

Setting up the Workable MCP server in Microsoft Copilot Studio

A step-by-step walkthrough for adding Workable to a Copilot Studio agent, either through the certified **Workable MCP** connector or by registering the remote MCP server yourself. Both paths authenticate over OAuth 2.0.

NEW Workable MCP is now a certified Power Platform connector (Preview)

You no longer need to type in a server URL or OAuth settings. Search for **Workable MCP** in the Copilot Studio tool catalogue, sign in to Workable, and add it to your agent. Connector reference: learn.microsoft.com/en-us/connectors/workablemcp

What you get at the end

- A published Copilot Studio agent with **100+ Workable tools** available to it — jobs, candidates, employees, offers, requisitions, time off, time tracking, performance reviews and more.
- An OAuth 2.0 connection scoped to **your own Workable permissions** — the agent can never do more in Workable than you can.

1. Overview

The Workable MCP server is a remote Model Context Protocol server hosted by Workable at <https://mcp.workable.com/mcp>. Any MCP-compatible client can connect to it and gain access to Workable's recruiting and HR tool set without custom integration code.

In Microsoft Copilot Studio there are now two ways to connect to it:

	Option A — Certified connector (recommended)	Option B — Manual registration
How you add it	Pick Workable MCP from the tool catalogue	Enter name, description, URL and OAuth settings in the Add MCP server form
OAuth setup	Pre-configured by Workable (publisher, certified by Microsoft) — just sign in	Dynamic client registration via discovery
Governance	A named connector admins can allow or block in the Power Platform admin center	Subject to your tenant's rules for custom / third-party MCP servers
Licensing & availability	Premium connector in Copilot Studio, currently in Preview . All commercial regions; not available in GCC, GCC High, DoD or China (21Vianet)	Wherever your tenant allows custom MCP servers
Use it when	Always, where the connector is available in your environment	You're in a government or sovereign cloud where the connector isn't offered, or your admin has only approved custom MCP servers

2. Prerequisites

- An active Workable account with access to the account you want the agent to read. The MCP server is available on all Workable subscription tiers; HR tools (employees, time off, time tracking, performance reviews) need the matching Workable HR products enabled on the account.
- A Microsoft Copilot Studio licence and permission to create agents and connections in the target Power Platform environment.
- **Option A:** a Copilot Studio licence that covers **Premium** connectors, an environment in a commercial region (the connector isn't offered in GCC, GCC High, DoD or China operated by 21Vianet), and connector policies that allow Workable MCP.
- **Option B:** permission to add custom / third-party MCP servers. Some tenants restrict this via Power Platform admin policies.
- A browser that allows the Workable OAuth pop-up window.

Permissions model. The MCP server acts strictly as the signed-in Workable user. Whatever that user cannot see or do in Workable, the agent cannot see or do either — so grant the connection with an account whose role matches the agent's intended scope. Candidate and employee data is not used for training.

3. Configuration reference

Both options

Connection display name	Workable
Authentication	OAuth 2.0 — you sign in with your Workable credentials
Transport	Streamable HTTP, stateless, JSON mode (no SSE, no streaming) — handled by Copilot Studio automatically
Agent model (as tested)	GPT-5.6 Reasoning

Option A only — certified connector

Connector name	Workable MCP (Preview) — search for it in the Add a tool dialog
Publisher	Workable Inc
Class in Copilot Studio	Premium
Action	Workable MCP server (operation ID InvokeMCP) — one Streamable HTTP endpoint; the individual tools are discovered at runtime
Credentials	None to enter — OAuth 2.0 sign-in only; no API key, client ID or secret
Reference	learn.microsoft.com/en-us/connectors/workablemcp

Option B only — manual registration

Server name	Workable MCP — free text; pick something recognisable, as it becomes the tool's chip name on the agent.
Server description	Workable MCP Server helps users work with their Workable account: discover accounts, inspect jobs and candidates, manage candidate workflow actions, handle employee lookup, time off, time tracking, requisitions, offers, departments, and performance review templates.
Server URL	<code>https://mcp.workable.com/mcp</code>
Configuration type	Dynamic (with discovery) — no client ID or secret to enter

Agent instructions to paste

Every Workable tool except `get_accounts` requires an `account` argument. Adding the line below to the agent's **Instructions** saves a round trip on every conversation and prevents the agent from guessing a subdomain.

```
When using Workable tools, call get_accounts first and use the subdomain of your account as the `account` argument on every subsequent call.
```

Why discovery works (Option B). The server publishes `/.well-known/oauth-authorization-server` and `/.well-known/oauth-protected-resource`, so Copilot Studio registers itself dynamically. That is why **Dynamic (with discovery)** is the correct choice and no credentials are needed.

