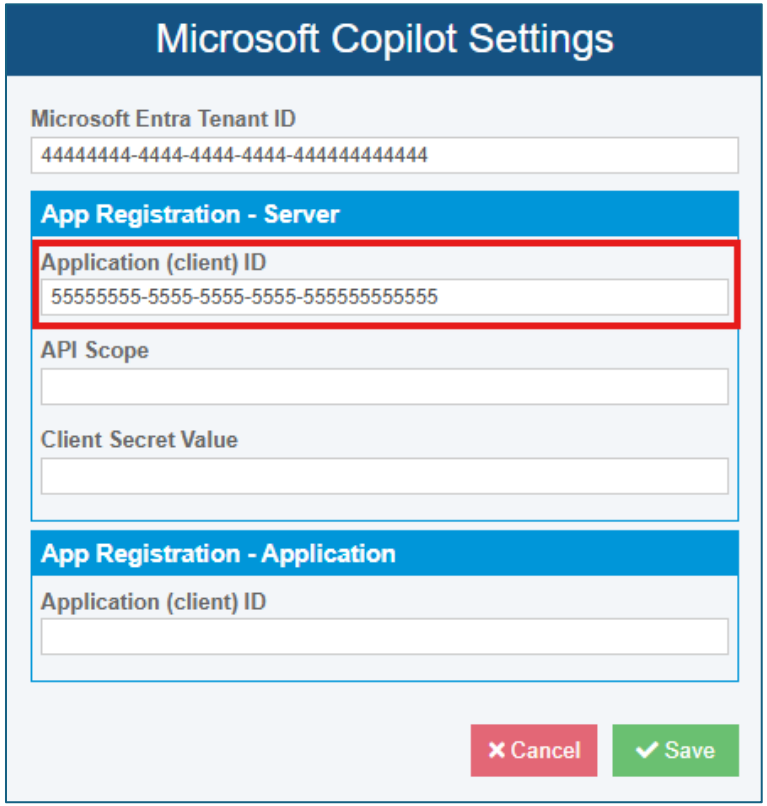
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

d. The **Overview** page will be shown for your newly created App Registration. **Copy** the **Application (client) ID** using the copy button



Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

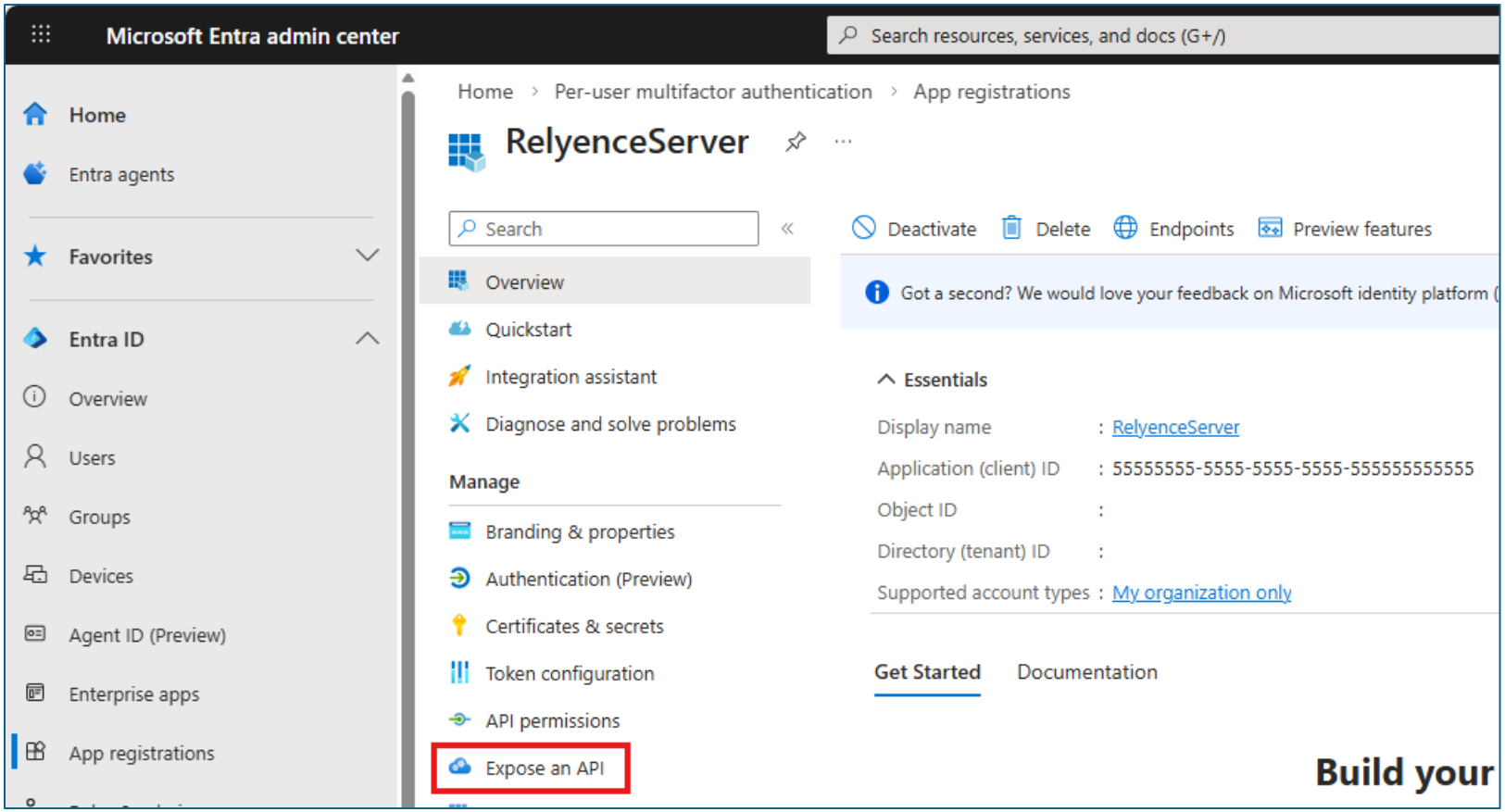
e. **Paste** the **Application (client) ID** value into Relyence



Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

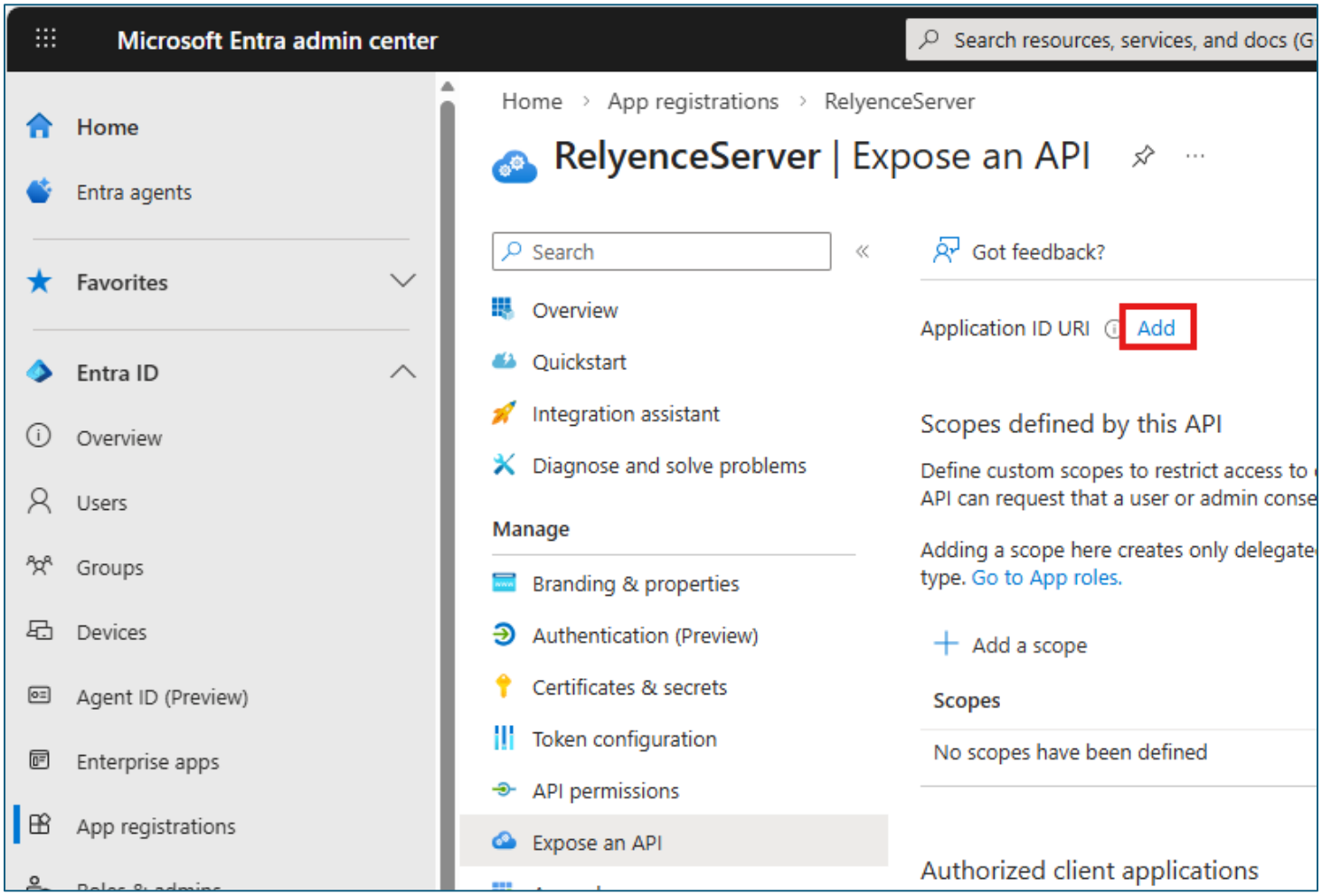
f. Expose an API address for this App Registration that the Relyence server will use

i. **Click** on **Expose an API**.



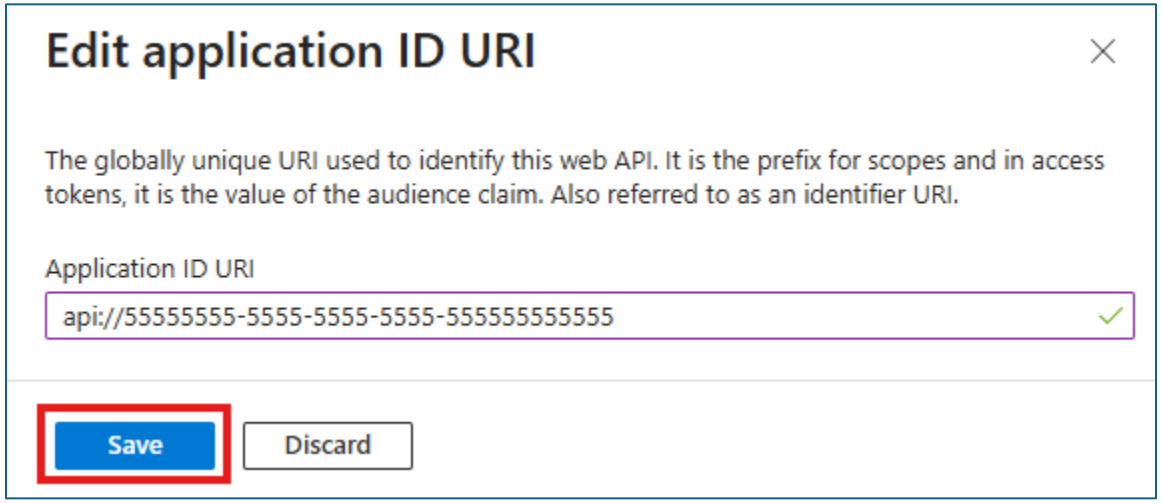
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

ii. On the **Expose an API** page, **click Add**



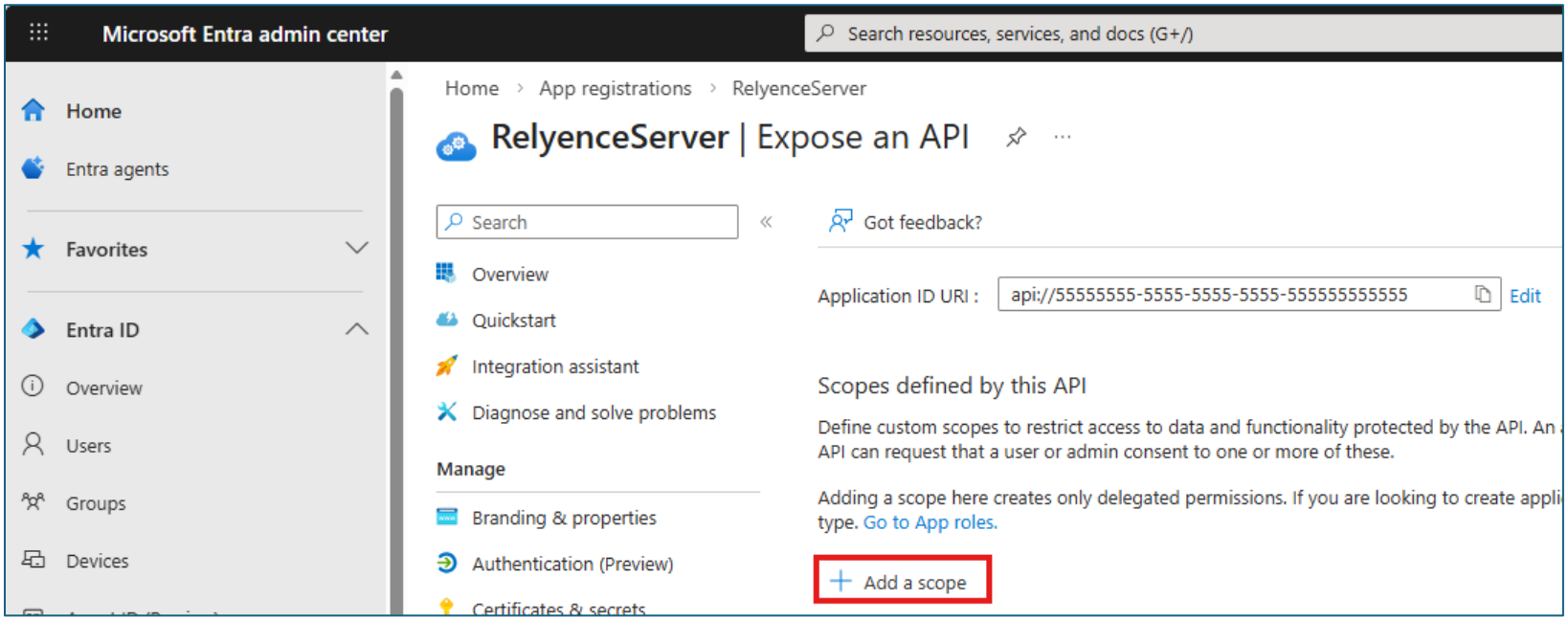
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

iii. The **Edit application ID URI** window will open. **Click Save** to accept the default.



Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

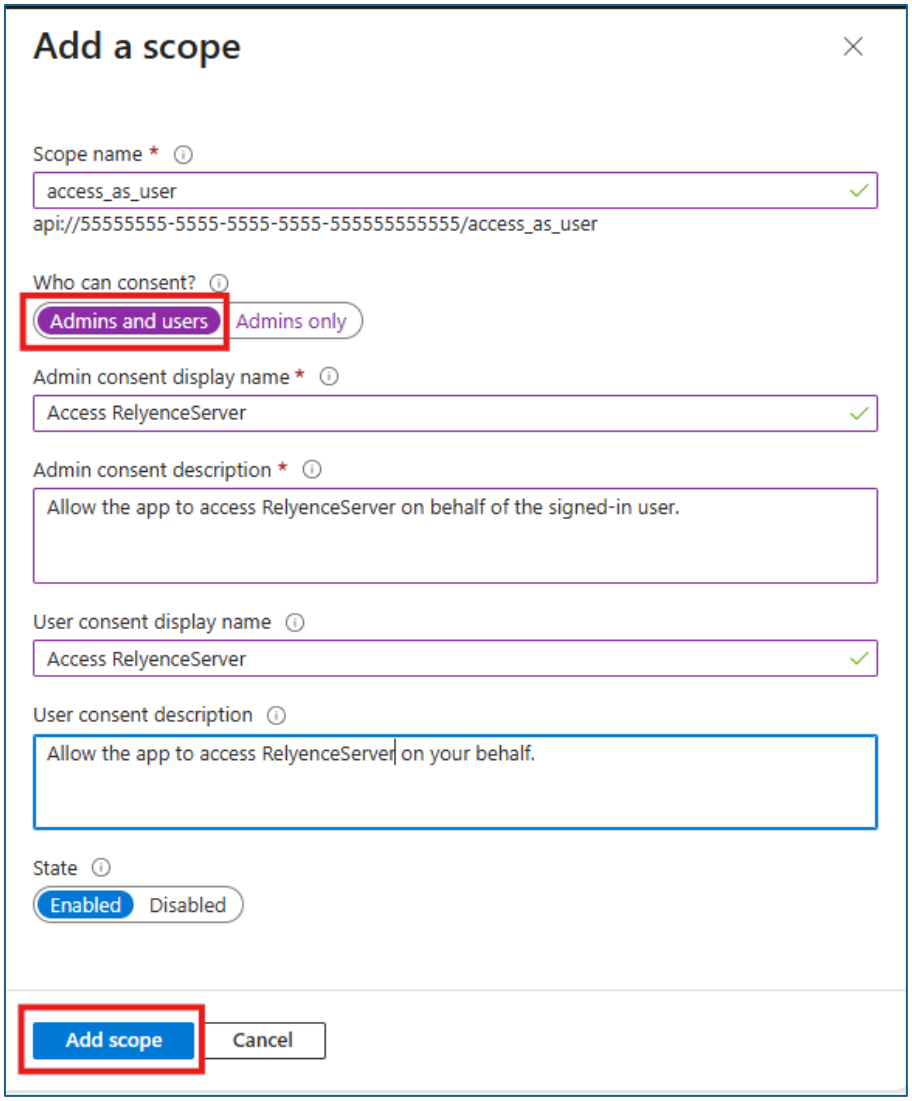
iv. Back in the **Expose an API** page, **click** the **Add a scope** button



Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

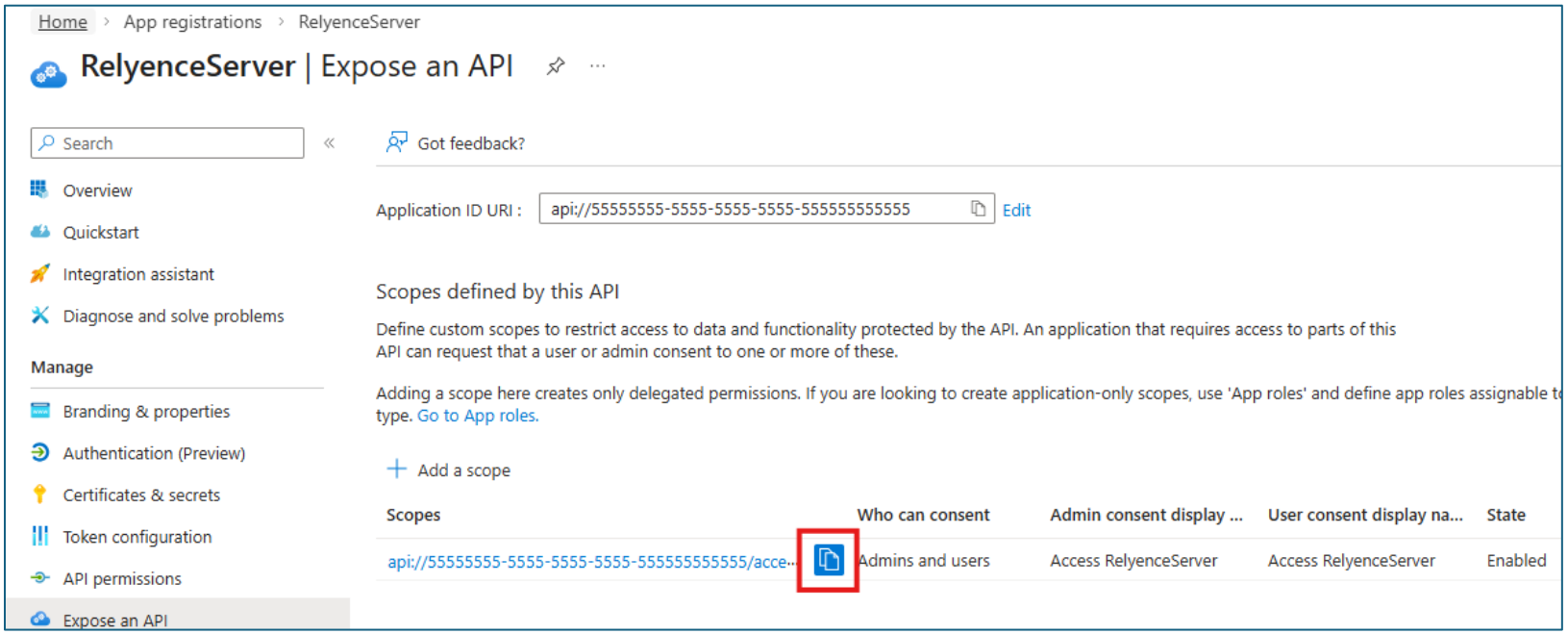
v. The **Add a scope** window will open
    1. **Fill** in the following information and **click** the **Add scope** button
    2. Scope name
        a. access_as_user
    3. Click on ‘Admins and users’
    4. Admin consent display name
        a. Access RelyenceServer
    5. Admin consent description
        a. Allow the app to access RelyenceServer on behalf of the signed-in user.
    6. User consent display name
        a. Access RelyenceServer
    7. User consent description
        a. Allow the app to access RelyenceServer on your behalf.

Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.



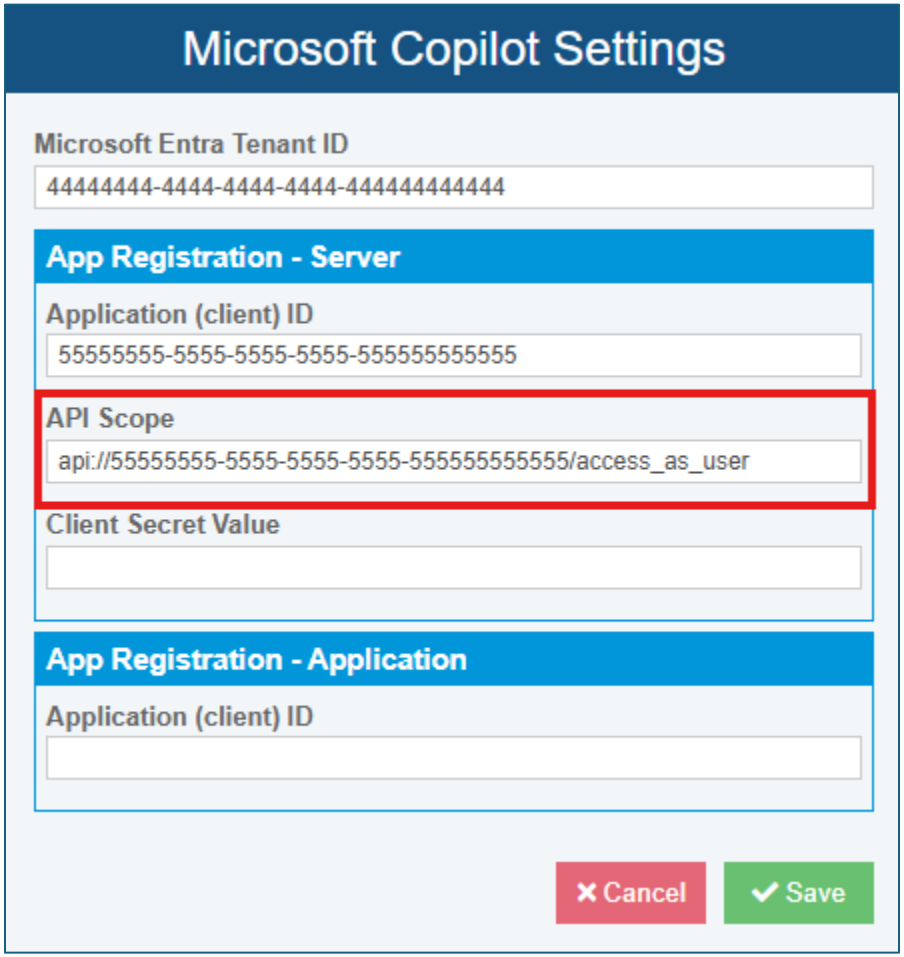
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

vi. You will be returned again to the **Expose an API** page. **Click** the **copy** button to copy your new API scope.



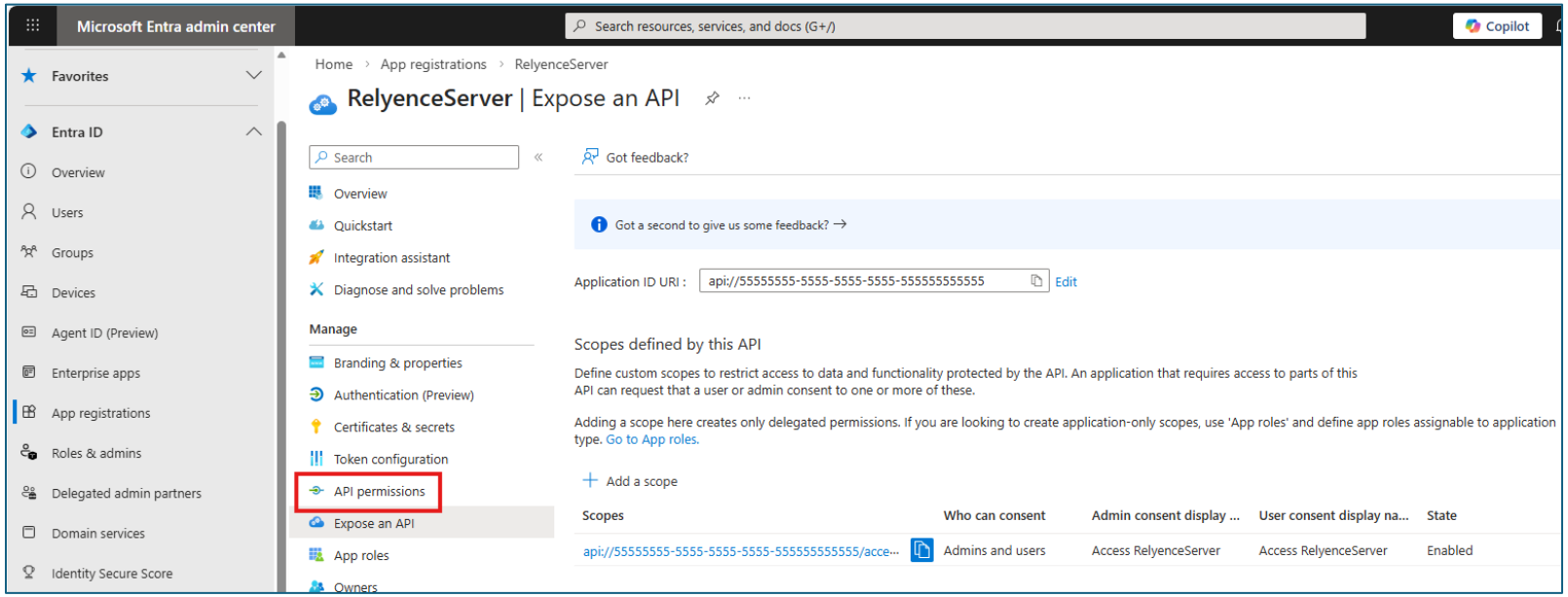
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

