

Getting started with the AI Document Processor (Microsoft 365 Copilot Agent)

The AI Document Processor Copilot agent provides a conversational interface inside Microsoft 365 Copilot for submitting documents and initiating AI-powered workflows. While the agent itself can be installed from Microsoft Marketplace, full functionality, processing, and data access require an active subscription to the Connectbatch AI Document Processor SaaS service.

Customers must complete SaaS onboarding and tenant activation before the agent can execute document processing workflows or access backend services.

Subscription & entitlement requirements

The AI Document Processor is delivered as a SaaS service integrated with Microsoft 365.

To use the agent beyond basic discovery:

- Your organisation must have an active subscription
- Your Microsoft 365 administrator must grant one-time admin consent
- Required permissions are limited to read-only access for documents users explicitly submit

If your organisation is not yet subscribed, the agent will guide you to the appropriate onboarding steps.

Administrator approval (one-time)

A Microsoft 365 Global Administrator must complete a one-time consent to allow secure access via Microsoft Graph.

This enables the agent to retrieve documents only when users explicitly submit them via:

- Copilot
- SharePoint / OneDrive
- Outlook or shared mailboxes (if enabled)

Permissions can be reviewed or revoked at any time in Microsoft Entra ID.

Using the Copilot declarative agent

Once subscribed and approved, users can interact naturally with Copilot, for example:

“Upload this clinical letter and generate a structured summary.”

The agent:

- Runs entirely within Microsoft 365

- Uses Entra ID for authentication
- Routes documents through your organisation's isolated processing pipeline
- Does not access documents unless explicitly requested by the user

What happens without a subscription?

If your organisation is not subscribed:

- The agent remains visible
- Users can ask general questions
- Document ingestion and processing actions are disabled
- The agent will explain what's required and link to this support page

This ensures transparency and avoids unexpected errors.

Support and onboarding

For subscription setup, admin consent, or troubleshooting:

- Review Entra ID → Enterprise Applications for consent status
- Confirm your mailbox or SharePoint source configuration
- Contact our support team using the details provided during onboarding