RECOMMENDED

4. Option A — Add the certified Workable MCP connector

A1 Open your agent in Copilot Studio

Go to copilotstudio.microsoft.com, open the environment you want to build in, and either create a new agent or open an existing one. Stay on the **Build** tab — the right-hand panel lists Model, Skills, Tools, Knowledge, Connected agents and Memory.

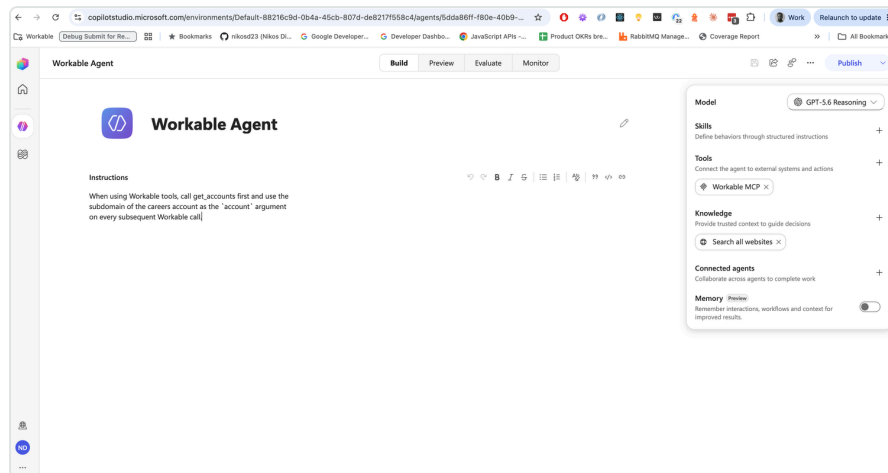


Figure 1 — The agent's Build tab. Tools are added from the right-hand panel.

A2 Find Workable MCP in the tool catalogue

Click the **+** next to **Tools**. In the **Add a tool** dialog, type **Workable** in the search box and switch to the **MCP** filter. Click the **Workable MCP** tile.

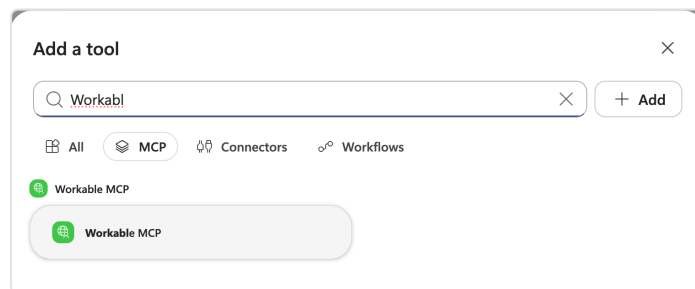


Figure 2 — Searching the catalogue. Click the Workable MCP tile.

Pick the right one. The catalogue may also list an older **Workable (Independent Publisher)** connector under Connectors. That is a community connector that uses a Workable API key and is not published by Workable. Choose **Workable MCP**. If it doesn't appear at all, see Troubleshooting (section 7).

A3 Review the connector and click Add

The detail view shows the connector's description and a link to its documentation. Click **+ Add**.

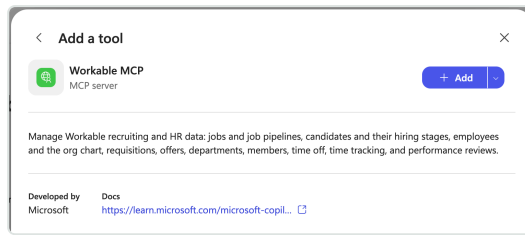


Figure 3 — The Workable MCP detail view in Add a tool.

