Recast

Set Up Copilot Integration for Application Workspace Reporting

Last Modified on 2026-11-27

To set up the integration, you'll need to complete the following tasks described below:

- Create Application Workspace API Credentials
- Create the Copilot Studio Agent
- Create the Power Automate Agent Flow
- Configure the OData HTTP calls
- Publish the Agent Flow as an Agent Tool

Create Application Workspace API Credentials

To create required Application Workspace API credentials:

1. In Application Workspace, go to **Manage** > **System** > **API Access**.

2. Select **Create**.

3. Enter a description that identifies the agent flow and set an expiration date.

4. Finish the wizard. Copy the generated secret immediately and store it in an approved secure location; it cannot be displayed again.

5. Open the newly created client secret and copy the client-secret username. The username is static and unique per zone.

CREDENTIAL MAPPING
Power Automate Basic authentication username = Application Workspace client-secret username
Password = the secret value shown when the client secret is created

Create the Copilot Studio Agent

To create the Copilot Studio agent:

1. Open Copilot Studio in the intended Power Platform environment.

2. Create a custom agent. Give it a clear name, such as Application Workspace assistant.

3. Add a concise description that explains the data the agent can retrieve and the users it is intended for.

4. Add instructions that tell the agent when to use the Application Workspace reporting tool, to avoid guessing, and to say when the returned dataset does not support the request.

5. Save the agent and test a simple conversational response before adding the flow.

Suggested instructions for the Copilot Studio Agent

- Use the Application Workspace reporting tool for questions about applications, deployments, launches, installations, and related health data.
- Base answers only on data returned by the tool.
- If a requested field is unavailable or ambiguous, say so and ask for the minimum clarification needed.

- Do not reveal credentials or raw secrets.

Create the Power Automate Agent Flow

From the agent's Tools page, select **Add tool** > **Agent flow**. Copilot Studio creates a starter flow with the required 'When an agent calls the flow' trigger and 'Respond to the agent' action.

1. Keep the agent trigger. The current sandbox does not require an input parameter; a production design can accept a dataset name, user identifier, application name, date range, or another constrained parameter.

2. Initialize a string variable named AllData with an empty value.

3. Add an HTTP action named HTTP call to locate all available datasets.

4. Add Parse JSON for the first HTTP response.

5. Add Apply to each and iterate over body('Parse JSON')?['value'].

6. Inside the loop, call the selected dataset and append its name and response body to AllData.

7. Return AllData as a text output named alldata in Respond to the agent.

8. In the Respond to the agent action settings, open Networking and keep Asynchronous response turned off so the flow returns in real time.

9. Publish the flow.

Configure the OData HTTP calls

Discovery request

```
Method: GET
URI: https://<zone-fqdn>/api/reports/v4/
Authentication type: Basic
Username: <client-secret username>
Password: <client secret>
```

The response is an OData document with a value array. The exported sandbox definition expects each entry to include name, kind, and url.

```
Minimal Parse JSON shape
{
"type": "object",
"properties": {
"value": {
"type": "array",
"items": {
"type": "object",
"properties": {
"name": { "type": "string" },
"kind": { "type": "string" },
"url": { "type": "string" }
},
"required": ["name", "kind", "url"]
}
}
}
}
```

Dataset request inside the loop

```
Method: GET
URI expression:
concat('https://<zone-fqdn>/api/reports/v4/', items('Apply_to_each')?['name'])
Authentication: same Basic credential
```

Append each result to AllData with a recognizable delimiter:

```
concat(
'=== ', items('Apply_to_each')?['name'], ' ===', '\n',
string(body('Individual_Dataset_HTTP_Call')), '\n\n'
)
```

PRODUCTION RECOMMENDATIONS

- Do not retrieve every dataset for every question unless the payload is small and the run consistently completes within the agent-flow action limit.
- Prefer an allowlist and route the request to only the needed dataset.
- Where the selected dataset supports them, use OData query options such as $select, $filter, and $top to reduce data volume, and validate each option against your Application Workspace version.

Publish the Agent Flow as an Agent Tool

To publish the Agent flow:

1. Open the agent and go to Tools.

2. Select Add a tool and Flow.

3. Choose the published Application Workspace flow and select Add and configure.

4. Give the tool a name and description. The description should tell the orchestrator when the tool applies and what its output contains.

5. Configure completion behavior, save the tool, and confirm it appears in the agent's tool list.

Publish and share the agent

To publish the agent:

1. Test the agent in the Copilot Studio test pane.

2. Select Publish and confirm. Republish after every change that users need to receive.

3. Open Channels and select the Microsoft 365 and Microsoft Teams channel.

4. Turn on Make agent available in Microsoft Copilot if the agent should be available from Microsoft 365 Copilot, and then add the channel.

5. Install and test the published version yourself before expanding access.

Choose an availability option

Audience	Method	Notes
Pilot user	Install for yourself / see the agent in Teams.	Best first validation of the published channel experience.
Small approved group	Share the agent and use the installation link or Show to my teammates and shared users.	Users still need permission to the agent; possession of a link alone is not sufficient.
Organisation	Show to everyone in my org and submit to the organisation catalog.	Requires administrator approval. Use only after security and data-scope review.

In Microsoft 365 Copilot, users can invoke the installed agent by typing @ and selecting it, or by selecting it from the available agents. A newly published version appears in new sessions. Use start over or begin a new session when validating an update.

BEFORE BROAD DISTRIBUTION

Verify the shared Application Workspace credential exposes only data appropriate for every person who can access the agent. Microsoft 365 does not automatically translate the user's Application Workspace permissions to the sharedOData connection.