vii. **Paste** the **API scope** value into Relyence



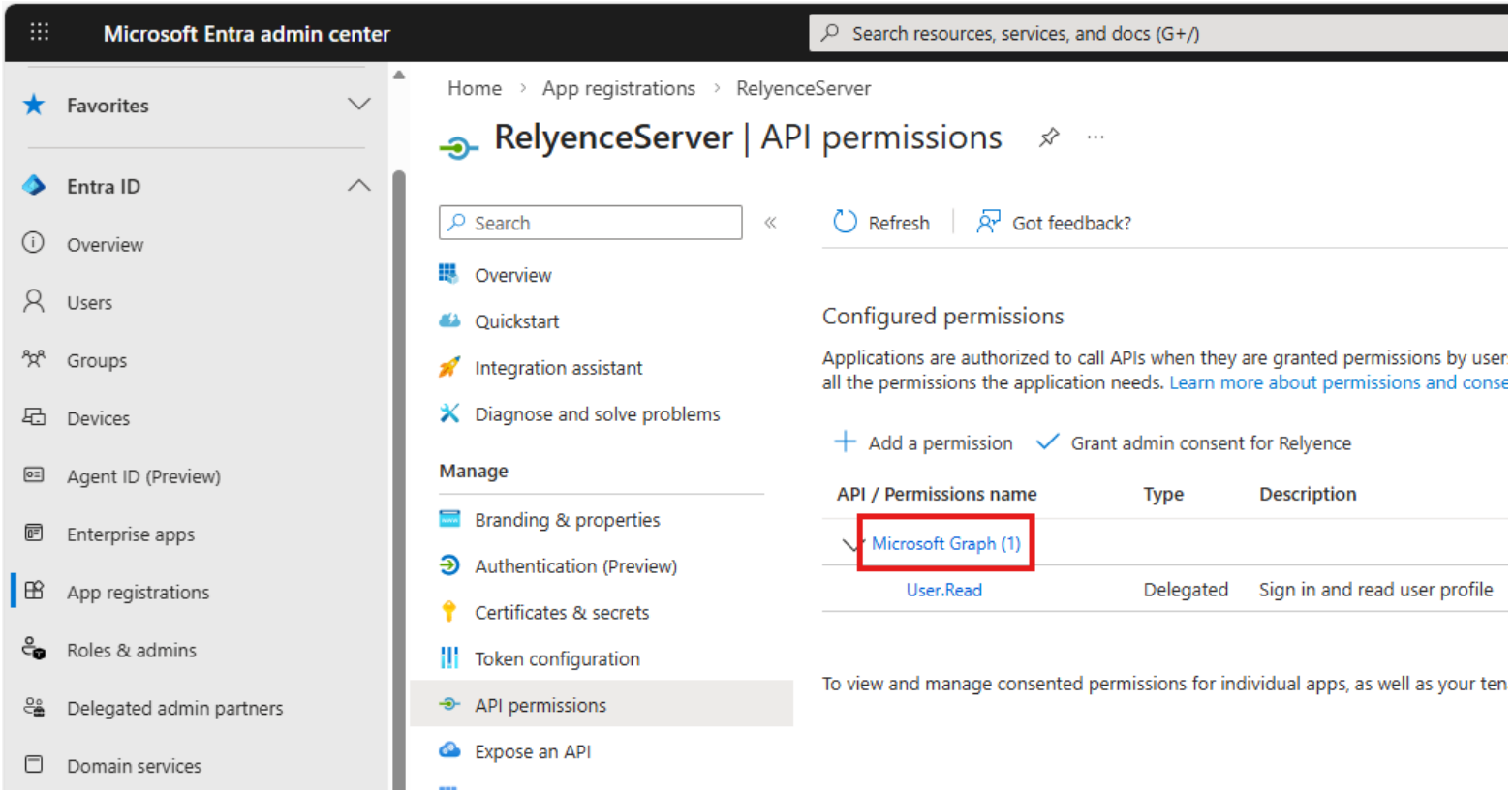
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

viii. Back on the **Expose an API** page, **click** on **API permissions**



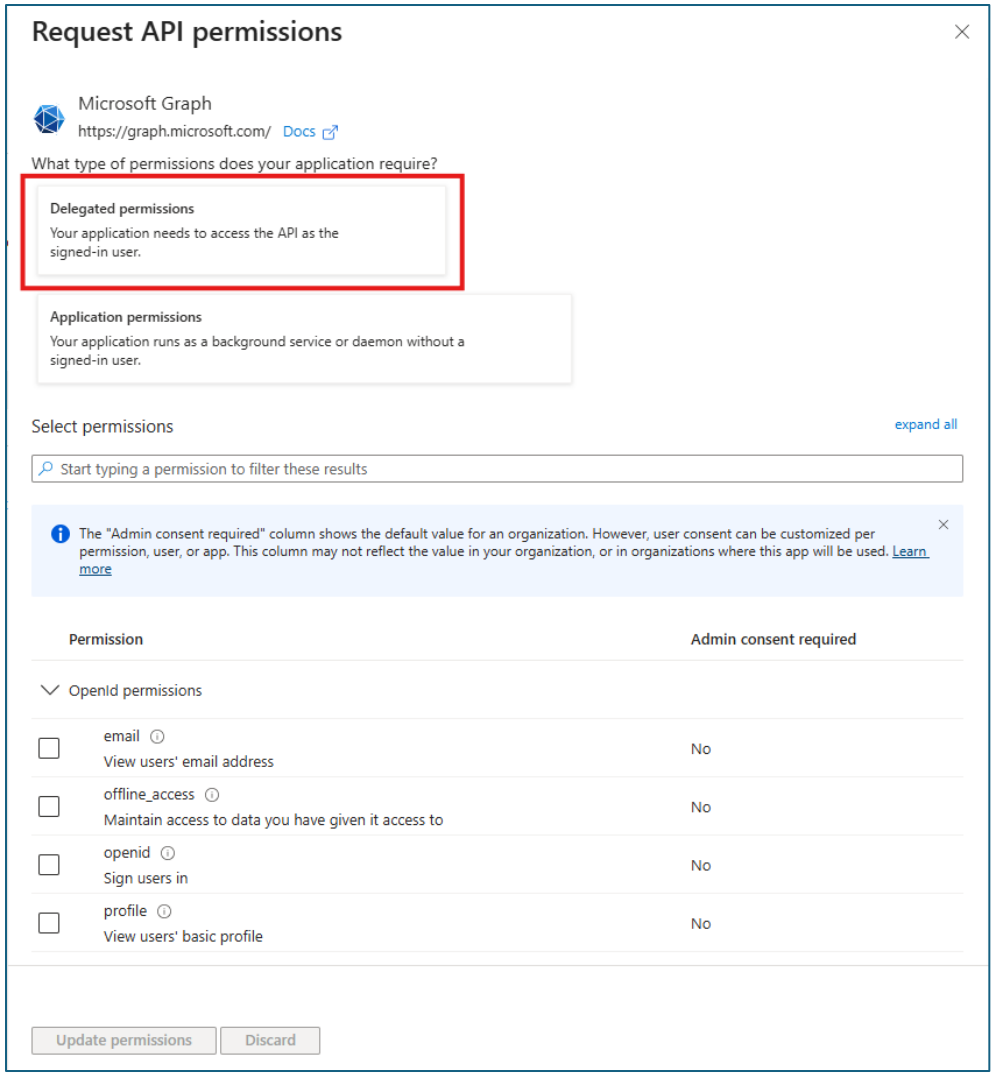
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

ix. The **API permissions** page will open. **Click** on **Microsoft Graph**.



Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

x. The **Request API permissions** page will open. Click **Delegated permissions**.



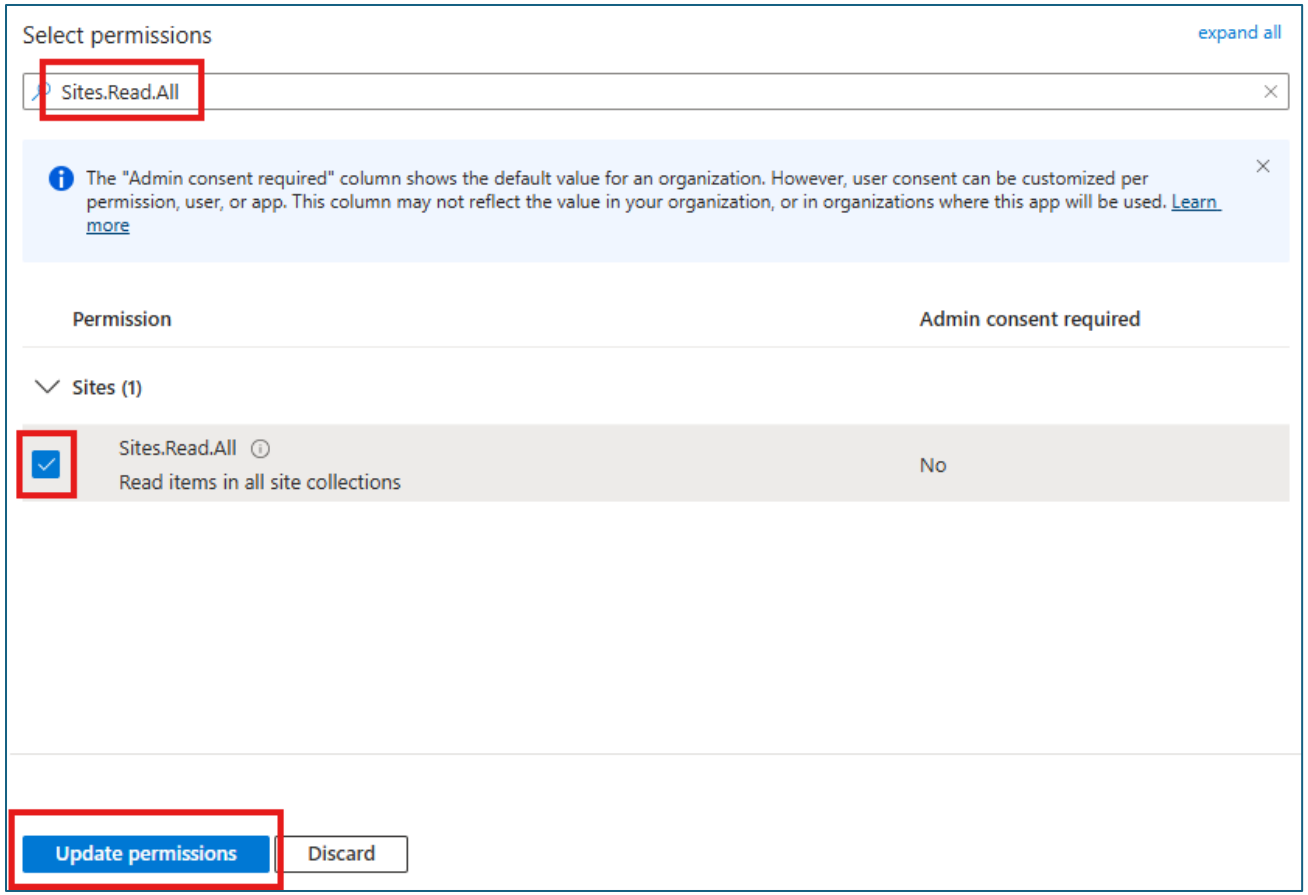
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

xi. Add the following permissions.

(NOTE: You can select them all then click Update permissions or do them individually.)

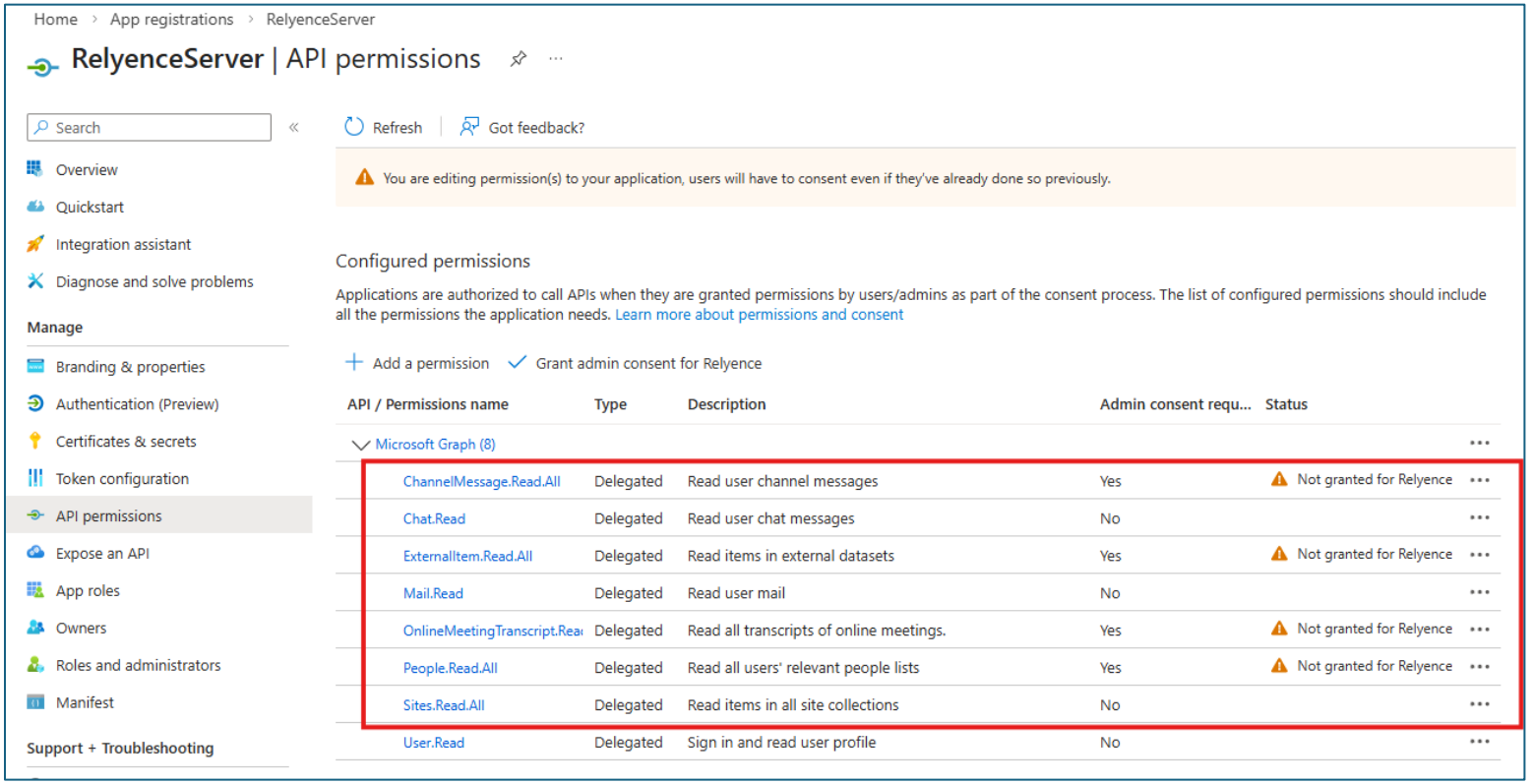
1. Sites.Read.All
2. Mail.Read
3. People.Read.All
4. Chat.Read
5. ChannelMessage.Read.All
6. OnlineMeetingTranscript.Read.All
7. ExternalItem.Read.All

Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.