A4 Create the connection and sign in to Workable

If you don't have a Workable connection yet, Copilot Studio prompts you to create one (name it Workable if asked). A Workable OAuth window opens at workable.com/oauth/authorize, listing the scopes the connector requests — candidates, jobs, offers, requisitions, comments, account, departments, members, employees, time off and more. Sign in if prompted, review the list, and approve.

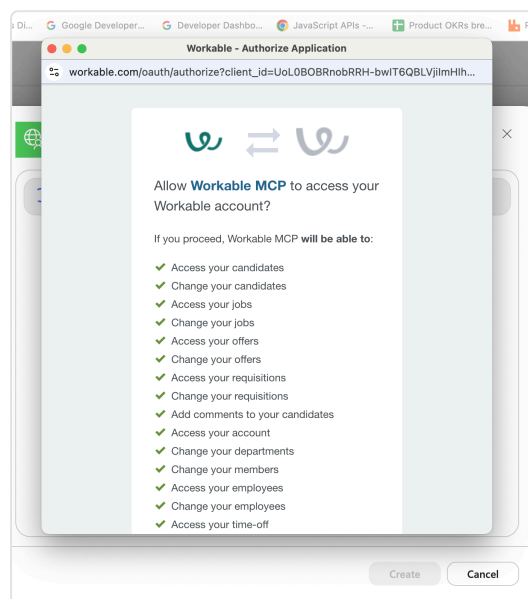


Figure 4 — The Workable consent screen. Scroll to the bottom of the window to reach the approve button.

There is no server URL, API key, client ID or secret to enter. Workable issues an access token scoped to your user and the connection stores it. Tokens refresh automatically, so you only sign in again if you revoke access or a Workable administrator removes your account.

A5 Check the connection and tool permissions

The tool now appears under **Tools** on the agent. Click it to open **Edit tool** and confirm:

- **Connection** shows **Workable** with a green check. Use **Manage connections** to switch or repair it.
- **Authentication** is **End user account**, so each person chatting with the agent signs in with their own Workable account and only sees what they're allowed to see.
- **Tool permissions** has **Allow all** on, which gives the agent every Workable tool. To limit the agent (for example, read-only), turn **Allow all** off and enable individual tools. Use **Search tools** to find them.

Click **Done**. If the agent also has a manually registered Workable server (Option B), remove that chip with the **x** so it sees one copy of each tool.

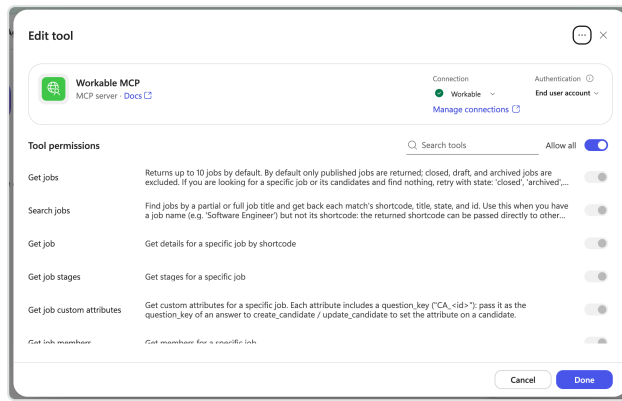


Figure 5 — Edit tool. A healthy connection, end-user authentication and all tools allowed.

A6 Add the instructions, then save and publish

Paste the `get_accounts` instruction from section 3 into the agent's **Instructions** box, then click **Publish**. Confirm **Save and publish** in the dialog — an agent that has never been saved is saved first, then published.

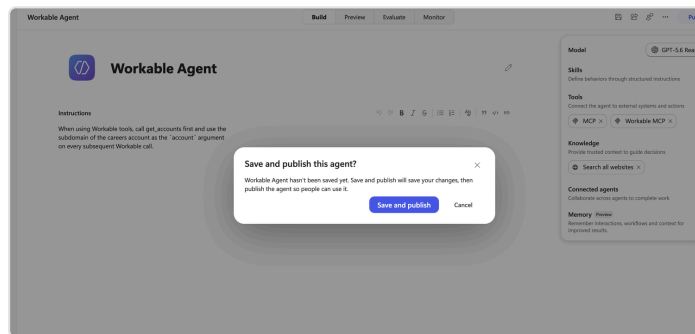


Figure 6 — Save and publish. Publishing is what makes the agent usable outside the Build canvas.

