

# Mastering Microsoft 365 Copilot Onboarding: Secure, Classify, and Strategize

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- Denmark & Norway

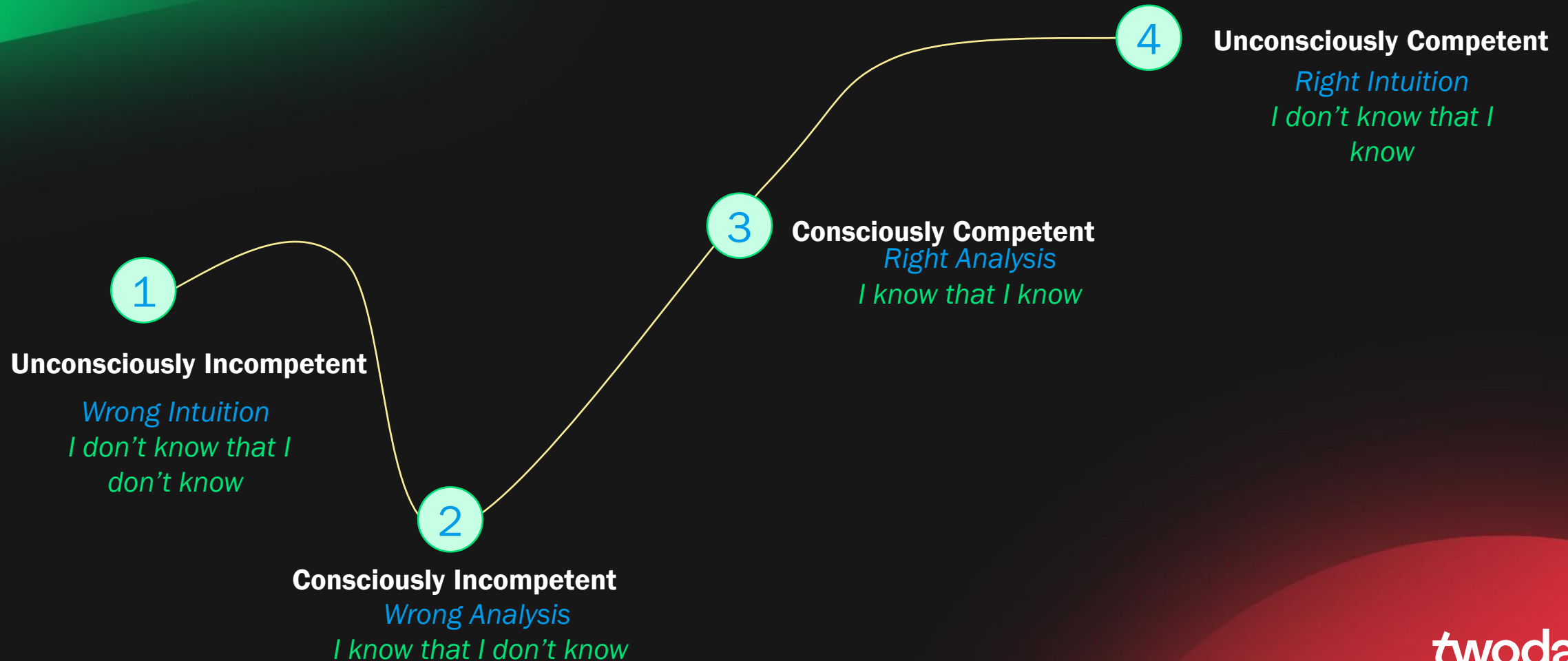


## Kent Agerlund

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- Primarily focused on AI, modern work including device management, security and compliance solutions within Microsoft products.
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# Secure, Classify, and Strategize - the States of Competence





# The 4 States of Competence

Unconsciously Incompetent & Consciously Incompetent

# “We haven’t really started using GenAI yet”

## Cloud Discovery

Updated on Nov 27, 2024, 7:57 PM

[Dashboard](#) [Discovered apps](#) [Discovered resources](#) [IP addresses](#) [Users](#) [Devices](#)

Apps	IP addresses	Users	Devices	Traffic
3688	21.5K	16.1K	3549	53.5TB <span>↑ 6.7 TB</span> <span>↓ 46.8 TB</span>

### App categories

< 26-30 of 42 >

Traffic



☒ Sanctioned ☒ Unsanctioned ☒ Other

Business management	30.3 GB
Data analytics	27.7 GB
Generative AI	26.6 GB
CRM	15.1 GB
Operations management	14.1 GB

### Discovered apps

< 1-15 of 99 >

[View all apps](#)

Generative AI

Upload



☒ Sanctioned ☒ Unsanctioned ☒ Other

OpenAI ChatGPT	3.8 GB
Microsoft Copilot	636 MB
Adobe Express	197 MB
TalkAI	131 MB
OpenArt	69 MB
freepik	49 MB
HubSpot	25 MB
Gamma App	20 MB
BeyondWords	19 MB
Adobe Sensei	18 MB
Microsoft Copilot f...	14 MB
Quizlet	11 MB
Midjourney	8 MB
Wix	7 MB
Leonardo.AI	4 MB

1

# Cloud Discovery

Updated on Nov 27, 2024, 7:57 PM

Defender-managed endpoints ▾ Last 90 days ▾ Actions ▾ ?