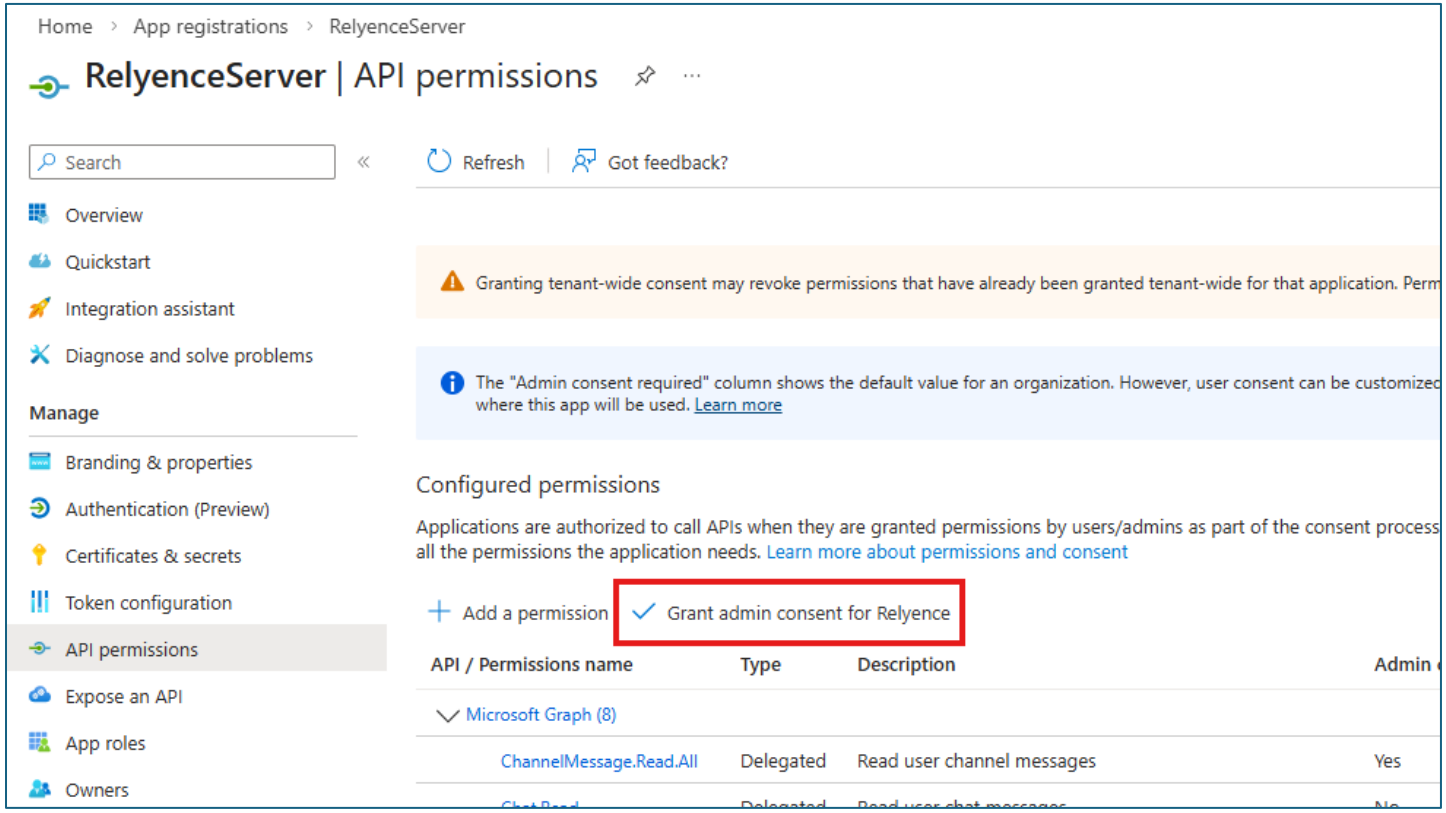
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

8. Permissions added



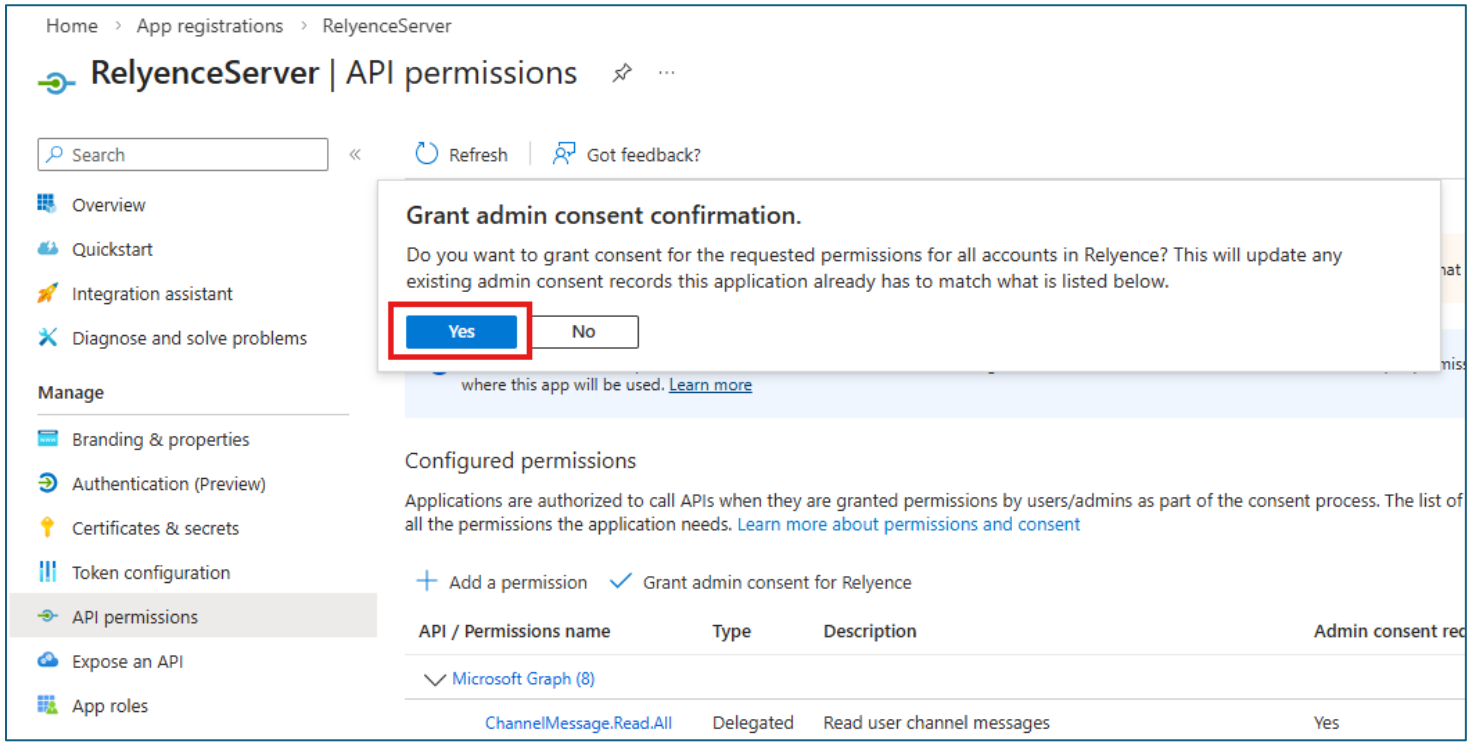
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

9. Grant Admin Consent for the new permissions.
    a. **Click** the **Grant admin consent for Relyence** button



Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

b. In the window that pops open, **click Yes**



Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

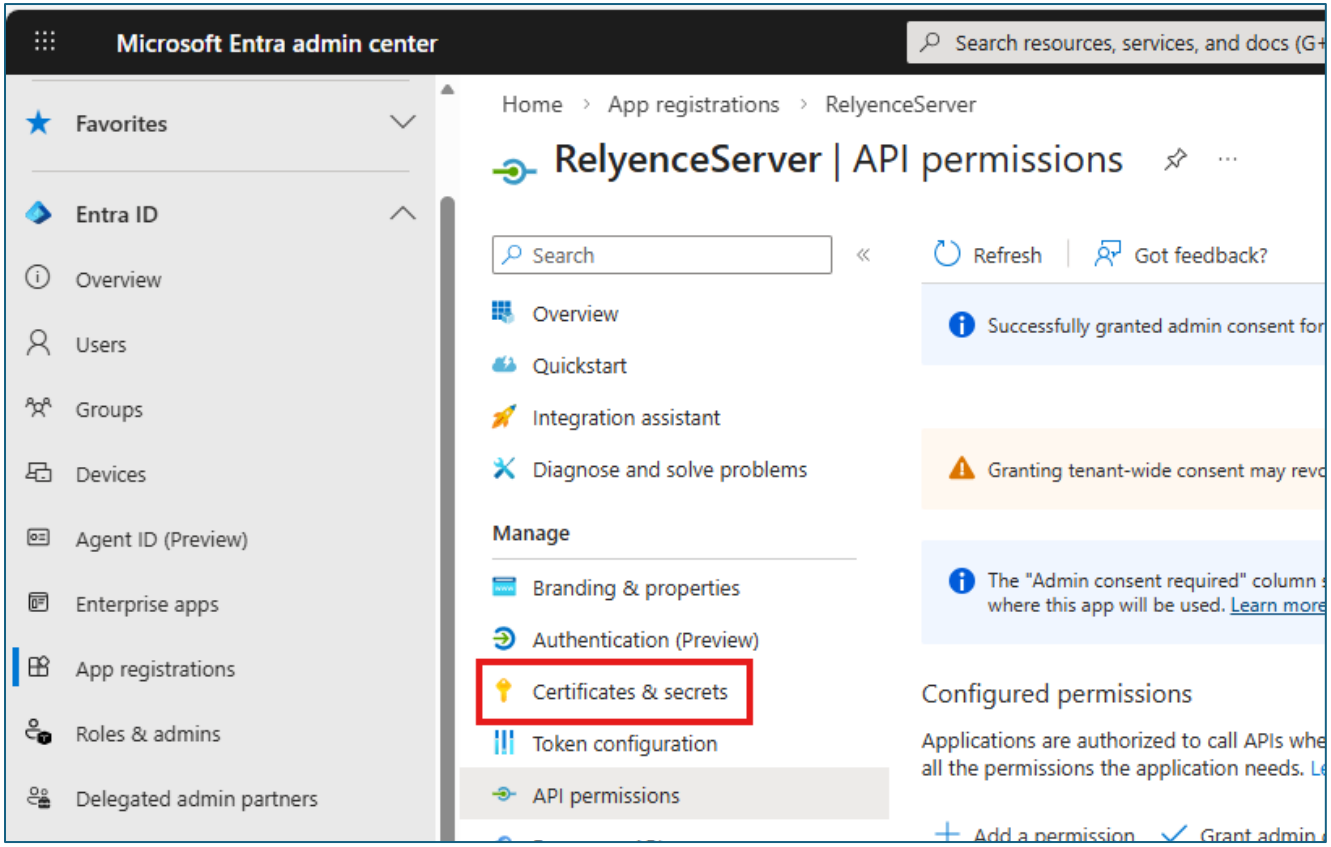
c. Verify permissions were granted

API / Permissions name	Type	Description	Admin consent requ...	Status
Microsoft Graph (8)				
ChannelMessage.Read.All	Delegated	Read user channel messages	Yes	Granted for Relyence
Chat.Read	Delegated	Read user chat messages	No	Granted for Relyence
ExternalItem.Read.All	Delegated	Read items in external datasets	Yes	Granted for Relyence
Mail.Read	Delegated	Read user mail	No	Granted for Relyence
OnlineMeetingTranscript.Rea	Delegated	Read all transcripts of online meetings.	Yes	Granted for Relyence
People.Read.All	Delegated	Read all users' relevant people lists	Yes	Granted for Relyence
Sites.Read.All	Delegated	Read items in all site collections	No	Granted for Relyence
User.Read	Delegated	Sign in and read user profile	No	Granted for Relyence

Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

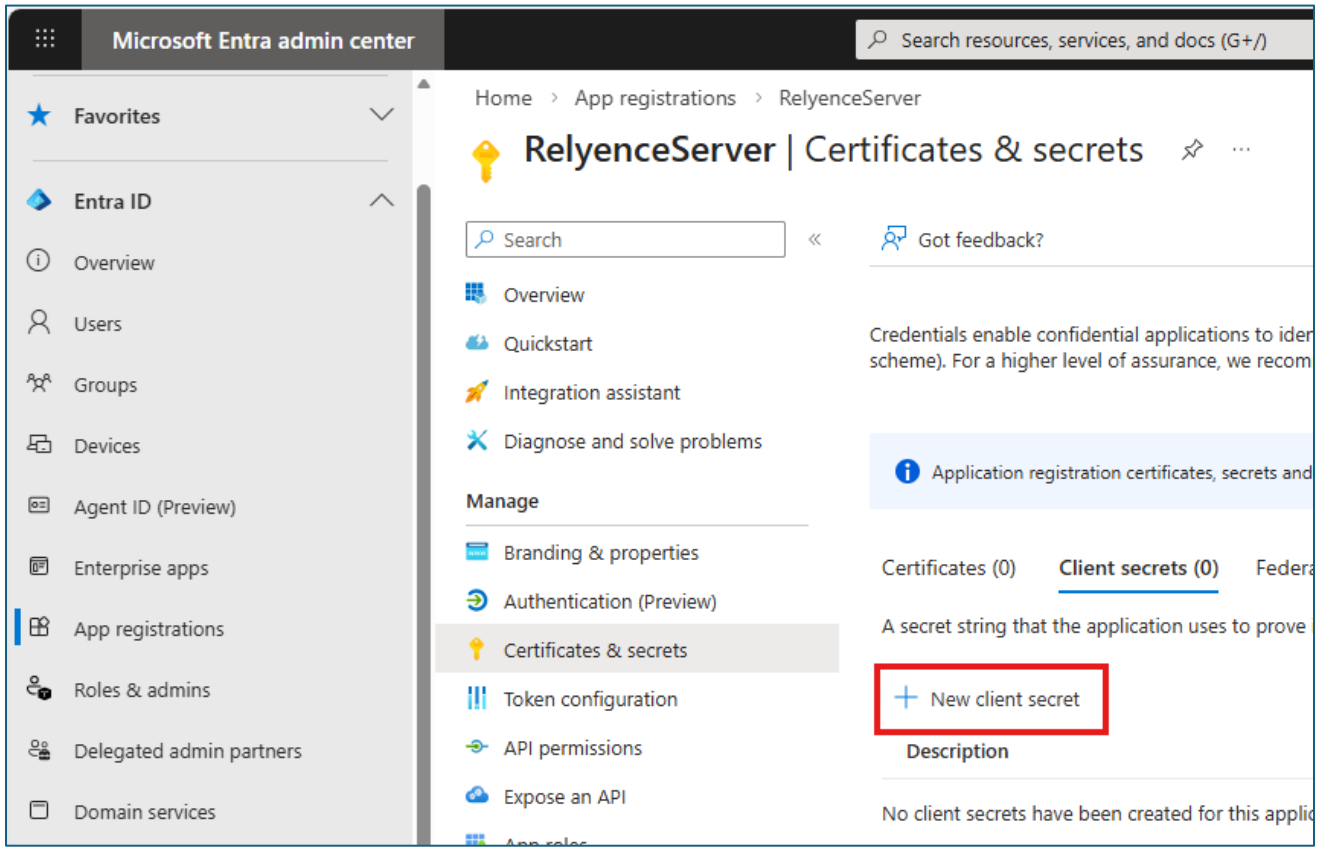
g. Creating a Client Secret

i. **Click** on **Certificates and secrets**



Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

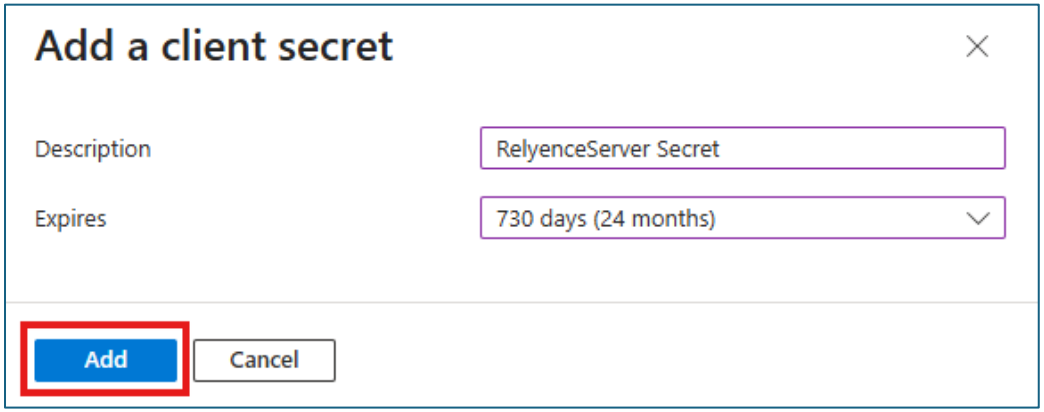
ii. On the Certificates & secrets page, **click** the **New client secret** button



Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

iii. The **Add a client secret** window opens.

1. Fill in a **Description** and pick an **expiration** date that works for you.
2. **Click Add**

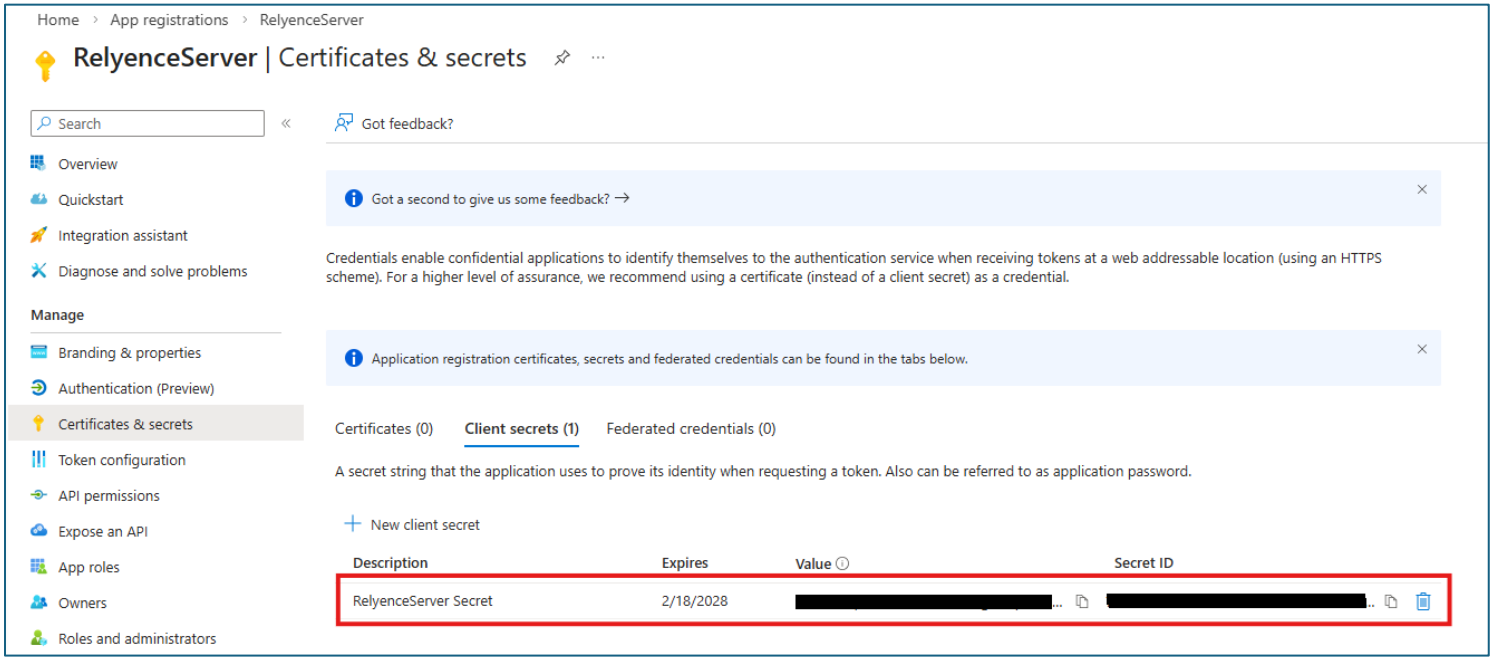


Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

iv. Your secret was created.

1. DO NOT CLOSE THIS PAGE BEFORE YOU COPY THE VALUE.

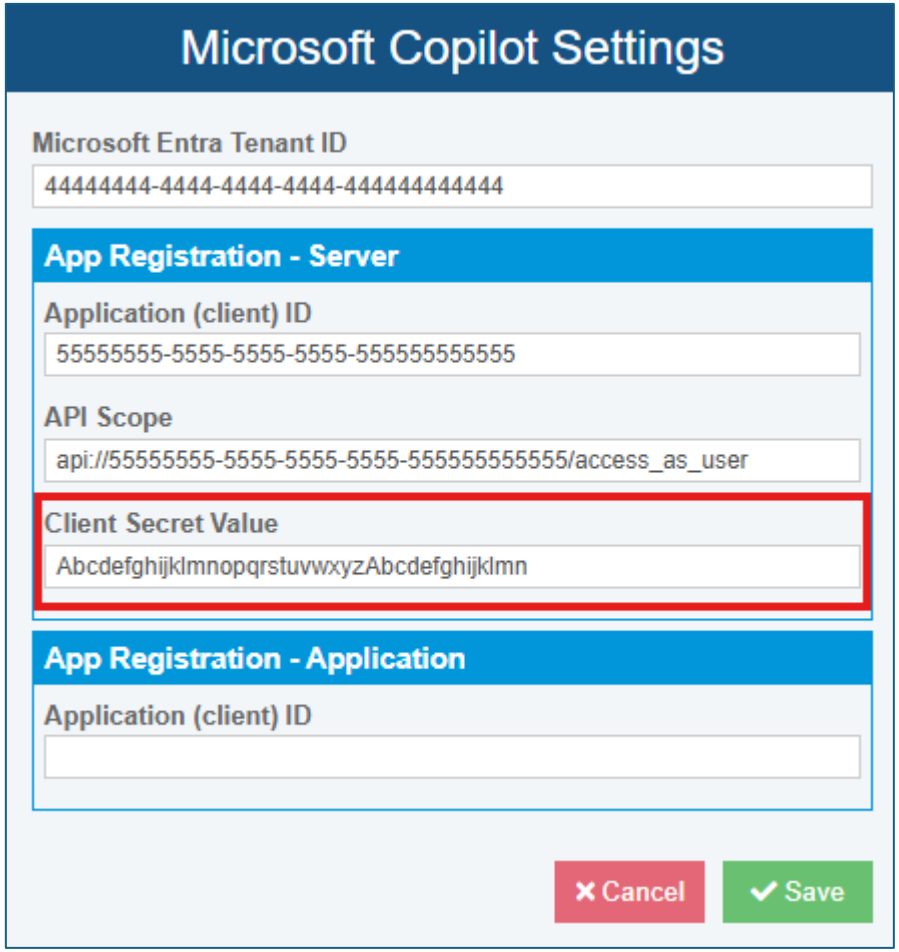
    a. If you do, you will lose the secret value. In that case, delete the secret and create a new one.



Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

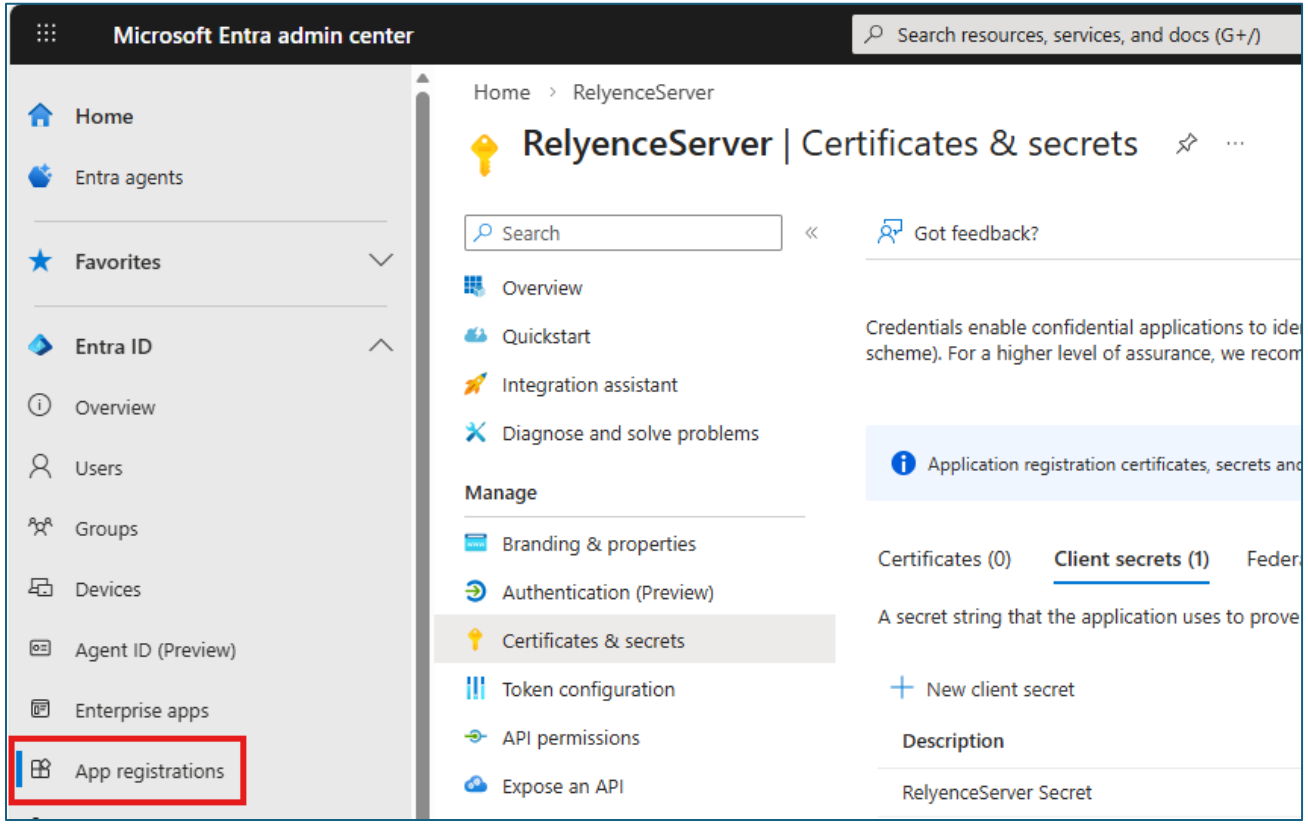
v. Using the Copy button, **copy** the secret's **Value**.

vi. **Paste** the value into **Client Secret Value** in Relyence.