A7 Test it

Open the agent's chat pane (or the **Preview** tab) and ask a question that needs live Workable data, for example:

which are the open jobs in my account?

Expand the agent's trace: you should see **Get accounts** called first, then **Get jobs**, followed by an answer built from your real Workable data.

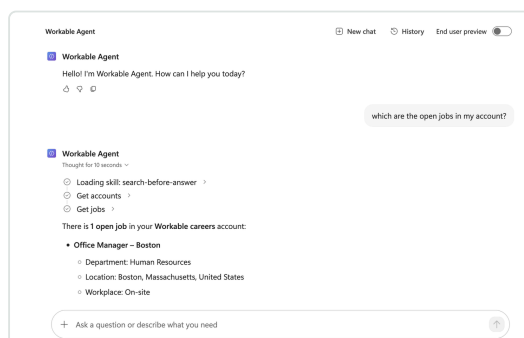


Figure 7 — A successful test. The trace shows `get_accounts` followed by `get_jobs`, then the live result.

ALTERNATIVE

5. Option B — Register the remote MCP server manually

Use this path only if the certified connector isn't available to you. Start with steps **A1** and the first part of **A2** (open the agent, click + next to Tools, switch to the MCP tab), then continue below.

B1 Open the Add MCP server form

In the **Model Context Protocol (MCP)** tab, click + **Add** at the top right to register a new server. An empty **Add MCP server** form appears. Note that the **Configuration type** row is hidden until you pick an authentication method — it only applies to OAuth.

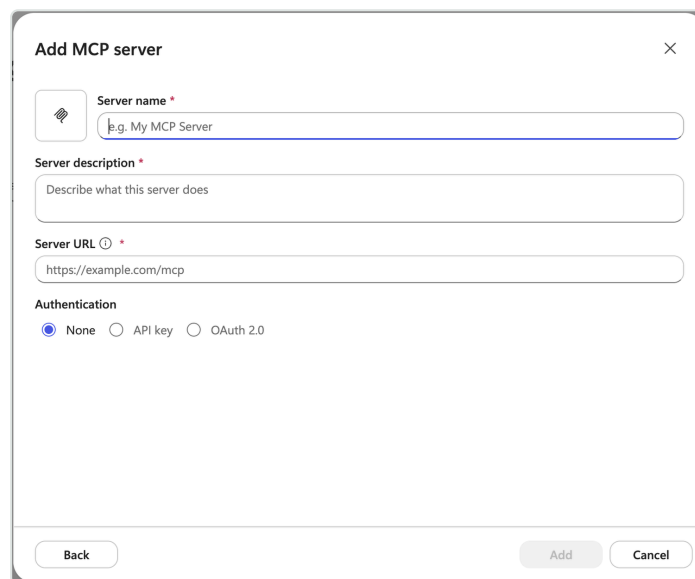


Figure 8 — The blank Add MCP server form.

B2 Fill in the Workable server details

Enter the values from the Option B table in section 3:

- **Server name** — e.g. Workable MCP
- **Server description** — the Workable description text (required field)
- **Server URL** — <https://mcp.workable.com/mcp>
- **Authentication** — **OAuth 2.0**
- **Configuration type** — **Dynamic (with discovery)**

Click **Add**.

Add MCP server [X]

Server name *
MCP

Server description *
Workable MCP Server helps users work with their Workable account from ChatGPT: discover accounts, inspect jobs and candidates, manage candidate workflow actions, handle employee lookup, time off, time tracking, requisitions, offers, departments, and performance review templates.

Server URL ⓘ *
https://mcp.workable.com/mcp

Authentication
☐ None ☐ API key ☒ OAuth 2.0

Configuration type
☒ Dynamic (with discovery) ☐ Dynamic ☐ Manual

[Back] [Add] [Cancel]

Figure 9 — The completed form. Dynamic (with discovery) means no client ID or secret is required.