Dashboard Discovered apps Discovered resources IP addresses Users Devices

Queries: Select a query ▾ Save as

Advanced filters

Apps: Search for apps... App tag: ☒ Sanctioned ☒ Unsanctioned ☐ None Risk score: 0  10 Compliance risk factor: Select factors ▾ Security risk factor: Select factors ▾

Browse by category:



Q gener

✓ Generative AI 99

☐ Bulk selection ▾ + New policy from search Export ▾

1 - 20 of 99 discovered apps Table settings ▾

App ▾	Risk ... ↑ ▾	Tags ▾	Traffic ▾	Upload ▾	Transacti... ▾	Users ▾	IP addres... ▾	Devices ▾	Last seen... ▾	Actions
Leonardo.AI Generative AI	<div><div></div></div> 3		81 MB	4 MB	27	2	4	2	Nov 19, 2024	<input checked="" type="radio"/> <input type="radio"/> ⋮
Lexica Generative AI	<div><div></div></div> 3		3 MB	—	4	4	4	4	Oct 23, 2024	<input checked="" type="radio"/> <input type="radio"/> ⋮
DeepAI Generative AI	<div><div></div></div> 3		4 MB	60 KB	22	6	7	6	Nov 13, 2024	<input checked="" type="radio"/> <input type="radio"/> ⋮
Craiyon Generative AI	<div><div></div></div> 3		48 MB	275 KB	18	9	9	9	Nov 7, 2024	<input checked="" type="radio"/> <input type="radio"/> ⋮
HIX.AI Generative AI	<div><div></div></div> 3		62 MB	2 MB	25	10	10	10	Nov 18, 2024	<input checked="" type="radio"/> <input type="radio"/> ⋮
VanceAI Generative AI	<div><div></div></div> 3		1 MB	—	2	1	1	1	Sep 25, 2024	<input checked="" type="radio"/> <input type="radio"/> ⋮
Stable Diffusion Generative AI	<div><div></div></div> 3		3 MB	81 KB	11	9	9	9	Nov 22, 2024	<input checked="" type="radio"/> <input type="radio"/> ⋮

twoday



# You get a Copilot! You get a Copilot!

## Microsoft 365 Chat

Included in the Microsoft 365 license  
Provides access to Chat based on GPT-4o  
Access to the use of agents (usage-based)  
Data is protected via Enterprise Data Protection (EDP)

## Microsoft 365 Copilot

Includes all Chat features  
Personal assistant in Microsoft 365 applications  
Requires a separate license per user

		<span>● Included</span> <span>▲ Included — Metered</span>	
		Microsoft 365 Copilot Chat Free + Consumption	Microsoft 365 Copilot \$30 pupm
Chat	Copilot Chat – Web grounded (powered by GPT-4o)	●	●
	Copilot Chat – Work grounded (work data in your tenant's Microsoft Graph and 3rd party data via Graph connectors)	●	●
	Copilot Pages	●	●
	File upload <sup>1</sup>	●	●
	Code Interpreter <sup>1</sup>	●	●
	Image generation <sup>1</sup>	●	●
Agents <sup>2</sup>	Create agents using Copilot Studio <sup>3</sup> , including SharePoint agents	●	●
	Discover and pin agents	●	●
	Use agents grounded in Web data	●	●
	Use agents grounded in work data (work data in your tenant's Microsoft Graph and 3rd party data via Graph connectors)	▲	●
	Use agents that act independently using autonomous actions	▲	▲
Personal assistant	Copilot reasons over personal work data (e.g. Outlook, OneDrive, meeting transcripts)		●
	Copilot in Teams		●
	Copilot in Outlook		●
	Copilot in Word		●
	Copilot in Excel		●
	Copilot in PowerPoint		●
	Copilot Actions		In preview
	Pre-built M365 agents (Interpreter, Facilitator, Project Manager, Employee Self-Service)		In preview
	Enterprise Data Protection (EDP)	●	●
Copilot Control System	IT management controls	●	●
	Agent management	●	●
	SharePoint Advanced Management		●
	Copilot Analytics to measure usage and adoption <sup>4</sup>		●
	Pre-built reports and advanced analytics to measure ROI		●
			●

1. Limits apply. 2. Applies to employee-facing agents only. 3. Learn more about the full capabilities of Copilot Studio: [aka.ms/CopilotStudioCapabilities](https://aka.ms/CopilotStudioCapabilities) 4. Basic reporting in Microsoft Admin Center available for Copilot Chat.

