

Microsoft 365 Copilot release notes

08/05/2025 Applies to: Microsoft 365 Copilot

This page lists the latest features and improvements for Microsoft 365 Copilot. It includes changes that are generally available (Current Channel for Microsoft 365 apps) and specific to each platform.

All features

August 5, 2025

Updates released between July 22, 2025, and August 5, 2025.

Copilot extensibility

- **Admin pre-approval for trusted declarative agents [Web]**

Admins can now pre-approve specific agents so their actions are always allowed without extra confirmation. This reduces interruptions and helps ensure a smooth workflow in integrated apps. [Learn more](#).

- **Discover and install Copilot agents easily**

Users in Word and PowerPoint can seamlessly find and install Copilot agents directly from the Unified App Store. [Learn more](#).

- **Enhance agent builder with full screen mode [Windows, Mac, Web]**

Enjoy an improved agent builder experience with a full-screen view that streamlines the process of creating and managing your agents. [Learn more](#).

- **Enhanced adaptive card capabilities in declarative agents**

Developers now have access to enhanced adaptive card functionalities—including task modules, stage view, inline actions, and charts—directly in declarative agents for richer app experiences. [Learn more](#).

- **Enhanced Q&A accuracy for SharePoint files [Windows, Web]**

Improve the precision of Q&A interactions on SharePoint files that include tables, comments, and formatting. Benefit from more relevant and insightful responses whether you're working with Word, PDF, or PowerPoint files.

- **Fine-tune models with tenant data**

Developers and makers can fine-tune a model used in Microsoft 365 Copilot using their tenant data. [Learn more.](#)

- **Get relevant calendar results by time period [Windows, Web]**

Quickly summarize meetings for a specific day to stay on top of your schedule and focus on the events that matter most.

- **Improve email responses with extra context [Windows, Web]**

Get fuller email replies that expand your initial lists, indicate the number of related messages, and let you easily paginate for more details—all to help you manage your inbox more effectively. [Learn more.](#) ↗

- **Schedule meetings with smart time insights [Windows, Web]**

Easily discover optimal meeting times and streamline Outlook handoffs with intelligent calendar suggestions that make scheduling a breeze. [Learn more.](#) ↗

- **Semantically index more document pages**

With improved indexing, P99 documents can now include up to 180,000 characters (about 90-100 pages) for more comprehensive document insights, while P99.99 documents support up to 1.8 million characters (about 900–1,000 pages), which is a significant increase from the previous 18-20 page limit. [Learn more.](#)

Copilot Studio

- **Ground your agents with live enterprise data [Web]**

You can now enhance your copilots built with Microsoft Copilot Studio by incorporating structured data from both Microsoft and select non-Microsoft systems. These copilots enable users to ask natural language questions about enterprise systems within their Power Platform tenants. Building on the natural language query capabilities introduced with Microsoft Dataverse knowledge, Microsoft is extending this functionality to include certain third-party services. [Learn more.](#)

- **Only use grounded knowledge for agent response [Windows, Web]**

Prevent agents from using model-trained knowledge by turning off internal knowledge, ensuring responses are based on specified grounded sources. [Learn more.](#)

Microsoft 365 admin center

- **Onboard SharePoint Agents as a PayG scenario in CCS [Web]**

This feature introduces SharePoint Agents to the Pay-as-you-go tab under Copilot → Billing & usage, aligning with the existing workflow used for Microsoft 365 Copilot Chat. Administrators will gain the ability to manage and monitor SharePoint Agent consumption through the familiar Pay-as-you-go interface, ensuring consistent oversight across Copilot experiences. Integration with the SharePoint backend via API enables precise usage tracking and billing for this new scenario. [Learn more.](#)

Microsoft 365 Copilot App

- **Ask Microsoft 365 Copilot for insights using Click to Do [Windows]**

Streamline your workflow by seamlessly sharing highlighted content with Microsoft 365 Copilot using Click to Do for quick insights and assistance. [Learn more.](#)

- **Start an instant chat with Copilot [Windows]**

Launch a chat with Copilot quickly using the quick view for instant assistance. Use the Win+C shortcut or the Copilot key on supported devices.

Microsoft 365 Copilot Chat

- **Share agents with your enterprise [Windows, Web]**

Generate sharing links for your agents in Business Chat. If the recipient doesn't have the agent, they'll be directed to the Microsoft 365 application catalog to install it. If they do, the agent will open directly in Microsoft 365 Copilot Business Chat. [Learn more.](#) ↴

Microsoft Intune

- **Analyze error codes efficiently**

Use Copilot to analyze Intune error codes from device configuration profiles, compliance policies, and app installations, simplifying troubleshooting. [Learn more.](#)

- **Compare device settings to uncover issues**

Easily compare settings on two devices using Copilot in Intune to identify potential misconfigurations. [Learn more.](#)

- **Get device summaries with Copilot**

Access device-specific information such as installed apps and group membership using Copilot in Intune for better device management. [Learn more.](#)

PowerPoint

- **Copilot uses enterprise assets hosted on SharePoint OAL when creating presentations now [Mac, Windows, Web]**

Once you integrate your organization's assets into a Sharepoint OAL (Organization Asset Library) you will be able to create presentations with your organization's image. [Learn more.](#)

- **Copilot uses Enterprise assets hosted on Templafy when creating presentations now [Mac, Windows, Web]**

Once you connect your asset library hosted with Templafy to Microsoft365 and Copilot, you will be able to create presentations with your organization's images. [Learn more.](#)

SharePoint

- **Manage site ownership effectively [Web]**

The site ownership policy enables you to define and enforce ownership criteria for your SharePoint sites, automating actions to prevent data risks if sites remain ownerless for over three months. [Learn more.](#)

Teams

- **Ability to Stop Copilot while it is generating a response [Windows]**

Copilot in Teams now has a 'stop' button after sending a prompt. This allows the user to stop Copilot's response either before the response has started to generate, or even after the response is generating. The user can then start a new prompt if they wish.

- **Interpreter agent for seamless communication [Windows, Mac]**

Interpreter Agent acts like an instant translator during your Teams meetings. It listens to the spoken language in a meeting and immediately translates it into another language in real-time. This allows participants who speak different languages to

understand each other and collaborate more effectively without waiting. Whether you're holding a business meeting, customer calls, or project discussions, the AI interpreter in Teams ensures everyone can participate fully, enhancing communication and productivity across diverse teams. It supports 9 different languages: English, Italian, German, French, Portuguese (Brazil), Japanese, Spanish, Chinese (Mandarin), and Korean. [Learn more.](#)

- **Translated Intelligent meeting recap for multilingual meetings (Copilot and Teams Premium)** [Windows, Mac]

Now, intelligent meeting recap supports multilingual meetings, ensuring you can easily catch up on key discussions even when multiple languages were spoken. After the meeting, your recap is automatically generated in the translation language you selected for live transcription and captions. [Learn more.](#)

Word

- **Access audio overviews in Word** [Web]

Generate a convenient audio overview of your document through Copilot from the Summary tab, enhancing your document review process. [Learn more.](#)

- **Kickstart your document with contextual prompts** [Windows]

Copilot suggests prompts by including files and meetings based on your recent activity, helping you draft a new document in Word seamlessly.

- **Use Writing suggestions to review content in Word** [Mac]

Enhance your document content with AI-generated writing suggestion in the Copilot context menu. Get suggestions on logical structure, flow, and tone to make your documents more impactful. [Learn more.](#)

July 22, 2025

Updates released between July 8, 2025, and July 22, 2025.

Copilot extensibility

- **Hebrew support in Agent builder** [Windows, Web]

Integrate Hebrew language support in agent builder to build accessible, localized solutions that simplify multilingual deployments and enhance user engagement.

[Learn more.](#)

- **Increased support for uploading up to 20 documents to agents' knowledge [Windows, Web]**

End users and makers can now upload up to 20 documents to ground agents with richer, embedded knowledge in Microsoft Copilot Studio agent builder. [Learn more.](#)

- **Share agents from embedded builder [Windows, Web]**

Users can share agents from an embedded agent builder to other individual users or group chats. [Learn more.](#)

- **Share agents with context-aware link previews [Windows, Web]**

Streamline your interactions by using context-aware buttons that adapt based on where links are shared—making it easier to take the right action in chats and meetings.

- **Upload and embed knowledge in declarative agents [Windows, Web]**

Empower your agents with enriched context by uploading your own files and embedding crucial knowledge for personalized, day-to-day assistance. [Learn more.](#)

- **Users can share agents from SharePoint [Web]**

Users can share agents via links from SharePoint to Teams group chats. This means users will be able to chat and collaborate with SharePoint agents in group chats. The shared links will unfurl into preview cards with actionable buttons to 'Add to this chat'. [Learn more.](#)

Copilot Studio

- **Easily find and use knowledge data sources [Web]**

In Copilot Studio agent builder you can now quickly identify and select the right knowledge data sources without manually scanning long lists. This streamlined workflow helps you get to the insights you need faster for everyday tasks. [Learn more.](#)

Excel

- **Ask Copilot to generate formulas [Web]**

Type “=” anywhere on your grid or in the formula bar and let Copilot generate formulas from natural language, making complex calculations simpler and faster. [Learn more.](#)

- **Copilot advanced text analysis in Excel [Web]**

Copilot can now analyze text by identifying themes and sentiments, citing data examples, and inserting a column with labels—helping you quickly uncover actionable insights. [Learn more.](#)

- **Copilot icon on the grid in Excel for the web for M365 personal and family [Web]**

Access AI-powered support directly from your spreadsheet with a single click. The Copilot icon helps you stay in your flow by offering instant insights while you work. [Learn more.](#)

Microsoft 365 Copilot app

- **Get an audio overview of a notebook [Web]**

Turn the files in your notebook into a dynamic audio overview for an engaging listening experience. Simply select “Get audio overview” at the top of your notebook—available in English only, with more languages coming soon. [Learn more.](#)

Microsoft 365 Copilot Chat

- **Dictate your prompts in Copilot Chat [Windows, Web]**

You can now use the dictation button to input your prompts via speech, making interactions with Copilot more natural and efficient. [Learn more.](#)

- **Researcher [available in GA](#) [Windows, Mac, Web]**

The [Researcher](#) agent is pre-installed in Copilot Chat for all worldwide users. Find it in the left navigation pane alongside other agents, giving you quick access to research tools as part of the Copilot Premium license. [Learn more.](#)

Microsoft 365 Purview compliance portal

- **Data Security Posture Management for AI - Data Risk Assessments. [Web]**

Admins can drive better security outcomes by reviewing default assessments, examining data sensitivity, and monitoring user accesses—all to quickly identify risks and remediate them in daily operations. [Learn more.](#)

PowerPoint

- **Create a presentation with Microsoft 365 Copilot from menus [Windows]**

You can quickly begin a new presentation using Microsoft 365 Copilot from the PowerPoint start menu or file menu. Copilot is easily accessible when you open PowerPoint or click the File tab, helping to simplify your workflow. [Learn more.](#) ↗

- **Microsoft 365 Copilot generates the new presentation in a new file when starting from an existing presentation [Mac, Windows]**

Now, when creating a presentation using Microsoft 365 Copilot from an existing presentation using, it will create the new presentation in a new file without affecting the original presentation [Learn more.](#) ↗

- **Reference multiple files in your presentation creation using Microsoft 365 Copilot [Windows, Mac, Web]**

Enhance your PowerPoint presentations by referencing up to five files with Microsoft 365 Copilot, making it easier to incorporate detailed insights and comprehensive data without switching contexts. [Learn more.](#) ↗

Teams

- **Catch up on meetings with AI recaps on mobile**

On iOS and Android, view AI-generated notes, tasks, @mentions, and speaker-indexed recordings so you can quickly get up to speed when you miss a meeting. [Learn more.](#)

Word

- **Catch up on a summary of document comments in the top of your document [Web]**

Copilot now has a Discussion tab in the top of your document to summarize open comments, helping you quickly understand what people have said.

- **Easily write a prompt or choose quick actions from the Copilot icon in your Word doc [Mac, Windows]**

The Copilot icon in your document margin makes it easy to quickly add a prompt or choose from a range of quick options Copilot can offer. [Learn more.](#) ↗

- **Include citations in drafted content [Web]**

Enhance the credibility and reliability of your documents with Copilot's ability to automatically include citations when drafting content from referenced sources. This feature ensures proper attribution and helps maintain academic and professional standards in your work.

- **Listen to an audio summary of your document [Web]**

Transform your Word document into a dynamic audio experience with Copilot. Enjoy a podcast-style discussion that makes your content easy to consume on the go. Currently available in English, this feature allows you to listen to your documents anytime, anywhere. [Learn more.](#) ↗

- **Preserve text formatting in drafted content [Windows]**

Word Copilot now preserves the styling of surrounding content when generating text, ensuring a seamless and professional authoring experience. Copilot now understands and respects more contextual formatting—whether the user is writing in a list, table, heading, or styled paragraph. This includes support for bold, italic, underline, and links. This allows the generated text to better match the structure and basic formatting of the document. The result is a smoother authoring experience with less need for manual reformatting.

- **Reference very large documents when prompting Copilot [Web]**

Easily work with extensive documents by typing a forward slash (/) or selecting the attach icon to choose a document up to 3,000 pages long. This becomes the basis of the content you're requesting from Copilot, making it seamless to generate content from detailed sources. [Learn more.](#) ↗

July 8, 2025

Updates released between June 24, 2025, and July 8, 2025.

Copilot extensibility

- **Ability to use the Graph connector selector when using Teams Toolkit**

Developers using Teams Toolkit to author declarative agents can select specific Graph connectors to improve their knowledge grounding. [Learn more.](#) ↗

- **Add Dataverse as knowledge in Copilot [Web, Windows]**

Users can now include Dataverse as a knowledge source in Copilot, enabling more comprehensive responses and insights. [Learn more](#).

- **Audit and eDiscovery for Copilot actions and declarative agents [Windows, Web]**

View detailed audit logs and eDiscovery records for Copilot actions and declarative agents in Microsoft Purview to simplify compliance and investigation workflows.

[Learn more](#).

- **Automatic project scaffolding in Teams Toolkit for building Graph connectors**

Developers can now leverage an automatic project scaffolding for Graph connector applications within the Teams Toolkit, allowing for the generation of a full production-ready Graph connector application from just an API description file, significantly reducing setup time and complexity. [Learn more](#).

- **Deploy Copilot agents for easy discovery [Windows, Web]**

Deploy Copilot agents in the store for user discovery directly from your apps. Users can get new agents, open the store, install, and use them seamlessly within App Chat. [Learn more](#).

- **Developers can use TypeSpec as an authoring experience**

Developers can use TypeSpec as an authoring experience for declarative agents and API plugins in Teams Toolkit. [Learn more](#).

- **Discover, acquire, and manage agents through in-app store in Word and PowerPoint [Windows, Web]**

With Copilot extensibility, users can discover, acquire, and manage agents through the unified store. We are excited to introduce the Microsoft 365 unified store to Office documents, enabling users to discover, acquire, and manage agents directly within the in-app store for Word and PowerPoint, with Excel support coming soon. [Learn more](#). ↗

- **Ground agents in Outlook email**

Makers can now build custom agents that read and reason over Outlook messages, delivering answers that reflect the latest decisions and context stored in your inbox—no data migration or retraining needed. [Learn more](#).

- **Publish Microsoft Copilot Studio agents to Microsoft 365 Copilot**

Organizations can now publish, manage, and use agents built with Copilot Studio directly within the Microsoft 365 Copilot app—across both web and desktop—and in

Microsoft Teams, bringing intelligent assistance into the flow of everyday work. [Learn more.](#)

Copilot Studio

- **See performance metrics for every knowledge source [Web]**

Review usage frequency, answer rate, and error rate for each knowledge source to spot high-value content and quickly fix low-performing links, keeping your agents accurate and helpful. [Learn more.](#)

Excel

- **Copilot in Excel with Python | Reasoning Model Integration (Think Deeper) [Mac, Windows, Web]**

While performing advanced analysis with Copilot in Excel with Python, users can choose the "Think Deeper" mode to get a more elaborate and detailed plan, followed by automatic execution to generate Python code, results, and explanations. This improves performance on complex asks by leveraging the power of the latest AI reasoning models. [Learn more.](#) ↗

Microsoft 365 Admin Center

- **Metadata for Shared agent management in Microsoft 365 admin center [Web]**

IT admins can view metadata for Shared agents in Microsoft 365 admin center similar to metadata information for line of business applications built by customer organization. It provides IT admins the opportunity to explore all data besides honoring UX filters for a seamless user experience. [Learn more.](#)

Microsoft 365 Copilot App

- **Create in the Microsoft 365 Copilot app [Windows, Web]**

The creative hub for AI led artifact generation capabilities. [Learn more.](#) ↗

- **Updated UI for Microsoft 365 Copilot App [Windows, Web]**

The Microsoft 365 Copilot app is your starting place for AI at work, offering quick access to secure AI chat, search, files, and content creation in one seamless app. [Learn more.](#) ↗

Microsoft 365 Copilot Chat

- Locate your Copilot Pages in Microsoft 365 Copilot Chat navigation pane [Windows, Web]

For quick access to your Copilot Pages, find all page artifacts created across your apps/modules in one place underneath the Chat section in the Microsoft 365 Copilot app. [Learn more.](#)

Microsoft Purview compliance portal

- Data assessments in Microsoft Purview AI Hub [Web]

Create targeted assessments, review sensitivity and access for key locations, and take remediation actions to reduce oversharing risks—all from one dashboard. [Learn more.](#)

OneNote

- Copilot Chat on OneNote for web and in Teams [Web]

User can enjoy the power of Microsoft Copilot to OneNote for web and in Teams. [Learn more.](#)

Teams

- Copilot in Meetings will suggest follow up questions to ask it [Windows, Mac]

When Copilot in Teams Meetings responds to a prompt, it will also suggest follow up prompts to ask Copilot that build on the prior response. These questions will generally be based on the response it gave prior, and could be related to honing in on a particular topic, asking for more details, or even reformatting the content into a table if appropriate. [Learn more.](#)

Viva Connections

- New News feature in Microsoft Teams [Android, Windows, iOS, Web]

This update replaces the current Feed experience in Viva Connections across desktop, mobile, and web platforms with a SharePoint News reader experience. This new experience presents SharePoint news from organizational sites, boosted news, users' followed sites, frequent sites, and people they work with in an immersive reader.

format. It includes a Copilot-powered news summary as well, available only in Teams for Windows desktop in this initial release. [Learn more.](#)

Word

- **Automatic summary of documents on file-open in Word [Windows, Mac, Web]**

When users open a document, Copilot generates a summary in the Word window. You can hide the summary or open the Copilot chat pane to ask specific questions about the document. [Learn more.](#)

- **Implement coaching suggestions when rewriting your text with Copilot [Web]**

Enhance your writing process by letting Copilot apply tailored coaching tips when rewriting your selected text—refine your documents effortlessly. [Learn more.](#)

- **Kickstart your document with contextual prompts [Mac]**

Copilot leverages your recent files and meetings to suggest contextual prompts, helping you quickly draft a new document for day-to-day tasks.

June 24, 2025

Updates released between June 10, 2025, and June 24, 2025.

Copilot extensibility

- **Admins can manage Copilot extensibility under Copilot tab in Microsoft 365 admin center [Windows, Web]**

Admins have options to manage Copilot extensibility under Copilot tab including agent management for IT published agents and shared agents. [Learn more.](#)

- **Build agents faster with built in Office skills [Windows, Web]**

Empower your agent building by consuming built-in Office skills like Q&A on documents and PowerPoint summaries. This feature speeds up integrations, reduces the need for custom solutions, and delivers context-aware insights for a smarter agent experience.

