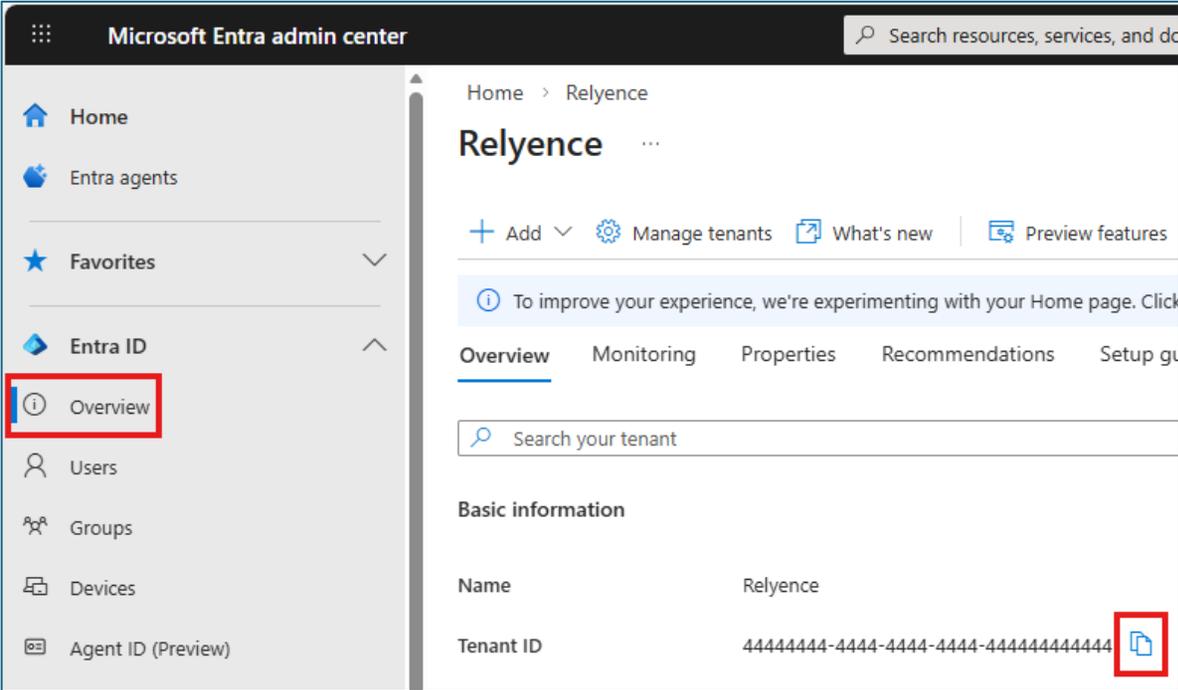


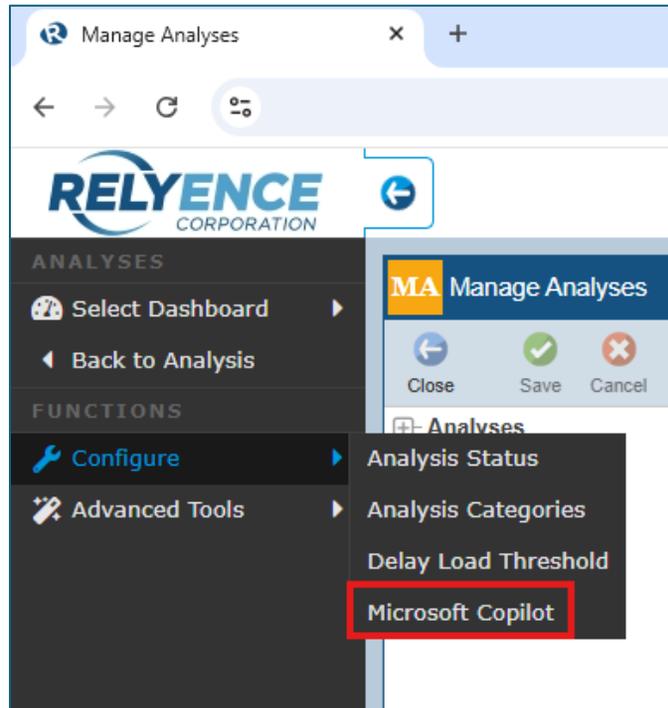
# Microsoft Copilot Integration Setup Guide

## 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



- b. In **Relyence**, open **Manage Analyses**
  - i. Open the Microsoft Copilot Settings
    - 1. **Configure** → **Microsoft Copilot**



---

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## 2. Microsoft Copilot Settings window

### Microsoft Copilot Settings

Microsoft Entra Tenant ID

#### App Registration - Server

Client Secret ID

Client Secret Value

API Scope

#### App Registration - Application

Application (client) ID

---

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

**Microsoft Copilot Settings**

Microsoft Entra Tenant ID  
44444444-4444-4444-4444-444444444444

**App Registration - Server**

Application (client) ID

API Scope

Client Secret Value

**App Registration - Application**

Application (client) ID

---

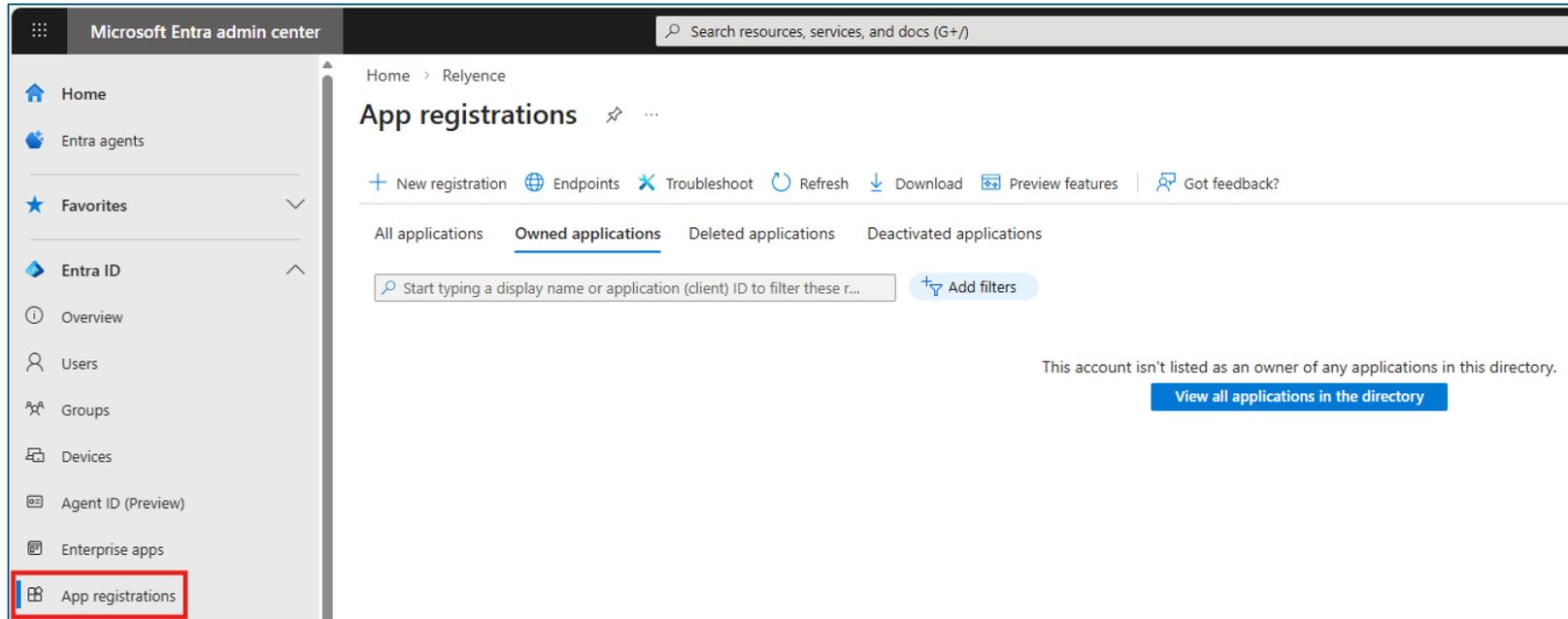
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## 2. Create an App Registration to allow the Relyence server to interact with Entra ID through an API

- a. Back in the **Microsoft Entra Admin Center**, click on **App registrations**



