Use SourceLace from Microsoft Teams or Slack

From the SourceLace manual: Optional. SourceLace is an app: people do their work in the SourceLace app, and admins set everything up there. If your people spend their day in Microsoft Teams or Slack, they can also ask SourceLace questions from there, through Microsoft's or Slack's own AI assistant c

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The latest version is at https://sourcelace.ai/docs

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Optional. SourceLace is an app: people do their work in the SourceLace app, and admins set everything up there. If your people spend their day in Microsoft Teams or Slack, they can also ask SourceLace questions from there, through Microsoft's or Slack's own AI assistant connected to SourceLace, in the same way as any other AI app.

What stays the same, wherever people ask from:

- **Each person signs in to SourceLace as themselves**, so they see only what their own sources and groups allow, and every call is in your organization's audit trail under their name.
- **Changes are previewed first**, and run only after the person confirms them.
- **Agents are built, tested, approved and reviewed in the SourceLace app.** From Teams or Slack people can start an agent and check its runs, but every approval an agent waits for is decided in the SourceLace app, never in Teams or Slack.
- Your data protection rules apply to every answer.

What Teams or Slack add is their own assistant: it decides how to use SourceLace's tools and writes the reply. What happens to the answers there is covered by your agreement with Microsoft or Slack.

The SourceLace address to use in both is:

```
https://mcp.sourcelace.ai/mcp
```

Menu names below are Microsoft's and Slack's and change from time to time; their own documentation has the latest steps.

Microsoft Teams (Copilot Studio)

In Microsoft Teams, people use SourceLace through an agent your organization builds in Microsoft Copilot Studio, with SourceLace added as one of its tools.

To start SourceLace agents by mentioning them in a Teams channel instead (no Copilot Studio needed), see Start from Slack or Teams.

Build the agent (someone with Copilot Studio):

1. In Copilot Studio, create an agent (for example "SourceLace") or open an existing one.
2. On its **Tools** page, choose **Add a tool → New tool → Model Context Protocol**.
3. Enter a **Server name** (SourceLace), a **Server description** that tells the agent when to use it (for example "Answers questions about our business systems and proposes changes, with each person's own access"), and the **Server URL** above.
4. Choose **OAuth 2.0** with **Dynamic discovery**. SourceLace follows the MCP authorization standard, so Copilot Studio finds SourceLace's sign-in and registers itself. Select **Create**.
5. Create a connection, then **Add to agent**.
6. **Publish** the agent.

Put it in Teams:

1. On the agent's **Channels** page, choose **Teams and Microsoft 365 Copilot** and **Add channel**.

2. Under **Availability options**, share it with chosen colleagues, or choose **Show to everyone in my org** and submit it for approval.

What each person does: the first time the agent uses SourceLace, they get a sign-in card in the chat. They sign in to SourceLace with their own account (Google, Microsoft or your single sign-on), and from then on the agent acts as them.

What admins approve on each side:

Where	Who	What
Microsoft	A Teams admin	Approves the agent for everyone in the organization in the **Teams admin center** (**Manage apps**), if it was submitted that way.
Microsoft	A Power Platform admin	Your data policies cover the connector that the SourceLace tool uses: it must be allowed in the environment where the agent lives.
SourceLace	Your SourceLace admin	Nothing new: people sign in with their usual SourceLace access. Which sources they reach and what they may change are set in the SourceLace app as always (Admin guide).

Slack (Slackbot)

In Slack, people use SourceLace through Slackbot, Slack's own assistant. Slackbot uses other services through Slack apps that include an MCP server: your organization makes a small Slack app that points Slackbot at SourceLace's address, and a Slack admin approves it. Slackbot's AI features, and what Slack admins can control, depend on your Slack plan: Slack's help center says which plans include what.

To start agents with a slash command instead (no Slackbot needed), see Start from Slack or Teams.

Who does it: someone allowed to build Slack apps in your workspace (any member, unless your Slack admins have limited who may) makes the app. A **Workspace Owner or Admin** installs or approves it; on Slack's Enterprise plans an **Org Owner or Admin** does. Nothing is set up in SourceLace.