- **Build custom engine agents with Copilot Studio**

Use Copilot Studio to create, test, and update custom engine agents that run seamlessly in Microsoft 365 Copilot Chat and Teams, streamlining your development

and deployment process. [Learn more.](#)

- **Declarative agents can read the current document in WXP [Windows, Web]**

Improve your workflow with agents that dynamically interact with open documents. Receive real-time suggestions, automate edits, and extract key data to streamline reviews and boost productivity. [Learn more.](#) ↗

- **Developers can use Copilot Studio to create declarative agents that include Teams Channel as knowledge**

Developers can use Copilot Studio to create declarative agents that include Teams Channel as knowledge.

- **Developers can use Teams Toolkit to create declarative agents that include Teams Channel as knowledge**

Developers can use Teams Toolkit to create declarative agents that include Teams Channel as knowledge.

- **Discover, acquire, and manage agents through in-app store [Windows, Web]**

Users can now easily discover, acquire, and manage Copilot agents directly within their Word and PowerPoint documents through a unified in-app store. This streamlined experience simplifies adding new capabilities—and Excel support is coming soon. [Learn more.](#) ↗

- **Manage custom Copilot agents in Agent Center [Windows, Web]**

Organize, store, and update your declarative Copilot agents in one place. Agent Center lets developers register in-context actions, fine-tune prompts, and test behavior faster—so IT admins can roll out reliable, task-specific Copilot experiences at scale. [Learn more.](#) ↗

- **Microsoft 365 Agents Toolkit uses Kiota as the API plugin generation tool**

The Microsoft 365 Agents Toolkit now generate API plugins using Kiota. This unlocks new scenarios in the Agents Toolkit like searching our repository of public APIs, visually selecting the main integration endpoints and improving the maintainability of existing plugins by adding new endpoints as the developer continue evolving their agents. [Learn more.](#) ↗

- **Non-citation links remain visible in custom actions [Windows, Web]**

Links returned from your custom actions are no longer redacted when they aren't part of a citation, letting users follow the full URL for easier validation and deeper

exploration. [Learn more.](#)

Copilot Studio

- **Add custom Copilot Studio agents to Microsoft 365 [Web]**

Publish your Copilot Studio agent to the Microsoft 365 channel in one click, then roll it out to yourself, a pilot group, or your whole org. Messages, quick replies, adaptive cards, and multi-turn chat work instantly, while Power Platform analytics and governance keep everything secure and measurable. [Learn more.](#)

- **Automate repetitive tasks with agent flows [Web]**

Build agent flows in Copilot Studio using natural language to automate workflows with AI-powered actions. Makers can build intelligent, scalable, and flexible automations for tasks ranging from intelligent summarization to advanced approvals - and get fast, consistent results. [Learn more.](#)

- **C2 image upload and Q&A [Web]**

Allow your Microsoft Copilot Studio agent to analyze images that users upload during conversations with the agent. This feature enhances visual content collaboration with intelligent insights for everyday tasks. [Learn more.](#)

- **Quarantine compromised agent to boost security**

Give IT admins a critical tool to isolate potentially compromised agents, reducing risk and protecting your network without disrupting daily operations. [Learn more.](#)

Excel

- **Use Copilot with any table in the workbook, referring by natural language [iOS, Web, Mac, Windows]**

Copilot uses the context of your prompt to pick what selection of data to answer about and reason over, including tables in other sheets. [Learn more.](#)

Microsoft 365 Copilot app

- **Copilot Notebooks [Web]**

Copilot Notebook in the Microsoft 365 Copilot app streamlines your workflow by integrating notebook functionality directly into the app. [Learn more.](#)

- **Upload phone images to Copilot in Office apps [Windows]**

Snap a photo on your phone and send it straight to Copilot in Word, PowerPoint, Excel, or OneNote to generate content, extract text, or get design ideas—no cables or transfers needed. [Learn more.](#)

- **Use Copilot suggested prompts for recommended entities [Windows, Mac, Web]**

Empower your work with a \$30 Copilot license by clicking on curated prompts within recommended entities. Uncover key insights on demand—helping you boost productivity in everyday tasks. [Learn more.](#)

Microsoft 365 Copilot

- **Copilot Prompt Gallery – share prompts with a Teams team [Windows, Web]**

Share custom prompts with members of a Microsoft Teams team directly from Copilot Prompt Gallery, allowing colleagues to easily discover and reuse them in Copilot Chat. [Learn more.](#)

Microsoft 365 Copilot Chat

- **Catch up on Task related emails through Microsoft 365 Copilot Chat. [Windows]**

Users can use Microsoft 365 Copilot Chat to prioritize emails that require immediate attention, address urgent tasks, or contain action items or questions. Timely identification of such emails will help users complete these tasks efficiently or plan their work effectively.

- **Find any past Copilot conversation instantly [Web]**

Search your Copilot Chat history by keyword to revisit decisions, copy answers, or resume a discussion without endless scrolling. [Learn more.](#)

- **Locate your Copilot Pages in Copilot Chat navigation pane [Windows, Web]**

For quick access to your Copilot Pages, find all page artifacts created across your apps/modules in one place underneath the Chat section in the Microsoft 365 Copilot app. [Learn more.](#)

- **Play back responses as audio [Windows, Web]**

Listen to Copilot's replies with a built-in read aloud feature—ideal for multitasking or when you need to review content hands-free. [Learn more.](#)

- **Scheduled prompts** [Windows, Mac, Web, Teams]

Plan ahead by scheduling essential prompts for repeated tasks in Copilot chat. Create a productive routine that helps you stay organized and efficient. [Learn more.](#)

Microsoft Clipchamp

- **Clipchamp Copilot video creator** [Windows, Web]

Create a video draft on any topic by providing a prompt. Clipchamp will generate a script, source stock footage and music, add AI voice-over, text overlays, and transitions—giving you a ready-to-edit project you can export to OneDrive. [Learn more.](#) ↗

Microsoft Loop

- **Rich artifacts in Copilot Pages** [Web]

You can now create rich artifacts, including interactive charts, tables, complex diagrams, and code created with Copilot from enterprise or web data. Artifacts can be added to Pages to further edit and refine with Copilot. They are interactive and stay in sync across Microsoft 365 when shared for collaborative work. [Learn more.](#) ↗

Outlook

- **Content language is the default summarize language** [Mac]

When summarizing Copilot will try to identify the language of the email and summarize in that language. [Learn more.](#) ↗

PowerPoint

- **Create a PowerPoint slide from a file or prompt** [Web, Windows, Mac]

Creating impactful slides can be challenging and time-consuming. Copilot helps you quickly turn your ideas and files into a fully designed slide with content ready to edit and refine, making the presentation creation and refinement process more personalized and efficient. [Learn more.](#) ↗

- **Designer is now part of Copilot, enhanced with new template and slide suggestions** [Mac, Windows, Web]

Enjoy familiar Designer slide layouts and presentation template suggestions in a vertical gallery. Copilot now brings you enhanced suggestions to quickly build impactful presentations. [Learn more.](#)

- **Easily select a template while you create a new PowerPoint presentation with Copilot [Mac, Web, Windows]**

When creating a new presentation with Copilot in PowerPoint, choose a template from your organization's collection for on-brand presentations, or select from Microsoft's handpicked templates, ensuring the new presentation is built as per your chosen template. [Learn more.](#)

- **Reference a PDF file when creating a presentation with Microsoft 365 Copilot [Mac, Windows, Web]**

You can now reference a PDF file when you create a presentation with Copilot within the PowerPoint application. [Learn more.](#)

Teams

- **Copilot generated summaries for call transfers on Teams phone devices [Android]**

Copilot generated summary provides an overview of the details and outcomes of transferred calls. It includes information such as the caller's details, the reason for the transfer, and the final resolution. [Learn more.](#)

- **Speaker recognition and attribution in Teams Rooms on Android [Android]**

Enhance your meetings with real-time speaker recognition and transcript attribution in Teams Rooms on Android. This feature identifies voices through cloud-enabled intelligent speakers and lets you securely enroll voices via Teams Settings—note that a Teams Rooms Pro license is required. [Learn more.](#)

June 10, 2025

Updates released between May 29, 2025, and June 10, 2025.

Copilot extensibility

- **One-click setup for all connectors [Windows, Web]**

New and existing connectors now install in a single step within the admin center, speeding up data integration and reducing support calls. [Learn more.](#)

Copilot Studio

- **Encrypt Copilot content with your own keys [Web]**

Microsoft Copilot Studio now allows you to use your own customer manager encryption keys (CMKs, hosted in Microsoft Azure Key Vault) to govern how Copilot Studio encrypts your copilot content. By using customer managed encryption keys (CMKs), you can ensure that any data provided to your agent by your users, and the data you provide to Microsoft, is encrypted with your own keys. You maintain control of your keys, providing you further protection over the security of your data and ensuring you have control over how your data is stored at rest. Key capabilities include hosting with Azure Key Vault to manage your keys, lifetimes, and rotation periods, encryption of all of your content, including copilot topics, settings and configurations, and conversation transcript data, rotation of CMKs, and, evocation of access, if necessary. [Learn more](#).

- **Improve the agent template gallery in the create page [Web]**

Experience a redesigned agent template gallery that makes it simple to find and select the right templates quickly. This modern, organized layout boosts productivity and encourages more frequent use. [Learn more](#).

Excel

- **Create with Copilot generates templates and tables [Web]**

Create with Copilot in Excel empowers you to generate tailored templates and tables simply by writing prompts. Its multi-turn conversation refines schemas, formulas, and visuals for a polished result.

- **Improvements to Copilot chat experience [Windows, Web, Mac]**

Improvements to the Excel Copilot chat experience to give more consistent responses to all chat questions.

Microsoft 365 Copilot Chat

- **Advanced email filtering in Copilot chat [Windows]**

Quickly surface exactly the emails you need—ask Microsoft 365 Copilot Chat for “last week’s external emails,” “threads I haven’t replied to,” “purple-category mail,” or “summarize German emails” “emails where I’m on the To line”—and focus on what matters most.

- **Find emails awaiting your reply [Windows]**

Tell Microsoft 365 Copilot Chat “show me emails that I need to reply” and instantly see unread, read, @mentioned emails or emails with some question, task that you haven’t answered—while hiding threads you’ve already closed—so you can clear your inbox with confidence.

- **Manage Microsoft 365 Copilot personalization in one place**

A new tenant-level control groups personal-productivity AI features under a single toggle, letting admins enable or disable them globally or by Entra group with ease. [Learn more.](#)

- **Microsoft 365 Copilot Chat: Updates to Copilot Chat response output [Web]**

Easily interact with Microsoft Graph content represented by bolder references, new action bar, and more.

- **Module UI refresh [Windows, Web]**

Copilot Chat is designed to provide a streamlined UI, making it easy to get started and achieve your goals quickly. It offers a helpful, understanding, and personalized experience, allowing you to search for past interactions, content, agents, or pages with ease. [Learn more.](#) ↗

- **Simplified Input box update [Windows, Web]**

We've made it easier for users to type prompts with access to CIQ, local files, attach cloud files, and agents by adding it under the Plus Menu.

Microsoft Loop

- **Add a Loop workspace to your Teams channel [Web]**

Pin a Loop workspace as a channel tab so everyone can brainstorm, co-create, and organize project content in real time while membership, governance, and compliance stay in sync. [Learn more.](#) ↗

- **Copilot Pages module on Microsoft 365 Copilot mobile app [iOS]**

With the Copilot Pages module in the Microsoft 365 Copilot app on your mobile, you can now access all of your Pages in one place on the go. [Learn more.](#) ↗

- **Create Copilot Pages from Copilot Chat on your mobile phone [iOS]**

Create Copilot Pages on your mobile phone to continue working on the go. Pages shared in Microsoft 365 are interactive and automatically synchronized for seamless collaboration. [Learn more.](#)

Microsoft Purview compliance portal

- **Data Security Posture Management for AI [Web]**

Microsoft Purview Data Security Posture Management for AI (DSPM for AI) is a centralized location to gain insights into generative AI activity including the sensitive data flowing in AI prompts. [Learn more.](#)

- **Gain DLP policy insights with Copilot [Web]**

Let Copilot instantly summarize Data Loss Prevention policies across locations, classifiers, and notifications. Use natural-language prompts to zoom into specific policies, spot gaps, and adjust settings faster—keeping your organization's data posture aligned without manual digging. [Learn more.](#)

OneNote

- **Include OneNote pages in Copilot reasoning**

Copilot can now use your OneNote content as context, helping you generate more informed summaries, drafts, and action items.

Outlook

- **Custom Instructions for draft with Copilot [Android, Windows, iOS, Mac, Web]**

Give Copilot some instructions about your emails - like the tone, length, greeting - so your Copilot generated drafts sound more like you want them to.

#newoutlookforwindow

- **Schedule a meeting from an email with Copilot [Android, Windows, iOS, Mac, Web]**

Turn any email thread into a meeting in one click. Copilot builds a complete invite for your review —title, agenda, attendee list, and a summary of the email conversation— plus attaches the original email thread so everyone is up to speed. Available in the new Outlook for Windows, web, Mac, and mobile. #newoutlookforwindows [Learn more.](#)

PowerPoint

- Microsoft 365 Copilot Chat: Reference a TXT file when creating a presentation with Copilot [Windows, Mac, Web]

You can now reference a TXT file when you create a presentation with Copilot within the PowerPoint application. [Learn more.](#) ↗

Teams

- Improvements to the transcription experience in meetings [Windows, Mac]

These updates enhance the transcription experience in meetings. When transcription, recording, or Copilot is enabled, users are prompted to choose the spoken language for accurate captions. Once transcription is running, only the organizer, co-organizers, and transcript initiator can change that language. A new settings page under Caption settings > Language settings > Meeting spoken language, along with a matching option under Transcript > Language settings, streamlines configuration. If someone speaks a language that doesn't match the selected one, The organizer/co-organizer and initiator receives a mismatch notification so they can adjust quickly.

[Learn more.](#) ↗

- Microsoft Teams: Intelligent recap support for ad-hoc meetings and calls in GCC High [Android, Windows, iOS, Mac, Web]

Intelligent meeting recap is now available in GCC High for impromptu calls and meetings, like those started from 'Meet now' and calls started from chat. You can easily browse the recording by speakers and topics, as well as access AI-generated notes, AI-generated tasks, and name mentions after the ad-hoc meeting ends. This capability is available for users with a Teams Premium or M365 Copilot license.

Viva Glint

- Feature access management for Copilot in Viva Glint [Web]

Enable or disable Copilot in Viva Glint for specific users directly from the Microsoft 365 admin center, giving you granular control over AI access. [Learn more.](#)

Word

- Draft content from up to 10 chosen references [Mac, Windows]

Type a forward slash (/) to pick as many as ten files, meetings, or emails for Copilot to cite while drafting your document. The release started with 10 chosen references but is expanding to support up to 20. [Learn more.](#) ↗

- **Write a prompt for selected portions of text in Word [Mac]**

Writing a prompt to draft content based on your selection no longer expands your selection to the entire paragraph, table, or list. You can prompt based on a single sentence or item.

- **Write a prompt for selected text in Word [Windows]**

Draft content based only on the sentence or list item you highlight—no more expanding the selection to the entire paragraph or table.

May 29, 2025

Updates released between May 13, 2025, and May 29, 2025.

Copilot extensibility

- **Create agents that learn from a Teams channel**

Build custom Copilot agents that pull knowledge directly from a chosen Teams channel, letting them answer FAQs or surface project updates without extra coding.

- **Insert images in adaptive cards for richer interactions [Windows, Web]**

Make your adaptive cards more dynamic by adding images—perfect for illustrating ideas, sharing visual data, or engaging users with eye-catching content. This feature helps teams communicate clearly, support diverse learning styles, and create more memorable interactions in everyday workflows. [Learn more](#).

- **Unified Agent Management for admins in Microsoft 365 admin center [Windows, Web]**

Admins can consistently manage Copilot agents in the Microsoft 365 admin center, regardless of how they were built, simplifying deployment and governance. [Learn more](#).

Copilot Studio

- **Reuse connector and API actions across multiple copilots [Web]**

Take an action that already works in Copilot for Sales and publish it to Customer Service—or any other eligible Copilot—in a few clicks. Skip duplicate setup, speed up

delivery, and keep functionality consistent, all with built-in admin approval flows. [Learn more.](#)

- **Unpublish connector actions when data or services change [Web]**

Roll back a published connector to draft so it no longer appears in Microsoft 365 Copilot. Makers can pause their own connectors, and admins can disable any connector to update configurations or retire obsolete services—without deleting them. [Learn more.](#)

Excel

- **Access Copilot tools right from the grid [Windows]**

A handy Copilot icon and context menu now follow your work in the worksheet, letting you launch summaries, formula help, and more without breaking focus. [Learn more.](#) ↗

- **Improved fallback answers in Copilot Chat [Web]**

When specific data isn't found, Copilot seamlessly shifts to general reasoning so conversations keep flowing and users avoid dead ends in Excel for the web.

- **Visual outline confirms Copilot's data range [Mac]**

When you call on Copilot, Excel now draws a clear border around the table or cell range in focus. Instantly see exactly what data will be summarized, cleaned, or chart-ready—so you can adjust the selection before Copilot gets to work.

Forms

- **Automate response collection and insights in Forms [Web]**

Copilot builds a follow-up plan, sends reminders, tracks progress, and surfaces early trends—then hands off to Excel for deeper analysis—so you spend less time chasing respondents and more time acting on feedback. [Learn more.](#) ↗

- **Copilot in Forms can now reference files to help generate drafts [Web]**

When creating a form with Copilot, users can now reference existing documents such as Word, Excel, and PowerPoint. Users can also reference an existing form by pasting the form's URL into the prompt box. Additionally, Copilot can search and suggest relevant files when generating a form, so users can easily create a draft that meets their needs. [Learn more.](#) ↗

- Copilot in Forms has been refreshed to help users better refine and edit their forms [Web]

Copilot in Forms has been revamped to more easily help users refine and modify their forms. Users can now type prompts to Copilot to help with editing and refinement, so they can get tailored suggestions and easily get their forms ready to send. [Learn more.](#)

Microsoft 365 admin center

- Usage reports – monitor Copilot.cloud.microsoft/Teams/Outlook activity in Microsoft 365 Copilot Chat usage report [Web]

Track active users and last activity dates for Copilot.cloud.microsoft, Teams, and Outlook—even for employees without a Copilot license—to gauge grassroots adoption and fine-tune rollout plans in Microsoft 365 Copilot Chat usage report. [Learn more.](#)

Microsoft 365 Copilot Chat

- Analyze usage of declarative agent in Developer Portal

Developers of custom app and published apps can analyze declarative agent usage in Developer Portal. By using these analytics, developers can gain valuable insights into how users interact with your app, identify areas for improvement, and make data-driven decisions to enhance the overall user experience. [Learn more.](#)

- Bring Azure AI Search indexes into Copilot Studio knowledge [Web]

Attach existing Azure AI Search indexes as grounding data, enabling natural-language queries over enterprise content with minimal setup and no added cost.

- Copilot Chat now offers access to cloud files to insert in user prompts [Windows, Web]

In the Web tab of Copilot Chat or Microsoft 365 Copilot, users can browse OneDrive or SharePoint, select a file, and drop it into their prompt to give Copilot precise context for richer responses.

- Enable agent builder for Copilot chat [Windows, Web]

Empower developers with the ability to build custom agents to support Copilot Chat. This feature streamlines the creation of tailored chat experiences that enhance everyday communication and workflow. [Learn more.](#)

- Enhanced typography improves readability [Windows]

Enjoy crisper fonts, roomier line spacing, clear headers, and neatly formatted tables and code blocks—making every Copilot chat easier to scan, share, and act on.