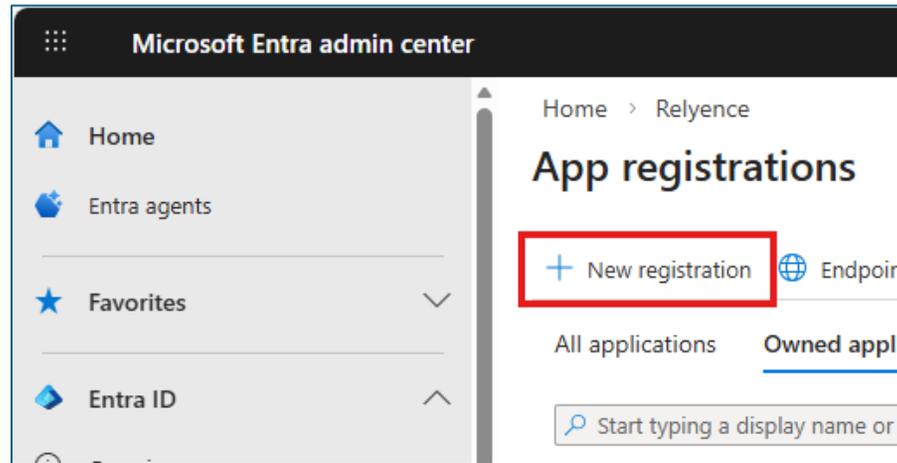
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b. **Click on New registration**



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

---

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Microsoft Entra admin center

Search resources, services, and docs (G+/)

Copilot

Home > Relyence > App registrations

## Register an application

\* Name

The user-facing display name for this application (this can be changed later).

RelyenceServer

Supported account types

Choose the account types that can use this application or access this API

Single tenant only - Relyence

Help me choose

Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing the optional and it can be changed later, but a value is required for most authentication scenarios.

Select a platform e.g. https://example.com/auth

Register an app you're working on here. Integrate gallery apps and other apps from outside your organization. [Enterprise applications.](#)

By proceeding, you agree to the [Microsoft Platform Policies](#)

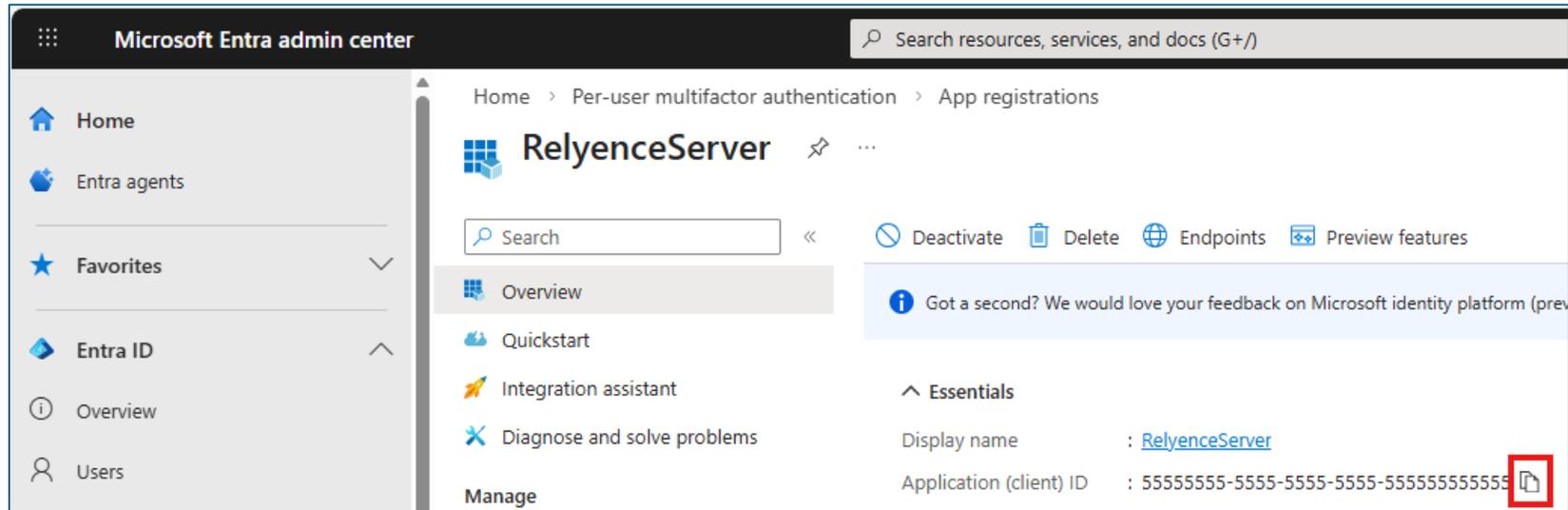
Register

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



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

### Microsoft Copilot Settings

Microsoft Entra Tenant ID  
44444444-4444-4444-4444-444444444444

#### App Registration - Server

Application (client) ID  
55555555-5555-5555-5555-555555555555

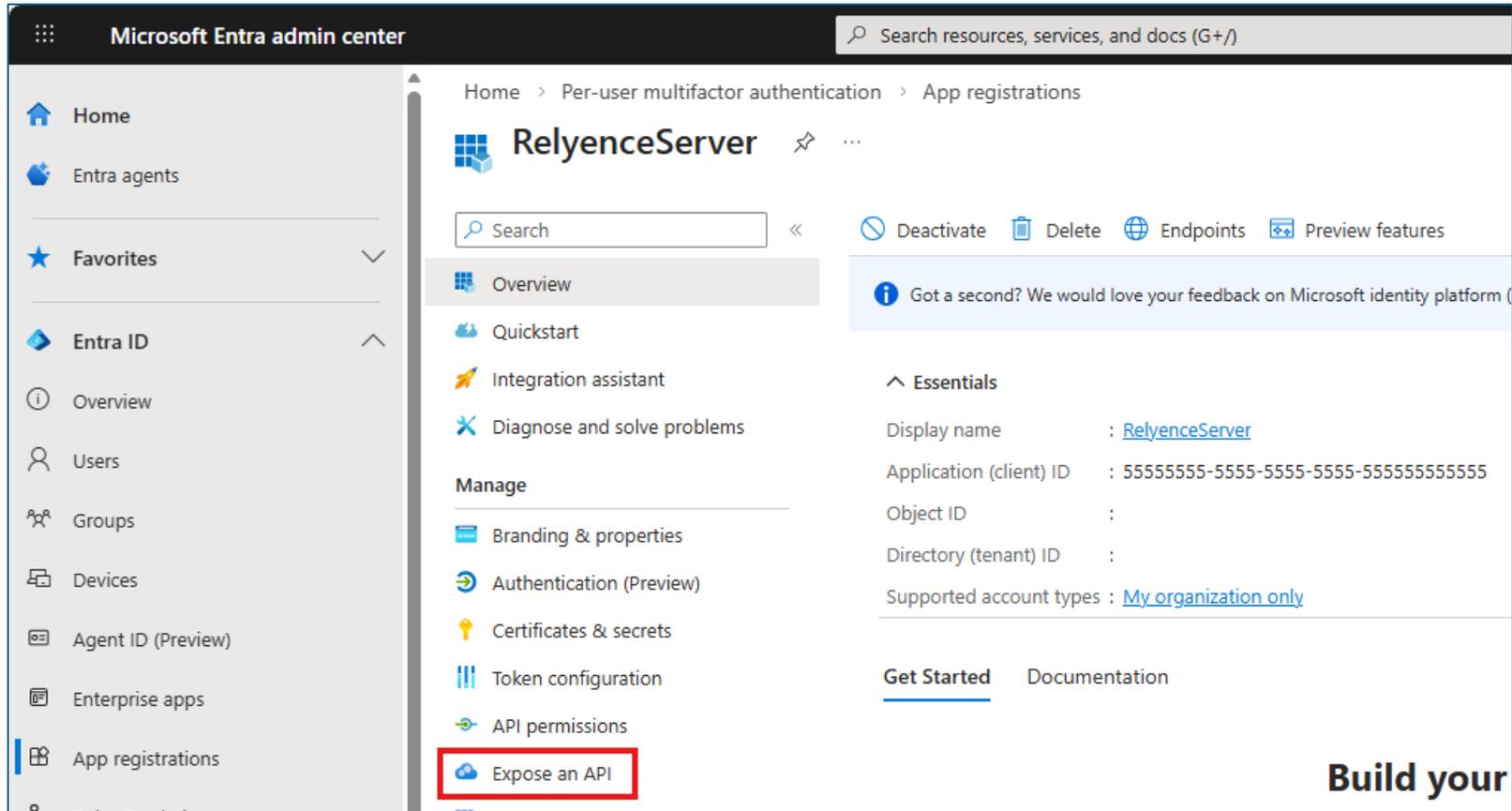
API Scope

Client Secret Value

#### App Registration - Application

Application (client) ID

- f. **Expose an API address for this App Registration that the Relyence server will use**
  - i. **Click on Expose an API.**



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

The screenshot shows the Microsoft Entra admin center interface. The left sidebar contains navigation options: Home, Entra agents, Favorites, Entra ID, Overview, Users, Groups, Devices, Agent ID (Preview), Enterprise apps, App registrations, and Roles & admin. The main content area is titled 'RelyenceServer | Expose an API'. It includes a search bar, a 'Got feedback?' link, and a list of management options: Overview, Quickstart, Integration assistant, and Diagnose and solve problems. Below this is a 'Manage' section with options: Branding & properties, Authentication (Preview), Certificates & secrets, Token configuration, API permissions, and Expose an API. The 'Expose an API' option is highlighted. On the right side, there is a section for 'Application ID URI' with an 'Add' button highlighted in a red box. Below this is a section for 'Scopes defined by this API' with an 'Add a scope' button. The 'Scopes' section currently shows 'No scopes have been defined'. At the bottom, there is a section for 'Authorized client applications'.