# Scale to measure success

Scale	Description
1	Have never used Microsoft 365 Copilot and have no knowledge of it.
2	Have heard about Microsoft 365 Copilot, but I have not used it myself.
3	have tried Microsoft 365 Copilot once, but I have very limited experience
4	Have used Microsoft 365 Copilot a few times and have a basic understanding of its features.
5	Have moderate experience with Microsoft 365 Copilot and can perform some tasks with guidance
6	have good experience with Microsoft 365 Copilot and can use it for daily tasks
7	Have advanced knowledge of Microsoft 365 Copilot and can help others use it
8	Very familiar with Microsoft 365 Copilot and can optimize workflows using it
9	Have expert knowledge of Microsoft 365 Copilot and can teach others how to use it
10	Master of Microsoft 365 Copilot and can develop advanced solutions and workflows using it.

Outcome



Tools

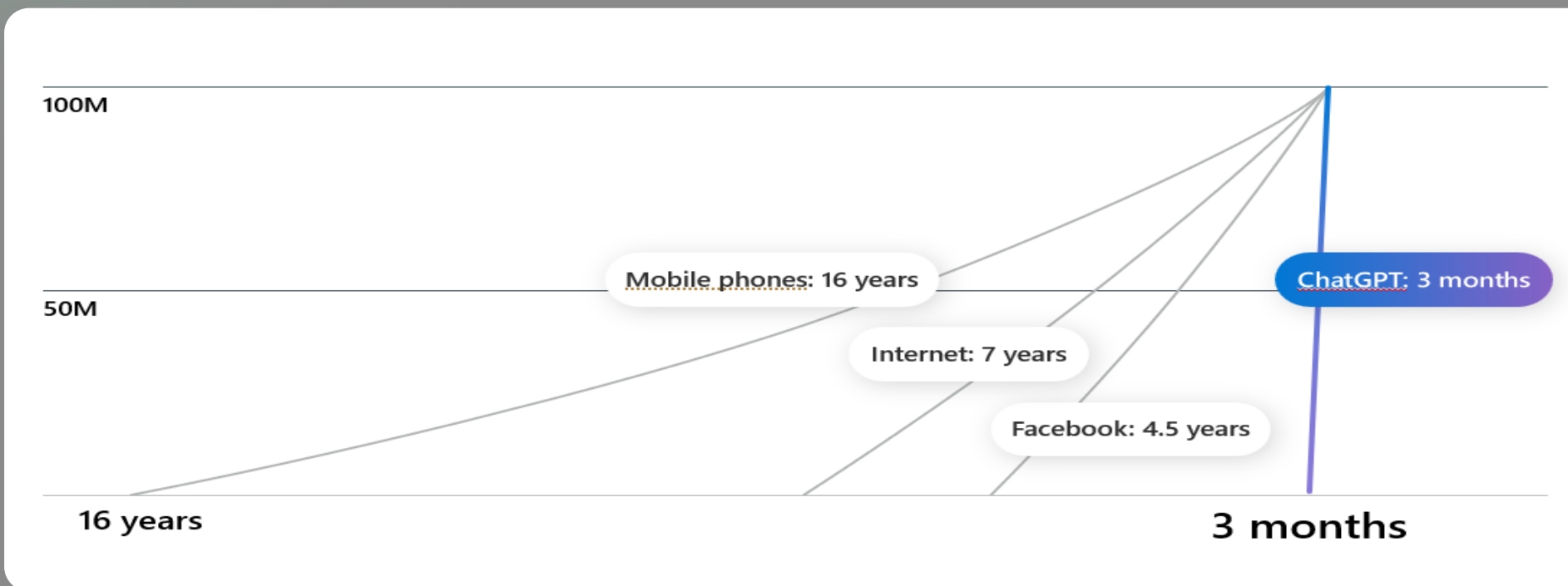




# It's OK not to know it all

The AI technology is here

Time to reach 100M users

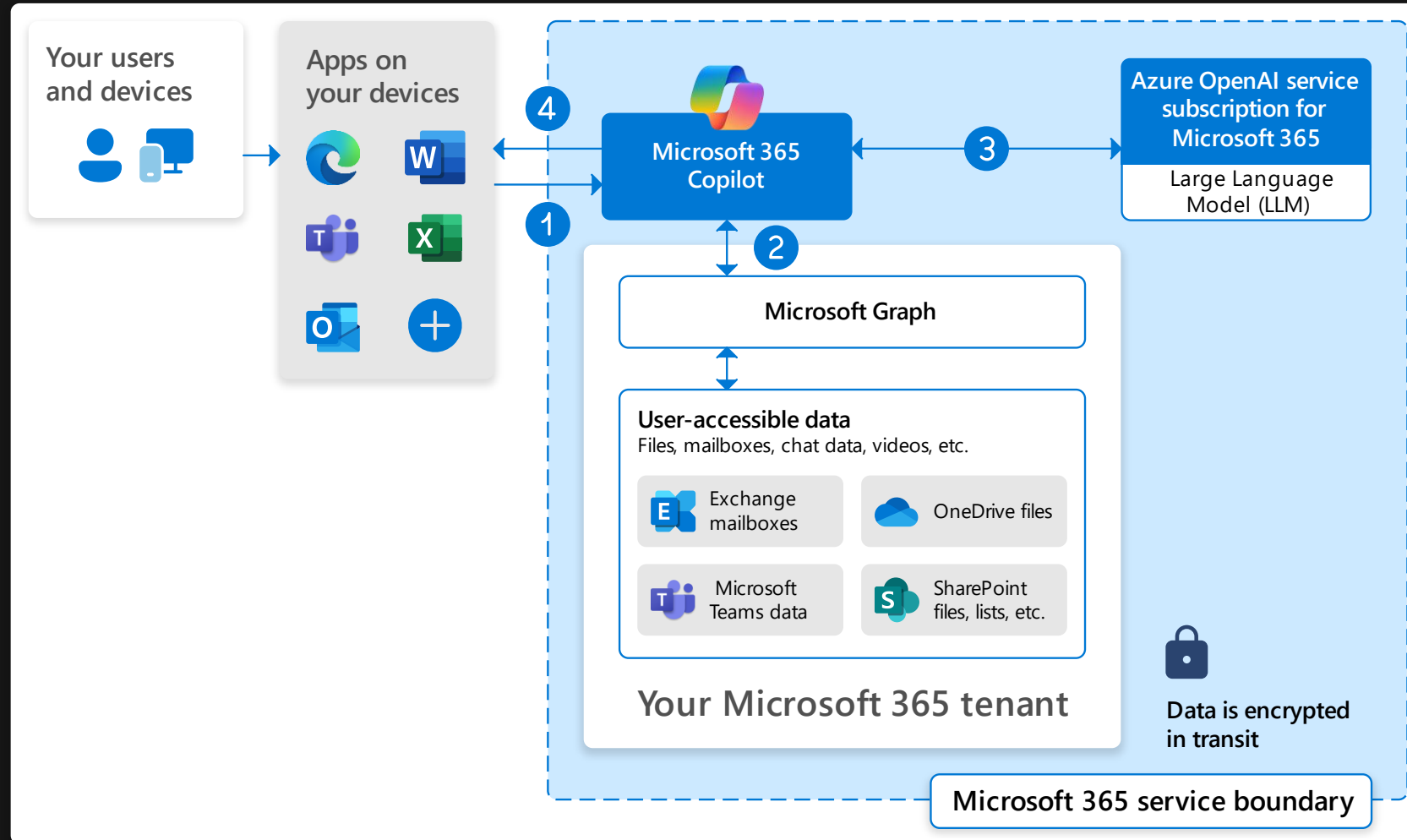




# The 4 States of Competence

Consciously Competent

# Brush up on how Microsoft 365 Copilot works



# Common Copilot oversharing risks in SharePoint

## Privacy settings

Public - anyone in the organization can access this site

Public - anyone in the organization can access this site

Private - only members can access this site

Site privacy set to public

## Share "Branding Elements.pptx"

Add a name, group, or email

Add a message

People in Contoso with the link can edit.



Copy link



Send

Link copied. People in Contoso with the link can edit.

Default sharing option is everyone

## m365x32957528.sharepoint.com says

You are about to create unique permissions for this document library. Changes made to the parent site permissions will no longer affect this document library.

OK

Cancel

Broken permission inheritance

## Share site

Add users, Microsoft 365 Groups, or security groups to give them access to the site.