- Expanded reference panel for sources and search results [Windows]

The reference widget now shows both cited sources and relevant web results, helping you verify information, resolve ambiguities, and ask smarter follow-up questions without leaving the chat.

- Ground copilots with real-time data from Salesforce, ServiceNow, and more [Web]

Connect structured records from popular non-Microsoft apps directly in Copilot Studio so users can ask, “Show my open Zendesk tickets” and get instant answers without leaving chat.

- Pay-as-you-go policies keep Copilot costs in check [Windows, Web]

Allocate budgets by department, set usage caps, and manage access from the admin center so your organization can innovate with Copilot while staying on budget. [Learn more.](#)

- Safe Links validates redacted URLs [Windows]

When Copilot masks a link, Safe Links now scans it instantly and alerts users to malicious sites, adding an extra layer of protection before anyone clicks. [Learn more.](#) ↗

PowerPoint

- Ask Copilot to rewrite text as a list [Web, Mac, Windows]

Transform paragraphs into clear bullet points or lists with a single command—ideal for quickly organizing content when preparing your presentation. [Learn more.](#) ↗

Word

- Ask agents to refine any text selection [Windows, Web]

Highlight a section of your document and let Copilot agents rewrite, shorten, or expand it—keeping the rest of your file private while you perfect the details.

- Ask Copilot to analyze document visuals [Mac]

Add any image, chart, or diagram to your prompt and Copilot instantly extracts text, explains trends, suggests alt text, and surfaces quick insights—making documents more accessible and informative in seconds.

- **Chat with Copilot about any image or chart [Windows]**

Drop a visual into Copilot chat to extract text, get a plain-language description, generate alt text, or request quick insights—perfect for accessibility checks or fast analysis. [Learn more.](#)

May 13, 2025

Updates released between April 29, 2025, and May 13, 2025.

Copilot Studio

- **Deeper visibility into agent runs**

Trace every agent session from trigger to transcript. Inspect actions, inputs, and outputs in one place to debug faster, refine behavior, and document compliance. [Learn more.](#)

- **Monitor autonomous agents with detailed analytics [Web]**

Instantly see run volume, trigger breakdowns, success rates, action paths, and run-time details for every autonomous agent. Use these insights to spot failures, tune performance, and boost reliability before your users notice issues.

- **Single connector for knowledge and actions [Web]**

You can now reuse connector actions across multiple Copilot deployments without recreating them each time. This feature lets you select a previously published action—such as one from Copilot for Sales—and publish it to other endpoints, such as Copilot for Customer Service, with just a few clicks. It's enabled by default and streamlines deployment while reducing duplication. [Learn more.](#)

Excel

- **Advanced analysis with Python and Copilot [Windows]**

Chat with your spreadsheet and let Copilot run Python scripts to surface trends, build rich visuals, and test what-if scenarios—now fully localized for your team's language. [Learn more.](#)

- **Ask Copilot about any part of your sheet** [Web, Mac, Windows, iOS]

When you ask questions about your worksheet, Copilot can look at the content of your sheet and use it to inform an answer to your question. This will include understanding worksheet data on your selected area, beyond tables and ranges, and provide Copilot answers in chat.

- **Easily access copilot on web** [Web]

Find a dedicated Copilot icon in your web spreadsheet, allowing you to tap into AI-powered insights and streamline tasks without breaking your workflow. [Learn more.](#) ↗

- **Visual cue for Copilot's data context** [Web]

A subtle outline now highlights the exact cells or table Copilot is working with, so you can confirm the right data is selected before insights or edits are generated.

Microsoft 365 admin center

- **AI adoption score** [Web]

A new people experiences category in Adoption Score in the Microsoft 365 admin center introduces AI adoption metrics, helping organizations understand how Microsoft Copilot features are being used across Microsoft 365. [Learn more.](#)

- **Manage pay-as-you-go billing for Copilot** [Windows, Web]

Admins can manage pay-as-you-go billing directly within Copilot settings in the Microsoft 365 admin center. This capability is available to users with Global admin, AI admin, and Global reader roles. [Learn more.](#)

- **Overview of Copilot for admin** [Web]

Streamline IT management with Copilot's real-time, contextually relevant insights that help you make faster, data-driven decisions in the Microsoft 365 admin center. [Learn more.](#) ↗

Microsoft 365 Copilot app

- **Copilot in Excel with Python for Mac** [Mac]

Speak plain English and let Copilot write and run Python for forecasting, machine learning, and rich visuals—results land right on the grid in Excel for Mac. [Learn more.](#) ↗

Microsoft 365 Copilot Chat

- **Conversation history grouped by time frame**

Copilot Chat now clusters past sessions into daily and weekly views, making it easier to scan, revisit, and manage your conversations.

- **Copilot pages in Government Clouds [Windows]**

Copilot Pages is an interactive, shareable canvas in Microsoft 365 Copilot Chat designed for multiplayer AI collaboration. With Pages, users can turn Copilot responses into something durable with a side-by-side page where users can edit and share with others to collaborate. Now available for Government Cloud users. [Learn more.](#) ↗

- **Create web-aware agents in Agent Builder**

Build declarative agents that draw knowledge from up to four public websites, delivering more precise, source-linked answers inside Microsoft 365 chat experiences. [Learn more.](#)

- **Image generation in mobile Copilot chat [Android, iOS]**

Create images using natural language to visualize concepts and ideas within the flow of work, directly in Copilot on Microsoft 365, Teams, and Outlook mobile apps.

- **Unified prompt box across web and work chats [Windows, Web]**

Enjoy a consistent prompting experience across Copilot Chat with an input box that looks and behaves the same in both work and web chat modes.

Microsoft Graph

- **Agent plugins for Semantic Kernel : [Developer]**

Accelerate Copilot solutions by adding ready-made plugins that tap Microsoft 365 data and actions through Semantic Kernel—so you can build smarter agents with far less code. [Learn more.](#)

Microsoft Viva

- **AI Administrator can manage Microsoft Copilot Dashboard settings [Web]**

Delegate Copilot Dashboard control to the new Entra AI Administrator role, giving admins the permissions they need without granting AI admin privileges. [Learn more.](#)

OneDrive

- Ask Copilot questions about images [Web]

Select up to five pictures in OneDrive Web and chat with Copilot to summarize, extract text, or describe what's inside—perfect for cataloging photos or pulling details from scanned documents. [Learn more.](#) ↗

PowerPoint

- Get slide template suggestions as you create [Windows]

Copilot now recommends polished layouts the moment you add or name a slide, letting you stay in the flow and skip manual design hunts. [Learn more.](#) ↗

- Suggestions for slide templates as you work [Mac, Web]

On PowerPoint for Mac, Copilot proposes design-ready layouts as soon as you insert a slide or start typing a title, helping you build polished decks faster. [Learn more.](#) ↗

Viva Insights

- Viva Insights now included in Microsoft 365 Copilot subscriptions [Windows, Web]

Create advanced, custom reports with Viva Insights to understand Copilot adoption, productivity and business impact. Full access to Viva Insights is available now with Microsoft 365 Copilot subscriptions.

Word

- Choose the level of detail for summaries when documents are opened [Windows, Mac, Web]

Tailor each document opening with your preferred summary style—select brief, standard, or detailed insights to match your workflow. [Learn more.](#) ↗

- Key statistics at a glance in Copilot summaries [Web]

Instantly see critical numbers—totals, dates, percentages, and more—in the Understanding tab, so you can grasp a document's quantitative story in seconds. [Learn more.](#) ↗

- Suggested questions help you explore any document [Web]

The Understanding tab now proposes smart questions about the file you're reading—just click one to see Copilot's answer and dive deeper without crafting your own prompt. [Learn more.](#)

April 29, 2025

Updates released between April 16, 2025, and April 29, 2025.

Excel

- **Ask Copilot to extract insights from inserted images [Windows]**

Transform images in your Excel workflows into actionable data. Simply insert an image into the prompt area and ask Copilot to break down details and trends, so you can make informed decisions on the fly.

- **Formula Explain on grid entry points [Web]**

Understand complex formulas by triggering step-by-step explanations directly from the grid. Copilot breaks down calculations and clarifies references so you gain confidence when working with your data. [Learn more.](#)

- **Paste images into Copilot chat [Web, Windows]**

Ask questions about images you insert into the prompt area to extract key data for your spreadsheets. [Learn more.](#)

- **Seamless transition from clean data to Copilot chat [Web]**

After finalizing your data with Clean Data, effortlessly switch to Copilot chat for deeper insights and analysis. [Learn more.](#)

Microsoft 365 Copilot extensibility

- **Agent builder now available in new regions [Windows, Web]**

You can now access Copilot Studio agent builder in Norway, Sweden, South Korea, and South Africa. [Learn more.](#)

- **Developers using Copilot Studio can use API key auth for actions in a declarative agent**

Developers using Copilot Studio can now leverage API key authentication to perform actions in a declarative agent, enhancing security and integration ease. [Learn more.](#)

- **Grounding with metered consumption in Copilot Studio**

Makers can now ground their agents built in Copilot Studio with their enterprise data using metered consumption. This ensures compliant access to your enterprise data estate without need to export or egress content to an alternate location or public cloud, creating vector embeddings, or custom RAG solutions. This feature provides flexible and cost-effective access to secure data retrieval. [Learn more.](#)

Microsoft 365 Copilot Chat

- **Microsoft 365 Copilot for GCC Environments: Wave 2 [Windows]**

Bringing Microsoft 365 Copilot GCC your AI assistant for work in the GCC environment. It combines the power of Large Language Models with your work content and context, to help you draft and rewrite, summarize and organize, catch up on what you missed, and get answers to questions via open prompts. Copilot generates answers using the rich, people-centric data and insights available in the Microsoft Graph. Microsoft 365 Copilot GCC is now available in Stream, SharePoint, OneNote, and Pages in Loop. [Learn more.](#) ↗

- **Submit feedback on the agent builder experience [Windows, Web]**

Improve your custom Copilot Chat solutions by providing targeted feedback on RAI and agent response during test chats. This direct input helps refine and enhance the builder experience. [Learn more.](#)

Microsoft Purview

- **GCC Microsoft Purview capabilities for Microsoft 365 Copilot [Web]**

Microsoft Purview is launching several capabilities in government cloud environments that help secure and govern data in Microsoft 365 Copilot. These are capabilities in Information Protection, Data Lifecycle Management, Audit, eDiscovery, and Communication Compliance. These capabilities will be available once Microsoft 365 Copilot is deployed. [Learn more.](#)

Outlook

- **Chat with Copilot in Outlook for Mac [Mac]**

The same Microsoft Copilot experience you can get in the Microsoft Teams app, at copilot.microsoft.com (work mode) and in other places is now available from within

Microsoft Outlook for Mac. You can find the Copilot app in the left app bar. [Learn more.](#)

- **Prepare for meetings with AI-generated insights [Web]**

Stay ahead of busy schedules by using the proactive “Prepare” button in your inbox to generate key meeting insights and summarize relevant files—helping you arrive ready to engage. [Learn more.](#)

SharePoint

- **Restricted access control enhancements [Web]**

New enhancements for RAC policy for SharePoint administrators to restrict access to SharePoint sites including managing Microsoft 365 group connected sites with Microsoft 365 groups or Security groups. [Learn more.](#)

Viva Learning

- **AI & Copilot Resources provider availability to all Viva Learning users [Windows, Web, Teams]**

The AI & Copilot Resources provider is now enabled by default for all Viva Learning users. Administrators now have the ability to manage the visibility of this provider within Viva Learning. [Learn more.](#)

- **Copilot Academy availability to all Microsoft 365 users [Windows, Web, Teams]**

Copilot Academy is now accessible to users without Copilot licenses. Admins now have the option to select their preferred access settings for Copilot Academy. [Learn more.](#)

Word

- **Coach is now generally available across all markets and languages that Copilot currently supports [Web]**

Coach is now generally available across all markets and languages that Copilot currently supports, ensuring a consistent experience for every user. [Learn more.](#)

- **Reference a whole folder when prompting Copilot [Web]**

Quickly attach a folder from OneDrive or SharePoint by typing a forward slash (/) or selecting the attach icon. Copilot now uses the 10 most recent files from your

selected folder to streamline your document creation. [Learn more.](#)

- **Replace your selection with generated content** [Web, Mac, Windows]

Selecting the Replace button lets you instantly replace your selected text with content that was generated in Draft with Copilot.

April 16, 2025

Updates released between April 2, 2025, and April 16, 2025.

Excel

- **Access Copilot on-grid in Windows** [Windows]

A Copilot icon appears right within your spreadsheet on Windows, giving you quick AI assistance as you work to keep your flow uninterrupted.

- **Graph-grounded chat** [Windows, Mac, Web]

Ask Copilot in Excel for insights drawn from your chats, documents, meetings, and emails via Microsoft Graph—enhancing your workbook analysis with contextual organizational data. [Learn more.](#)

- **Use Copilot to search for answers from the web** [Windows, Mac, Web]

In Excel, simply ask Copilot to search the web for answers and integrate the insights directly into your workbook, making data analysis even smoother. [Learn more.](#)

Microsoft 365 admin center

- **AI Admin role has permissions to manage agents** [Web]

As an AI Admin, you manage agents with various capabilities including creating and overseeing Copilot connections that index data in Graph and perform actions, controlling which makers can build these connections and regulating the data sources used, maintaining observability over all connections, approving or denying agents, pre-installing them without requiring consent, and viewing them in Microsoft 365 admin center integrated apps page.

Microsoft 365 Copilot Chat

- **Get contextual suggestions during Copilot agent conversations** [Windows, Web]

Speed up tasks with AI-driven prompts for next steps in Copilot Chat. See real-time suggestions to refine queries, dive deeper into topics, or resolve issues faster during agent interactions.

- **Support for longer prompts** [Windows, Web]

Copilot Chat now supports larger inputs for smoother handling of extensive documents and data.

Microsoft 365 Copilot extensibility

- **Discover agents for unlicensed and metered users** [Windows, Web]

Empower more users with easy access to agents tailored to their needs—even if they are unlicensed or metered—broadening Copilot's reach across your organization.

[Learn more.](#)

- **Enable developer mode in Copilot Chat** [Developer]

Leverage Microsoft 365 Copilot Chat developer mode directly within your development tools, simplifying the process to build and test custom integrations.

[Learn more.](#)

OneNote

- **Copilot-powered organization in OneNote** [Windows]

Transform a flat list of pages within a section to have an intuitive hierarchy. Ask Copilot in chat to organize your section and apply the update for a streamlined Notebook organization experience. [Learn more.](#) ↗

PowerPoint

- **Copilot in PowerPoint has improved performance when summarizing your presentation** [Web]

PowerPoint Copilot now updates its language models regularly to deliver faster summaries, helping you quickly review your presentation content.

SharePoint

- **Author engaging web pages with Authoring** [Web]

Combine the power of Large Language Models, your data in the Microsoft Graph, built-in or custom templates, and existing documents to create high-quality SharePoint pages while ensuring enterprise-level data security and privacy. [Learn more.](#)

April 2, 2025

Updates released between March 20, 2025, and April 2, 2025.

Copilot Studio

- **Enhanced SharePoint URL support in Copilot Studio [Web]**

Previously, only SharePoint site URLs could be used as knowledge for Copilot Studio agents. Users can now use SharePoint file, folder, and site URLs, including links from the Share button or browser address bar; once the URLs are added, the agents will be grounded to the content within the URL. Additionally, more granular error messages help with transparency and managing expectations. [Learn more.](#)

- **Public website scoping for agents [Web]**

Makers can now scope agents' knowledge sources to specific websites, enhancing the precision of web searches. This capability, previously available in custom agents from Microsoft Copilot Studio, is now extended to agents in the Microsoft 365 context. [Learn more.](#)

- **SharePoint knowledge for agents [Web]**

Makers can now leverage additional data sources, including Dataverse and SharePoint, when building autonomous agents. This expands the variety of use cases for autonomous agents.

- **Use agent builder in Copilot chat [Web]**

Create custom agents in Copilot chat to streamline repetitive tasks and achieve consistency. Use specific instructions and grounding details to save time, reuse your agents, and enhance team productivity. [Learn more.](#)

Excel

- **Gain insights with Copilot and Python in Excel on Web [Web]**

Using everyday language, ask Copilot to perform advanced analytics like machine learning and predictive forecasting, which would usually take hours or require special skills. Copilot writes Python code and inserts it on the grid, providing deeper insights and stunning/ visuals. Available in multiple languages on Excel for the Web. [Learn more.](#)

- **Read aloud for Excel text responses [Web]**

Users can now use the Read Aloud button on the Copilot response card to have an audio narration of the response, enhancing accessibility and ease of information consumption.

Microsoft 365 admin center

- **View security information and certification evidence**

Admins in Microsoft 365 Admin center can view the evidence of audits, and self-attestation to provide further confidence as to the certification, and compliance, of public apps and agents.

Microsoft 365 Copilot Chat

- **Ask questions about images with natural language [Android, iOS, Web]**

Easily gain insights from images by asking natural language questions. Upload images for quick analysis using advanced vision models—helping you make sense of visual data across your apps.

- **Enhance email insights with interactive hovers [Web]**

Enjoy enriched emails with interactive hovers that reveal contextual details—like sender info, dates, and follow-up prompts—to streamline your daily workflow.

Microsoft 365 Copilot Studio

- **Collect user feedback in Copilot Studio agent builder [Web]**

Makers can also now submit feedback—compliments, problems, or suggestions—directly to the product team from inside the Microsoft 365 agent builder. This can be done at any stage of the authoring process, including comments and optional metadata for troubleshooting. This feature allows quick issue reporting without disrupting workflow and enables the product team to address feedback efficiently. [Learn more.](#)

Microsoft Loop

- Load existing Copilot pages and create multiple pages [Web]

With multipage functionality in Copilot Pages, users can load existing pages and create multiple pages within a single conversation. [Learn more.](#) ↗

- Recap changes over a longer time [Web]

Recap changes in Loop over extended periods, such as the last week or last 30 days, instead of being limited to the current session. This feature helps users share updates more effectively.

PowerPoint

- Translate your presentation [Windows, Web, Mac]

Produce a translated copy of your entire presentation in about 40 languages while preserving your slide design and structure, making global collaboration effortless. [Learn more.](#) ↗

Viva Engage

- Questions surfacing in Copilot results

Viva Engage questions from communities, storyline, and Answers surface in Copilot results. [Learn more.](#)

Word

- Narrate your ideas to Copilot [iOS]

Brainstorm out loud and let Copilot convert your voice notes into structured documents, making it easier to organize and develop your ideas.

- Rewrite with Copilot [iOS]

Get suggestions from Copilot on how to rewrite any text, helping you improve clarity and style effortlessly.

- Simplified prompt experience in chat [Web]

The chat experience in Word is now simplified with access to attachments, images, and agents now accessed from a single plus-sign menu.

- **Visualize as table** [iOS]

Easily convert plain text into structured tables, helping you organize and present data more effectively in your daily work.

March 19, 2025

Updates released between March 5, 2025, and March 19, 2025.

Copilot Studio

- **Use generative actions** [Web]

Replace manual topic triggers with AI-powered orchestration. You can now configure an agent to use generative AI to dynamically select relevant topics or plugin actions, creating more fluid conversations while reducing manual topic configuration. [Learn more](#).

- **Create automated copilots triggered by events** [Web]

Automates routine tasks by triggering copilots on events like table updates, new documents, or incoming emails—minimizing manual effort and keeping processes running smoothly. [Learn more](#).

Microsoft 365 admin center

- **Enhanced transparency for declarative agent metadata**

Admins can now view granular metadata in the Microsoft 365 Admin Center—including data source details and custom actions—for declarative agents. This clarity enables more informed decisions on app availability and management across your organization.

