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| A close up of a logo  Description generated with very high confidence |  | |
| Add app currency to Copilot page | |
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## Overview

Copilot is a cloud-based service that is quickly evolving, so it is vital for customers to keep Microsoft 365 apps up to date so that these desktop apps work properly as Copilot evolves. After setting devices to receive updates on a qualifying cadence (current channel or monthly channel), customers may struggle to keep individual devices current. We will add a card to the Copilot health page to give admins visibility into the currency of their org’s devices, and urge them to update devices that have fallen two or more builds behind.

## Business Justification

This effort is part of a broad Copilot customer health improvement effort; the business justification and other details are in the master plan doc: [M365 customer health improvement - Copilot health definition and overall plan.docx](https://microsoft-my.sharepoint-df.com/:w:/p/jonorton/EW7ZNuI22jpJpT3N43paR4ABAb9eqt6P4_dRsCZuICXWKA?e=XtxoT9)

## Additional Context

Read [Currency - M365 customer health improvement.docx](https://microsoft-my.sharepoint-df.com/:w:/p/jonorton/EeUU79FQgYNClxemJ_w115kBL24REU6K01rfZFp6c2i98w?e=fb8KlS) to understand this health signal before you read this doc.

## Figma Mockups

Under development here: [Copilot Health Insights – Figma](https://www.figma.com/design/KAI54eE2Hvyx3AsVmZuH1N/Copilot-Health-Insights?node-id=1533-22809&node-type=canvas&t=Y7QvlbEh6xB1i1JW-0)

## Scenarios

Scenario #1: **An admin views the app currency card**

The admin sees a graph that shows the currency of devices in their organization: current, 1 build behind, or 2 or more builds behind.

A screenshot of a computer error

Description automatically generated

*(see figma for latest designs)*

If no devices are two or more builds behind, the status is show to be Healthy, otherwise, it shows as Needs attention.

*Note: As the Copilot health page gets more cards added, we may decide to hide this card if the customer is in a healthy state, to reduce clutter. Right now, we have ample space so it will be displayed regardless of what percentage of devices are up to date.*

Scenario #2: **An admin clicks to view details on devices that have fallen behind**

The admin wants to identify the devices that have fallen behind on builds, so they click the button to view details. Language in the detail panel urges the admin to update the devices that have fallen behind, noting that this is important for security reasons, as well as to ensure compatibility with services like Copilot.

* If the customer has previously signed up for the Inventory service in the Apps Admin Center, a detail pane shows the names of devices that have fallen behind
* If the customer has not signed up for the Inventory service, they are given a link and instructions to do so, with an explanation of the benefits of doing so.

Scenario #3: **Admin views the card, but device data is not available because diagnostic data is blocked and Inventory is not enabled**

The card does not show data because the customer has blocked diagnostic data and Inventory is not enabled. The customer is encouraged to activate device Inventory so they can see data on application currency:

No data available. Turn on device Inventory to get information about Microsoft 365 app installations in your organization. [Learn more about Inventory.](TBD)

Scenario #4: **There are no devices in the customers environment, card is not visible**

If no licenses in the tenant include the Microsoft 365 desktop apps, the card is not shown.

## Data Sources

There are two sources of information about M365 app currency:

* Client telemetry: This data is available as long as the customer has not blocked the transmission of diagnostic data from M365 apps. But it is limited; showing status on devices that have been active during the past 14 days, and not able to show device names
* Device inventory: Requires the customer to activate Inventory in the Apps Admin center. Once this is done, the customer can see a fuller picture of their device landscape.

For any customer that has activated Inventory, we will use those numbers to power the chart and to display the names of devices that have fallen behind on updates, in the side panel.

If a customer has not activated Inventory, we will fall back to client telemetry to display data in the main card. However, when these customers open the details panel to act, we will direct them to activate inventory in Apps Admin Center so they can see the specific devices that have fallen behind.

## Possible Customer States

We need to make sure the card functions properly under various customer states:

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| ***Customer situation*** | ***Card expected behavior*** | ***Test result*** |
| No Copilot licenses at all | Entire Health tab not shown | PASS (wayneweb.net and several others) |
| No Office licenses in tenant, or no licenses assigned to users | Card invisible |  |
| Office licenses assigned, but no active users | Card invisible |  |
| Office licenses assigned, active users, Inventory not activated | Card visible with message encouraging customer to activate Inventory |  |
| Office licenses assigned, active users, Inventory activated, no devices found | Card visible with message "No devices were found in inventory” | FAIL. Shows: “No data available. Your org may need to turn on diagnostic data for ‎Microsoft 365 apps‎..." (testtestamplifycopilotdemo tenant) |
| Office licenses assigned, active users, Inventory is activated, but no devices found that are linked to Copilot users | Card visible with message “No devices with Copilot users could be found” | FAIL. Shows graph with 0 devices and “All devices are up-to-date" message (m365healthteam tenant) or shows  “No data available. Your org may need to turn on diagnostic data for ‎Microsoft 365 apps‎..." (testtestamplifycopilotnids tenant) |
| Office licenses assigned, active users, Inventory is activated, devices found – all are up to date | Card visible with data chart showing 100% and “All devices are up-to-date" headline |  |
| Office licenses assigned, active users, Inventory is activated, devices found – not all are up to date | Card visible with data chart showing 0-99% and “Not all devices are up-to-date" headline |  |
| API fails to retrieve data | Card visible with API failure message (see Figma) |  |

## Requirements

Device landscape: In our first version of this card, we will show the currency of all devices in the customer’s environment. When the data becomes available, we will change this to be a view to be *Copilot-specific*, showing the currency of only those devices with Copilot enabled for M365 apps.

Admin roles: The card should be visible to admins with any of the following admin roles. This list corresponds to the roles able to use the Apps Admin Center (plus the Global Reader Role that can see but not change things in the M365 admin center.

* Global Administrator
* Global Reader
* Office Apps Administrator
* Security Administrator

## Measurement

Usage: We will log when the card is loaded, the state of the card (whether or not devices are two or more builds behind), log when users click the button to launch the side pane, and log when they follow any links

Impact: Using the currency data available in the [Copilot customer insights dashboard](https://customerinsights.microsoft.com/copilot?date=2024-04-01&platform=All&level=TenantId&cohort=ECAP&application=All&mau=500&scoreType=Readiness) we will track the changes in app currency for tenants who have at least one engage with the app currency card. This is correlation analysis, not suitable for proving causation. It is possible that app currency may improve due to other methods of customer outreach or by the customer’s own initiative. Our goal for this phase of the work is simply to check whether there is positive correlation; efforts to disentangle the effect of this UI element from other efforts will come in a later phase.

## Goals

* Help customers understand that it is important to keep Microsoft 365 desktop apps current so they will work properly with Copilot
* Make customers aware when they have fallen behind on currency
* Make it easier for customers to identify and address devices that have fallen two or more builds behind
* Determine whether engagement with the app currency card is associated with improvements in app currency of the customer’s device landscape