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

### Edit application ID URI ✕

The globally unique URI used to identify this web API. It is the prefix for scopes and in access tokens, it is the value of the audience claim. Also referred to as an identifier URI.

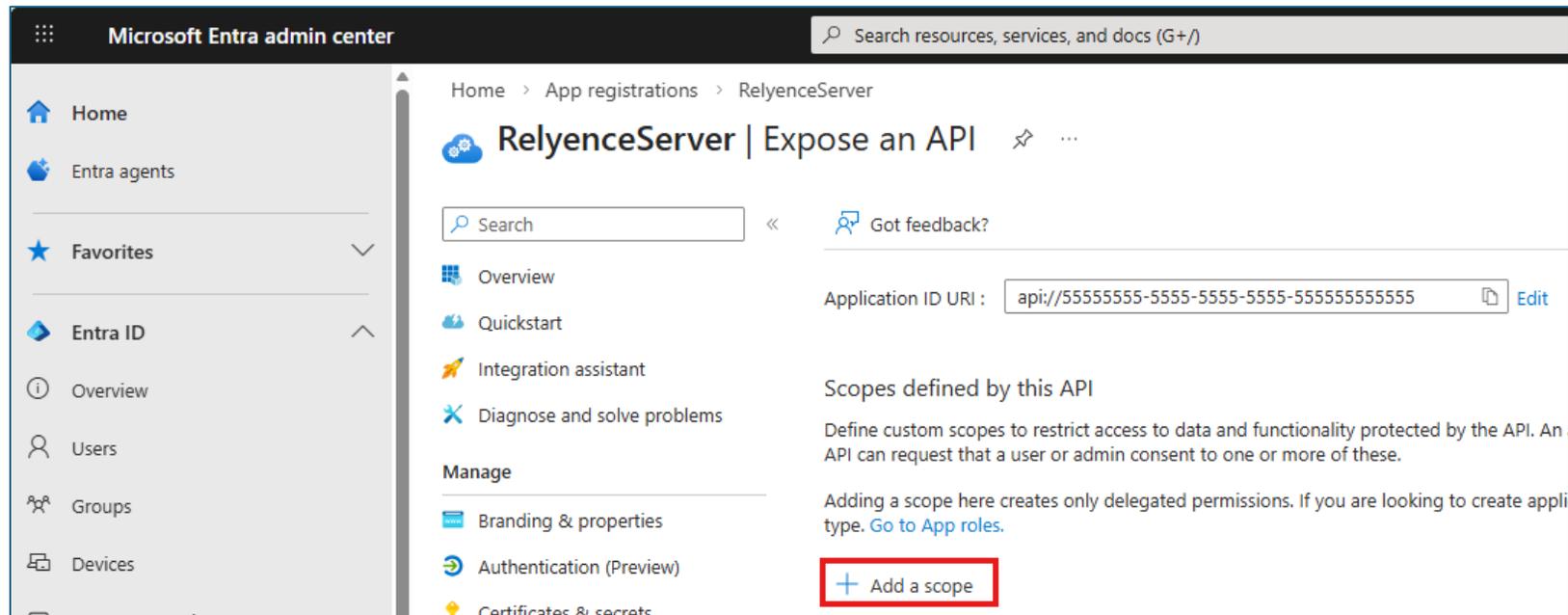
Application ID URI

✓

---

Save Discard

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



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- 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.

## Add a scope ✕

Scope name \* ⓘ  
access\_as\_user ✓  
api://55555555-5555-5555-555555555555/access\_as\_user

Who can consent? ⓘ  
**Admins and users** Admins only

Admin consent display name \* ⓘ  
Access RelyenceServer ✓

Admin consent description \* ⓘ  
Allow the app to access RelyenceServer on behalf of the signed-in user.

User consent display name ⓘ  
Access RelyenceServer ✓

User consent description ⓘ  
Allow the app to access RelyenceServer on your behalf.

State ⓘ  
**Enabled** Disabled

**Add scope** Cancel

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

Home > App registrations > RelyenceServer

## RelyenceServer | Expose an API

Search << Got feedback?

Application ID URI:  Edit

### Scopes defined by this API

Define custom scopes to restrict access to data and functionality protected by the API. An application that requires access to parts of this API can request that a user or admin consent to one or more of these.

Adding a scope here creates only delegated permissions. If you are looking to create application-only scopes, use 'App roles' and define app roles assignable to type. [Go to App roles.](#)

+ Add a scope

Scopes	Who can consent	Admin consent display ...	User consent display na...	State
<a href="#">api://55555555-5555-5555-555555555555/acce...</a>	Admins and users	Access RelyenceServer	Access RelyenceServer	Enabled

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

### Microsoft Copilot Settings

Microsoft Entra Tenant ID  
44444444-4444-4444-4444-444444444444

#### App Registration - Server

Application (client) ID  
55555555-5555-5555-5555-555555555555

**API Scope**  
api://55555555-5555-5555-5555-555555555555/access\_as\_user

Client Secret Value

#### App Registration - Application

Application (client) ID

✕ Cancel   ✓ Save

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

The screenshot shows the Microsoft Entra admin center interface. The left-hand navigation pane is expanded to show the 'API permissions' link, which is highlighted with a red rectangular box. The main content area displays the 'Expose an API' page for an application named 'RelyenceServer'. The page includes a search bar, a 'Got feedback?' link, and a list of management options such as 'Overview', 'Quickstart', 'Integration assistant', and 'Diagnose and solve problems'. Below these, there is a 'Manage' section with options like 'Branding & properties', 'Authentication (Preview)', 'Certificates & secrets', 'Token configuration', 'API permissions', 'Expose an API', 'App roles', and 'Owners'. The 'API permissions' link is highlighted in blue. The right-hand side of the page shows the 'Scopes defined by this API' section, which includes a description of scopes and a table of existing scopes.

Scopes	Who can consent	Admin consent display ...	User consent display na...	State
api://55555555-5555-5555-5555-555555555555/acce...	Admins and users	Access RelyenceServer	Access RelyenceServer	Enabled

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

The screenshot shows the Microsoft Entra admin center interface. The left sidebar contains navigation options: Favorites, Entra ID, Overview, Users, Groups, Devices, Agent ID (Preview), Enterprise apps, App registrations, Roles & admins, Delegated admin partners, and Domain services. The main content area is titled 'RelyenceServer | API permissions'. It includes a search bar, a refresh button, and a 'Got feedback?' link. Below this is a 'Manage' section with options like Branding & properties, Authentication (Preview), Certificates & secrets, Token configuration, API permissions (highlighted), and Expose an API. The 'Configured permissions' section shows a table with one entry: 'Microsoft Graph (1)' with the 'User.Read' permission, which is highlighted with a red box. The table also shows the permission type as 'Delegated' and the description as 'Sign in and read user profile'.

API / Permissions name	Type	Description
Microsoft Graph (1)	Delegated	Sign in and read user profile

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

### Request API permissions

Microsoft Graph  
<https://graph.microsoft.com/> Docs

What type of permissions does your application require?

**Delegated permissions**  
Your application needs to access the API as the signed-in user.

**Application permissions**  
Your application runs as a background service or daemon without a signed-in user.

Select permissions [expand all](#)

**i** 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 organizations where this app will be used. [Learn more](#)

Permission	Admin consent required
OpenId permissions	
<input type="checkbox"/> email View users' email address	No
<input type="checkbox"/> offline_access Maintain access to data you have given it access to	No
<input type="checkbox"/> openid Sign users in	No
<input type="checkbox"/> profile View users' basic profile	No

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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

---

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Select permissions expand all

×

**i** 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 organizations where this app will be used. [Learn more](#) ×

Permission	Admin consent required
▼ Sites (1)	
<input checked="" type="checkbox"/> Sites.Read.All ⓘ Read items in all site collections	No

Update permissionsDiscard

## 8. Permissions added

Home > App registrations > RelyenceServer

### RelyenceServer | API permissions

Search << Refresh Got feedback?

