Agents

Agents are integrations with external applications, enabling search and interoperability across third-party or custom applications configured as content in the HERE browser.

The following third-party systems are currently supported for integrations:

- Microsoft 365
- Microsoft Dynamics 365
- Microsoft Copilot 365
- ServiceNow
- Salesforce
- Atlassian
- Zendesk
- Zoom
- Slack
- Google Workspace (includes Google Chat)
- Bloomberg Terminal

Some agents might require information from or configuration of the third-party software. For example, Microsoft 365 and Microsoft Dynamics 365 require an app registration to be configured in the Microsoft Entra ID admin center.

> **INFO**
>
> For an example configuration, see Example HERE agent configuration: Microsoft 365.

In HERE 8 and earlier, agents are managed on a separate page. In HERE 9 and later, agents are managed in the Content page.

Add an agent to HERE

1. In HERE 9 or later, on the Content page, click **Create** and then **Agent**; In HERE 8 or earlier, on the **Agents** tab, click **Add Agent**. The **Add Agent** dialog box opens.

2. Click the applicable agent type. The **Agent Configuration** dialog box opens.

3. Enter the listed values. These values may be provided by the application's administrator.

4. Click **Grant Access**. The **Users Access** dialog box opens.

5. Use the search field to filter users and groups by name. You can also filter with the **Users**, **Groups**, and **Nesting** (when enabled, shows all nested values within a group) checkboxes.

6. In the **All** listbox, select the checkbox next to the ID of any users or groups you want to have access to the agent. Selected users and groups are listed in the **Selected** listbox.

7. When you have selected the users and groups you want to access this agent, click **Save**. By default, the new agent is activated.

Edit a HERE agent definition, configuration, or access

1. Find the agent you want to modify.

2. Click its **Edit** menu, and then click **Definition** (if applicable), **Configuration**, or **Access**.

3. Modify the field values as needed. You can change the **ID** value, but it must be unique across all agents in your platform.

4. When you are done making changes, click **Save Changes**. A confirmation message tells you that the agent has been updated.

Deactivate a HERE agent

By default, agents are activated as soon as they are created. However, you can deactivate an agent if you need to make it unavailable to users.

If you deactivate an agent, you might disrupt workflows for users who rely on it. As a best practice, ensure that users are informed of the deactivation ahead of time, especially if the agent is critical to daily operations.

1. Find the active agent you want to deactivate

2. In HERE 9 and later, click the **Action** ⋮ menu and click **Deactivate**; in HERE 8 and earlier, click its **Deactivate** button. The status indicator next to the agent name changes from `Active` to `Inactive`. A confirmation message tells you that the agent has been deactivated.

Activate a HERE agent

If an agent has been deactivated, you can re-activate it.

1. Find the inactive agent you want to activate.

2. Click its **Activate** button. The corresponding **Edit Agent** dialog box opens.

3. Make any changes to the agent definition that are needed, and click **Activate**. The status indicator next to the agent name changes from `Inactive` to `Active`. A confirmation message tells you that the agent has been activated.

Delete a HERE agent

If you delete an agent, it is permanently removed from your platform. If you want to recover it, you must re-create it. As a best practice, ensure that no users rely on the agent before you delete it.

1. Find the agent you want to delete.

2. Click the **Action** ⋮ menu and then click **Delete**.

3. In the confirmation dialog box, if you are sure you want to delete the agent, click **Delete Agent**. A confirmation message tells you that the agent has been deleted.

Example HERE agent configuration: Microsoft agents

In order to use a Microsoft agent in HERE Enterprise Browser, an "app registration" must be created in your organization's Entra admin center. The available Microsoft agents are the following:

- Microsoft 365
- Dynamics 365
- Microsoft 365 Copilot (in HERE 10.0 and later)

Configure an app registration in Microsoft Entra

> **IMPORTANT!**
>
> This section applies to integrations with Microsoft applications only.
>
> Registration must be done by a user with **Application Administrator** permissions or higher in Microsoft Entra. This might be someone in a different department from the HERE administrator.

1. Go to the Microsoft Entra admin center (or Azure portal — Microsoft provides multiple ways to access the same functionality).