Note that this site is part of a Microsoft 365 Group. If you add users here, they will be given access to the site, but not to other group resources such as calendars and conversations. To do that, add members to the group instead.

everyone



Everyone except external users

Search Directory

Use of "everyone except external users" domain group

## Documents

Name	Sensitivity
Branding Elements.pptx	
Cross Cultural Marketing Campaigns.pptx	Confidential
DG-1000 Product Overview.pptx	
DG-2000 Product Overview.docx	Confidential
DG-2000 Product Pitch.pptx	
DG-2000 Product Specification.docx	
International Marketing Campaigns.docx	

Sites and files without sensitivity labels

# Data oversharing assessments

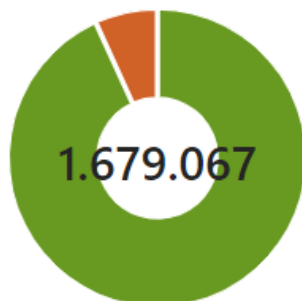
## Data security assessment

### Assessment info

Total items  
1.679.067

Sources included  
3.912

### Total items



Scanned For Sensitive Info Type

Not Scanned

### Sensitivity labels on data

Labeled  
0

Not labeled



● No Sensitive Information Types Detected

● Sensitive Information Types Detected

● Data Not Scanned

### Data with sharing links

Shared with anyone  
0

Shared organization wide

30.6k

Shared with specific people

1.0M

Shared externally

192.1k

● SharePoint

# Data oversharing assessments

The screenshot shows the 'Sharing links' page under 'Data access governance'. The left sidebar contains navigation links: Home, Sites, Containers, Policies, Settings, Content services, Migration, Reports, Data access governance (highlighted with a red arrow), OneDrive accounts, and More features. The main content area has a breadcrumb 'Data access governance > Sharing links' and a title 'Sharing links'. Below the title is a description: 'Use these reports to review SharePoint sites where users created the most sharing links for files and folders in the last 30 days. To get the latest data for a report, you must run it, which can take a few hours. [Learn more about these reports](#)'. There are two buttons: 'Run all' and 'Refresh status'. Below these is a table with three columns: 'Report name', 'Status', and 'Description'. The table lists three reports: 'Anyone' links, 'People in your organization' links, and 'Specific people' links shared externally. All three reports have a status of 'Updated 24 minutes ago' or 'Updated 25 minutes ago' and are marked with a green checkmark. The first three rows of the table are enclosed in a red rectangular box.

Report name	Status	Description
<input type="checkbox"/> "Anyone" links	✓ Updated 24 minutes ago	Sites where the most links were created that dont require sign-in.
<input type="checkbox"/> "People in your organization" links	✓ Updated 24 minutes ago	Sites where the most links were created that can be forwarded internally.
<input type="checkbox"/> "Specific people" links shared externally	✓ Updated 25 minutes ago	Sites where the most links were created for guests.



## One of the fixes?

# Set the correct default sharing type

Set-SPOTenant -DefaultSharingLinkType Direct

\$Site = "https://coretechdk.sharepoint.com/sites/Internalteamtest"

Set-SPOSite -Identity \$Site -DisableCompanyWideSharingLinks Disabled

# Before

← **Link settings** Summer Holiday Plan for Your Child.docx ⓘ ✕

The link works for

☒ People in twoday CTGlobal ⓘ

☐ Only people with existing access ⓘ


☐ People you choose  
Share with specific people you choose inside of twoday CTGlobal, using their name, group, or email.

More settings

👁 Can view ▾

📅 Set expiration date (MM/DD/YYYY) ✕

Apply



# After

← **Link settings** Summer Holiday Plan for Your Child.docx ⓘ ✕

The link works for

☐ Only people with existing access ⓘ

☒ People you choose  
Share with specific people you choose inside of twoday CTGlobal, using their name, group, or email.

More settings

👁 Can view ▾

📅 Set expiration date (MM/DD/YYYY) ✕

Apply

“But we only save sensitive documents in our document management system”

The screenshot shows the Microsoft 365 Data Explorer interface. The left sidebar contains navigation options: Home, Solutions, Learn, Settings, Information Protection, Communication Compliance, Data Loss Prevention, Data Catalog, and Audit. The main area is titled 'Data explorer' and shows '5 locations with items containing All Full Names'. A search bar contains 'denmark'. Below the search bar, there is a table with columns: Data source, Sensitive info types, Sensitivity labels, Trainable classifiers, and EDM classifiers. The table lists results for Copilot, Exchange, OneDrive, SharePoint, and Teams. A red box highlights the 'Sensitive info types' column and the list of results.