Make the app:

1. Go to api.slack.com/apps and sign in. Choose **Create New App → From scratch**, enter a name (SourceLace), pick your workspace, and choose **Create App**.
2. In the left sidebar under **Features**, choose **MCP Servers**, then **Get Started**.
3. Enter:
   - **Name:** SourceLace.
   - **URL:** the address above.
   - **Auth Type: Dynamic Client Registration**. SourceLace follows the MCP authorization standard, so Slack registers itself with SourceLace and each person signs in to SourceLace as themselves. Leave the optional identity fields empty.

   Choose **Save**. Slack adds the `mcp:connect` scope to the app for you.
4. Under **Settings → Install App**, choose **Install to** your workspace, or **Request to Install** when your workspace requires app approval.

Approve it (Slack admins):

1. When approval is required, the request appears in your admins' app requests. The approval lists the app's scopes and a **Connected MCP Servers** section with SourceLace's address: **Allow** it, then approve the app. Slackbot offers SourceLace only after it is approved, and asks for approval again if the app later points at a different address.
2. Check it any time in the admin dashboard under **Integrations → Installed apps**: the app's **Connected MCP Servers** shows SourceLace as **ALLOWED**.
3. On Slack's Enterprise Grid and Enterprise+ plans, Org Owners and Org Admins can, on the app's **Member Permissions** tab, choose who may use the app and the MCP server, and which kinds of tools are offered by default (read-only, write or other) or each tool on its own. For example, allow only SourceLace's read-only tools. Slack says this is not available on its Pro, Business+ or Enterprise Select plans.

What each person does: click **Slackbot** at the top of the Slack sidebar (under **More** if it is not shown), open **Apps**, and choose **Connect** next to SourceLace. A browser window opens: sign in to SourceLace with your own account (Google, Microsoft or your single sign-on), once. If the app later changes, Slack may ask you to connect again.

Check that it worked: ask Slackbot "Using SourceLace, which sources can I use?". It should list your SourceLace sources. Under **Slackbot → Apps → SourceLace** you can see the tools Slackbot may use.

What admins approve on each side:

Where	Who	What
Slack	A Workspace Owner or Admin (Enterprise: an Org Owner or Admin)	Approves the app and its connected MCP server, and on Enterprise Grid and Enterprise+ who may use it and which tools.
SourceLace	Your SourceLace admin	Nothing new: people sign in with their usual SourceLace access, and everything they may do is set in the SourceLace app as always.

When something goes wrong:

What you see	What to do
SourceLace is not listed under **Slackbot → Apps**	The app is not installed or not approved yet, or its MCP server was denied. A Slack admin checks **Integrations → Installed apps**: **Connected MCP Servers** must show SourceLace as **ALLOWED**. On Enterprise plans, check the app's **Member Permissions** too.
Connect fails, or the SourceLace sign-in page shows an error	Check that the MCP server's **URL** is exactly the address above and its **Auth Type** is **Dynamic Client Registration**. A sign-in refused by SourceLace means the person is not one of your organization's people in SourceLace: your SourceLace admin adds them.
Slackbot says it cannot use a tool	A Slack admin limited which SourceLace tools Slackbot may use (Enterprise plans), or the person turned the tool off under **Slackbot → Apps → SourceLace**.
Slackbot asks to connect again	The app changed, or the person's SourceLace sign-in ended (for example after 30 days without use, or when they left the organization). Connect again.

Slack's own guides: Slack Help Center (search for "Connect Slackbot to other apps with MCP") and Slack API documentation (search for "Slackbot MCP client").

Good to know

- **Start in the SourceLace app.** It is where people keep chats and projects, build and run agents, approve changes, and where admins manage everything. Teams and Slack are a convenient extra place to ask.
- **Approvals never move.** An agent's approval waits in the SourceLace app, and a change asked for from Teams or Slack is previewed and confirmed by the person who asked.
- **Audit:** calls from Teams and Slack are recorded like calls from any AI app, under the person's own name.
- **Removing access:** when someone leaves your organization in SourceLace, their access from Teams and Slack ends with it.