- **Manage shared Copilot agents across your organization** [Web]

Tenant admins can now view, search, and block shared Copilot agents in the admin center. Maintain control over agent usage and ensure compliance with organizational policies.

Microsoft 365 Copilot App

- **View, edit and share Copilot Pages on mobile** [Android, iOS]

Stay productive while on the go—use the Microsoft 365 mobile app to view, edit, or share Copilot-generated pages instantly. Collaborate with colleagues in real time, whether you're commuting or between meetings. [Learn more.](#)

Microsoft 365 Copilot Chat

- **Copilot on Edge Update [Web]**

Copilot on Edge has been updated and requires users to update their version of Edge to version 134.0.3124.51 or newer to receive the latest functionality. This update includes file upload availability on the web tab as well as a smoother authentication experience via the Edge Work Profile.

- **Enhanced large file support in Copilot Chat**

Work seamlessly with larger documents in Copilot Chat. You can now reference and interact with bigger files, such as lengthy reports or detailed presentations.

- **Prompt suggestions in Copilot chat [Windows, Web, Mac]**

Get started in Copilot chat quickly with automatic prompt suggestions that enhance your productivity by providing relevant and context-aware prompts based on your previous interactions.

Microsoft 365 Copilot extensibility

- **Support for message extension and declarative agents [Windows, Web]**

Transform legacy plugins into integrated experiences by exposing them as declarative agents—enhance Office apps like Word, Excel, and PowerPoint with message extensions.

Microsoft Loop

- **Track collaborative changes with "who did what and when" [Web]**

Ask Copilot about recent edits in Loop workspaces to identify contributors, review timeline updates, and maintain clarity during team projects. Example: "Show changes to the onboarding checklist this week."

OneNote

- **Support image input in OneNote chat [Windows]**

Ask Copilot to analyze image input and organize your notebook pages by detecting themes and topics. Quickly group pages and update your Notebook structure with a simple click.

Microsoft 365 Copilot

- **Share a Copilot prompt with a Teams team [Windows, Web]**

Easily share custom prompts from the Copilot Prompt Gallery with your Microsoft Teams team. This streamlined sharing makes it simple for team members to discover and make the most of these prompts in their daily workflow. [Learn more.](#) ↗

SharePoint

- **Create and share agents [Web]**

Easily create agents by selecting SharePoint sites or files and share them with your team in SharePoint or Teams to boost collaboration. [Learn more.](#) ↗

- **Use Data Access Governance to analyze tenant permissions [Web]**

Leverage detailed reports on permissioned user counts and sharing links to identify oversharing risks and make informed governance decisions. [Learn more.](#)

March 4, 2025

Updates released between February 20, 2025, and March 4, 2025.

Microsoft 365 Copilot Chat

- **Search archived mailboxes in Copilot Chat [Windows, Web, Android, iOS, Mac]**

Leverage Copilot Chat to search emails across both primary and archived mailboxes by appending 'from my archives' or 'also look for emails in my archives' in your prompts to quickly locate key messages.

- **Support lockbox for GenAI [Web]**

Lets you review and approve data access requests in real time—ensuring sensitive information is safeguarded during critical support interactions.

- **Enrichment of Messages in Copilot Chat [Web]**

This feature enhances your communication experience by making it easier to understand and interact with your chat messages in Copilot Chat. With this feature, you will see cards and hoverable experiences that provide additional details of the chat without leaving your current view. This means you can quickly grasp the context of your conversations and find the information you need more efficiently.

Copilot Studio

- **Add enterprise data with new graph connections [Web]**

Connect your organization's data seamlessly using pre-configured graph connectors like Stack Overflow, and Salesforce Knowledge. Build smarter agents with semantic search—no custom solution required. [Learn more.](#)

Microsoft 365 admin center

- **Enhanced Copilot admin page with comprehensive tools [Web]**

Navigate a refreshed admin interface featuring Overview, Health, Discover, and Settings—delivering key metrics, insights, and controls to tailor Copilot to your organization's needs.

- **Simplify Copilot license assignment [Web]**

Use a data-driven license optimizer to identify users who gain the most value from Copilot. Streamline assignments in the admin center for efficient adoption across your organization.

Microsoft 365 Copilot App

- **View, edit and share Copilot Pages on mobile [iOS]**

Stay productive no matter where you are. With mobile access to Copilot Pages, you can view, edit, and share content on the go, ensuring seamless collaboration with colleagues. [Learn more.](#) ↗

Microsoft 365 Copilot extensibility

- **Simplified 1-page Graph Connector setup**

Quickly set up external data connections with a single, simplified page for all Graph Connectors, reducing complexity and saving admin time. [Learn more.](#)

- **Create Copilot agents with scoped web knowledge**

Build customized Copilot agents that integrate up to four public web sites. Enhance functionality with targeted web knowledge for smarter, context-aware experiences.

[Learn more.](#)

PowerPoint

- **Add speaker notes to all slides with one command [Windows]**

Speed up your presentation creation by having Copilot automatically add speaker notes to every slide, getting your narrative draft ready in a flash. [Learn more.](#)

- **Narrative builder creates slides with tables [Windows, Web, Mac]**

Convert grounded content from Word documents into dynamic slides with tables. Enhance your presentations with structured, data-driven visuals effortlessly.

February 19, 2025

Updates released between February 5, 2025, and February 19, 2025.

Microsoft 365 Copilot Chat

- **Enhanced entity context card [Web]**

Enjoy smoother motion, improved reliability, and a more intuitive experience with the upgraded entity context card—making it easier to explore contextual details as you work. [Learn more.](#)

- **Increased results in Copilot Chat responses [Web]**

Get more comprehensive email and calendar results in Copilot Chat responses to easily summarize messages or track your meetings throughout the day.

Excel

- **Get powerful insights with python [Windows]**

Explore your data naturally with advanced analysis that leverages Python—no expert coding needed to uncover trends and create dynamic visualizations.

Microsoft Teams

- **AI-enabled file summaries on mobile** [Android, iOS]

Summarize Word, PowerPoint, and PDF files on mobile by tapping the summary icon or selecting “Summarize with Copilot” for a quick, digestible overview—even on small screens.

- **Intelligent meeting recap for instant meetings (premium)** [Windows, Mac]

Effortlessly browse meeting recordings by speaker and topic and access AI-generated notes, tasks, and mentions for instant meetings—empowering premium Copilot users with comprehensive insights. [Learn more.](#) ↗

OneNote

- **Enhance note-taking with iterative content proposals** [Windows]

Refine your notes on the fly by iterating prompts and reviewing alternate drafts, giving you a dynamic, customizable note-taking experience. [Learn more.](#) ↗

- **Take notes with Copilot directly in the flow from the canvas** [Windows]

Seamlessly gather and create notes right on your page with Copilot integrated into your personal OneNote notebook, making in-flow note-taking more intuitive. [Learn more.](#) ↗

PowerPoint

- **Create a presentation from a file-based prompt** [Windows, Web, Mac]

Pull key facts and data from a selected file to shape your narrative. Simply provide Copilot with a prompt and quickly build your deck with relevant information. [Learn more.](#) ↗

Viva Insights

- **Copilot dashboard for usage and retention insights** [Windows, Web, Android, iOS, Mac]

Dive into usage frequency, compare top user groups, and track retention metrics—all in a single, comprehensive dashboard for actionable insights. [Learn more.](#)

- **Simplify analysis with advanced insights**

Build queries quickly with Copilot's intelligent suggestions for relevant metrics, filters, and attributes, streamlining your data analysis process effortlessly. [Learn more.](#)

Word

- **Chat with Copilot about selected text** [Windows, Web, Mac]

Highlight text, start a chat with Copilot, and receive responses tailored to what you've selected. Get targeted writing assistance and refine your content in real time.

February 4, 2025

Updates released between January 24, 2025, and February 4, 2025.

Microsoft 365 Clipchamp

- **Video creation in Copilot Visual Creator powered by Clipchamp** [Web]

Type your prompt and Clipchamp writes a bespoke script, sources high-quality footage, and assembles a video project with music, voiceover, text overlays, and transitions. Open your draft in the Clipchamp app to continue editing, exporting, and sharing your video. [Learn more.](#) ↗

Microsoft 365 Copilot App

- **Updates to the Microsoft 365 (Office) app** [Windows, Web, Android, iOS]

The Microsoft 365 Copilot app (formerly Microsoft 365 app) has a new name and icon. [Learn more.](#) ↗

Microsoft 365 Copilot Chat

- **Access support pages in Copilot Chat** [Windows, Web, Android, iOS, Mac]

View organizational support pages directly within Copilot Chat, for quick help and guidance in your workflow.

- **Accommodate user's time zones in Copilot** [Windows, Web, Android, iOS]

Copilot now references your local time zone when responding helping to avoid confusion and scheduling errors.

- **Charts, graphs, and data analysis in Copilot for Microsoft 365 [Windows, Web]**

Use natural language to create charts, graphs, and data analysis in Copilot Chat work mode.

- **Get more Copilot value with Microsoft 365 Copilot [Web]**

Easily add full Copilot Chat capabilities including grounding conversations in work data and accessing Copilot in your favorite Microsoft 365 apps by purchasing or requesting a Microsoft 365 Copilot license directly in Copilot Chat. [Learn more.](#) ↗

- **Automatic session titles for easier organization [Web]**

Let Copilot Chat generate smart, descriptive titles for your chat sessions, making it simpler to find and revisit important conversations.

Excel

- **Entry point from the column header [Web]**

Offers an intuitive option to access column tools directly from the header, speeding up your workflow in Excel.

Microsoft Teams

- **Speaker recognition and attribution in BYOD rooms with Copilot [Windows, Mac]**

Take advantage of speaker recognition and transcript attribution, unleashing new AI capabilities in any meeting space, whether or not it has a Teams Rooms system deployed. This feature identifies and attributes people in live transcripts, utilizing a unique voice profile for each participant enabling intelligent recaps and unlocking maximum value from Microsoft 365 Copilot in Teams meetings. Users can easily and securely enroll their voices via Teams Settings. This feature requires a Microsoft 365 Copilot or Teams Premium license for the user hosting the meeting for Copilot experiences and intelligent recaps, respectively. [Learn more.](#)

PowerPoint

- **Use Copilot to rewrite, trim, or formalize text [Web, Mac]**

Transform your presentation text by letting Copilot fix grammar, shorten lengthy content, or adopt a more professional tone—perfect for crafting clear, polished slides.

Microsoft 365 Copilot

- **Share a prompt with a co-worker [Windows, Web]**

Easily create, save, and share your favorite prompts using Copilot Prompt Gallery, inspiring your co-workers to achieve more with Copilot. [Learn more.](#)

SharePoint

- **Restricted Content Discovery [Web]**

Prevent specific SharePoint sites from being discoverable in tenant-wide search and Copilot. [Learn more.](#)

Word

- **Browse cloud files with the file picker [Mac]**

Use a file picker to browse your cloud directory and include relevant files without searching by name, making it easy to add key references to your draft.

- **Draft from selected text, lists, or tables [iOS]**

Generate new content right where you work by selecting text, lists, or tables and tapping into Copilot's on-canvas menu. Quickly refine drafts and collaborate more interactively. [Learn more.](#) ↗

- **Draft with Copilot [iOS]**

Quickly produce paragraphs or entire sections for your documents, whether you're creating a brand-new file or adding to existing text. [Learn more.](#) ↗

- **Reference data from the Microsoft cloud when drafting with Copilot in Word [Windows, Web, Mac]**

Draft with Copilot now supports attaching rich content from the Microsoft cloud—including emails and meetings—resulting in more contextually relevant content. [Learn more.](#) ↗

- **Reference plain text files in Copilot [Windows, Web, Mac]**

Add .txt files as sources with Copilot in Word, streamlining your process when working with text-based research or background content.

January 23, 2025

Updates released between January 8, 2025, and January 23, 2025.

Forms

- Smart reminders with Copilot in Forms [Web]

Copilot in Forms now offers smart reminders to help you monitor response progress and get more engagement with your forms, delivered right to your email inbox.

[Learn more.](#) ↗

Microsoft 365 Copilot Chat

- Introducing Microsoft 365 Copilot Chat [Windows, Web, Android, iOS]

Microsoft 365 Copilot Chat—free, secure AI chat powered by GPT-4o with agents accessible right in chat, and IT controls including enterprise data protection and agent management. Copilot Chat serves as a powerful new on-ramp for everyone in your organization to build an AI habit. Get started with Copilot Chat with the updated [Microsoft 365 Copilot app](#) ↗ (formerly Microsoft 365 app). [Learn more.](#) ↗

- Updated Copilot Chat responses UI [Windows]

Enjoy a more intuitive Copilot experience with streamlined message boundaries, refined message count alerts, and a clearly positioned security badge for higher trust and transparency.

- Updated meeting entity card in Copilot Chat [Windows, Web]

Check meeting details like RSVP status, date, and attachments without switching contexts in Copilot Chat.

- Copilot agents available in Copilot Chat web mode [Web]

In Copilot Chat web mode, discover and use Copilot agents available for your organization. Agents are custom grounded chats that include specific knowledge sources from work and web.

Microsoft 365 Copilot App

- Control auto-start behavior on windows [Windows]

Adjust Windows settings to let users auto-launch the M365 app upon login, while giving admins the option to enforce group policy controls for enterprise needs.

- **Keep the app running in the background [Windows]**

Enable the setting to keep the app active as a background process after closing, ensuring faster subsequent launches without a full reload.

Microsoft 365 Copilot extensibility

- **Consistent user experience with developer-submitted plugins**

Developer-submitted plugins (ME, PPC, DV) are promoted to agents seamlessly, ensuring a uniform user experience and simplifying plugin management.

- **Use agents in Copilot Chat Web mode**

You can now access agents in the web-grounded Copilot Chat, enabling you to get access to additional sources of knowledge across both the work and web grounded experiences of Copilot Chat. [Learn more.](#) ↗

Microsoft 365 Copilot Studio

- **Enable makers to configure SharePoint as a knowledge source for agents [Web]**

Empowers makers to connect SharePoint, giving agents a richer context for delivering accurate and relevant responses. [Learn more.](#) ↗

PowerPoint

- **Generate summaries for longer presentations [Windows, Web, Mac]**

Copilot now supports text summaries up to 40k words (around 150 slides), giving you richer information and more polished layouts. [Learn more.](#) ↗

- **Listen to Copilot's responses with Read Aloud [Windows, Mac]**

Hear Copilot's replies in the chat pane, letting you stay hands-free while reviewing your content.

SharePoint

- **Copilot in SharePoint [Web]**

Copilot in SharePoint combines the power of Large Language Models (LLMs), your data in the Microsoft Graph, and best practices to create engaging web content. Get assistance drafting your content when creating new pages. Adjust the tone, expand meeting bullets into structured text, or get help making your message more concise. All within our existing commitments to data security and privacy in the enterprise.

[Learn more.](#) ↗

Microsoft Teams

- **Require explicit consent for meeting recording and transcription.**

Manage meeting recording policies via the Teams admin center or PowerShell to require explicit participant consent before recording or transcription in ad-hoc meetings or group calls. When enabled and recording/transcription starts, all participants are muted with cameras and sharing turned off until they give explicit consent to be recorded and transcribed, ensuring a compliant meeting experience.

Viva Amplify

- **Microsoft 365 Copilot in Viva Amplify editor [Web]**

The superpowers of Microsoft 365 Copilot integrates seamlessly into Viva Amplify, transforming content creation. Use Copilot in Amplify to auto-rewrite for suggestions, expand or condense text, and adjust tone for consistent, relevant messaging. [Learn more.](#)

Viva Insights

- **Copilot dashboard access can be granted using Entra groups [Web]**

Global admins can now grant Microsoft Copilot Dashboard access using Microsoft Entra ID (AAD) Groups, reducing the manual effort needed for management. [Learn more.](#)

- **New Copilot adoption metrics and completing total actions taken [Windows, iOS, Mac]**

This adds seven new Copilot adoption metrics to the Copilot dashboard and Viva Insights Advanced insights. It also updates the "total actions taken" metric in the Copilot dashboard to include these new Copilot adoption metrics. [Learn more.](#) ↗

Word

- Get started on a draft immediately with example prompts [Windows, Mac]

On blank documents, Copilot in Word offers one-click example prompts to help you get started quickly. [Learn more.](#)

- Listen to Copilot's responses with Read Aloud [Windows, Web, Mac]

Hear Copilot's replies in the chat pane, letting you stay hands-free while reviewing your content.

January 7, 2025

Updates released between December 18, 2024, and January 7, 2025.

Microsoft 365 Copilot

- Access Copilot Prompt Gallery in Word and PowerPoint mobile apps [Android, iOS]

Discover and use suggested Copilot prompts in Prompt Gallery within the Word and PowerPoint apps on iOS and Android. Enhance your productivity on the go with helpful AI suggestions.

Microsoft 365 admin center

- Track usage of Microsoft 365 Copilot Chat [Web]

Filter data by date range, review Microsoft Copilot usage by app entry point, and use these insights plan adoption strategies more confidently. [Learn more.](#)

Microsoft 365 Copilot extensibility

- Include Code Interpreter in agents [Windows, Web]

Enhance your agents by including Code Interpreter for advanced data analysis tasks in agent builder. [Learn more.](#)

OneNote

- Use Copilot quick actions in OneNote: Rewrite, Summarize, and Create To-Dos [Windows]

Enhance your notes by using Copilot directly on the OneNote canvas. Instantly generate summaries, create to-do lists, or rewrite selected content within your notes. [Learn more.](#)

Outlook

- **Schedule meetings with Copilot chat in Outlook [Windows, Web]**

Save time and streamline your day by asking Copilot to schedule meetings for you in Outlook. Whether it's a 1:1 or focus time, Copilot will find the best available time slots with ease. [Learn more.](#)

- **Switch between Work and Web grounding in Microsoft 365 Copilot Chat [Android, iOS]**

In Outlook mobile apps, you can now toggle between Microsoft 365 Graph (Work) and Web grounding in Microsoft 365 Copilot Chat. Choose the grounding source that best suits your needs for more personalized assistance.

Viva Amplify

- **Copilot in Viva Amplify editor [Web]**

Experience the power of Copilot right in your Amplify editing workflow. You can quickly auto-rewrite sections of your text, expand or condense content to match your preferred length, and seamlessly adjust the tone—casual, engaging, or professional—to suit your audience. [Learn more.](#)

Viva Insights

- **Expand your understanding of Copilot adoption with enhanced metrics [Windows, iOS, Mac]**

Access seven new Copilot metrics and see them reflected in "total actions taken," helping you better track how teams use Copilot. [Learn more.](#)

- **New metrics for enterprise data-protected prompts [Windows, Web, Android, iOS, Mac]**

Gain visibility into prompts submitted through Microsoft 365 Copilot Chat (web) and enterprise data-protected Copilot scenarios. [Learn more.](#)

Viva Learning

- **Copilot Academy support for external content [Web]**

Enhance your learning experience with a wider range of external content in Copilot Academy, including links to Copilot Prompt Gallery. [Learn more.](#)

December 17, 2024

Microsoft 365 Copilot

- **Microsoft 365 Copilot GCC general availability [Windows, Web]**

Your AI assistant for work in the GCC (Government Community Cloud) environment. It combines the power of large language models (LLMs) with your work content and context, to help you draft and rewrite, summarize and organize, catch up on what you missed, and get answers to questions via prompts. [Learn more.](#) ↗

Microsoft Purview

- **Generate keyword query language from natural language prompt in eDiscovery with Copilot for Security [Web]**

Copilot for Security is embedded in eDiscovery to enable users to provide a search prompt in natural language and will translate into keyword query language to help expedite the start of an eDiscovery search. [Learn more.](#)

OneNote

- **Use Copilot in OneNote on Mac and iPad [iOS, Mac]**

Experience the power of Copilot across OneNote for Mac and iPad. Quickly summarize, rewrite, and understand your notes, whether at your desk or on the go. [Learn more.](#) ↗

PowerPoint

- **Ask Copilot about visuals while in PowerPoint [Windows, Web]**

Now you can add an image to your chat with Copilot. You can ask questions about the image, extract text, get a description of a chart, translate information, or generate alt text. This helps you stay in the flow of work while getting necessary information to continue working on your document.