**Warning:** You are editing permission(s) to your application, users will have to consent even if they've already done so previously.

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 Relyence

API / Permissions name	Type	Description	Admin consent requ...	Status
Microsoft Graph (8)				
ChannelMessage.Read.All	Delegated	Read user channel messages	Yes	⚠ Not granted for Relyence ...
Chat.Read	Delegated	Read user chat messages	No	...
ExternalItem.Read.All	Delegated	Read items in external datasets	Yes	⚠ Not granted for Relyence ...
Mail.Read	Delegated	Read user mail	No	...
OnlineMeetingTranscript.Read	Delegated	Read all transcripts of online meetings.	Yes	⚠ Not granted for Relyence ...
People.Read.All	Delegated	Read all users' relevant people lists	Yes	⚠ Not granted for Relyence ...
Sites.Read.All	Delegated	Read items in all site collections	No	...
User.Read	Delegated	Sign in and read user profile	No	...

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

Home > App registrations > RelyenceServer

## RelyenceServer | API permissions

Search Refresh Got feedback?

- Overview
- Quickstart
- Integration assistant
- Diagnose and solve problems

**Manage**

- Branding & properties
- Authentication (Preview)
- Certificates & secrets
- Token configuration
- API permissions**
- Expose an API
- App roles
- Owners

Granting tenant-wide consent may revoke permissions that have already been granted tenant-wide for that application. Permissions that have been granted tenant-wide for that application will be removed.

The "Admin consent required" column shows the default value for an organization. However, user consent can be customized where this app will be used. [Learn more](#)

### Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. All the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission  Grant admin consent for Relyence

API / Permissions name	Type	Description	Admin consent required
Microsoft Graph (8)			
ChannelMessage.Read.All	Delegated	Read user channel messages	Yes
Chat.Read	Delegated	Read user chat messages	No

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

Home > App registrations > RelyenceServer

## RelyenceServer | API permissions

Search << Refresh Got feedback?

Overview  
Quickstart  
Integration assistant  
Diagnose and solve problems

Manage

- Branding & properties
- Authentication (Preview)
- Certificates & secrets
- Token configuration
- API permissions**
- Expose an API
- App roles

**Grant admin consent confirmation.**

Do you want to grant consent for the requested permissions for all accounts in Relyence? This will update any existing admin consent records this application already has to match what is listed below.

**Yes** No

where this app will be used. [Learn more](#)

### 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 all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission ✓ Grant admin consent for Relyence

API / Permissions name	Type	Description	Admin consent rec
Microsoft Graph (8)			
ChannelMessage.Read.All	Delegated	Read user channel messages	Yes

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c. Verify permissions were granted

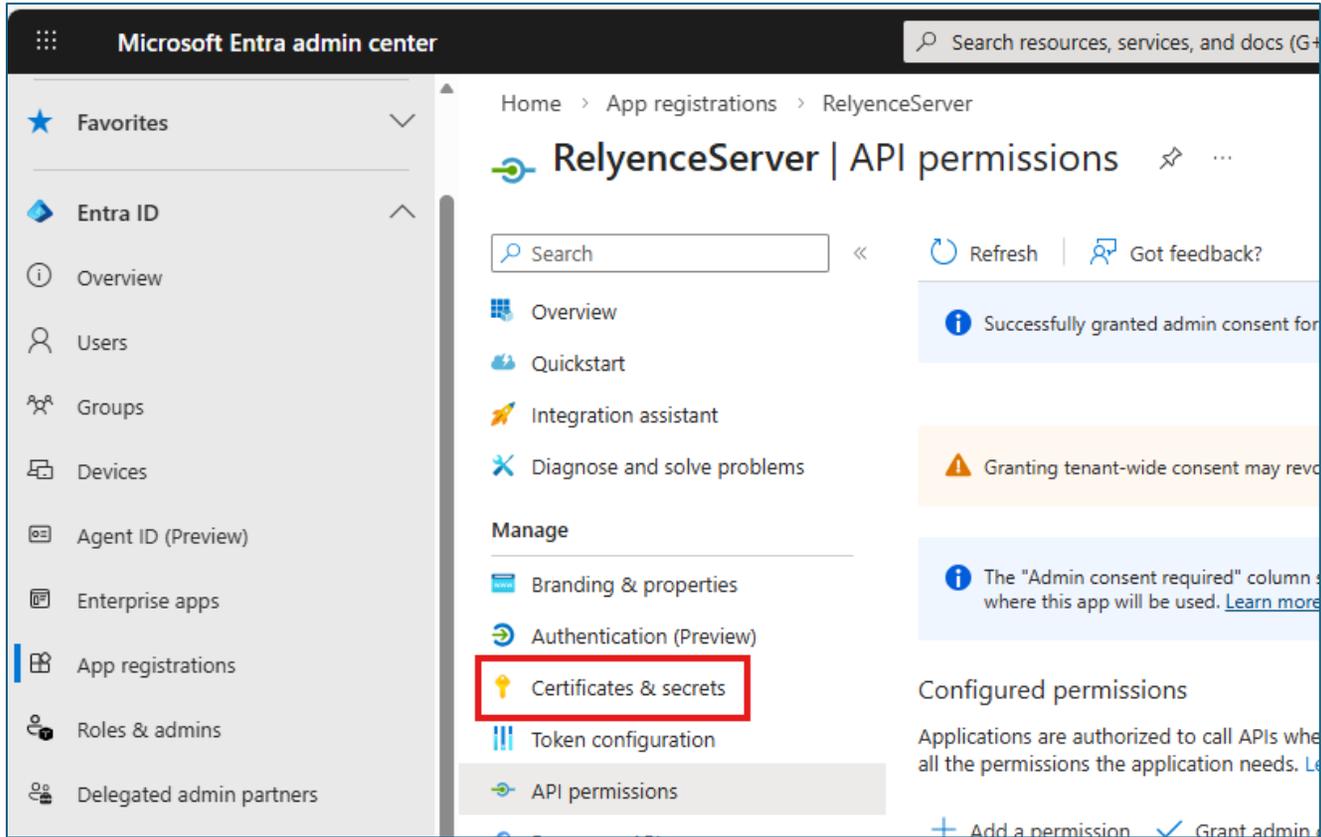
API / Permissions name	Type	Description	Admin consent requ...	Status	
∨ Microsoft Graph (8)					...
<a href="#">ChannelMessage.Read.All</a>	Delegated	Read user channel messages	Yes	✔ Granted for Relyence	...
<a href="#">Chat.Read</a>	Delegated	Read user chat messages	No	✔ Granted for Relyence	...
<a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

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- g. Creating a Client Secret**
  - i. Click on Certificates and secrets**