2. Navigate to **App registrations** and create a new registration to be used for the Microsoft agent in HERE or choose an existing one. For details, see the [Microsoft documentation on registering an application].

3. Create the registration as a **Single-page Application**.

4. For **Supported account types**, the option you choose depends on your company's Microsoft setup and how it chooses to deploy HERE. The administrator for HERE

needs to know whether the app registration is configured as *single-tenant* (**Accounts in this organizational directory only**) or *multitenant* (any other option).

5. For the **Redirect URI** value: *Ask your HERE customer contact for the URI value*.

6. (Optional) We recommend that you grant consent for all permissions the Microsoft agent needs so that your users do not have to do this individually when signing in for the first time. You can do this as part of the app registration or, if you have a HERE account and access to the Microsoft agent, you can grant consent for all users when you sign in to the Agent.

   Go to **App permissions** > **Add a permission** > **Microsoft Graph** > **Delegated permissions**, and select the following permissions:

   - For Microsoft 365
     - Files.Read.All
     - Mail.ReadWrite.Shared
     - offline_access
     - People.Read
     - User.Read
     - User.ReadBasic.All
   - For Microsoft Dynamics 365
     - user_impersonation
     - offline_access
     - User.Read
   - For Microsoft 365 Copilot
     - offline_access
     - User.Read
     - Files.Read.All
     - Sites.Read.All
     - Mail.Read

        - People.Read.All
        - OnlineMeetingTranscript.Read.All
        - Chat.Read
        - ChannelMessage.Read.All
        - ExternalItem.Read.All

7. Go to **Certificates & Secrets** and create a new client secret. Make a note of the client secret value.

8. If you have specified app permissions, select **Grant admin consent for** at the top of the list of permissions, and confirm.

9. Make a note of the following information to use for the agent configuration:

    - Directory (tenant) ID, if single-tenant
    - Application (client) ID

10. For Microsoft Dynamics 365, in a web browser (not within Entra admin center) navigate to the Dynamics instance. Make a note of the base URL of the Dynamics instance; it is similar to `https://ORGNAME.crm.dynamics.com`.

Add a Microsoft agent to HERE

1. On the **Agents** page, click **+ Add Agent**. The **Add Agent** dialog box opens.

2. Click on a Microsoft agent: **Microsoft 365**, **Dynamics 365**, or **365 Copilot**.

The agent configuration dialog box opens.

1. (Optional) Modify the default description of the agent.

2. Enter the following values. These values are provided by your Microsoft Entra ID administrator, noted from the Microsoft Entra admin center configuration.

    - **Directory (tenant):** If specified, *must* be the tenant where the app registration was done. This restricts the allowed users to only be tenant specific, even if the app registration is multi-tenant.

        - The word `organizations` *must* be used if the app registration was configured as multi-tenant and you want to allow users from other tenants to sign in. The word `organizations` *can* be used if the app registration was configured as multi-tenant.
        - The words `common` or `consumers` *can* be used in combination with a multi-tenant app registration, to ensure personal Microsoft accounts are allowed to utilize the Microsoft 365 Search Agent.
    - **Application (client) ID**
    - **Client Secret**
    - (For Microsoft Dynamics) **Dynamics instance URL**
3. Click **Grant Access**. The **Users Access** dialog box opens.
4. If access was already granted via Microsoft Entra, click **Save**. By default, the new agent is activated.

Add a content app for Microsoft domains

Add a content app that includes relevant Microsoft domains, so that users can access content results returned by the Microsoft search agent.

1. In the **Content** section of the admin console, click **Create** and choose **App**.
2. Leave the **Content Type** as **Web App**.
3. Add the following domains as URIs in the **Basics** section:
    - Microsoft 365 and 365 Copilot
        - m365.cloud.microsoft
        - cloud.microsoft
        - microsoftonline.com
        - office.com
        - office365.com

    - sharepoint.com
    - outlook.com
    - live.com
    - microsoft.com
  - Dynamics 365
    - crm.dynamics.com
    - dynamics.com
    - microsoftonline.com
    - login.microsoftonline.com
    - apps.powerapps.com

4. Define any other settings and access as needed and click **Publish**.