Viva Pulse

- Templates for Copilot readiness, adoption and impact [Windows, Web, Android, iOS, Mac]

Use new templates to measure employee sentiment and assess your organization's Copilot adoption—all within your Viva Pulse subscription.

Word

- Ask Copilot about visuals while in Word [Windows, Web]

Now you can add an image to your chat with Copilot. You can ask questions about the image, extract text, get a description of a chart, translate information, or generate alt text. This helps you stay in the flow of work while getting necessary information to continue working on your document.

November, 2024

Microsoft 365 Copilot Chat

- Audit copilot queries leaving the Microsoft 365 boundary

Allow admins to track and review copilot-generated queries that access external data, ensuring robust compliance and oversight.

- Admin control over Copilot web search access [Web]

Administrators can now manage user access to web search within Copilot using policies in config.office.com. This provides better control over how users interact with web content through Copilot. [Learn more](#).

- Focus Copilot responses on specific emails in Microsoft 365 Copilot Chat [Windows, Web, Android, iOS, Mac]

Narrow down Copilot responses by specifying a particular email folder, sub-folder, or subject line. Get more precise assistance by directing Copilot to the emails that matter most to you.

- Jumpstart with prebuilt prompts in Microsoft 365 Copilot Chat [Web]

Quickly get started in Microsoft 365 Copilot Chat by exploring and using prebuilt prompts designed to help you maximize productivity from the get-go.

- **Save and reuse your favorite prompts in Copilot [Windows, Web]**

Easily save your most-used prompts in Microsoft 365 Copilot Chat and Copilot Prompt Gallery website, keeping them at your fingertips for quicker interactions. [Learn more.](#) ↗

- **Search for meetings with external attendees**

Effortlessly find and access meetings that include people from other organizations using the improved search functionality in Microsoft 365 Copilot Chat.

- **Share your feedback with in-chat rating in Copilot [Windows, Web]**

Easily rate your experience with Copilot's web-grounded chat on a 1-5 scale. Your feedback helps us improve Copilot to better meet your needs.

- **Use web-grounded Copilot chat in Teams and Outlook [Windows, Web]**

Enhance your Copilot chat in Teams and Outlook with the latest information from the web. Get up-to-date answers and insights directly within your conversations.

- **View web queries used by Copilot for greater transparency [Web]**

See the exact web queries Copilot sends in response to your prompts, along with the list of websites queried, enhancing your awareness and control over the information process.

Microsoft 365 admin center

- **AI administrator role [Web]**

Empower designated admins to manage Copilot securely with the new AI administrator role—providing control without full Global admin permissions.

- **Copilot usage report for Business Chat [Web]**

Monitor usage data for Copilot Business Chat (web and work) directly in the admin center to support adoption and strategic planning.

Excel

- **Perform advanced analysis with Python integration [Windows]**

Leverage Python within Excel through Copilot to conduct advanced data analysis, unlocking new insights from your data. [Learn more.](#) ↗

Microsoft 365 Copilot extensibility

- Add image generation to agents [Windows, Web]

Enhance your agents by including image generation capabilities in agent builder
[Learn more.](#)

- Create agents in Microsoft 365 Copilot via agent builder [Windows, Web]

Use agent builder to create agents that contain specific instructions and knowledge, such as SharePoint files, to suit your needs. [Learn more.](#)

Microsoft 365 Copilot

- Copilot Prompt Gallery available in Word and PowerPoint on iOS [iOS]

Use suggested prompts directly from your Word and PowerPoint apps on iOS to spark creativity and streamline your workflow.

- Copilot prompt gallery – nonprofit, consumer goods, and mobility prompt collections [Windows]

Explore new prompt collections tailored for the nonprofit, consumer goods, and mobility sectors. Enhance your productivity with specialized prompts that fit your industry needs.

Microsoft Loop

- Reference documents within loop copilot prompts [Web]

Enhance your Loop experience by linking directly to Word, Excel, or PowerPoint files—just add a command to summarize or extract key points from your documents.

OneNote

- Copilot chat on Mac [Mac]

Transform your note-taking on Mac with natural language commands that help you understand, summarize, and rewrite notes—perfect for meeting prep and creative brainstorming.

PowerPoint

- **Build a narrative with file-based topics** [Windows, Web, Mac]

Create compelling presentations by integrating topic suggestions linked to your documents—whether Word files, PDFs, or encrypted docs—for a well-grounded narrative.

Microsoft Teams

- **Disable Copilot in meetings** [Windows, Android, iOS, Mac]

You can now turn Copilot off in your meeting settings. Copilot, recording, and transcription are disabled for meetings where Copilot is off. [Learn more](#).

SharePoint

- **Control site creation permissions with Restricted Site Creation** [Web]

Administrators can now manage who can create different types of SharePoint sites. Configure specific user groups with permissions to create Team sites, Communication sites, or all sites, enhancing governance and control. [Learn more](#).

- **Manage inactive sites with new lifecycle policies** [Web]

SharePoint administrators can now set up policies to detect inactive sites, notify site owners, and automatically archive or set sites to read-only if no action is taken. This helps in managing unused content and optimizing resources. [Learn more](#).

- **Site Access Review for scalable governance** [Web]

SharePoint administrators can now request site owners to review permissions directly from Data Access Governance reports. This helps in identifying and correcting potential oversharing, enhancing security and compliance. [Learn more](#).

- **Use Data Access Governance to analyze permissions and prevent Oversharing** [Web]

As a SharePoint admin, you can now leverage Data Access Governance (DAG) to understand your tenant's permission landscape. Generate reports that highlight sites with permissioned users exceeding your specified number to identify potential oversharing. [Learn more](#).

Viva Glint

- **Summarize survey comments for key insights** [Web]

Quickly uncover top issues and potential solutions from employee feedback by asking natural language questions—empowering leaders to act on valuable insights.

Word

- **Fine-tune rewrite responses in Copilot in Word [Windows]**

Customize the output from Copilot's Rewrite feature by specifying how the text should change to better suit your needs. [Learn more.](#) ↗

- **Reference larger files and write longer prompts with Copilot [Windows, Web, Mac]**

Create more detailed drafts by writing prompts over 2,000 characters and referencing files totaling up to 75,000 words. [Learn more.](#) ↗

October, 2024

Microsoft 365 Copilot Chat

- **Access local files in Microsoft 365 Copilot Chat [Web]**

Upload and reference your local files directly within Copilot Chat prompts by using the Local Files button or typing '/', making your interactions more informed and efficient. [Learn more.](#) ↗

- **Get contextual summaries in Edge sidebar with Microsoft 365 Copilot Chat [Web]**

Receive instant contextual summaries directly in the Edge Sidebar while using Microsoft 365 Copilot Chat, helping you quickly grasp information without leaving your browsing experience.

- **Solve complex tasks in Copilot chat [Web]**

Use Copilot to solve complex math problems, analyze data, generate visualizations, and more in Copilot chat.

Microsoft 365 Copilot

- **Expanded industry prompt collections in Copilot Prompt Gallery [Windows]**

We have expanded our industry prompt collections in Prompt Gallery with new prompt collections tailored to the nonprofit, consumer goods, and mobility sectors.

Microsoft 365 Copilot

- **Language expansion in Microsoft 365 Copilot [Windows, Web, Android, iOS, Mac]**

Microsoft 365 Copilot now supports 12 additional languages across all features: Bulgarian, Croatian, Estonian, Greek, Indonesian, Latvian, Lithuanian, Romanian, Serbian (Latin), Slovak, Slovenian, and Vietnamese. Microsoft 365 Copilot also improved the handling of language variants: Dutch (Belgium), German (Switzerland), English (UK), Spanish (Mexico), and French (Canada). [Learn more.](#)

Microsoft 365 Copilot extensibility

- **Create agents in Copilot with instructions and knowledge sources [Windows, Web]**

Users can build Copilot agents that include specific instructions and knowledge, such as SharePoint files, directly from Copilot Chat using Copilot Studio Agent Builder. [Learn more.](#)

- **Customize your agent list in Copilot across apps [Windows, Web]**

Reorder or remove agents from your agent list, with updates based on your most recently used agents and admin-installed agents, available in Copilot Chat, Microsoft Teams, and Microsoft 365.

- **Invoke agents with @mentions across apps [Windows, Web]**

Users can now @mention agents to invoke them in-context within Copilot Chat, Word, and PowerPoint, enhancing workflow efficiency. [Learn more.](#)

- **Start conversations easily with Agent starter prompts [Windows, Web]**

Select from conversation starter prompts to begin using an agent quickly and effortlessly. [Learn more.](#)

Microsoft Teams

- **Empower meeting organizers to adjust Copilot availability [Windows, Android, iOS, Mac]**

Admins can now set Copilot in Teams meetings to 'During and After Meeting' and allow meeting organizers to change it. [Learn more.](#)

Outlook

- Rewrite selected text in emails using Copilot [Windows, Web, Android, iOS, Mac]

Select specific parts of your drafted email and ask Copilot in new Outlook to rewrite it or provide more information to rewrite it. Provide detailed instructions or adjust the tone and length to suit your needs.

PowerPoint

- Create presentations with new slide types using Copilot [Windows]

When creating a presentation with Copilot, you'll now see agenda, section, and conclusion slides, giving your presentations better structure.

- Custom slideshow of key slides [Windows]

Ask Copilot to show key slides, and you'll have one-click access to play a custom presentation of the most important slides.

- Enhanced creation and editing with Copilot [Windows]

Copilot now offers richer information, elevated visual structures, better images, and more polished layouts when creating or editing your presentations. [Learn more.](#) ↗

Viva Insights

- New Microsoft 365 Copilot Chat prompts submitted through Teams [Windows, iOS, Mac]

Adding new Microsoft 365 Copilot Chat prompts submitted through Teams metric to Copilot dashboard and Viva Insights Advanced insights.

Word

- Fine-tune rewrite responses in Copilot in Word [Mac]

Customize the output from Copilot's Rewrite feature by specifying how the text should change to better suit your needs. [Learn more.](#) ↗

- Get started on a draft immediately with example prompts [Web]

On blank documents, Copilot in Word offers one-click example prompts to help you get started quickly.

- Reference up to 10 items when drafting with Copilot [Windows, Mac]

Expand your drafting capabilities by referencing up to 10 items—such as files, emails, and meetings—when using Copilot in Word. [Learn more.](#)

September, 2024

Microsoft 365 Copilot Chat

- **Access Microsoft 365 Copilot Chat work mode in Microsoft 365 app on mobile [Android, iOS]**

Ground your Copilot conversations in your work content with Microsoft 365 Copilot Chat in the Microsoft 365 app.

- **Convert Microsoft 365 Copilot Chat conversations into shareable pages [Web]**

Transform Microsoft 365 Copilot Chat Copilot responses in work mode into editable and shareable pages, so you can easily access and distribute important information.

- **Generate images in Microsoft 365 Copilot Chat [Web]**

Create custom images directly within Microsoft 365 Copilot Chat. Using natural language, ask Copilot to generate images. [Learn more.](#)

- **Get started quicker with grounded prompts [Windows, Web]**

Copilot Chat prompt suggestions now include relevant files, people, and meetings to help you get started with grounded prompts. Clicking the prompt card will add the prompt text and related file into the input box where you can select a different file, person, or meeting to fit your needs.

Excel

- **Access Copilot from the cell context menu [Windows, Web]**

Easily launch Copilot in Excel directly from the cell context menu, streamlining your workflow. [Learn more.](#)

- **Copilot in Excel is generally available [Windows, Web, iOS, Mac]**

Copilot in Excel, now no longer in Preview but Generally Available, works alongside you to analyze and explore your data, answering questions in natural language and revealing insights without the need for complex formulas. [Learn more.](#)

Microsoft 365 admin center

- Identify suggested candidates for Copilot licensing [Web]

Improve license assignment decisions and maximize Microsoft 365 Copilot adoption. In the Microsoft 365 Copilot usage report readiness section, a new "Suggested Candidates" column helps you assign licenses to users who are most likely to get the most value for Microsoft 365 Copilot, based on factors such as usage of relevant Microsoft 365 apps. [Learn more.](#)

Microsoft 365 Copilot

- AI-generated Images with Copilot and Microsoft Designer [Windows, Web, Mac]

Microsoft Designer integration in Copilot chat allows you to generate that perfect image, providing limitless creativity and bringing your presentations to life. [Learn more.](#)

- Insert brand-approved images from SharePoint using Copilot [Windows, Web]

Keep your documents and presentations on brand by adding company-approved images directly from your SharePoint organization asset library through Copilot. [Learn more.](#)

Microsoft Teams

- Copilot in Teams meetings considers meeting chat [Windows, Mac]

When generating meeting summaries or answering questions, Copilot in Teams will now use the chat and transcript as context, providing more accurate and relevant responses. [Learn more.](#)

OneDrive

- Copilot in OneDrive [Web]

Copilot in OneDrive, available on the web, allows you to ask questions and extract information from your files. Get summaries and insights from Word, PDF, PowerPoint, Excel, and text files. [Learn more.](#)

Outlook

- Instantly apply coaching suggestions from Copilot to your emails [Web, Android, iOS, Mac]

Improve your email writing with Coaching by Copilot in new Outlook. Request a full rewrite based on Copilot's feedback or apply the suggestions with a single click.

[Learn more.](#) ↗

PowerPoint

- Create presentations with new slide types using Copilot [Web, Mac]

When creating a presentation with Copilot, you'll now see agenda, section, and conclusion slides, giving your presentations better structure.

- Access your organization's approved images [Mac]

Seamlessly connect to your SharePoint asset library to find and add brand-approved images, keeping your presentations and documents consistently on brand.

- Custom slideshow of key slides [Mac]

Ask Copilot to show key slides, and you'll have one-click access to play a custom presentation of the most important slides.

- Improved template support with Copilot [Windows, Web, Mac]

Update your templates to PowerPoint's best practices, and Copilot will generate beautiful, on-brand slides every time you create a presentation. [Learn more.](#) ↗

Viva Glint

- View Glint and Pulse survey results in Viva Insights Copilot Dashboard [Web]

Leaders and adoption specialists can now initiate Copilot impact surveys and view the results from Viva Glint or Viva Pulse directly within the Viva Insights Copilot Dashboard. Understand the ROI of deploying Copilot and AI tools in your organization. [Learn more.](#)

Viva Insights

- Analyze adoption and impact trends

Adding trendlines to show metric movements over past 6-month time periods, before vs after Copilot comparisons, and providing the option to view an estimated

dollar value for the existing Copilot assisted hours metric. [Learn more](#).

- **Delegate access to Copilot Dashboard**

You can delegate access to your organizational insights or the Copilot Dashboard to other people within your company.

By granting delegate access, someone else at your company, such as your chief of staff or one of your direct reports, would have the same access you have to the insights. They can view them and operationalize business decisions based on the data.

Viva Learning

- **Providing Copilot Academy access to all Microsoft 365 Copilot users [Web]**

Microsoft Copilot Academy is now available for all users with a Microsoft 365 Copilot license or any Viva Learning license (premium, suite, or the Microsoft 365-included version). [Learn more](#).

Word

- **Easily write a prompt or choose quick actions from the Copilot icon in your Word doc [Web]**

The Copilot icon in your document margin now lets you easily write a prompt or choose quick actions, making AI assistance more accessible.

- **Reference up to 10 Items when drafting with Copilot [Web, iOS]**

Expand your drafting capabilities by referencing up to 10 items—such as files, emails, and meetings—when using Copilot in Word. [Learn more](#).

- **Use Copilot to enhance pasted text in Word [Windows, Mac]**

Copilot in Word now offers more options when you paste text. Reword content, transform it into tables or lists, and more, making it easier to format and organize your documents efficiently.

August, 2024

Microsoft 365 Copilot

- **Copilot Prompt Gallery is now available on iOS and Android [Android, iOS]**

Explore and use suggested prompts in Copilot Prompt Gallery within the Teams app on iOS and Android. Stay productive with ready-made prompts to use on the go.

- **Try prompts directly from the Copilot Prompt Gallery website [Windows, Web]**

Quickly launch suggested prompts from the Copilot Prompt Gallery website in Microsoft 365 Copilot Chat by clicking the "Try in" button on the prompt card.

Excel

- **Custom chart and PivotTable creation [Windows, Web, iOS, Mac]**

You can now ask Copilot for more specific charts and PivotTables, including specifying the X and Y axes. Customize your data presentations more precisely.

- **Formula data summaries from columns [Windows, Web, iOS, Mac]**

Add a single formula to summarize column data into one cell. This feature allows you to calculate data across columns and return a single result, simplifying data analysis.

- **Suggest conditional formatting with Copilot [Windows, Web, iOS, Mac]**

Ask Copilot to suggest conditional formatting for your data. Receive a list of prompts that might highlight key insights in your data.

- **Summarize text columns with Copilot [Windows, Web, iOS, Mac]**

Copilot can analyze columns of text to provide summaries, such as identifying main themes in survey responses. Understand your text data more effectively.

Forms

- **Copilot helps students understand quiz solutions [Web]**

After submitting quizzes, students can now receive Copilot-assisted explanations for correct and incorrect answers. This feature aids learning by providing detailed solution steps.

Microsoft Teams

- **Copilot summarizes content over specified time periods [Windows, Android, iOS, Mac]**

Copilot can now identify and summarize information over specific time periods, responding accurately to queries like "yesterday," "last month," or "last year." [Learn more.](#)

- **Linked files in Copilot replies** [Windows, Android, iOS, Mac]

We have optimized Copilot in Microsoft Teams to include linked files in Copilot answers for quicker and more reliable retrieval of files and links, making your experience smoother and more efficient.

Outlook

- **Microsoft 365 Copilot Chat in Outlook Mobile** [Android, iOS]

The Microsoft 365 Copilot Chat experience is now available in Outlook for iOS and Android. Enhance your mobile email experience with AI-powered assistance on the go.

- **Schedule meetings from an email with Copilot in new Outlook** [Windows, Web]

Quickly shift from an email thread to a meeting invite by clicking "Schedule with Copilot." Copilot summarizes the conversation, drafts an agenda, and includes key context automatically.

PowerPoint

- **Build your story with Narrative Builder** [Windows, Web, iOS, Mac]

Copilot helps you form your narrative and turns it into a fully designed presentation, streamlining the creative process.

- **Custom slideshow of key slides** [Web]

Ask Copilot to show key slides, and you'll have one-click access to play a custom presentation of the most important slides.

- **Improved presentation summary richness** [Windows, Web, iOS, Mac]

Copilot now leverages the latest GPT models to provide richer summaries when generating presentations, enhancing the quality of your content.

Viva Insights

- **Analyze Copilot impact over time** [Windows, Web, Android, iOS, Mac]

View trendlines of key productivity metrics over 6 months and estimate the financial value of Copilot-assisted hours. [Learn more](#).

Word

- **Document Summaries in Microsoft 365 Mobile App Previews [iOS]**

Copilot generates summaries of files that you can view in the file browser of the Microsoft 365 mobile app, helping you understand content without opening the file.