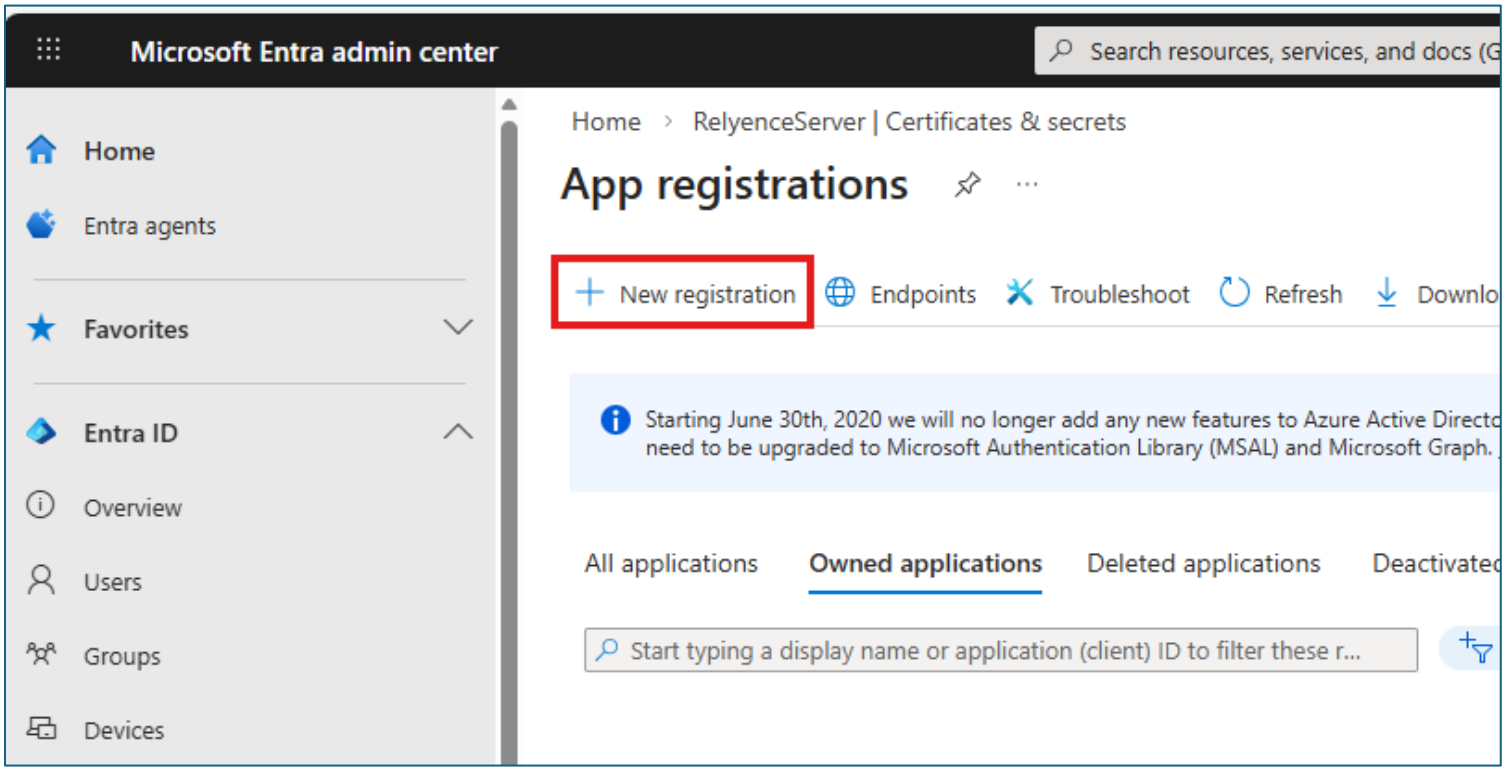
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

3. **Create an App Registration to allow the Relyence client (web browser) to interact with Entra ID through an API**
    a. Back in Microsoft Entra admin center, **click** on **App Registrations**



Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

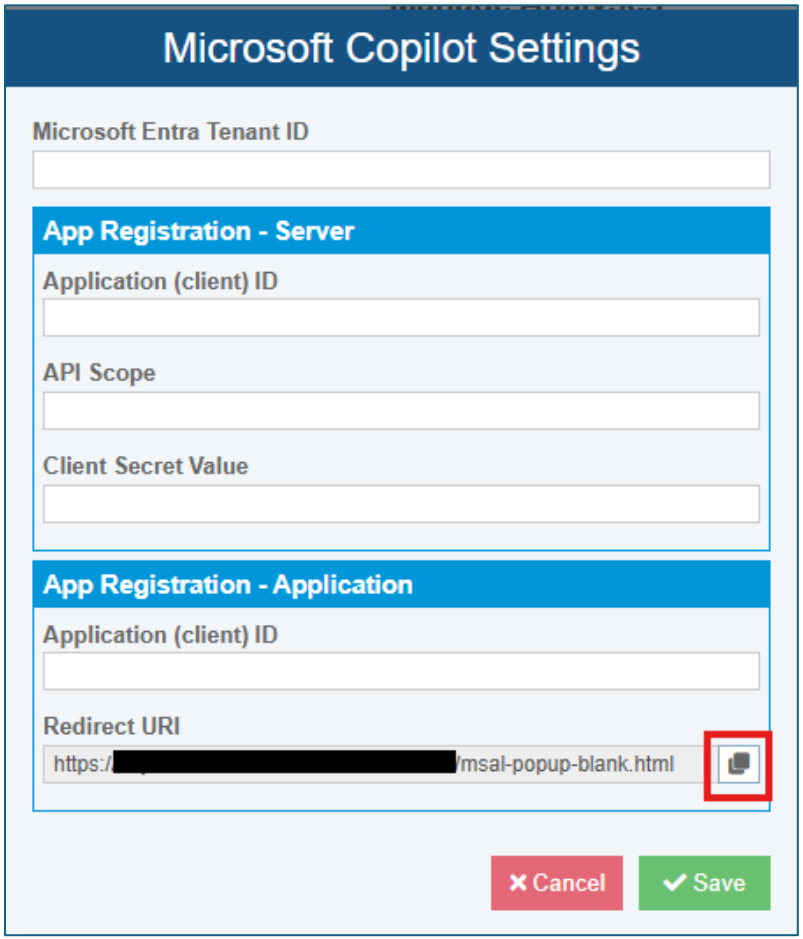
b. **Click** on **New registration**



Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

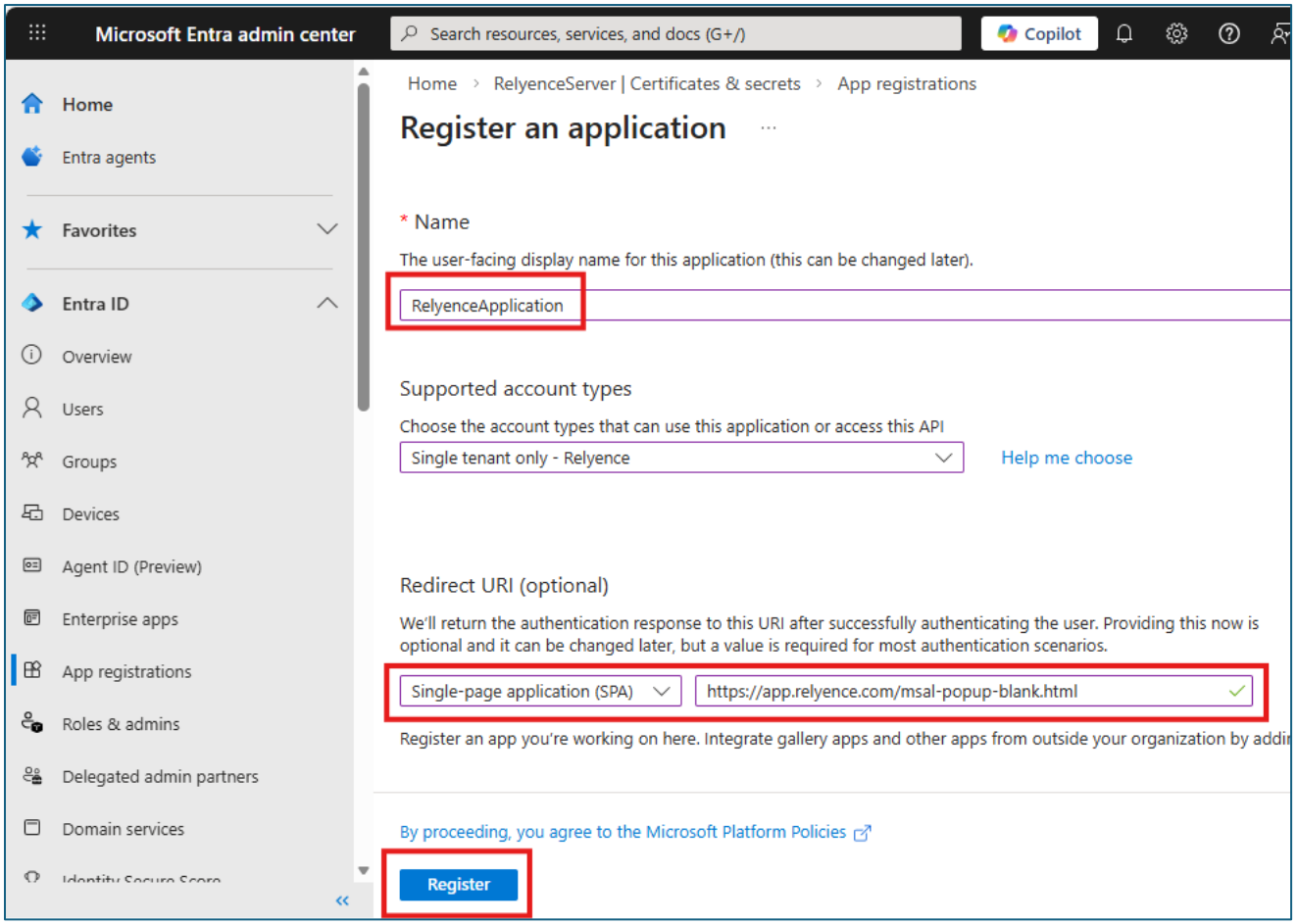
c. Enter the following information
    i. Name
    ii. Supported account types
    iii. For the Redirect URI
        1. Pick Single-page application (SPA) then fill in the address of your Relyence server with '/msal-popup-blank.html' tacked onto the end.
        2. You can copy the Redirect URI from the Copilot Settings in Relyence.
            a. Go back to Relyence. Click the Copy button on the Redirect URI

Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.



Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

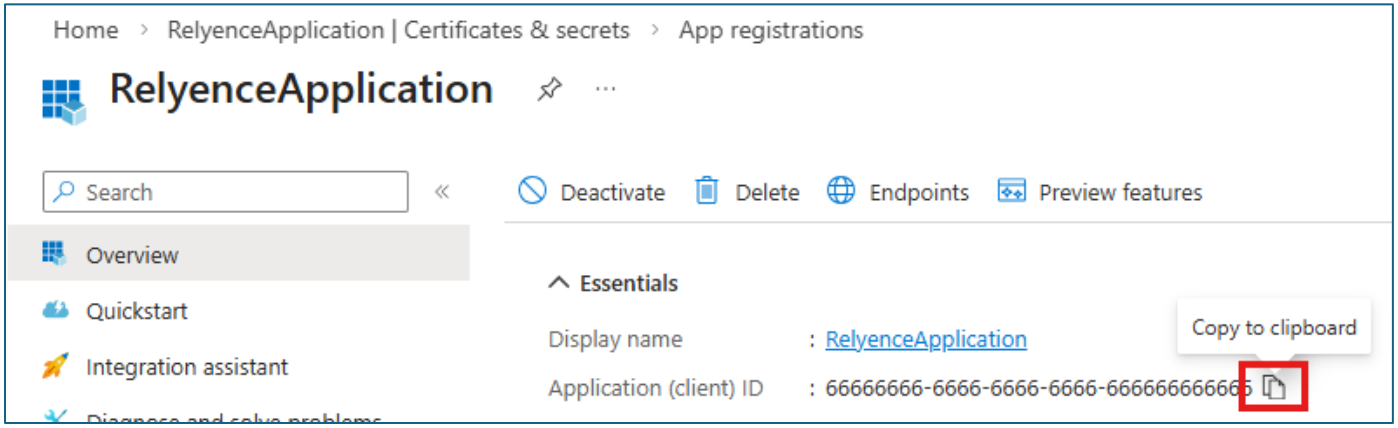
b. Paste the Redirect URI back into the **Register an application** window.



iv. **Click Register**

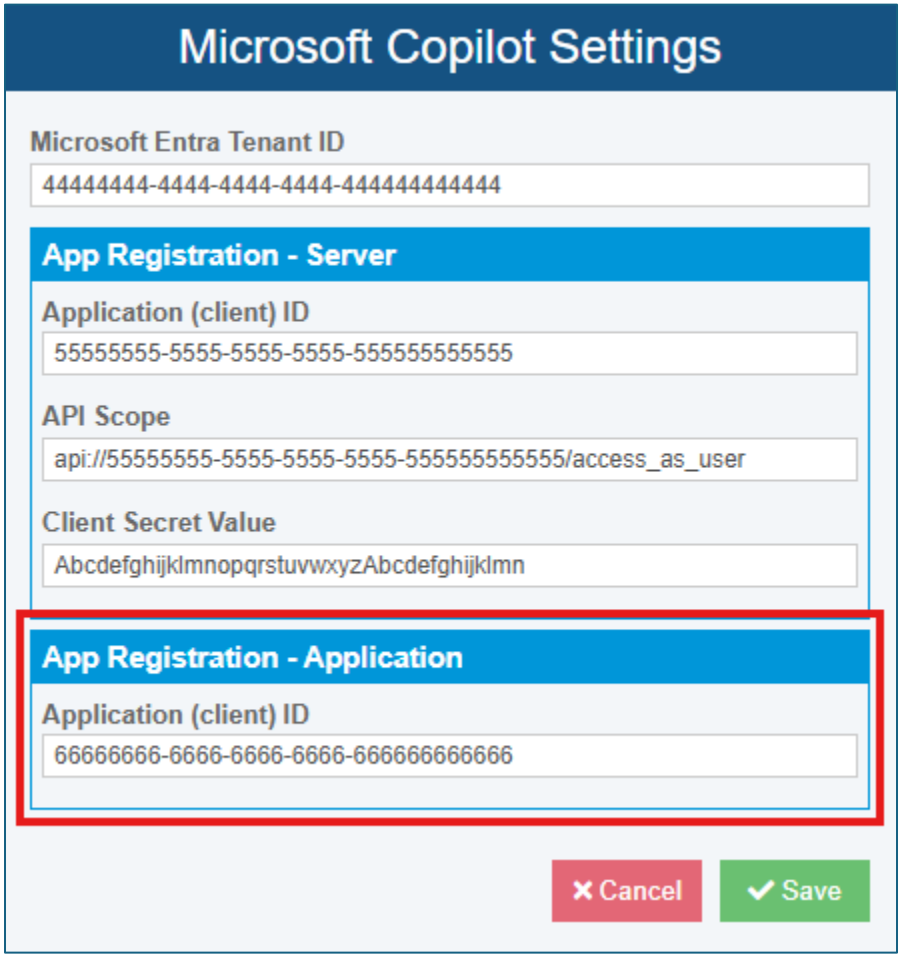
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

d. On your new App Registration **Overview** page, use the copy button to **copy the Application (client) ID**