Data source	Sensitive info types	Sensitivity labels	Trainable classifiers	EDM classifiers
Copilot	All Full Names, All M...		IT, Source code, Fina...	None
Exchange	All Full Names, New ...	Confidential, General...	IT, Targeted Harassm...	None
OneDrive	All Full Names, New ...	Confidential, General...	IT, Targeted Harassm...	None
SharePoint	All Full Names, New ...	Confidential, General...	IT, Targeted Harassm...	None
Teams	All Full Names, New ...		IT, Targeted Harassm...	None

# Sensitivity Label recommendation

AutoSave On Health Data Example Document.docx General • Last Modified: January 24 • Search

File Home Insert Draw Design Layout References Mailings Review View Help

Paste Font Paragraph Styles

**POLICY TIP** Your organization recommends that you apply the sensitivity: Sensitive. We have detected sensitive information in this document. To ensure the highest level of security and compliance, we recommend applying the Sensitive label.

## Health Data Example Document

Introduction Understanding and organizing health data is crucial for monitoring and improving individual and community health outcomes. Below is a test document showcasing various health-related terms and their applications in health data collection and management.

### Key Health Data Categories

1. General Health Metrics
  - o BMI (Body Mass Index)
  - o Blood type
  - o Blood sugar levels
  - o Heart rate
  - o Cholesterol levels
2. Chronic Conditions
  - o Chronic diseases