July, 2024

Microsoft 365 Copilot Chat

- **Access cloud files via Context IQ in Microsoft 365 Copilot Chat [Web]**

Easily include relevant documents in your chats with Context IQ suggestions. Now access "Browse Cloud Files" from the "Attach Cloud Files" button. [Learn more](#).

Excel

- **Advanced conditional formatting with Copilot [Windows, Web, iOS, Mac]**

Copilot now supports complex conditional formatting, such as highlighting rows based on multiple criteria. Enhance your data visualization with more formulaic formatting options.

- **Improved data insights in Copilot [Windows, Web, iOS, Mac]**

Copilot is now better at answering questions about data insights like trends and correlations. Get more meaningful analysis to make informed decisions.

- **Preview and apply changes suggested by Copilot [Windows, Web, iOS, Mac]**

Before Copilot makes changes to your Excel data, you'll now receive a description and an "Apply" button. This gives you more control over your data and allows for refinements before applying changes.

- **Preview conditional formatting rules [Windows, Web, iOS, Mac]**

When setting a conditional formatting rule, Copilot's response will include a preview of the style and an explanation of the formula. This helps you understand and apply formatting more confidently.

- **Support for data ranges resembling tables** [Windows, Web, iOS, Mac]

Copilot can now reason over data ranges with a single row of headers, even if they aren't formatted as formal tables. This makes data analysis more flexible.

Microsoft 365 admin center

- **Gain visibility into Microsoft 365 Copilot Chat usage** [Web]

Access usage metrics for Microsoft 365 Copilot Chat to inform your adoption strategies. [Learn more](#).

Microsoft Loop

- **Copilot-Assisted Loop Page Creation** [Web]

Collaborate with Copilot to create structured Loop pages quickly. Start from scratch or modify existing pages or templates with AI assistance for efficient teamwork.

PowerPoint

- **Create presentations from encrypted Word documents** [Windows, Web, iOS, Mac]

Copilot for PowerPoint can now create presentations using Word documents that have a protected sensitivity label, expanding your content creation options securely.

- **Easier access to Copilot in PowerPoint** [Windows, Web, iOS, Mac]

Access Copilot in PowerPoint more easily with new on-canvas entry points. Start enhancing your presentations with AI assistance in fewer clicks.

Viva Engage

- **Viva Engage Copilot Adoption Community** [Web]

Kickstart your Copilot adoption journey with a templated community in Viva Engage. Get setup checklists, suggested content, suggested members, and top Q&A to engage your employees effectively. [Learn more](#).

Viva Insights

- **Microsoft Copilot Dashboard powered by Viva Insights** [Windows, Web, Android, iOS, Mac]

The Microsoft Copilot Dashboard available to all Microsoft 365 Copilot customers at no extra cost. Access it via the Viva Insights app to monitor Copilot adoption and impact. [Learn more.](#)

Word

- **Bing search integration brings the power of the web to your chats in Word [Mac]**

Ask Copilot a question in Word chat, and Copilot generates an answer using the power of integrated Bing search. And you never have to leave the app.

- **Bring the latest from your organization into your Word chats with Microsoft Copilot Graph-grounded search. [Mac]**

Bring the latest from your organization into your Word chats with Microsoft Graph-grounded search. Access people-centric data and insights seamlessly.

- **Summarize longer documents in chat [Windows, Web, iOS, Mac]**

Copilot in Word can now summarize longer documents, with the upper limit increased to about four times more words (approx. 80k words). Get comprehensive overviews of lengthy content.

June, 2024

Microsoft 365 Copilot Chat

- **Contextual prompt suggestions in Microsoft 365 Copilot Chat [Windows]**

Microsoft 365 Copilot Chat now shows contextual prompt suggestions when you hover over entities like files, events, and people. Quickly access relevant information to enhance your productivity.

Excel

- **Copilot works on any selection in Excel [Windows, Web, iOS, Mac]**

Copilot now enables the edit box on any worksheet, regardless of selection. It intelligently finds the nearest table or data range for your analysis queries, making data manipulation more flexible.

- **Excel Copilot Chat Helper for Your Data Queries [Web]**

Get conversational Excel-specific answers to your Excel-related questions with the Copilot chat helper.

Forms

- **Copilot helps you draft quizzes and answers [Web]**

Teachers and staff can use Copilot in Forms to generate quizzes, including correct answers. Now they can focus more on helping students engage with assessments, icebreakers, and trivia, and less on writing and programming.

- **Gather more responses with Copilot suggestions [Web]**

Copilot in Forms now suggests the best distribution channels and settings when sending out forms or quizzes. Reach your audience more effectively and increase engagement.

Microsoft Teams

- **Admins can enforce Copilot during and after meetings [Windows, Android, iOS, Mac]**

Admins can set Copilot in Teams meetings to 'During and After Meeting' and prevent meeting organizers from changing it. [Learn more](#).

- **Control access to recordings and transcripts [Windows, Android, iOS, Mac]**

Introducing new meeting settings that allow you to control who can access recordings, transcripts, and prompt Copilot. Enhance your meeting security and privacy with these granular controls.

- **Intelligent Recap available for Copilot users [Windows, Mac]**

Copilot users can now access Intelligent Recap after meetings and calls. Browse recordings by speakers and topics, and access AI-generated meeting notes, action items, and @mentions, all designed to keep you informed.

OneNote

- **Access company information via Copilot in OneNote [Windows]**

Prompt Copilot in OneNote to get responses from all your company information stored in the Microsoft cloud. Find the data you need without leaving your note-taking app.

Outlook

- Microsoft 365 Copilot Chat in classic Outlook [Windows]

The Microsoft 365 Copilot Chat experience is now available in classic Outlook. Access AI-powered assistance directly from the App Bar on the left to enhance your email productivity.

PowerPoint

- Copilot adds transitions and animations automatically [Windows, Web, iOS, Mac]

When creating presentations from prompts or files, Copilot will now automatically add transitions and animations. This enhancement brings your slides to life without extra effort.

- Create presentations from PDF files with Copilot [Windows, Web, iOS]

You can now generate PowerPoint presentations directly from PDF files using Copilot. This feature simplifies the process of turning documents into engaging presentations.

- Improved content when creating presentations from prompts [Windows, Web, iOS, Mac]

Experience increased depth and richness of content when you create a presentation from a prompt. Copilot now provides better formatting and more detailed slides to enhance your presentations.

Viva Amplify

- Copilot deployment kit now in Viva Amplify [Web]

Prepare and launch Copilot in your organization effortlessly using the new deployment kit in Viva Amplify. Access pre-written and formatted publications to educate users on Copilot features and develop their AI skills, ensuring a smooth rollout. [Learn more.](#) ↗

Viva Insights

- Specific date ranges on Copilot Dashboard

In the Copilot Dashboard you will now see a specific date range identified in the upper right corner to clarify the measurement timeframe. This date range reflects a trailing 28 day period and is not configurable. For a custom date range analysis, use analyst workbench. [Learn more.](#)

Word

- **Find the perfect visual with Copilot + Designer in Word [Windows, Web, Mac]**

Enhance your documents with AI-generated images using the new integration of Microsoft Designer in Copilot Chat. Also search for stock images and brand assets to bring your content to life seamlessly.

- **Use a url to reference supported files in Copilot in Word [iOS]**

Users can copy-paste a link of a supported file into the Draft with Copilot UI as a reference, instead of searching for it in the file reference menu.

- **Use Draft with Copilot in Word based on text, list, or table selection [Windows, Mac]**

Use Draft with Copilot in Word with the on-canvas Copilot menu when a user selects text, a list, or a table, which generates new content from Copilot and provides a richer, more interactive experience.

- **Visualize as table [iOS]**

Easily turn plain text or lists into clear, organized tables for better readability and effortless data handling.

May, 2024

Microsoft 365 Copilot Chat

- **Enhanced Reference visibility in Microsoft 365 Copilot Chat [Windows]**

References in Microsoft 365 Copilot Chat responses are now unfurled by default at the bottom of each reply. This improvement increases transparency and makes it easier to discover the sources behind Copilot responses.

- **Grounding suggestions when pasting cloud file URLs in Microsoft 365 Copilot Chat [Web]**

When you paste file URLs as references in your prompts, Microsoft 365 Copilot Chat now informs you about inline referencing via Context IQ. Access Context IQ in chat using "/" or the "Attach Clip" option to enhance your interactions.

- **Proactive file suggestions for enhanced grounding in Microsoft 365 Copilot Chat [Web]**

Microsoft 365 Copilot Chat now proactively informs you about grounding opportunities when typing prompts. Highlighted text and file data source insertions help you create more effective and context-rich prompts.

Microsoft 365 Copilot

- **Explore curated prompt collections for various roles and industries in Copilot Prompt Gallery [Windows, Web]**

Discover and filter through a curated collection of Microsoft-authored prompts tailored for Marketing, HR, Finance, Retail, and Manufacturing roles. These prompts help you get the most out of Copilot with prompts tailored to your role or industry.

Microsoft Loop

- **Use Copilot in Loop components across Teams and Outlook [Web]**

People with a Copilot license can now leverage Copilot in Loop when they paste Loop components into Teams, Outlook, and Meeting Notes.

Microsoft Teams

- **Copilot notification in unrecorded meetings [Windows, Android, iOS, Mac]**

When Copilot is started in a meeting that isn't being recorded, every participant is notified that Copilot is active.

Outlook

- **Microsoft 365 Copilot Chat available in new Outlook for Windows and web [Windows, Web, Android, iOS]**

Access the power of Microsoft 365 Copilot Chat directly within Outlook on the web and the new Outlook for Windows. Access Microsoft 365 Copilot Chat through the left app bar.

SharePoint

- **Introducing Restricted SharePoint Search for Copilot [Web]**

Administrators can now enable Restricted SharePoint Search to disable organization-wide search and select up to 100 specific SharePoint sites accessible in search and Copilot experiences. Users will still interact with their OneDrive content in Copilot, balancing accessibility and security.

- **Monitor configuration changes with change history reports**

Administrators can now create custom reports to track changes made to SharePoint configurations across your organization. Review detailed CSV reports of site actions and organizational setting changes from the past 180 days to ensure compliance and maintain oversight.

Word

- **Use a url to reference supported files in Copilot in Word [Windows, Mac]**

Users can copy-paste a link of a supported file into the Draft with Copilot UI as a reference, instead of searching for it in the file reference menu.

- **Use Copilot to enhance pasted text in Word [Web]**

Copilot in Word now offers more options when you paste text. Reword content, transform it into tables or lists, and more, making it easier to format and organize your documents efficiently.

- **Use Draft with Copilot in Word based on text, list, or table selection [Web]**

Use Draft with Copilot in Word with the on-canvas Copilot menu when a user selects text, a list, or a table, which generates new content from Copilot and provides a richer, more interactive experience.

April, 2024

Microsoft 365 Copilot Chat

- **Microsoft 365 Copilot Chat now available in the Microsoft 365 app [Android, iOS]**

Microsoft 365 mobile app users with a Microsoft 365 Copilot license can receive answers grounded in their organizational Graph data, enhancing mobile productivity.

- **Use file links to reference files in your prompts** [Windows, Web]

Easily refer to files in your Copilot Chat prompts by pasting their URL links, streamlining your workflow and saving time.

Excel

- **Create Formula Columns Using Data from Multiple Tables** [Windows, Web, iOS, Mac]

Support for functions like XLOOKUP and SUMIF allows you to create formula columns that utilize data across multiple tables.

- **Generate multiple formula columns with a single prompt** [Windows, Web, iOS, Mac]

Use Copilot in Excel to create several formula-based columns at once. For example, ask Copilot to split a full name into first and last name columns, and watch it generate both formulas in one go.

Forms

- **Copilot helps you rewrite and extend your forms** [Web]

Beyond drafting from scratch, Copilot in Forms can now assist you in rewriting titles, descriptions, or questions, and adding more content to your surveys.

Microsoft 365 Copilot

- **Language expansion in Microsoft 365 Copilot** [Windows, Web, Android, iOS, Mac]

Microsoft 365 Copilot now supports 17 additional languages across all features: Arabic, Chinese (Traditional), Czech, Danish, Dutch, Finnish, Hebrew, Hungarian, Korean, Norwegian (Bokmal), Polish, Portuguese (Portugal), Russian, Swedish, Thai, Turkish, and Ukrainian. [Learn more.](#) ↗

- **Microsoft 365 Copilot Data Residency Commitments** [Web]

We have added new commitments covering stored content of interactions with Microsoft 365 Copilot to existing data residency commitments, enhancing data compliance.

Microsoft Loop

- Access Copilot in Loop easily from the right side of the page [Web]

We have added an entry point on the right side of the page to make Loop Copilot's Draft and Rewrite capabilities more accessible.

Microsoft Stream

- Quickly summarize videos with Copilot in Stream [Web]

Copilot in Stream uses AI to help you get insights from videos, allowing you to summarize content or ask in-depth questions efficiently. [Learn more.](#) ↗

Microsoft Teams

- Copilot understands previous conversations in chats and channels [Windows, Android, iOS, Mac]

When you ask follow-up questions in chats or channels, Copilot now has context from past interactions to provide more accurate answers.

OneDrive

- Share Word documents with AI-generated summaries [Web]

Users can now include an AI-generated summary when sharing Word documents, helping recipients understand content quickly and collaborate efficiently.

OneNote

- Use Copilot with your handwritten notes [Windows]

Copilot in OneNote now supports inked notes, allowing you to summarize, rewrite, or generate to-do lists from your handwritten content.

Outlook

- Control the 'Summary by Copilot' banner in new Outlook [Web]

You can now choose to show or hide the 'Summary by Copilot' banner in your emails for a personalized experience.

- Copilot chat now available in new Outlook [Windows, Web]

Access Copilot chat within Outlook to type and receive responses while managing your emails, all in a convenient side panel.

- **Draft Emails with Copilot in Classic Outlook for Windows [Windows]**

Copilot combines the power of AI and Outlook data to help you draft new messages or replies effortlessly.

SharePoint

- **Advanced tenant rename in SharePoint Advanced Management [Web]**

Change your SharePoint domain with greater control, including prioritizing up to 4,000 sites for early execution and supporting tenants with up to 100,000 sites. [Learn more.](#)

- **Restricted Access Control [Web]**

Control permissions of sensitive data by restricting SharePoint sites and OneDrive's access to specific users and their corresponding Copilot. [Learn more.](#)

Viva Engage

- **Copilot in Viva Engage enhances communication and connection [Web]**

Copilot in Viva Engage helps you catch up on what's happening in your network and write engaging communications that support your goals.

Whiteboard

- **Discover Whiteboard Copilot with First Run Experience [Windows, Web]**

First-time users will be guided to discover and leverage the power of Whiteboard Copilot features through an interactive introduction.

Word

- **Bing search integration brings the power of the web to your chats in Word [Windows, Web]**

Ask Copilot a question in Word chat, and Copilot generates an answer using the power of integrated Bing search. And you never have to leave the app.

- Bring the latest from your organization into your Word chats with Microsoft Copilot Graph-grounded search. [Windows, Web]

Bring the latest from your organization into your Word chats with Microsoft Graph-grounded search, enhancing the power of Copilot.

- Draft with Copilot supports referencing files encrypted with sensitivity labels [Windows, Web, Mac]

Draft with Copilot now allows you to reference files encrypted with sensitivity labels, ensuring secure document creation.

- Fine-tune rewrite responses in Copilot in Word [Web]

Customize the output from Copilot's Rewrite feature by specifying how the text should change to better suit your needs.

- Use a url to reference supported files in Copilot in Word [Web]

Users can copy-paste a link of a supported file into the Draft with Copilot UI as a reference, instead of searching for it in the file reference menu.

March, 2024

Microsoft 365 Copilot Chat

- Rich entity representations in Copilot responses [Windows, Web, Android, iOS, Mac]

Copilot now provides richer representations of entities like people, events, and files within responses, enhancing context and usability.

Excel

- Enable Copilot in Excel by saving files to OneDrive or SharePoint [Windows, Mac]

To use Copilot in Excel, save your files to OneDrive or SharePoint with AutoSave on. You'll receive prompts to help you set this up if needed.

- Speak to Copilot in Excel with new input methods [Windows, Web, iOS, Mac]

You can now use your microphone to send prompts to Copilot in Excel, and explore the Prompt Guide for customized suggestions.

Microsoft 365 admin center

- **Send Copilot welcome emails when assigning licenses to users [Web]**

Help users get started with Copilot faster. When assigning Microsoft 365 Copilot licenses, you can now send users a welcome email containing helpful resources and tips to maximize their Copilot experience.

Microsoft Teams

- **Customize your draft message when you compose with Copilot [Windows, Android, iOS, Mac]**

You can now instruct Copilot to adjust your draft message however you'd like. Adjust the message with a custom prompt, like "add a call to action" or "/make it persuasive". [Learn more.](#) ↗

- **Enhanced Copilot UI with new date dividers [Windows, Android, iOS, Mac]**

We have improved the Copilot user interface with new date dividers for chats, channels, and meeting Copilot.

Viva Insights

- **Analyze Copilot metrics with flexible queries in Analyst Workbench**

Use the Analyst Workbench to perform flexible Copilot queries on metrics, providing deeper insights into AI usage.

Word

- **Share Word documents with AI summaries [Web]**

Include an AI-generated document summary when sharing Word documents. Recipients get a rich preview, aiding quicker understanding and collaboration.

February, 2024

Forms

- **Create and customize Forms quickly with Copilot [Web]**

Use natural language to describe the form you need, and Copilot will generate it for you. Copilot can also help you customize your form with a theme or apply response settings, to help drive engagement from your audience.

Microsoft Teams

- **Copilot side pane stays open across group chats [Windows, Mac]**

When you open Copilot in a group chat, it will remain open even as you navigate between different chats, saving you time.

Outlook

- **Get Coaching from Copilot for an email draft in Classic Outlook for Windows [Windows]**

Copilot combines AI with your Outlook data to help you craft better emails, offering suggestions on tone and message effectiveness.

Word

- **Summarize your document using chat prompts [iOS]**

Ask via chat to summarize your document, highlighting key points for quick understanding and review.

January, 2024

Excel

- **Enjoy conversational Copilot in Excel [Windows, Web, iOS, Mac]**

Copilot in Excel now remembers the context of your chats, allowing for follow-up questions and clarifications for a smoother experience.

Microsoft Purview

- **Communication Compliance-Detect Microsoft 365 Copilot interactions template [Web]**

Communication Compliance is introducing a new template dedicated to analyzing all Microsoft 365 Copilot prompts and responses, to help ensure content prohibited by customers' policies, such as harassing or threatening language, isn't being used Microsoft 365 interfaces. This scales Communication Compliance's reach, consistent with Microsoft 365's expanding interfaces. In addition, administrators are also able to select Copilot chats as a checked location in the policy creation wizard for any new or existing policies. This empowers administrators to fine-tune their management strategy precisely to their organization's needs, with a focus on user privacy protection. Whether it's setting specific conditions or deploying trainable classifiers, this feature provides flexibility and adaptability in compliance management, ensuring your organization's communications remain secure, compliant, and respectful of user privacy.

Word

- **Get answers and enhance content with chat in Word [iOS]**

Ask specific questions about your document or request additional details to enhance your content, making your writing process more efficient.

- **Visualize as table [Windows]**

Easily turn plain text or lists into clear, organized tables for better readability and effortless data handling.