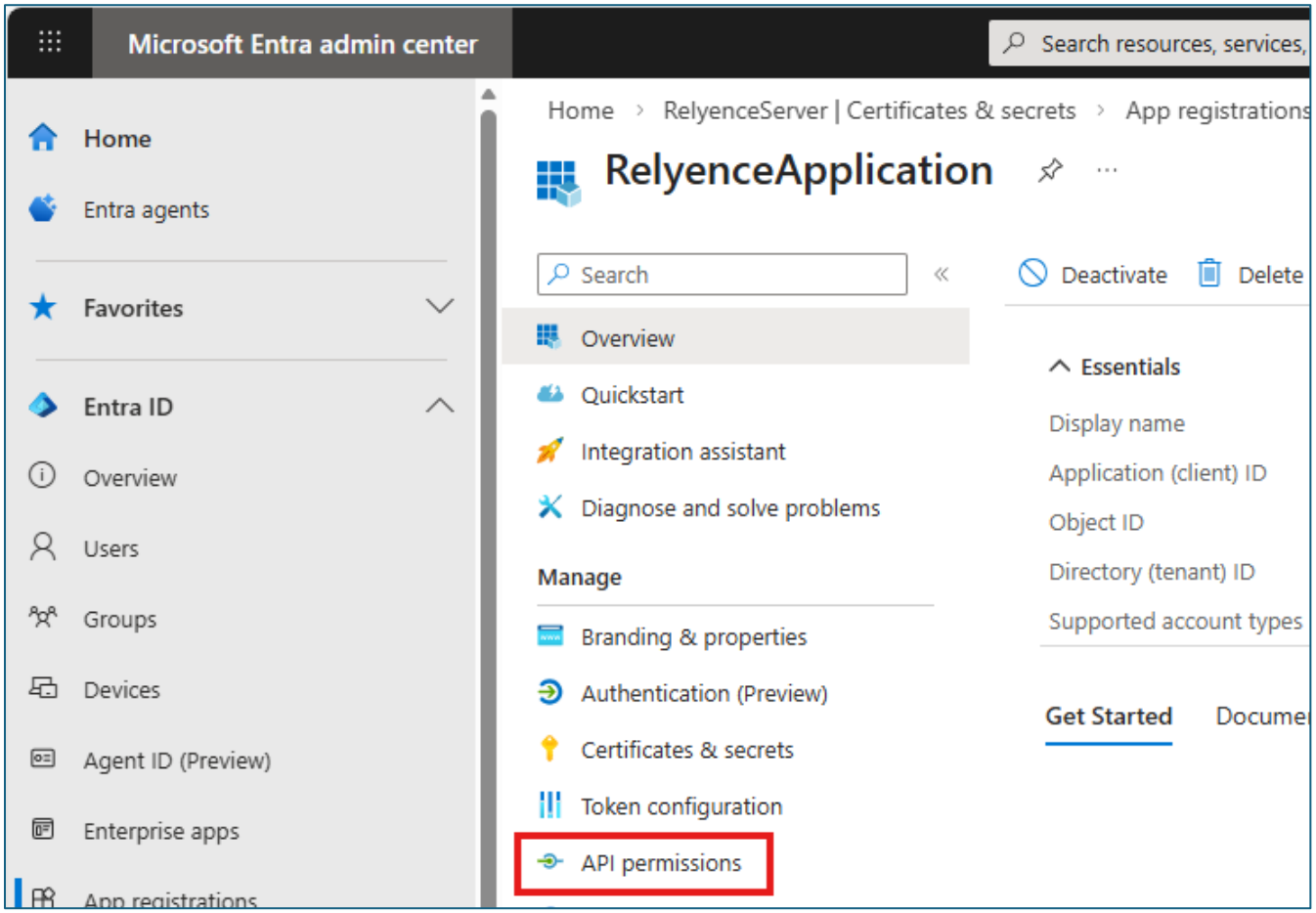
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

e. **Paste** the **Application (client) ID** into Relyence



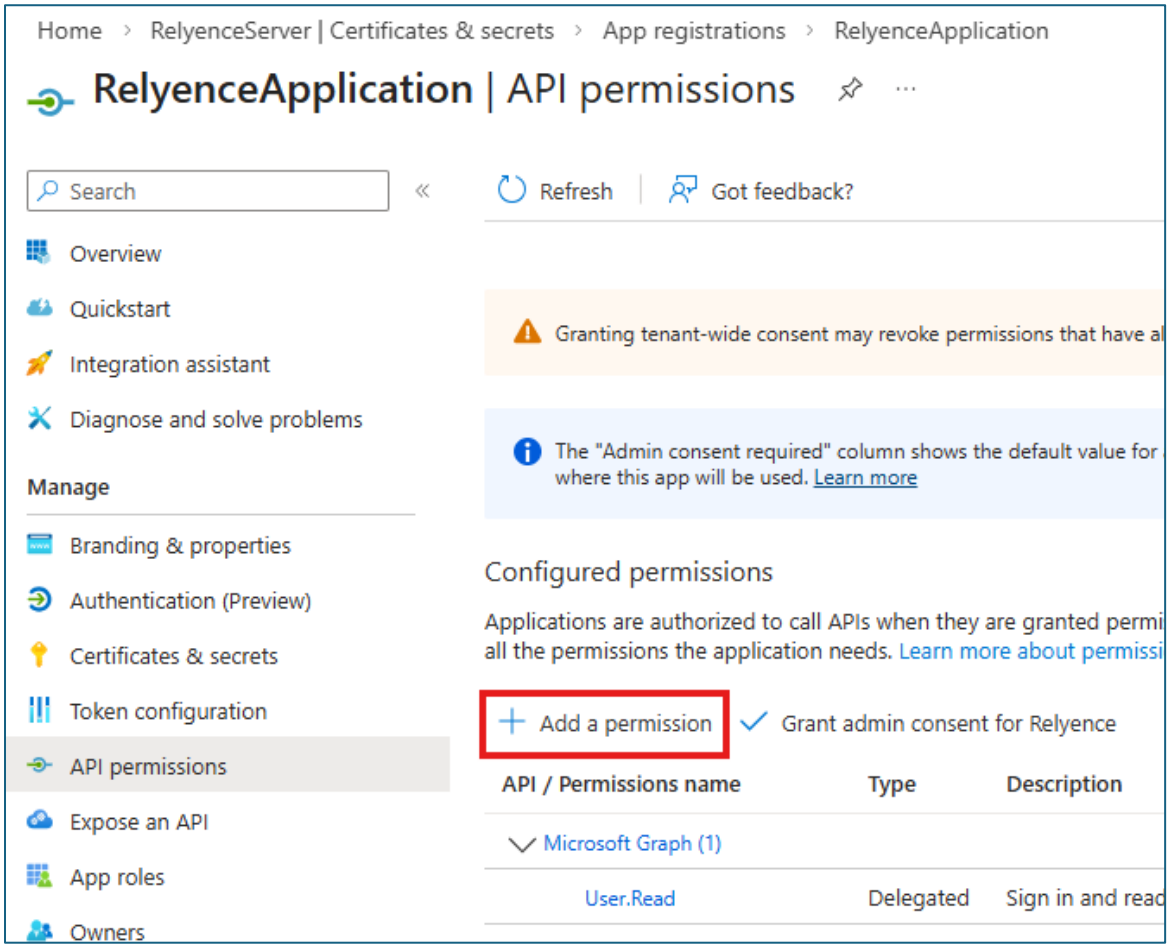
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

f. From the **Overview** page, **click API permissions**



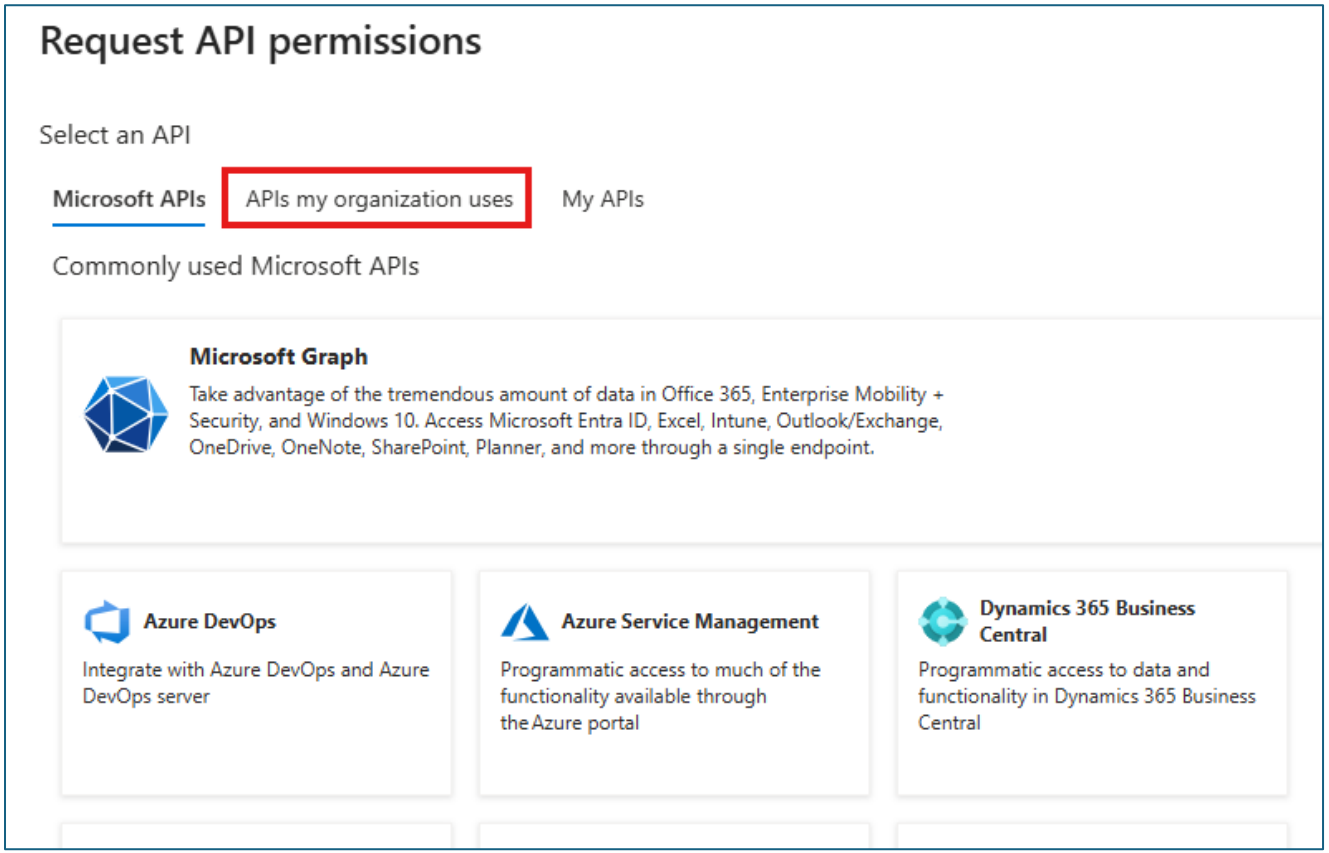
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

g. On the **API permissions** page, **click Add a permission**



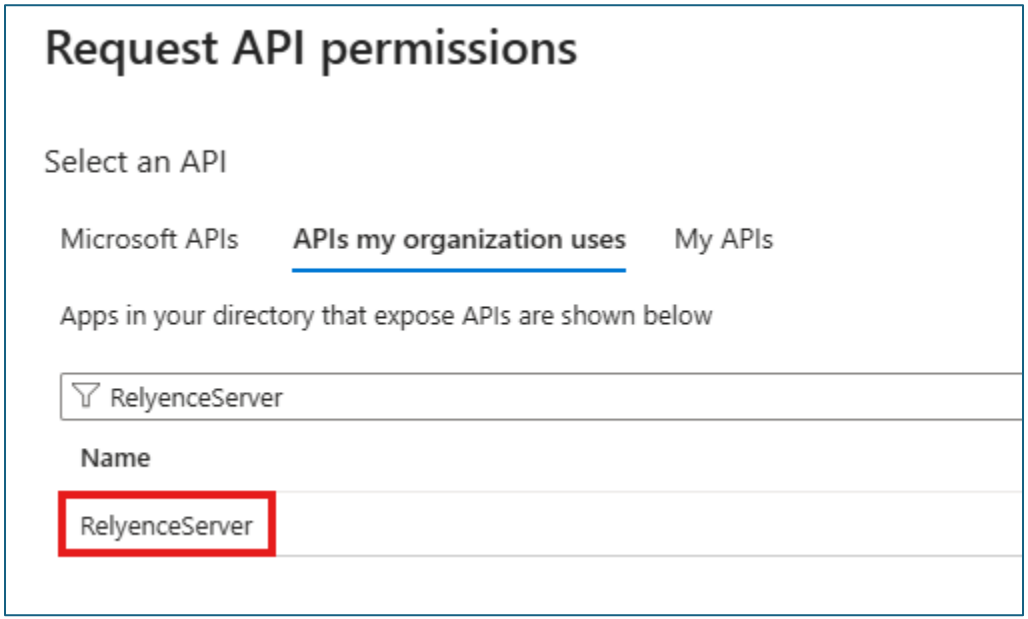
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

h. The **Request API permissions** window will open, **click APIs my organization uses**



