

IT Setup Instructions for Copilot Studio Participants

These instructions outline what your IT team may need to provision or enable if users are building agents directly in **Microsoft Copilot Studio** and encounter setup, access, publishing, or connector issues.

This guidance is intended for:

- Copilot Studio makers
 - advanced agent scenarios
 - connectors and actions
 - organisational data grounding
 - Power Platform integration
 - enterprise agent deployment
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1. What users need

Users typically need:

- A work or school Microsoft Entra ID account
 - Access to a Microsoft 365 tenant
 - Access to Microsoft Copilot Studio
 - A valid Copilot Studio licensing path:
 - Copilot Studio licence, OR
 - Microsoft 365 Copilot licence with supported scenarios, OR
 - Copilot Studio PAYG / Copilot Credits enabled
 - Access to a Power Platform environment
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2. What IT may need to provision

Copilot Studio access

Users must be able to access:

- [Copilot Studio](#)

IT may need to:

- assign licensing
- enable Copilot Studio access
- allow Power Platform maker access

Power Platform environment access

Users need access to a Power Platform environment where agents can be created.

IT may need to:

- provision an environment
- add users to the environment
- assign maker permissions

Without environment access, users may not be able to create agents.

Appropriate security roles

Depending on the scenario, users may require:

- Environment Maker
- Environment Admin
- Copilot Studio maker permissions

Publishing and connector setup often require elevated rights.

Copilot Studio PAYG / Copilot Credits

If agents will use:

- tenant grounding,
- organisational knowledge,
- connectors,
- generative answers,
- or advanced orchestration,

IT may need to configure:

- Copilot Studio PAYG billing
 - Copilot Credits
 - billing policies
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3. Common issues and what users should ask IT

Users cannot access Copilot Studio

Ask IT to confirm:

- Copilot Studio licensing/access is assigned
 - Power Platform access is enabled
 - tenant policies allow Copilot Studio usage
 - the user is in an allowed security group
 - the user is signed into the correct Entra ID tenant
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Users cannot create an agent

Ask IT to confirm:

- a Power Platform environment exists
 - the user has Environment Maker permissions
 - Copilot Studio maker permissions are enabled
 - environment DLP (Data Loss Prevention) policies are not blocking creation
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Users cannot see connectors or actions

Ask IT to confirm:

- connectors are allowed by DLP policies
 - premium connectors are permitted
 - custom connectors are permitted (if required)
 - connector governance policies are not blocking usage
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Users cannot use SharePoint or organisational data

Ask IT to confirm:

- Copilot grounding features are enabled
- users have access to the underlying SharePoint/Teams content
- Microsoft Search indexing is working
- content permissions are correctly assigned
- organisational data access is not restricted by governance policies

Users can only ground agents on content they already have permission to access.

Users cannot publish or share agents

Ask IT to confirm:

- agent publishing policies are enabled
 - Teams/custom app policies allow agent deployment
 - the environment allows publishing
 - organisational sharing policies allow agents to be shared
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Users cannot publish agents to Teams

Ask IT to confirm:

- Teams app policies allow custom apps/agents
- Power Platform apps are not blocked
- Teams app governance policies permit publishing
- org-wide app approval policies are configured appropriately

Teams Admin involvement may be required for:

- org-wide deployment
 - app-store publication
 - admin approval scenarios
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Users cannot configure Microsoft 365 Copilot connectors

Ask IT to confirm:

- the required connector type is enabled
 - AI Administrator permissions are assigned
 - connector deployment permissions are configured
 - Microsoft Graph/app consent requirements are approved
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Users cannot create authentication/app registrations

Ask IT to confirm:

- Entra app registration permissions are allowed
- tenant consent policies permit the required permissions
- Cloud Application Administrator / Application Administrator roles are configured where required

Some scenarios require admin consent before connectors or authentication flows will work.

4. Supported user experiences

Copilot Studio is supported in:

- modern web browsers
- supported Microsoft 365 tenants
- supported Power Platform environments

Some Teams/mobile experiences may not support full authoring capabilities.

5. Recommended minimum setup for workshops and hackathons

For the smoothest participant experience, Microsoft currently recommends:

- pre-created Power Platform environments
- pre-assigned maker permissions
- Copilot Studio access pre-enabled
- PAYG/Copilot Credits configured (if organisational grounding will be used)
- approved connector policies
- Teams app policies reviewed in advance

This avoids most participant provisioning delays during live events.

6. What users can do once enabled

Once configured, users can:

- build advanced agents in Copilot Studio
 - connect organisational data sources
 - use SharePoint/Teams knowledge
 - configure actions and workflows
 - use connectors
 - publish agents to Teams and Microsoft 365 experiences
 - share agents across the organisation
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Official Microsoft References

- [Copilot Studio licensing and requirements \[Assign use...soft Learn | Learn.Microsoft.com\]](#)

- [Copilot Studio billing and licensing \[Copilot St...soft Learn | Learn.Microsoft.com\]](#)
- [Set up your development environment for Microsoft 365 Copilot \[learn.microsoft.com\]](#)
- [Choose between Agent Builder and Copilot Studio \[learn.microsoft.com\]](#)
- [Microsoft 365 agents deployment checklist \[learn.microsoft.com\]](#)