December, 2023

Microsoft 365 admin center

- **Track Copilot readiness and usage across Microsoft 365 [Web]**

Easily assess your organization's technical eligibility, license assignment, and active usage of Microsoft 365 Copilot. Understand which apps drive engagement, monitor trends over time, and use these insights to guide licensing and adoption strategy decisions. [Learn more.](#)

Word

- **Visualize as table [Mac]**

Easily turn plain text or lists into clear, organized tables for better readability and effortless data handling. [Learn more.](#)

November, 2023

Microsoft 365 Copilot Chat

- **Access Microsoft 365 Copilot Chat on Microsoft365.com [Windows, Web]**

Use Microsoft 365 Copilot Chat directly from microsoft365.com/chat, providing a unified experience across platforms. [Learn more.](#)

- **Extend Microsoft 365 Copilot Chat to third-party connectors [Windows]**

Support for retrieval and synthesis of content from enabled third-party Graph connectors is now available.

- **Insert entities into prompts in Microsoft 365 Copilot Chat [Windows, Web]**

Use '/' to add entities in prompts submitted to Copilot, focusing responses on the most relevant information. [Learn more.](#)

- **Introducing Microsoft 365 Copilot Chat [Windows, Web, Mac]**

Your single destination to take on any task, combining AI power with your work content to draft content, catch up, and get answers. [Learn more.](#)

Excel

- **Add formula columns with Copilot [Windows, Web, iOS, Mac]**

Copilot provides formula suggestions with explanations, helping you create new columns based on your data. [Learn more.](#)

- **Generate data insights with Copilot [Windows, Web, iOS, Mac]**

Copilot can suggest insights like summaries, trends, and outliers, returning results as charts or PivotTables to enhance your analysis. [Learn more.](#)

- **Use Copilot to highlight, filter, and sort data in Excel tables [Windows, Web, iOS, Mac]**

Transform your data by asking Copilot to format your Excel tables. You can highlight top values, filter specific entries, or sort data. For example, ask Copilot to highlight

the top 3 values in a column, and it will apply conditional formatting. [Learn more.](#)

Microsoft Loop

- **Collaborate with Copilot in Loop [Web]**

Work together with Copilot and your team to create content, generate ideas, and refine results collaboratively. [Learn more.](#)

- **Enjoy richer Copilot in Loop outputs with formatting and tables [Web]**

Copilot can now produce results with rich formatting, including headings and tables, for more organized content.

- **Experience visual updates to the Copilot Block [Web]**

The Copilot Block now blends more naturally into your page, with AI interactions happening in the right margin.

- **Generate Page Summaries with Copilot in Loop [Web]**

Insert a 'Page Summary' component to have Copilot summarize the content on your current Loop page. [Learn more.](#)

- **Get insights from your current page content [Web]**

Copilot can answer questions based on the content on your current Loop page, providing summaries and analyses. [Learn more.](#)

- **Rewrite existing content with Copilot [Web]**

Leverage Copilot to help rewrite, supplement, or gain insights from content that already exists in Loop. [Learn more.](#)

- **See when teammates are editing prompts [Web]**

Loop Copilot now indicates when a teammate is actively writing or refining a prompt, enhancing collaboration. [Learn more.](#)

- **Summarize and share changes with your team [Web]**

Use the Recap experience to have Copilot generate a summary of your changes and share it with your team. [Learn more.](#)

Microsoft Purview

- Microsoft Purview capabilities for Microsoft 365 Copilot [Web]

Microsoft Purview is launching several capabilities that help with security and compliance of data in Microsoft 365 Copilot. These are capabilities in Information Protection, Data Lifecycle Management, Audit, eDiscovery, and Communication Compliance.

Microsoft Teams

- **Copilot available in a channel post conversation** [Windows, Web, Android, iOS, Mac]

Copilot can summarize and support Q&A on a channel post conversation, assisting you directly in your channel conversations.

- **Copilot to summarize and answer Q&A in Teams Chat** [Windows, Web, Android, iOS, Mac]

Copilot helps you catch up on conversations by providing summaries and answering questions in Teams chats.

- **Use Copilot in meetings, 1:1 and group calls** [Windows, Web, Android, iOS, Mac]

Get summaries, action items, and more after meetings and calls through Copilot in the side panel.

OneNote

- **Access powerful AI tools in the new OneNote pane** [Windows]

Use the new pane to summarize key points, extract insights and to-do lists, generate ideas, and rewrite your text for improved clarity and tone. [Learn more.](#)

Outlook

- **Compose emails effortlessly on Outlook for Android and iOS** [Android, iOS]

Provide a prompt and generate a full email. Customize the tone and length to suit your needs, streamlining your email writing process. [Learn more.](#)

- **Draft emails with Copilot in new Outlook** [Windows, Web, Mac]

Use Copilot to draft new emails from prompts, adjust length and tone, and even select parts of an email and use Copilot to rewrite those specific sections effortlessly. [Learn more.](#)

- **Get Coaching from Copilot for an email draft in new Outlook [Web, Android, iOS, Mac]**

Copilot combines AI with your Outlook data to help you craft better emails, offering suggestions on tone and message effectiveness. [Learn more.](#) ↗

- **Get quick summaries of email threads in new Outlook [Web]**

Receive concise summaries of email conversations, helping you stay informed without reading every message. [Learn more.](#) ↗

- **Meeting Recap in Calendar [Windows, Web]**

After a meeting ends, open the event from your calendar in the new Outlook to view the meeting summary, mentions, tasks, and more, helping you catch up and collaborate asynchronously.

- **Summarize email conversations on Outlook for Android and iOS [Android, iOS]**

Quickly get summaries of entire email threads, helping you catch up on conversations efficiently. [Learn more.](#) ↗

- **Summarize email threads in Classic Outlook for Windows [Windows]**

Summarize email conversations, extract key points, and receive recommended actions, enhancing your productivity. [Learn more.](#) ↗

PowerPoint

- **Automatically add an agenda slide to your presentation [Windows, Web, iOS, Mac]**

Generate and insert an agenda slide based on your existing content, helping you prepare your audience for what's ahead.

- **Convert Word documents into presentations [Windows, iOS, Mac]**

Transform your Word documents into fully designed PowerPoint presentations, simplifying the creation process. [Learn more.](#) ↗

- **Create a presentation from a simple prompt [Windows, Web, iOS, Mac]**

Provide a prompt and Copilot will help you generate a presentation, saving you time and effort [Learn more.](#) ↗

- **Create presentations using your organization's templates [Windows, Web, iOS, Mac]**

Generate presentations that utilize your company's templates, ensuring consistency and alignment with your brand. [Learn more.](#)

- **Edit your presentation in Copilot chat** [Windows, Web, iOS, Mac]

Add slides, add animations, or organize your presentation in Copilot chat, streamlining your editing process. [Learn more.](#)

- **Get answers about your presentation** [Windows, Web, iOS, Mac]

Ask questions about your existing PowerPoint presentation to quickly retrieve information and insights.

- **Organize your presentation's flow easily** [Windows, Web, iOS, Mac]

Structure your slides, add sections, and insert an agenda slide to improve the overall flow of your presentation. [Learn more.](#)

- **Summarize your presentation and identify key points** [Windows, Web, iOS, Mac]

Generate summaries, highlight key slides, and identify action items from your presentation, making it easier to review and share essential information. [Learn more.](#)

Whiteboard

- **Generate ideas effortlessly** [Windows, Web, Android, iOS]

Brainstorm by generating short text ideas, fueling your creativity during collaborative sessions.

- **Organize your ideas into themes** [Windows, Web, Android, iOS]

Categorize and group your ideas into themes, helping you visualize and structure your brainstorming sessions.

- **Summarize your Whiteboard sessions** [Windows, Web, Android, iOS]

Create summaries of your Whiteboard content, capturing key points from your collaborative work.

Word

- **Apply highest sensitivity label to generated content** [Windows, Web, iOS, Mac]

Ensure your documents maintain appropriate confidentiality levels as labels are automatically updated when referencing files with higher sensitivity.

- **Draft with Copilot** [Windows, Web, iOS, Mac]

Draft new content for your blank or existing documents, helping you write faster and with ease. [Learn more.](#) ↗

- **Get answers and enhance content with chat in Word** [Windows, Web, Mac]

Ask specific questions about your document or request additional details to enhance your content, making your writing process more efficient. [Learn more.](#) ↗

- **Rewrite with Copilot** [Windows, Web, iOS, Mac]

Get suggestions for how to rewrite any text in your document, enhancing clarity and effectiveness. [Learn more.](#) ↗

- **Summarize your document using chat prompts** [Windows, Web, Mac]

Ask via chat to summarize your document, highlighting key points for quick understanding and review. [Learn more.](#) ↗

- **Use chat in Word's Viewing mode** [Windows, Mac]

Access chat while in Viewing mode to ask questions about the document's content without switching to Editing mode, improving your reading experience. [Learn more.](#) ↗

- **Use voice prompts for assistance** [Windows, Web, Mac]

Use voice to dictate into the Copilot chat prompt field

- **Visualize as table** [Web]

Easily turn plain text or lists into clear, organized tables for better readability and effortless data handling. [Learn more.](#) ↗

Microsoft 365 Copilot overview

08/07/2025 Applies to:  Microsoft 365 Copilot

Note

- Copilot Chat is in the process of transitioning to OpenAI's latest generative AI model, the GPT-5 model, as its primary supporting LLM. [Users can try GPT-5](#) with their Copilot prompts by selecting the Try GPT-5 button at the top right in Copilot Chat.
- When using GPT-5 in Copilot Chat, Copilot chooses the best model, including GPT-5, to generate a response that has increased complexity, accuracy, and overall performance.
- The Try GPT-5 button will appear in Copilot Chat, whether users do or don't have a Microsoft 365 Copilot license.
- This model update doesn't change your [security, privacy, or compliance settings](#).

For more information, see the [Microsoft 365 Blog: Available today: GPT-5 in Microsoft 365 Copilot](#).

Microsoft 365 Copilot is an AI-powered tool that helps with your work tasks.

Users enter a prompt in Copilot and Copilot responds with AI-generated information. The responses are in real-time and can include internet-based content and work content that users have permission to access.

Users get content relevant to their work tasks, and in the context of the Microsoft 365 app they're using.

The following video provides an overview of Microsoft 365 Copilot. It's 1 minute and 49 seconds long.

<https://learn-video.azurefd.net/vod/player?id=c9679373-1812-4882-a690-8d4b8e8411ea&locale=en-us&embedUrl=%2Fcopilot%2Fmicrosoft-365%2Fmicrosoft-365-copilot-overview>

For example, you're an Operations Manager and are working with human resources to update job descriptions. In a Copilot prompting session, you can ask Copilot to create a job description and also add qualifications that should be included in the description. In the same prompting session, you can expand the generated job description to also create different levels, like Level 1, Level 2, and Level 3.

You can also [create and use agents](#) to customize your Copilot experience with your organization's data sources. For example, you're a warehouse manager and you need to know the status of a shipment. You can ask your Copilot shipping agent "What is the status of shipment 1234?" Copilot uses your data sources to get the information and can respond with the status.

This article is for IT admins. It describes the different components that Microsoft 365 Copilot uses and the Copilot features in the Microsoft 365 apps. To learn more about the architecture and how Copilot works, see [Microsoft 365 Copilot architecture and how it works](#).

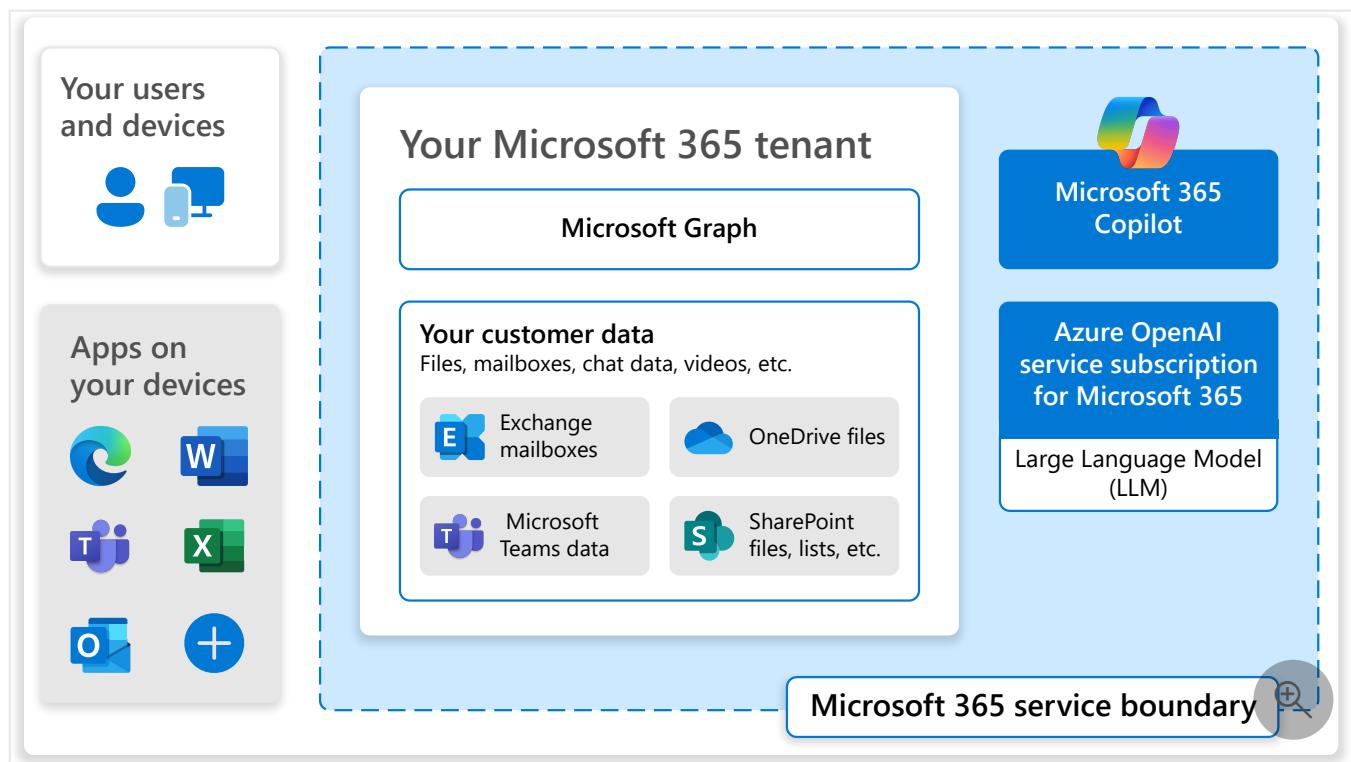
This article applies to:

- Microsoft 365 Copilot

 **Tip**

- Home users might automatically get Microsoft Copilot, which is the free consumer version. To learn more, see [How can Copilot help you?](#) and [Welcome to Copilot on Windows](#).
- Get sample prompts at the [Copilot Prompt Gallery](#) and training at the [Microsoft 365 Copilot Skilling Center](#).
- Learn more about data privacy at [Data, Privacy, and Security for Microsoft 365 Copilot](#).

The technical details



Microsoft 365 Copilot:

- Pairs with the Microsoft 365 productivity apps that you use every day, like Word, Excel, PowerPoint, Outlook, Teams, and others. You can use Copilot in Word to help create a document, in Excel to get suggestions for formulas, in Outlook to summarize an email thread, and in Teams to summarize meetings.
- Uses content in [Microsoft Graph](#) to personalize the responses with a user's work emails, chats, and documents. Copilot only shows the data that users have permission to access.
- Includes [Microsoft 365 Copilot Search](#), a universal search experience that allows users to search across all their Microsoft 365 and third-party data sources to find what they need quickly.
- Coordinates large language models (LLMs). LLMs are a type of artificial intelligence (AI) algorithms. These algorithms use deep learning techniques and data sets to understand, summarize, predict, and generate content.

The LLMs include pretrained models, like Generative Pre-Trained Transformers, like GPT-4, that are designed for these tasks. To learn more about Generative Pre-Trained Transformers (GPT), ask [Copilot ↗](#).

To learn more, see:

- [Microsoft 365 Copilot architecture and how it works](#)
- [Microsoft 365 Copilot service description](#)
- [Microsoft 365 Copilot Search overview](#)

- Video: [Copilot system explained by Microsoft](#)
- Video: [Microsoft 365 Copilot, LLMs, and your apps](#)
- Video: [How to get ready for Microsoft 365 Copilot](#)

Copilot works with Microsoft 365 apps and Microsoft Graph

Copilot has intelligent features, functionality, and prompting. These features are designed to help users in the context of their work within their Microsoft 365 apps.

Microsoft's LLMs and other components work together. They help users securely access and use your organizational data with AI-powered capabilities. Specifically, Microsoft 365 Copilot uses the following components:

Microsoft 365 apps

Apps like Word, Excel, PowerPoint, Outlook, Teams, and Loop work with Copilot to support users in the context of their work. For example, Copilot in Word helps users create, understand, and edit documents.

For more features, see [Copilot features in Microsoft 365 apps](#) (in this article).

Microsoft 365 Copilot Chat

With Microsoft 365 Copilot Chat, you can draft content, review what you missed, and get answers to questions using open-ended prompts. This information is securely grounded in your work data.

You can use Microsoft 365 Copilot Chat in Microsoft Teams, in the Microsoft 365 Copilot Chat app, at [Microsoft365.com](#), and at [copilot.microsoft.com](#).

Microsoft 365 Copilot Search

Copilot Search is an AI-powered universal search experience across all your Microsoft 365 applications and non-Microsoft data sources. It's integrated with Microsoft 365 Copilot, so users can find the results they need with search, then seamlessly transition to chat for deeper exploration or follow-up task completion.

Learn more about [Copilot Search](#).

Microsoft Graph

Microsoft Graph includes information on users, their activities, and the organization data they can access. The Microsoft Graph API brings a personalized context into the prompt, like

information from a user's emails, chats, documents, and meetings.

To learn more, see [Overview of Microsoft Graph](#) and [Major services and features in Microsoft Graph](#).

Semantic indexing for Microsoft 365 Copilot

Microsoft 365 Copilot enhances search relevance and accuracy by using advanced lexical and semantic understanding of Microsoft Graph data, resulting in more contextually precise information retrieval. Copilot preserves security, compliance, and privacy, ensuring organizational boundaries are respected while offering seamless user experience.

To learn more, see [Semantic indexing for Microsoft 365 Copilot](#) and [Semantic Index explained by Microsoft](#) (opens YouTube's website).

Copilot features in Microsoft 365 apps

Microsoft 365 productivity apps (like Word, Excel, PowerPoint, Outlook, Teams, and Loop) work with Copilot to support users in the context of their work.

Tip

To learn how users can use Copilot within Microsoft 365 apps, including sample prompts, see [Copilot Prompt Gallery](#).

Some of these features include:

 Expand table

Microsoft 365 App	Feature
Word	Draft —Generate text with and without formatting in new or existing documents. Word files can also be used for grounding data. Chat —Create content, summarize, ask questions about your document, and do light commanding.
PowerPoint	Draft —Create a new presentation from a prompt or Word file using enterprise templates. PowerPoint files can also be used for grounding data. Chat —Summary and Q&A Light commanding —Add slides, pictures, or make deck-wide formatting changes.