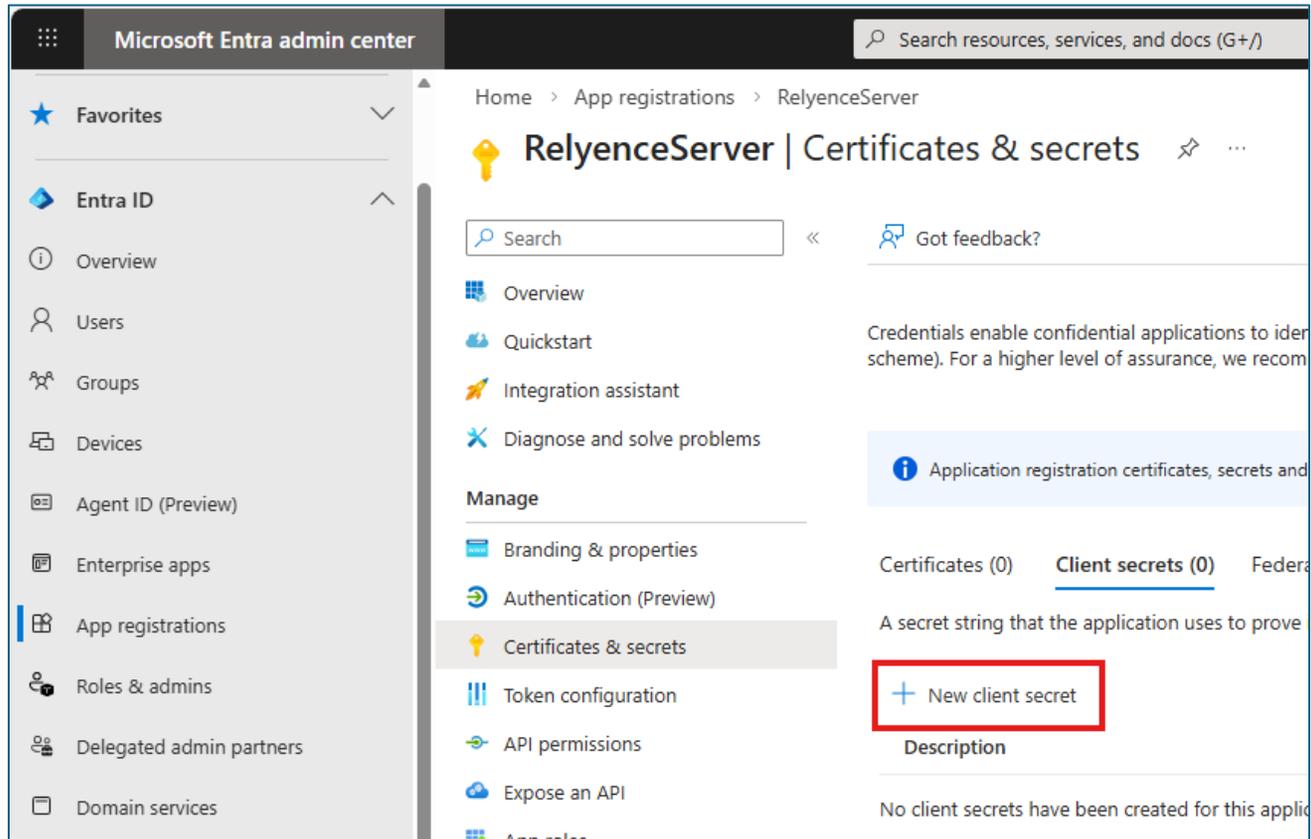


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- ii. On the Certificates & secrets page, **click** the **New client secret** button

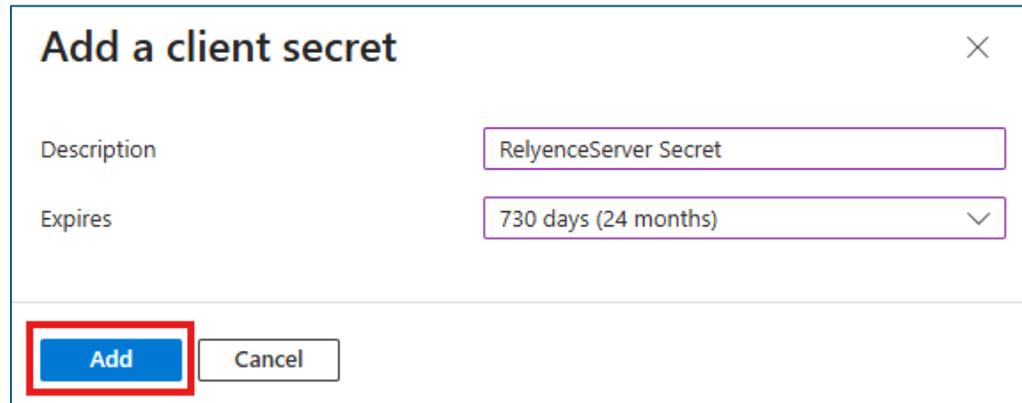


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- iii. The **Add a client secret** window opens.
1. Fill in a **Description** and pick an **expiration** date that works for you.
  2. **Click Add**



**Add a client secret** [Close]

Description: RelyenceServer Secret

Expires: 730 days (24 months) [Dropdown]

**Add** Cancel

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.

Home > App registrations > RelyenceServer

## RelyenceServer | Certificates & secrets

Search << Got feedback?

- Overview
- Quickstart
- Integration assistant
- Diagnose and solve problems

Manage

- Branding & properties
- Authentication (Preview)
- Certificates & secrets**
- Token configuration
- API permissions
- Expose an API
- App roles
- Owners
- Roles and administrators

Got a second to give us some feedback? →

Credentials enable confidential applications to identify themselves to the authentication service when receiving tokens at a web addressable location (using an HTTPS scheme). For a higher level of assurance, we recommend using a certificate (instead of a client secret) as a credential.

Application registration certificates, secrets and federated credentials can be found in the tabs below.

Certificates (0) Client secrets (1) Federated credentials (0)

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

+ New client secret

Description	Expires	Value	Secret ID
RelyenceServer Secret	2/18/2028	[REDACTED]	[REDACTED]

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- v. Using the Copy button, **copy** the secret's **Value**.
- vi. **Paste** the value into **Client Secret Value** in Relyence.

**Microsoft Copilot Settings**

**Microsoft Entra Tenant ID**  
44444444-4444-4444-4444-444444444444

**App Registration - Server**

**Application (client) ID**  
55555555-5555-5555-5555-555555555555

**API Scope**  
api://55555555-5555-5555-5555-555555555555/access\_as\_user

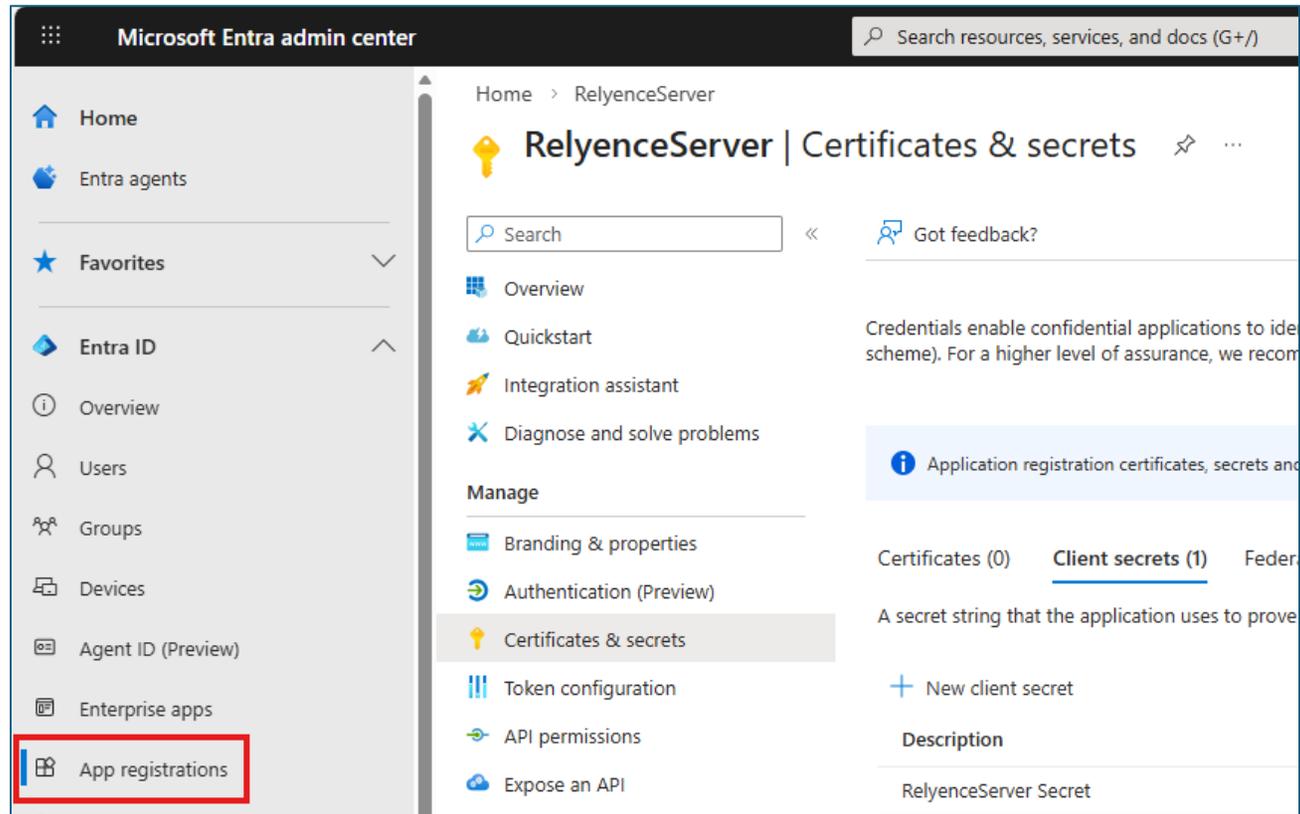
**Client Secret Value**  
AbcdefghijklmnopqrstuvwxyzAbcdefghijklmn