B3 Create the connection

Copilot Studio now shows **Select a connection** with the status **Not connected**. Open the dropdown next to **Connection** and choose to create a new connection.

Select a connection [X]


MCP

Connection  Not connected 

[Back] [Add] [Cancel]

Figure 10 — Before authenticating, the server shows as Not connected and Add is disabled.

B4 Name the connection and click Create

Give the connection a display name — Workable is a good default — and click **Create**. This opens the Workable authorisation window shown in Figure 4. Sign in, review the scopes and approve.

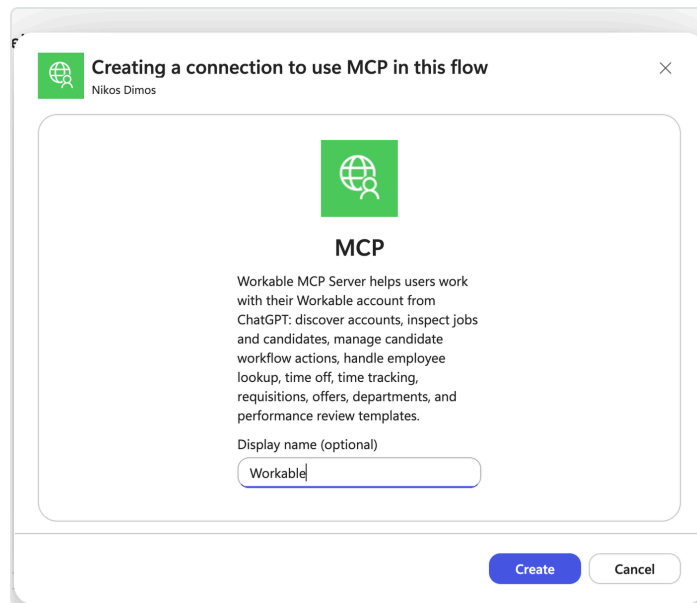


Figure 11 — Naming the connection. The connection is owned by the signed-in Microsoft user.

Redirect URI mismatch? If Workable returns a *redirect URI mismatch* error on this path, contact Workable Support with the redirect URI shown in the error so it can be allow-listed — or switch to Option A, which doesn't need this.

B5 Confirm the connection and add the tool

Back in **Select a connection**, the connection now reads **Workable** with a green check. Click **Add** to attach the server to the agent. The tool chip now appears under **Tools**; if you registered the server more than once while experimenting, remove the duplicate chips with the ✕.

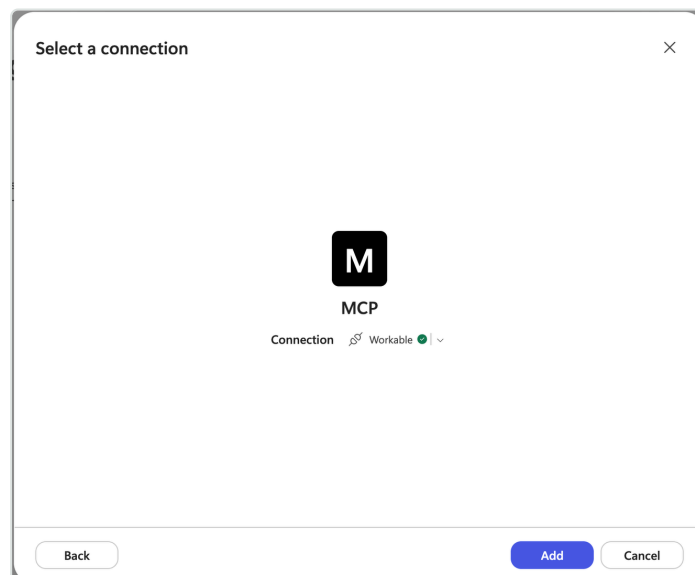


Figure 12 — A healthy connection. The Add button becomes available once the check is green.

Finish with steps **A6** (instructions, save and publish) and **A7** (test).