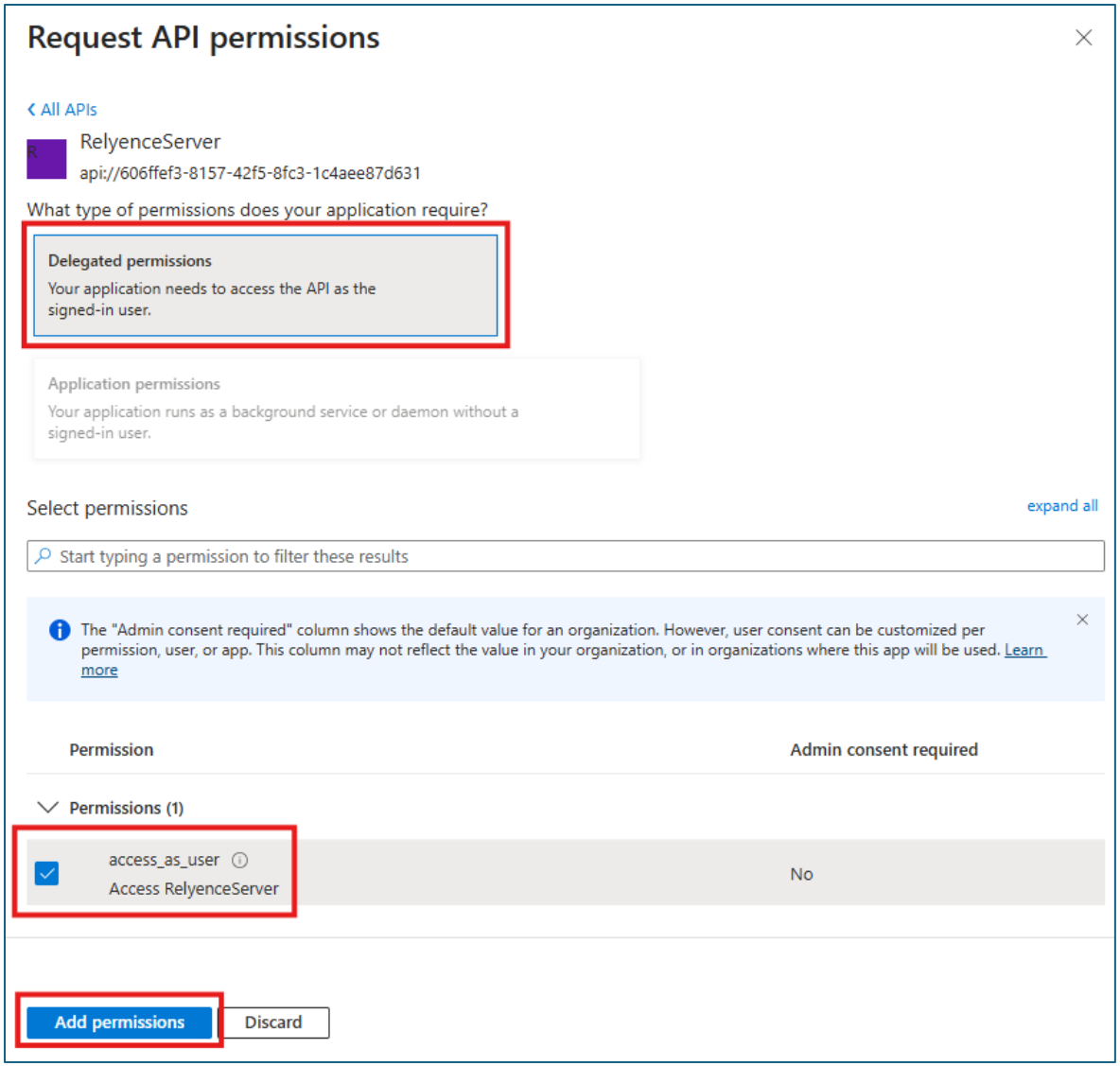
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

i. On the **Request API permission** window, filter by and **select RelyenceServer**



j. On the next window, **select Delegated permissions** (if not already selected)
   i. **Select access_as_user**
   ii. **Click Add Permissions**

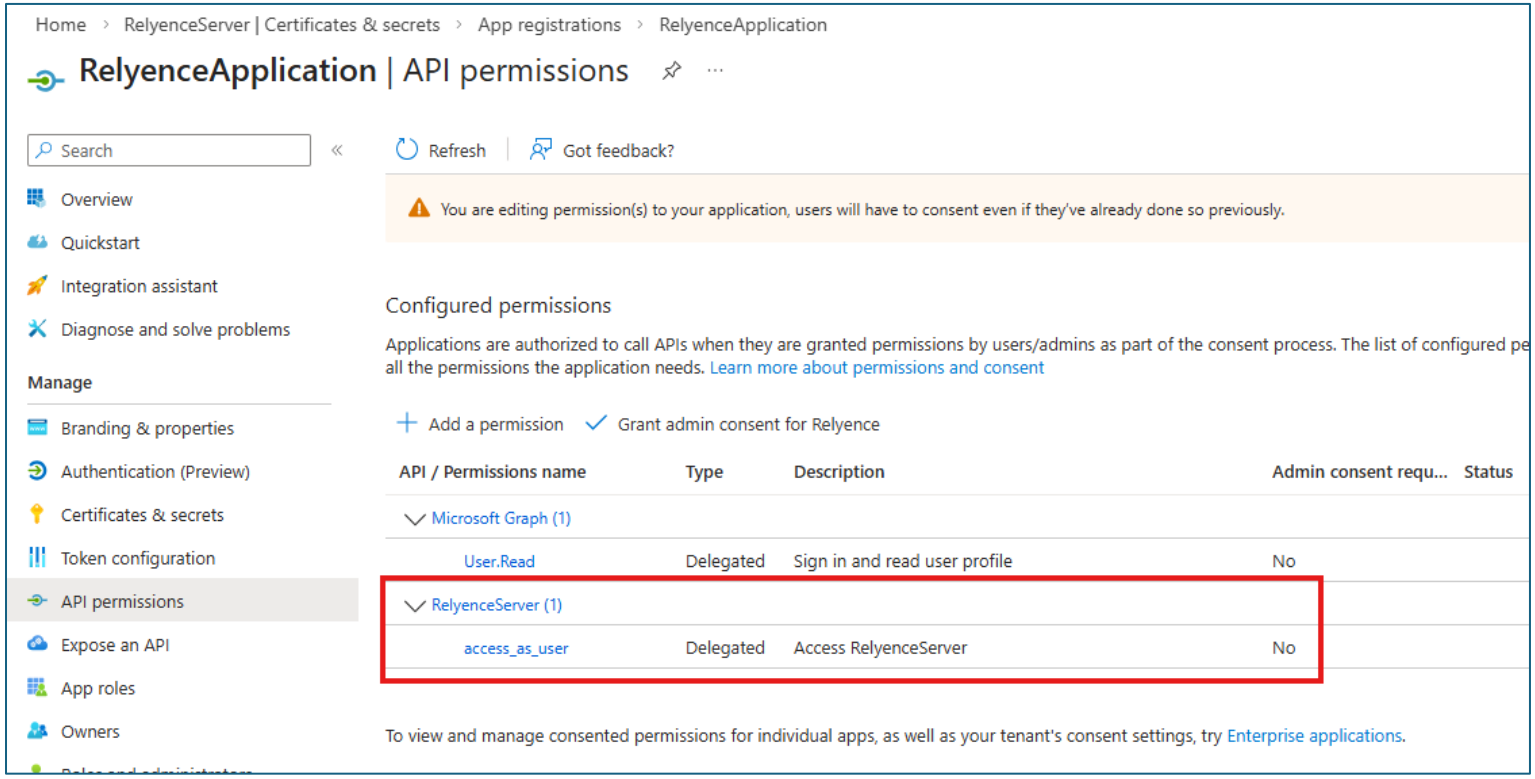
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.



Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

k. Permission Added.

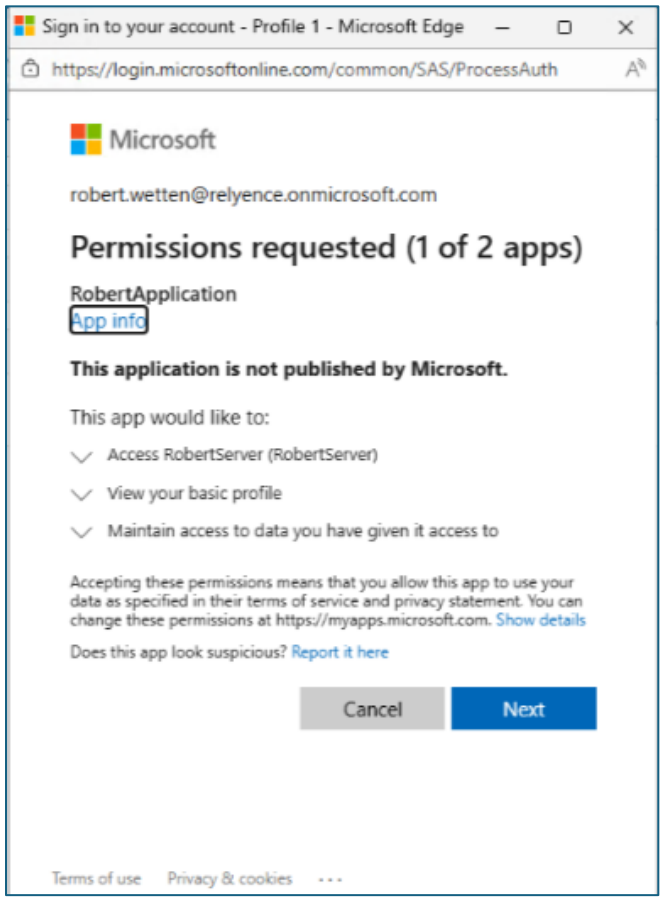
i. No Admin Consent is required here unless your tenant policy enforces it



4. **First Copilot Log-in**

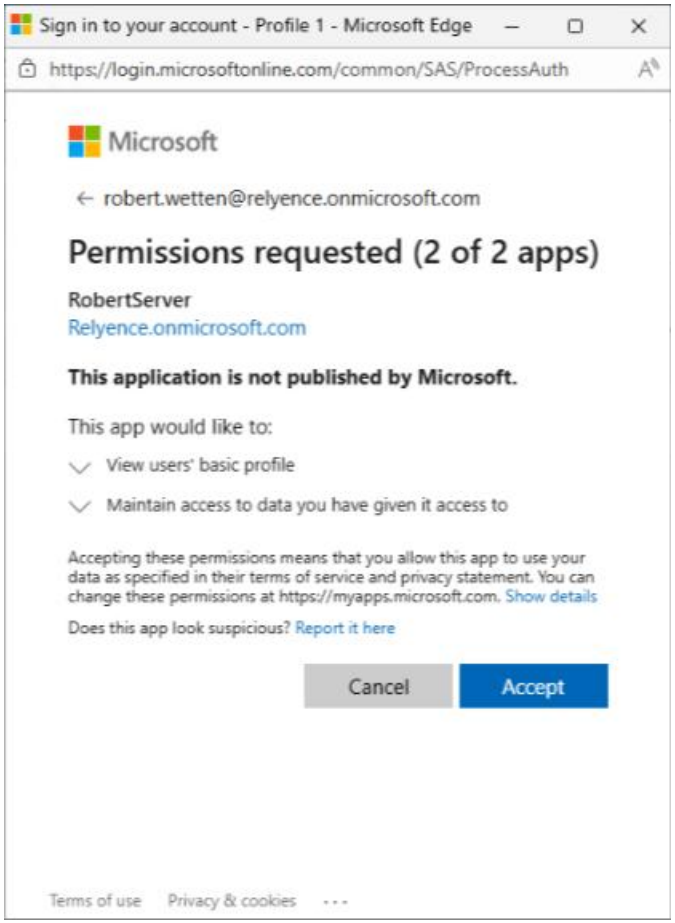
Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

a. When a user uses Copilot within Relyence the first time, they will be prompted to accept the permissions added above.
b. Normal User
    i. First page of permissions



Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

ii. Second page of permissions

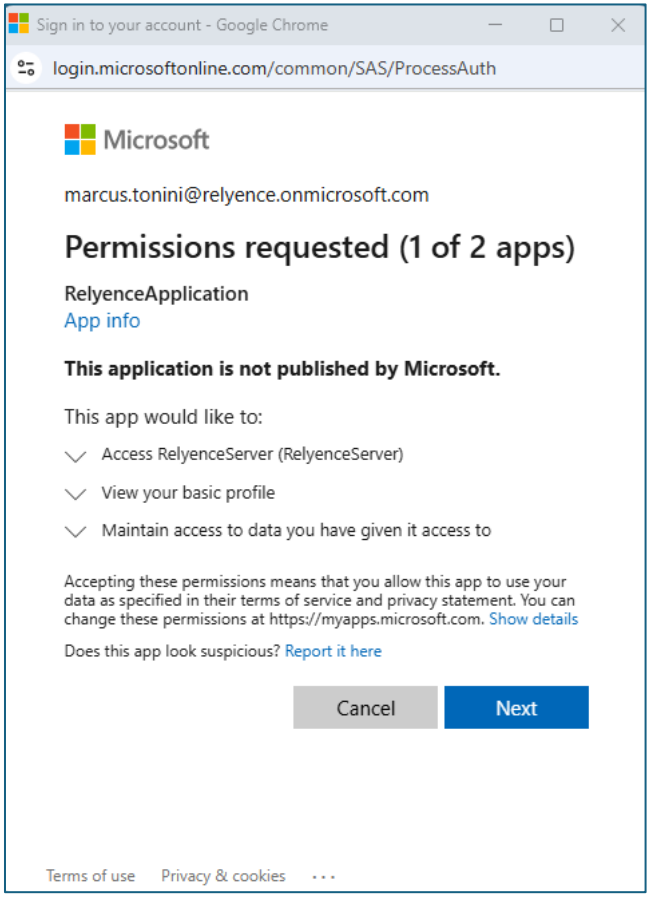


Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

c. Tenant Admin

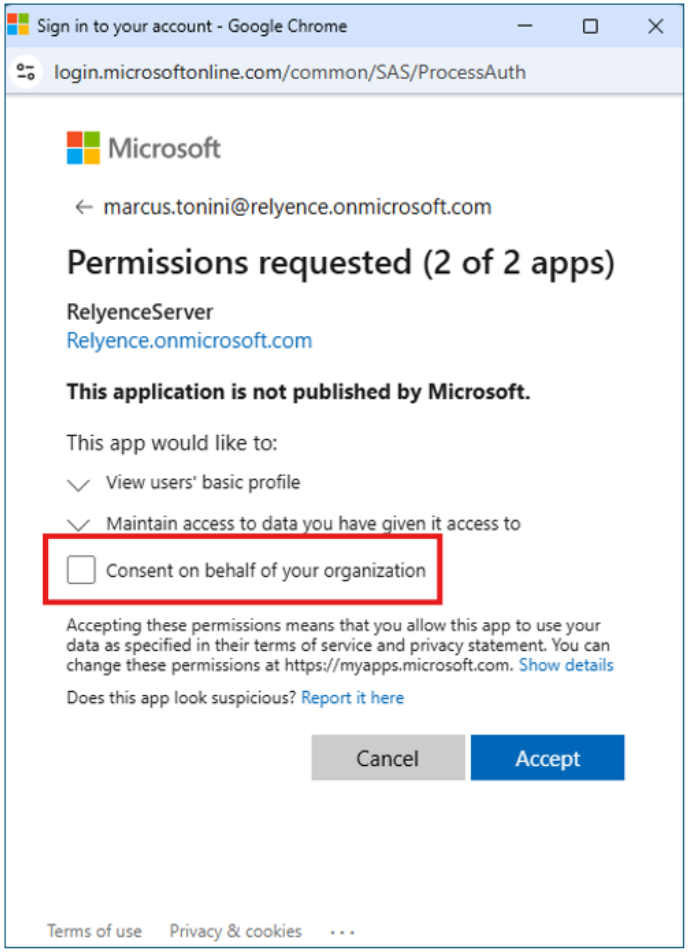
i. A tenant admin can accept the permissions for everyone in the tenant

1. First page of permissions



Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.

2. Second page of permissions
    a. Note the check box for ‘Consent on behalf of your organization’



Relyence is a trademark of Relyence Corporation. Copyright © 2026 Relyence Corporation.