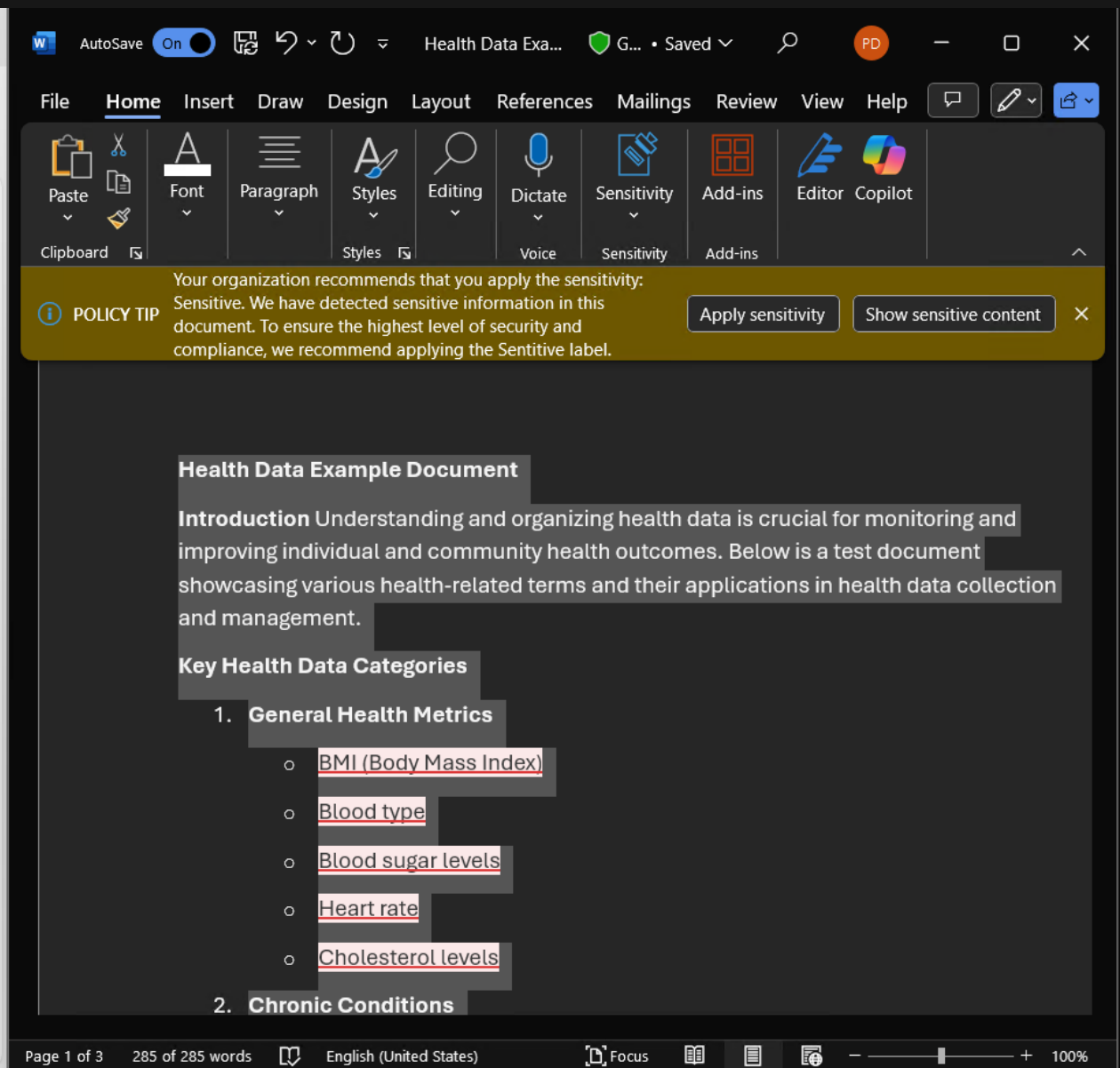
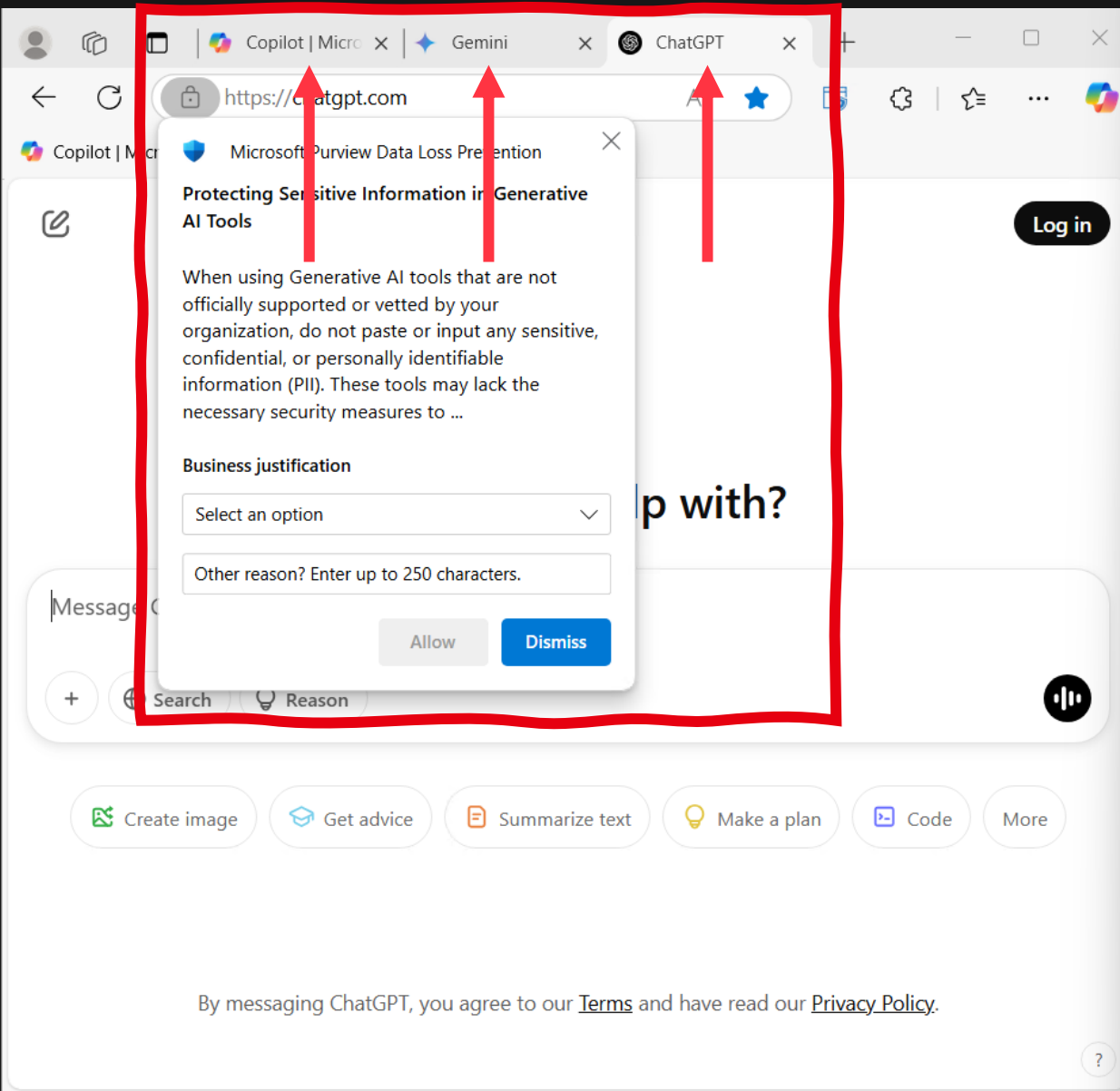
**Sensitivity** Add-ins Editor Copilot

purviewdemo@ctglobalservices.com

- Public
- Personal
- General**
- Sensitive
- Confidential
- Highly Confidential
- Learn More

Page 1 of 3 285 words English (United States) Text Predictions: On Accessibility: Good to go Focus 100%

# Endpoint DLP



# Data Security Posture Management for AI

Microsoft Purview

Search

New Microsoft Purview portal

Home

Solutions

Learn

Settings

Audit

Data Loss Prevention

Compliance alerts

DSPM for AI

Communi... Compliance

DSPM for AI

Overview

Recommendations

Reports

Activity explorer

Data assessments

Review AI activity including AI interactions (prompts and response), activity with sensitive info types, and more.