**App Registration - Application**

**Application (client) ID**

### 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**

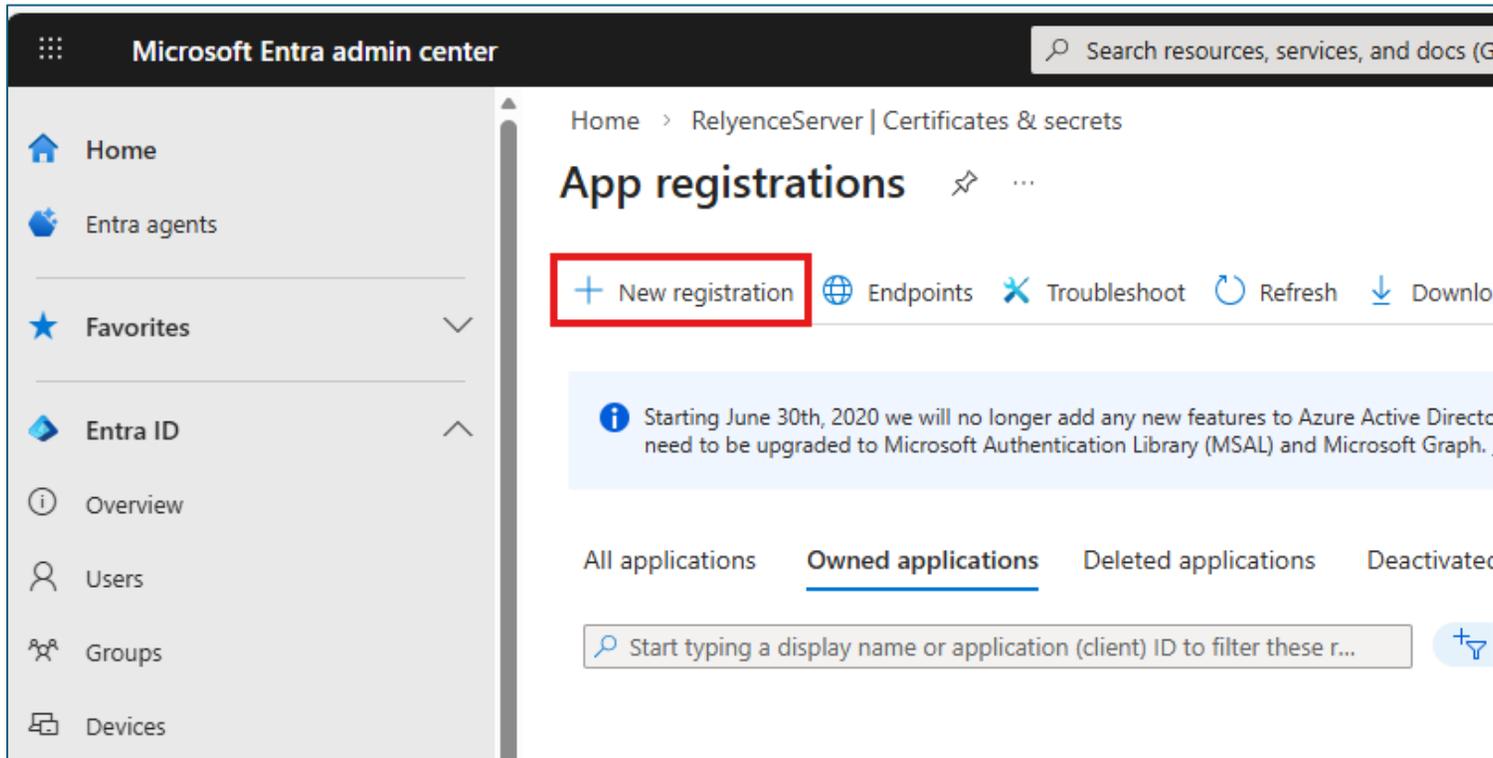


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b. Click on **New registration**



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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

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## Microsoft Copilot Settings