6. What the agent can do

The server exposes just over 100 tools. The authoritative list for your account is whatever the server returns at runtime, since some tools can be disabled for an account or deployment.

Area	What the agent can do	Representative tools
Accounts	Discover reachable accounts and custom permission sets	<code>get_accounts</code> <code>get_permission_sets</code>
Jobs	List, search and inspect jobs, stages, members, recruiters, application forms and activity	<code>get_jobs</code> <code>search_jobs</code>
Candidates	Inspect, create, move, copy, disqualify or requalify candidates; add comments, evaluations and ratings; manage tags	<code>get_candidates</code> <code>move_candidate</code>
Employees	Inspect employees, the org chart and employee documents; update records	<code>get_employees</code> <code>get_orgchart</code>
Members	List, invite, update or remove account members	<code>get_members</code> <code>invite_member</code>
Requisitions & offers	Read, create and update requisitions; approve or reject requisitions and offers	<code>get_requisitions</code> <code>approve_offer</code>
Time off & tracking	Read balances and requests, create and approve requests; clock in/out and manage time entries	<code>get_timeoff_balances</code> <code>clock_in</code>
Performance reviews	Read cycles, tasks and results; submit, share and sign reviews	<code>get_review_cycles</code> <code>submit_review</code>
Organisation & reporting	Manage departments; read legal entities and schedules; run filtered employee and candidate searches	<code>get_departments</code> <code>search_employees</code>
Reference data	Pipeline stages, disqualification reasons, custom attributes and events	<code>get_stages</code> <code>get_events</code>

Prompts to try once connected

```
Which candidates applied for the Senior Backend Engineer role this week, and where are they in the pipeline?  
Move candidate 12345 to the interview stage and add a note about their portfolio.  
Who is out of office in the Berlin office next month?  
Show me the requisitions waiting on my approval.
```

Known limitations

- **Tools only, Streamable HTTP only, stateless.** No MCP resources, prompts, sampling or elicitation; no SSE, session resumption or server-pushed notifications.
- **Explicit account.** There is no implicit "current account". A call without the `account` argument fails rather than guessing — hence the agent instruction in section 3.
- **Plan-dependent tools.** On an ATS-only account, HR tools return "not found" or "forbidden".

7. Troubleshooting

Setup

Symptom	What to do
Workable MCP isn't in the tool catalogue	Your connector policies may block it, your licence may not cover Premium connectors, or your environment is in GCC, GCC High, DoD or China (21Vianet). Ask your Power Platform admin, or use Option B.
Only "Workable (Independent Publisher)" shows up	That is a different, API-key-based community connector. Search for Workable MCP on the MCP tab.
Nothing happens after clicking Create / sign-in	The OAuth pop-up was blocked. Allow pop-ups for <code>copilotstudio.microsoft.com</code> and retry.
Redirect URI mismatch (Option B)	Contact Workable Support with the redirect URI shown in the error so it can be allow-listed, or switch to the certified connector.
The agent calls tools twice or picks the wrong copy	The agent has both the certified connector and a manually registered server. Keep one and remove the other chip with the ✕.

Tool errors

Error	Meaning	What to do
401 Unauthorized	The access token is missing, invalid or expired	Sign in again to refresh the connection.
403 Forbidden	The user or account may not perform this action	Check the user's Workable role and permissions, and that the relevant Workable product (e.g. HR) is enabled.
404 Not found	The resource doesn't exist or isn't visible to this account	Confirm the <code>account</code> subdomain, then re-fetch the list the id came from.
409 Conflict	The resource's state doesn't allow the action	Re-read the resource's current state and act accordingly.
422 Unprocessable	The arguments couldn't be processed as given	Check values against the tool's schema; read stage names and disqualification reasons from the account rather than assuming them.
429 Rate limited	Too many requests to the Workable API	Wait briefly and retry.

Permission refusals come back as tool errors describing the restriction — they are not connector faults. The same call can succeed for one user and be refused for another on the same account.

8. Resources

- Workable MCP connector reference (Microsoft Learn): learn.microsoft.com/en-us/connectors/workablemcp
- Workable Help Center and support: help.workable.com