Filters:

Timestamp: 11/19/2024-11/26/2024

Activity type: Any

AI app category: Any

App: Any

App accessed in: Any

User: Any

User risk level: Any

Sensitive info type: Any

Resources accessed: Any

Sensitive files referenced: Any

Scope: Any

Reset all

Date	AI Interaction	Sensitive info types
11/19/2024	150	60
11/20/2024	145	40
11/21/2024	165	65
11/22/2024	110	30
11/23/2024	45	15
11/24/2024	35	5
11/25/2024	100	35
11/26/2024	145	15

Export

1155 items

<input type="checkbox"/>	Activity type	User	User risk level	Timestamp (UTC)	AI app category	App	App accessed in	Sensitive info type	Resources access...	S
<input type="checkbox"/>	AI Interaction			Nov 26, 2024 6:56 PM	Microsoft Copilot...		Office		Yes	
<input type="checkbox"/>	Sensitive info types			Nov 26, 2024 6:55 PM	Microsoft Copilot...		Webchat	All Full Names		



# Communication Compliance

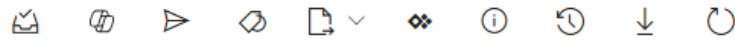
Policies > Microsoft 365 Copilot interactions

Export files Export report Download review activity

Pending (2) Resolved (0) Exports

Filter Reset Filters

Body/Subject: Any Date: Any Sender: Any Tags: Any



1 of 2 selected

<input type="checkbox"/>	<input type="checkbox"/>	Subject	Tags	Sender	Recipients	Sentiment	Date (UTC)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Copilot in BizChat	None	Purview Demo Use...	Copilot	Negative	Jan 22, 2025
<input type="checkbox"/>	<input type="checkbox"/>	Copilot in BizChat	None	Purview Demo Use...	Copilot	Neutral	Jan 22, 2025

Copilot in BizChat

Summary Plain Text User activity

Conditions detected: Denmark CPR (040490-1101)

View all

Insider risk activity not available Why?

**PU Purview Demo User** Asked Microsoft 365 Chat on Jan 22, 2025 4:06 PM (UTC)

Hi Copilot, please create a draft rejection letter to morten nilsen cpr 040490-1101 declining his application

Resolve

Summarize

Notify

Tag as

Escalate



# The 4 States of Competence

Unconsciously Competent

# Stage 4: Unconsciously Competent

***Fully integrated GenAI into operations. The team can use GenAI tools effortlessly and intuitively. GenAI is seamlessly embedded in workflows. The team can quickly generate content, analyze data, and automate tasks without needing to consciously think about the process. They can also troubleshoot and adapt to new GenAI features with ease***

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7	Have advanced knowledge of Microsoft 365 Copilot and can help others use it
8	Very familiar with Microsoft 365 Copilot and can optimize workflows using it
9	Have expert knowledge of Microsoft 365 Copilot and can teach others how to use it
10	Master of Microsoft 365 Copilot and can develop advanced solutions and workflows using it.



# Strategies for adopting the principles of Unconscious Competence

- Continuous Learning:
  - Dedicate time each day to **stay updated** on the latest technology trends
- Implementing Best Practices:
  - Regularly **apply best practices** in productivity and security
- Automation and Tools:
  - Use **automation tools** to streamline repetitive tasks.
- Peer Collaboration
  - Engage with your peers to **share knowledge and insights**.
- Feedback Loop:
  - Create a **feedback loop** with your team and clients. Regular feedback can help you identify areas for improvement and reinforce good practices.
- Mindfulness and Reflection:
  - Take time to reflect on your (and your teams) activities and identify **what worked well and what didn't**.





# Congratulations, you are still breathing !

## Summary of the deck

- **Competence States:** Understanding the four states of competence is crucial for effective GenAI integration.
- **Copilot Features:** Microsoft 365 Copilot includes chat features and requires a separate license per user.
- **Data Security:** Addressing data oversharing and implementing security measures are essential for safe Copilot usage.
- **Adoption Strategies:** Continuous learning, best practices, and automation tools are key for achieving unconscious competence.