Microsoft Entra Tenant ID

### App Registration - Server

Application (client) ID

API Scope

Client Secret Value

### App Registration - Application

Application (client) ID

Redirect URI



✕ Cancel

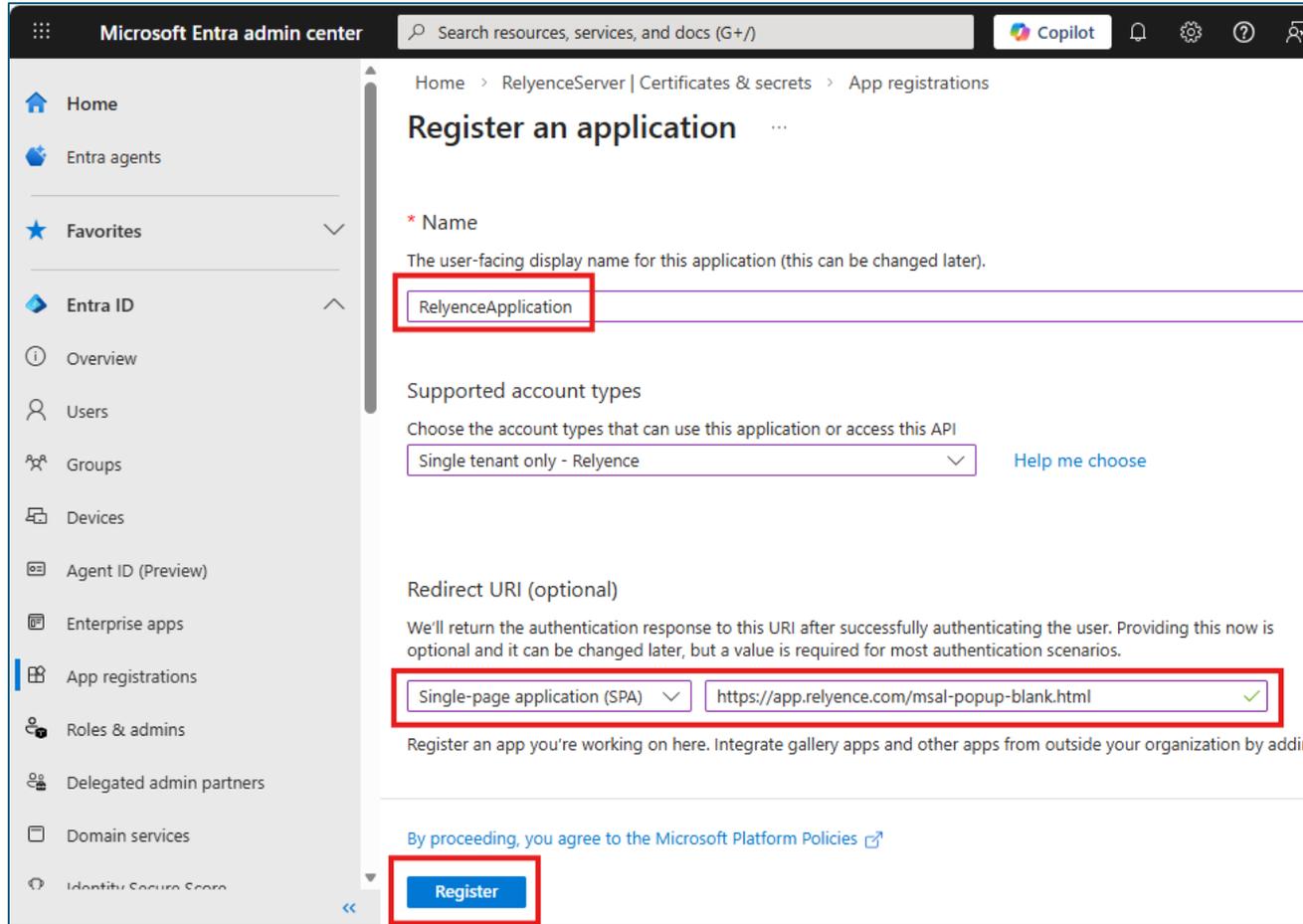
✓ Save

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



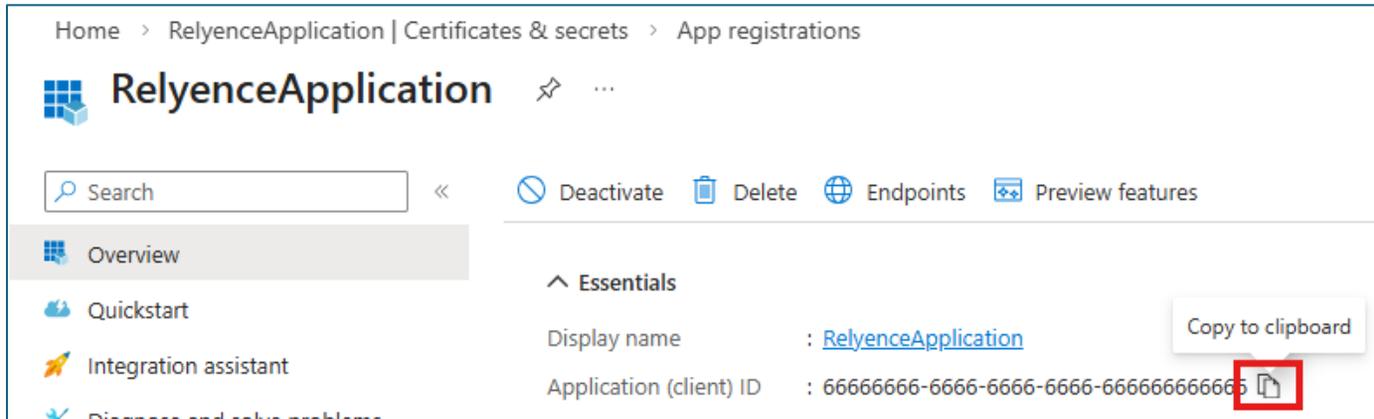
iv. **Click Register**

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



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

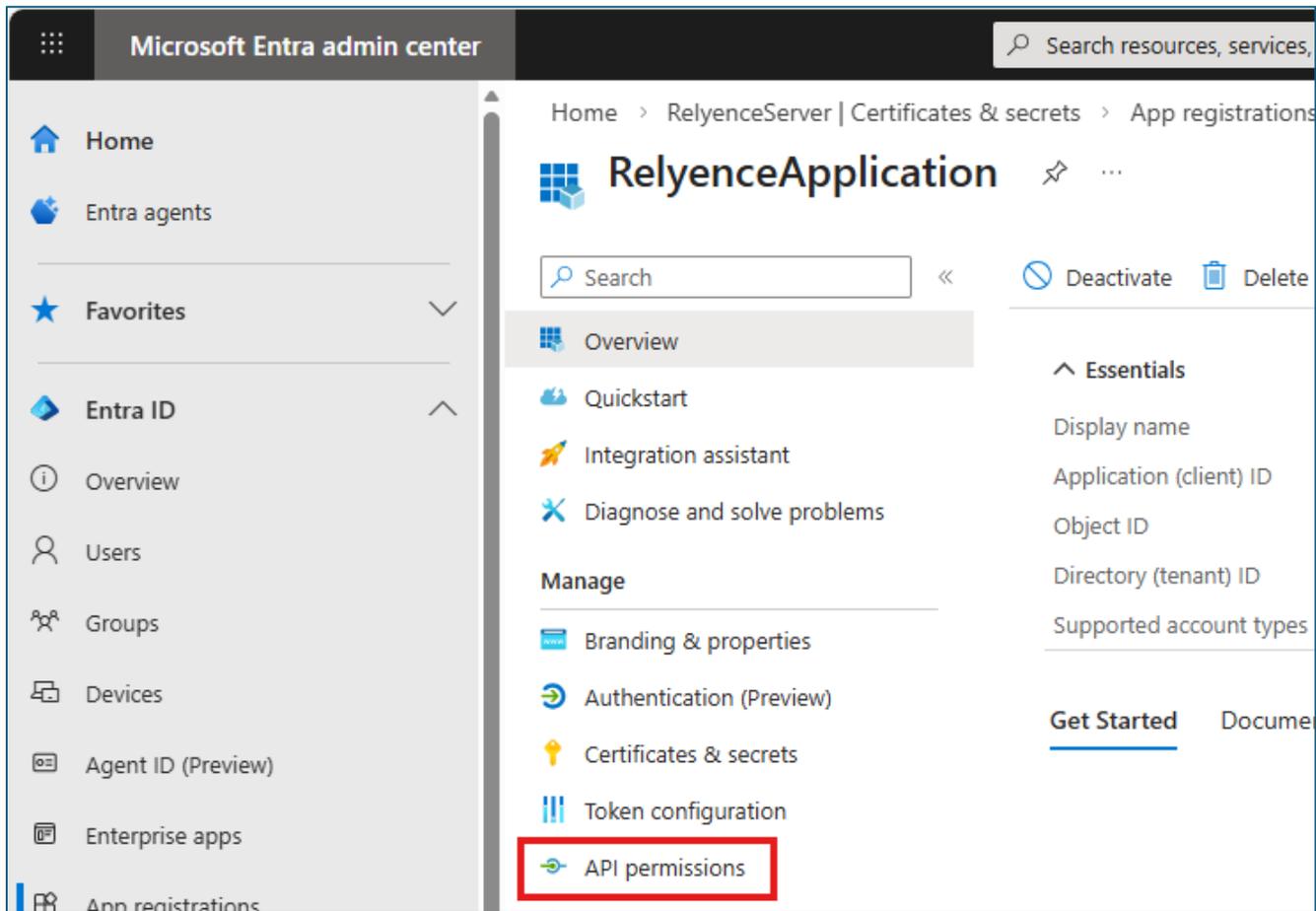
The image shows a 'Microsoft Copilot Settings' form. It has a blue header with the title 'Microsoft Copilot Settings'. Below the header, there are several sections. The first is 'Microsoft Entra Tenant ID' with a text input field containing '44444444-4444-4444-4444-444444444444'. The second is 'App Registration - Server' with a blue header, containing 'Application (client) ID' (55555555-5555-5555-5555-555555555555), 'API Scope' (api://55555555-5555-5555-5555-555555555555/access\_as\_user), and 'Client Secret Value' (AbcdefghijklmnopqrstuvwxyzAbcdefghijklmn). The third section, 'App Registration - Application', is highlighted with a red border and contains 'Application (client) ID' (66666666-6666-6666-6666-666666666666). At the bottom right are 'Cancel' and 'Save' buttons.

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



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

Home > RelyenceServer | Certificates & secrets > App registrations > RelyenceApplication

## RelyenceApplication | API permissions

Search << Refresh | Got feedback?

- Overview
- Quickstart
- Integration assistant
- Diagnose and solve problems

**Manage**

- Branding & properties
- Authentication (Preview)
- Certificates & secrets
- Token configuration
- API permissions**
- Expose an API
- App roles
- Owners

Granting tenant-wide consent may revoke permissions that have already been granted.

The "Admin consent required" column shows the default value for where this app will be used. [Learn more](#)

### Configured permissions

Applications are authorized to call APIs when they are granted permissions. All the permissions the application needs. [Learn more about permissions](#)

**+ Add a permission** ✓ Grant admin consent for Relyence

API / Permissions name	Type	Description
Microsoft Graph (1)		
User.Read	Delegated	Sign in and read

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

**Request API permissions**

Select an API

Microsoft APIs **APIs my organization uses** My APIs

Commonly used Microsoft APIs

**Microsoft Graph**  
Take advantage of the tremendous amount of data in Office 365, Enterprise Mobility + Security, and Windows 10. Access Microsoft Entra ID, Excel, Intune, Outlook/Exchange, OneDrive, OneNote, SharePoint, Planner, and more through a single endpoint.

**Azure DevOps**  
Integrate with Azure DevOps and Azure DevOps server

**Azure Service Management**  
Programmatic access to much of the functionality available through the Azure portal

**Dynamics 365 Business Central**  
Programmatic access to data and functionality in Dynamics 365 Business Central

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

**Request API permissions**

Select an API

Microsoft APIs    APIs my organization uses    My APIs

Apps in your directory that expose APIs are shown below

🔍 RelyenceServer

Name
RelyenceServer

- j. On the next window, **select Delegated permissions** (if not already selected)
  - i. **Select access\_as\_user**
  - ii. **Click Add Permissions**

## Request API permissions

< All APIs

**RelyenceServer**  
api://606ffef3-8157-42f5-8fc3-1c4aee87d631

What type of permissions does your application require?

**Delegated permissions**  
Your application needs to access the API as the signed-in user.

**Application permissions**  
Your application runs as a background service or daemon without a signed-in user.

Select permissions expand all

**i** 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 organizations where this app will be used. [Learn more](#)

Permission	Admin consent required
Permissions (1)	
<input checked="" type="checkbox"/> access_as_user ⓘ Access RelyenceServer	No

**Add permissions** Discard

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- k. Permission Added.
  - i. No Admin Consent is required here unless your tenant policy enforces it

Home > RelyenceServer | Certificates & secrets > App registrations > RelyenceApplication

**RelyenceApplication | API permissions**

Search << Refresh Got feedback?

**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 includes all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission ✓ Grant admin consent for Relyence

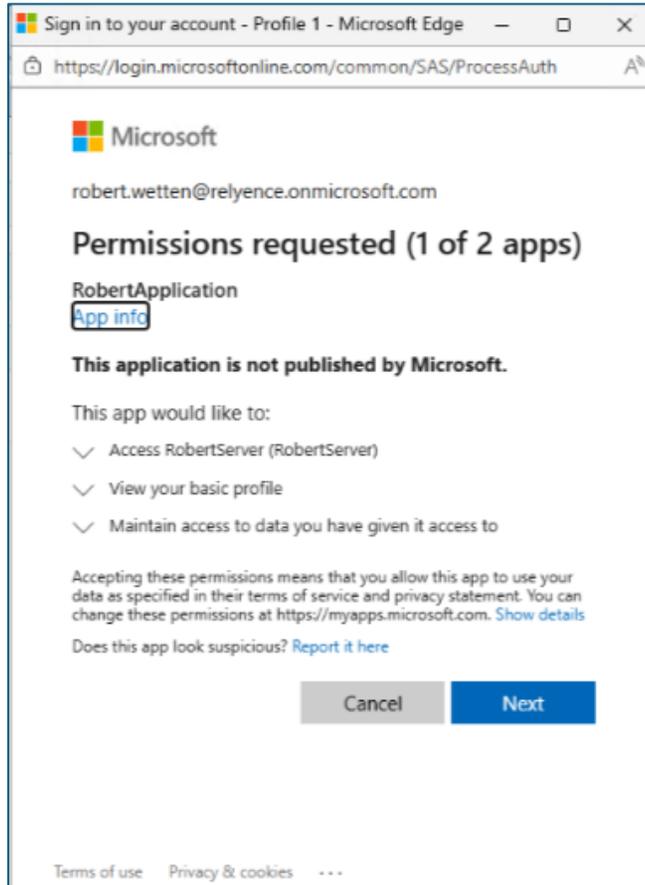
API / Permissions name	Type	Description	Admin consent required	Status
Microsoft Graph (1)				
User.Read	Delegated	Sign in and read user profile	No	
RelyenceServer (1)				
access_as_user	Delegated	Access RelyenceServer	No	

To view and manage consented permissions for individual apps, as well as your tenant's consent settings, try [Enterprise applications](#).

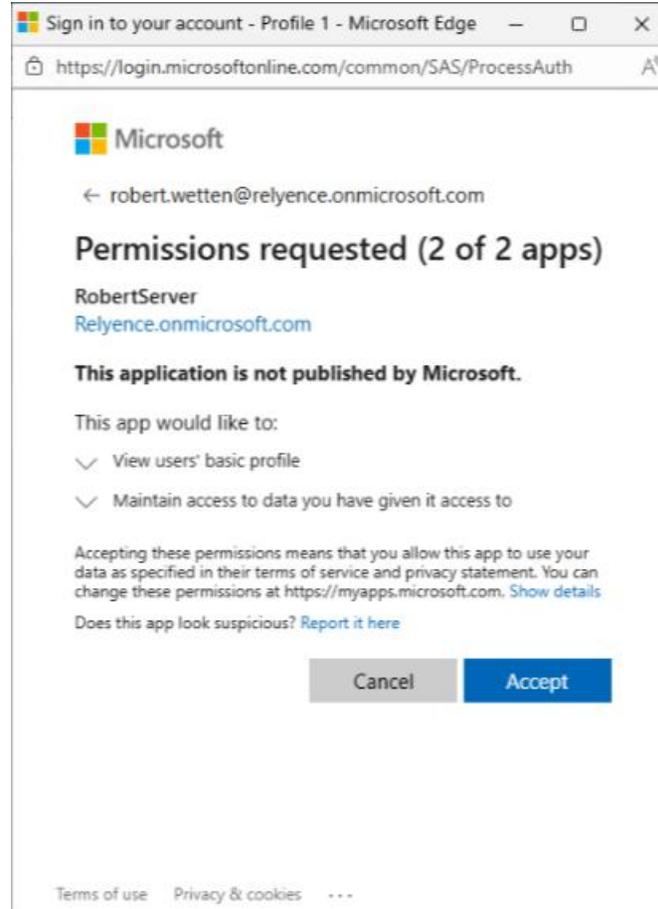
#### 4. First Copilot Log-in



- 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



ii. Second page of permissions



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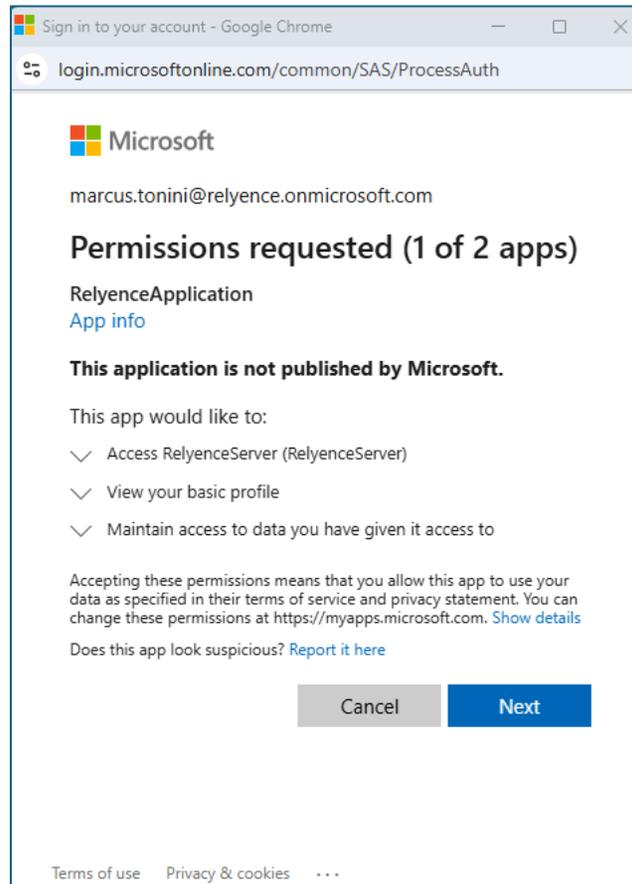
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c. Tenant Admin

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

1. First page of permissions



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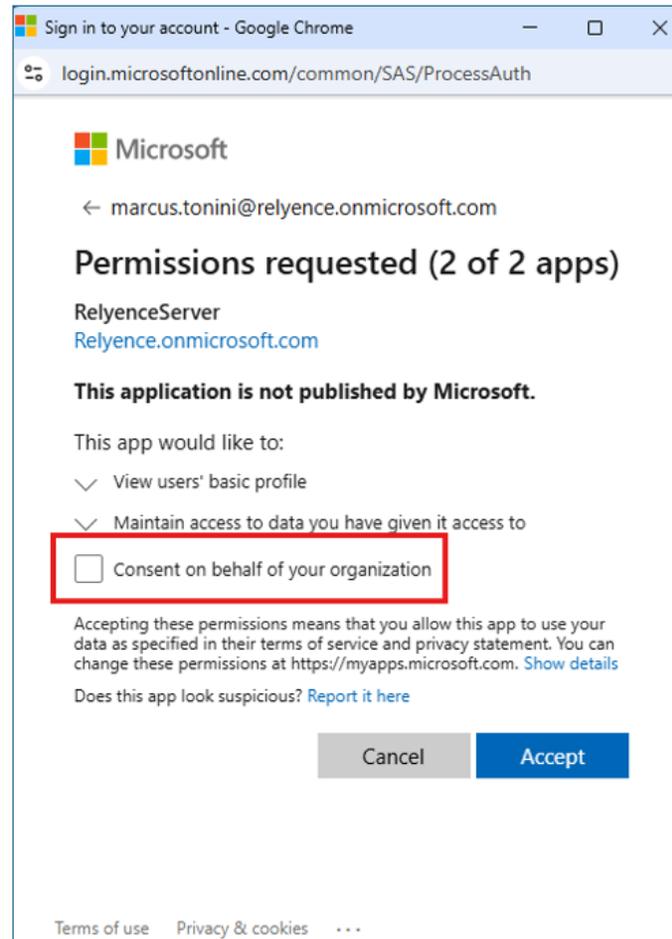
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2. Second page of permissions
  - a. Note the check box for 'Consent on behalf of your organization'



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