Microsoft 365 App	Feature
Excel	Draft —Get suggestions for formulas, chart types, and insights about data in your spreadsheet.
Loop	Collaborative content creation —Create content that can be collaboratively improved through direct editing.
Outlook	<p>Coaching tips—Get coaching tips and suggestions on clarity, sentiment, & tone, and an overall message assessment and suggestions for improvement.</p> <p>Summarize—Summarize an email thread to quickly understand the discussion.</p> <p>Draft—Pull from other emails or content across Microsoft 365 that the user already has access to.</p>
Teams	<p>Chat—Copilot can summarize up to 30 days of the chat content before the last message in a chat.</p> <p>Copilot uses only the single chat thread as source content for responses. It can't reference other chats or data types, like meeting transcripts, emails, and files. Users can select prewritten prompts or write their own questions. Responses include clickable citations that direct users to the relevant source content that was used.</p> <p>Conversations with Copilot take place in a side panel and allows users to copy and paste. Copilot conversations close when the side panel closes.</p> <p>Meetings—Users can invoke Copilot in meetings or calls within the same tenant. Copilot uses the transcript in real-time to answer questions from the user. It only uses the transcript and knows the name of the user typing the question.</p> <p>Users can type any question or use predetermined prompts. Copilot answers questions only related to the meeting conversation from the transcript. The user can copy/paste an answer and access Copilot after the meeting ends.</p> <p>Copilot—Users access data across their Microsoft 365 Graph and use LLM functionality.</p> <p>Calls—Automates important administrative tasks of a call, like capturing key points, task owners, and next steps. It supports voice over Internet Protocol (VoIP) and public switched telephone network (PSTN) calls.</p>
Whiteboard	Draft —Use natural language to generate ideas, organize ideas into themes, create designs based on ideas, and summarize whiteboard content.
OneNote	Draft —Use prompts to draft plans, generate ideas, create lists, and organize information to help you find what you need.
Forms	Draft —Use prompts to draft questions and suggestions that help you create surveys, polls, and other forms.

Microsoft 365 services that help support Copilot

In your Microsoft 365 license, there are services and features that can help you get your data and organization ready for Copilot.

- **SharePoint Advanced Management (SAM)**

Microsoft SharePoint Premium – SharePoint Advanced Management (SAM) can help you reduce oversharing and cleanup inactive sites. These tasks help declutter Copilot's data sources and improve the quality of the responses.

To learn more, see [Get ready for Microsoft 365 Copilot with SharePoint Advanced Management \(SAM\)](#).

- **Restricted SharePoint Search**

Restricted SharePoint Search (RSS) RSS gives you time to review and configure the correct permissions on your SharePoint sites. You add the reviewed & corrected sites to an allowed list that Copilot can access.

To learn more, see [Restricted SharePoint Search](#).

- **Microsoft Purview**

Microsoft Purview can classify and label your data based on the sensitivity of the content. It can also help prevent unauthorized sharing or leakage and review Copilot prompts and responses.

To learn more, see [Microsoft Purview data security and compliance protections for generative AI apps](#).

- **Microsoft Agents**

Agents are scoped or focused versions of Microsoft 365 Copilot that act as AI assistants and can automate business processes. For example, you can create an agent that creates help desk tickets, or a human resources agent that looks up employee info from your data source.

To learn more, see [Microsoft 365 Copilot extensibility overview](#).

More resources:

- [Compare features in the Microsoft 365 licenses that affect Copilot](#)
- Get your data ready for Microsoft 365 Copilot using the [E3 license admin guide](#) or [E5 license admin guide](#).

Related content

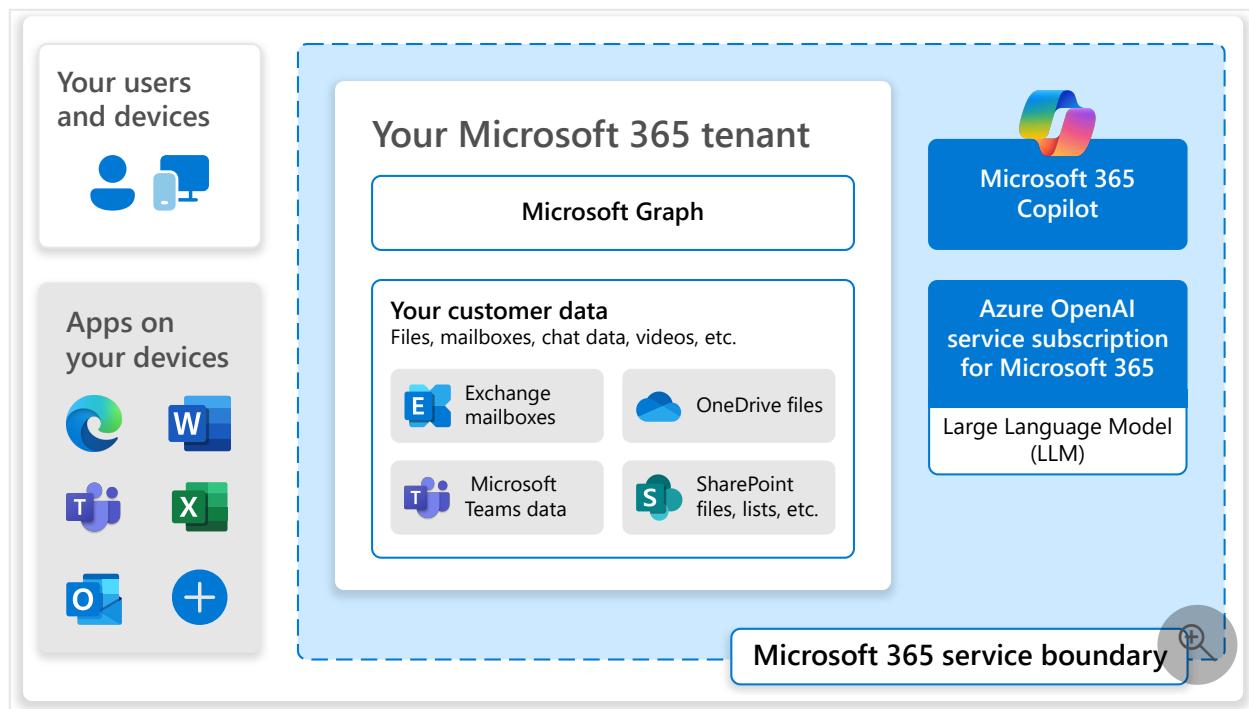
- Get licensing info and [set up Microsoft 365 Copilot](#).
- Learn about [Data, Privacy, and Security for Microsoft 365 Copilot](#).
- Get [sample prompts at the Copilot Prompt Gallery](#) and training at the [Microsoft 365 Copilot Skilling Center](#).
- Stay up to date on the latest Copilot features, changes, and announcements using the [Message center](#) in the [Microsoft 365 admin center](#).

Microsoft 365 Copilot architecture and how it works

Article • 01/28/2025 • Applies to: Microsoft 365 Copilot

When you create a Microsoft 365 subscription, a tenant is automatically created for your organization. Your tenant sits inside the **Microsoft 365 service boundary**, where [Microsoft 365 Copilot](#) can access your organization's data.

This data includes information that the user can access, including their activities, and the content they create & interact with in Microsoft 365 apps.



Copilot is a shared service, just like many other services in Microsoft 365. When using Copilot in your tenant:

- Your customer data stays within the Microsoft 365 service boundary.
- Your data is secured based on existing security, compliance, and privacy policies already deployed by your organization.

This article describes how Microsoft 365 Copilot works, including the data flow in a user prompt, how Copilot access data, and how Copilot honors Conditional Access and multifactor authentication (MFA).

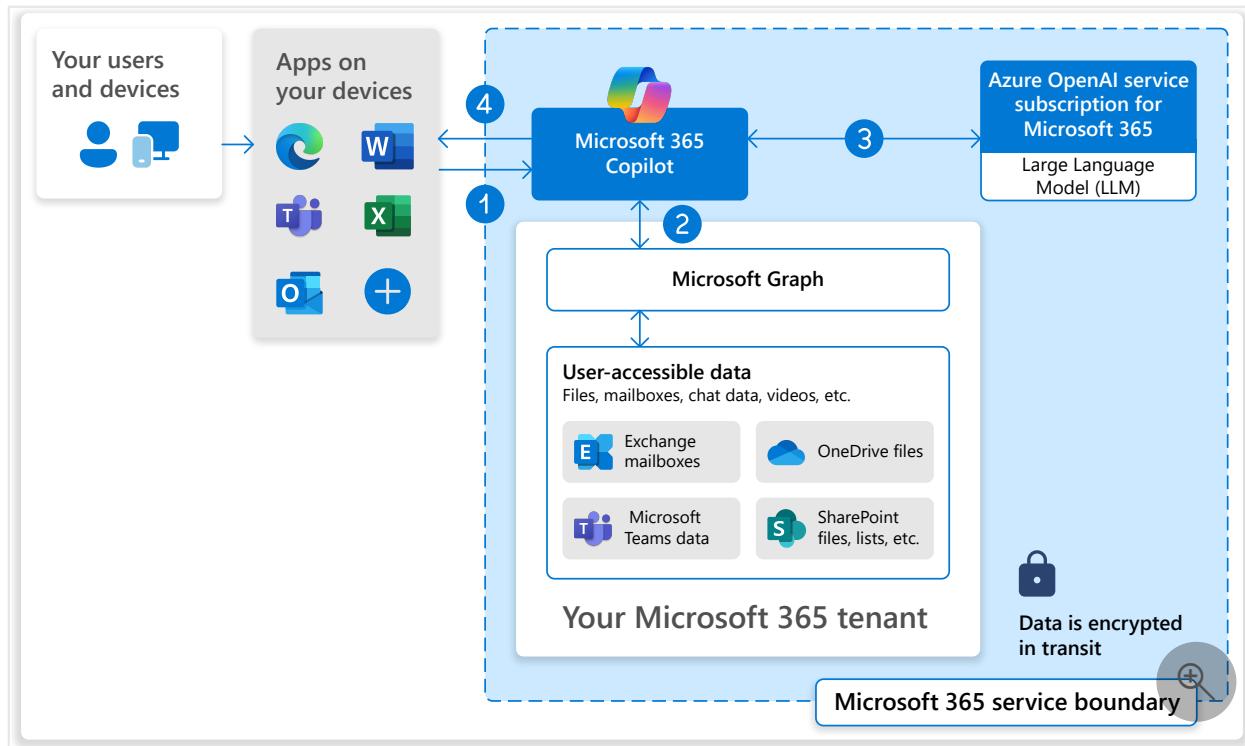
This article applies to:

- Microsoft 365 Copilot

User prompts and Copilot responses

When users open a Microsoft 365 app, like Word or PowerPoint, they can use Copilot to get real-time data.

The following diagram provides a visual representation of how a Copilot prompt works.



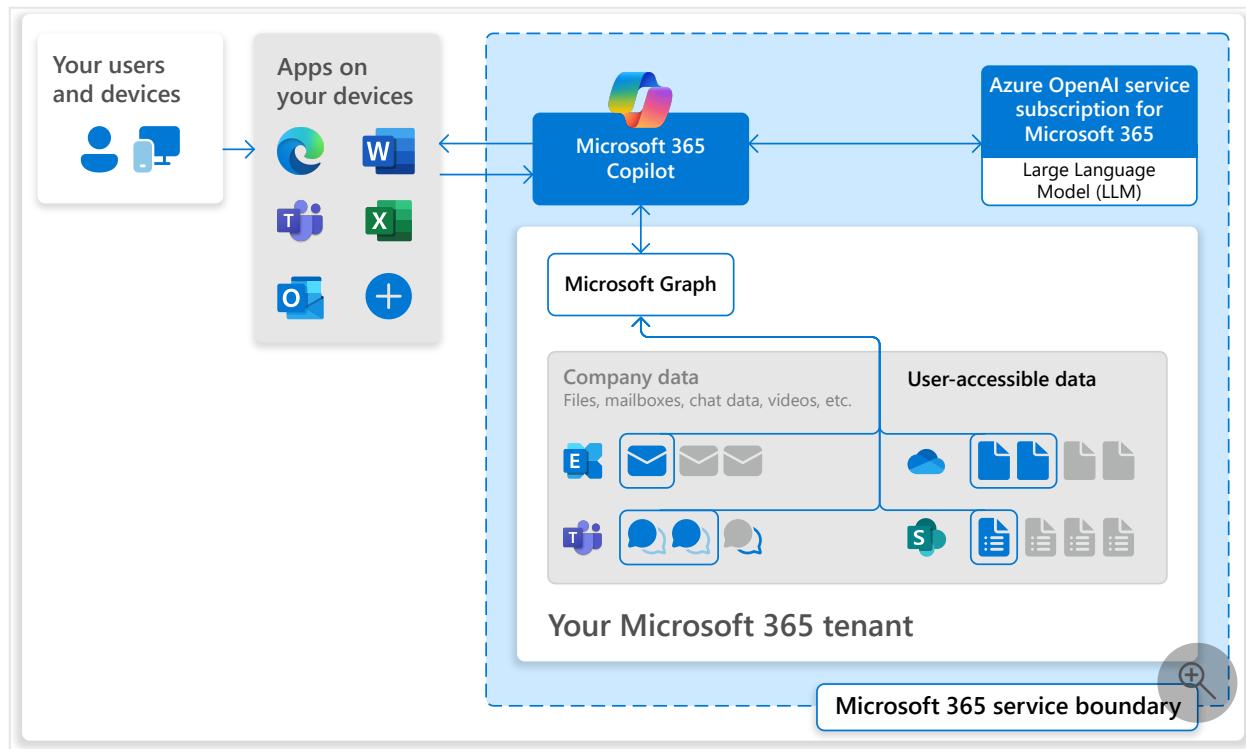
Let's take a look:

1. In a Microsoft 365 app, a user enters a prompt in Copilot.
2. Copilot preprocesses the input prompt using **grounding** and accesses Microsoft Graph in the user's tenant.
 - Grounding improves the specificity of your prompt, and helps you get answers that are relevant and actionable to your specific task. The prompt can include text from input files or other content Copilot discovers.
 - The data Copilot uses to generate responses is encrypted in transit.
3. Copilot sends the grounded prompt to the LLM. The LLM uses the prompt to generate a response that is contextually relevant to the user's task.
4. Copilot returns the response to the app and the user.

User access and data privacy

Copilot only accesses data that an individual user is authorized to access, based on, for example, existing Microsoft 365 role-based access controls. Copilot doesn't access data that the user doesn't have permission to access.

The following diagram provides a visual representation of how Copilot and user access work together.



Let's take a look:

- On devices, users open an app and enter a prompt in Copilot.
- Copilot uses **Microsoft Graph** to access user data that's in the user's unique context. This user data includes emails, chats, and documents that the user has permission to access.

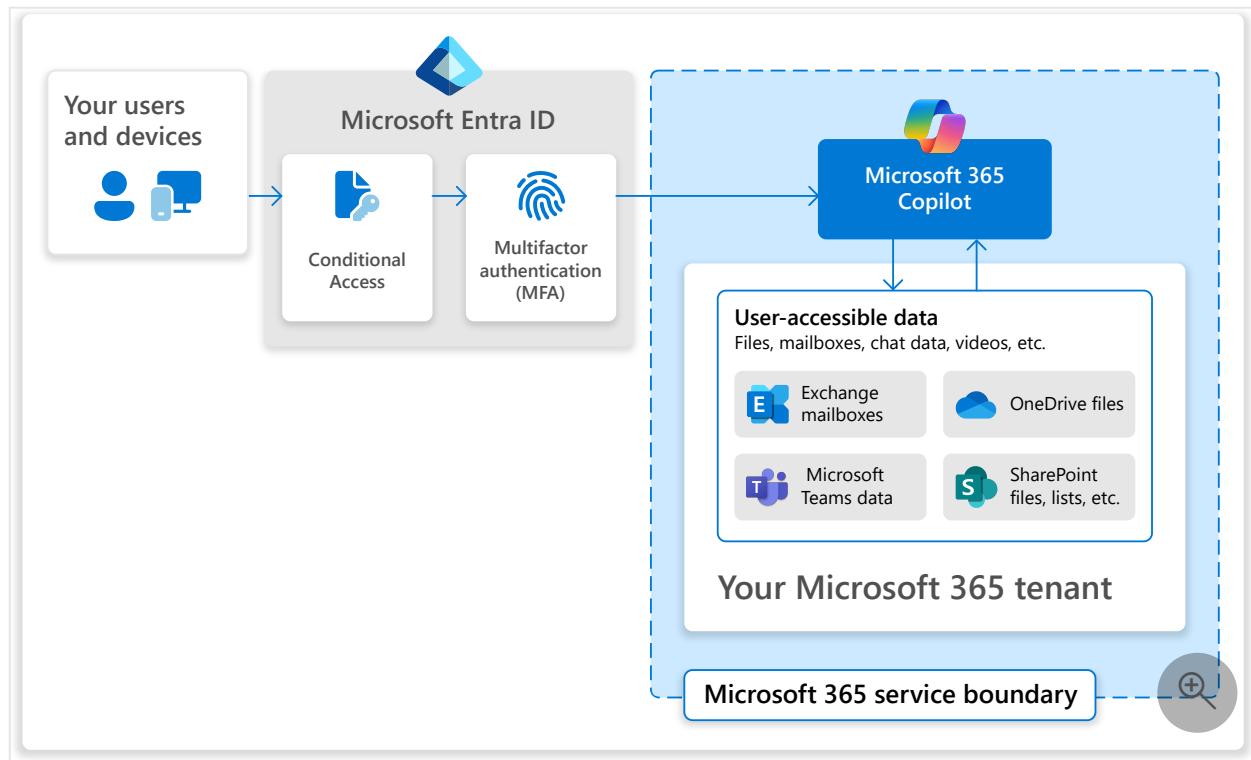
There are Microsoft 365 services that help control access and security to your organization's data. These services include Restricted SharePoint Search (RSS), SharePoint Advanced Management (SAM), and Microsoft Purview. To learn more, see [Microsoft 365 E3 and E5 feature comparison list for Microsoft 365 Copilot](#).

- Copilot can't access data that the user doesn't have permission to access. In the diagram, the grayed-out data represents data that Copilot can't access.
- When a user enters a prompt and Copilot responds, this **interaction** is stored in the user's Copilot chat history. Users can review and reuse their previous prompts. They can also [delete their chat history](#).

To learn more, see [Data stored about user interactions with Microsoft 365 Copilot](#)

Copilot honors Conditional Access and MFA

Copilot honors Conditional Access policies and multifactor authentication (MFA).



This means:

- If you [enable and configure Conditional Access policies](#), make sure your users are allowed to access Microsoft 365 services. You can manage access based on conditions you configure, including enforcing device compliance policies you set. To learn more, see [Protect AI with Conditional Access policy](#).

If you use Microsoft Intune, then you can use Intune compliance policies and Conditional Access together. To learn more, see [Use compliance policies to set rules for devices you manage with Intune](#).

- Copilot uses the same MFA features you configure for your tenant. With MFA, like all Microsoft 365 services, users must provide multiple forms of verification before they're allowed to access Copilot.

If your tenant is using [security defaults](#), then MFA is enabled by default. If MFA isn't enabled, then Microsoft recommends [enabling MFA](#).

Related content

- [Microsoft 365 Copilot data protection and auditing architecture](#)
- [Setup and deploy Microsoft 365 Copilot](#)

- [Read about Data, Privacy, and Security for Microsoft 365 Copilot](#)
-

Feedback

Was this page helpful?

 Yes

 No

Architecture diagrams of Microsoft 365 data protection features that affect Microsoft 365 Copilot

Article • 05/27/2025 • Applies to:  Microsoft 365 Copilot

Your Microsoft 365 subscription includes features that help you protect your data, including Microsoft Purview sensitivity labels & encryption, and SharePoint oversharing controls. These features affect [Microsoft 365 Copilot](#) and how Copilot interacts with your data.

First and foremost, [Microsoft 365 Copilot](#) honors your security & data protection controls. There are also features you can use to audit Copilot usage data.

This article is for IT admins, and describes & illustrates:

- How Copilot works with Microsoft Purview sensitivity labels.
- The controls you can use to prevent oversharing data in SharePoint sites and OneDrive.
- Where Copilot usage data is stored and how you can discover, audit, and retain this data.

This article applies to:

- Microsoft 365 Copilot

Tip

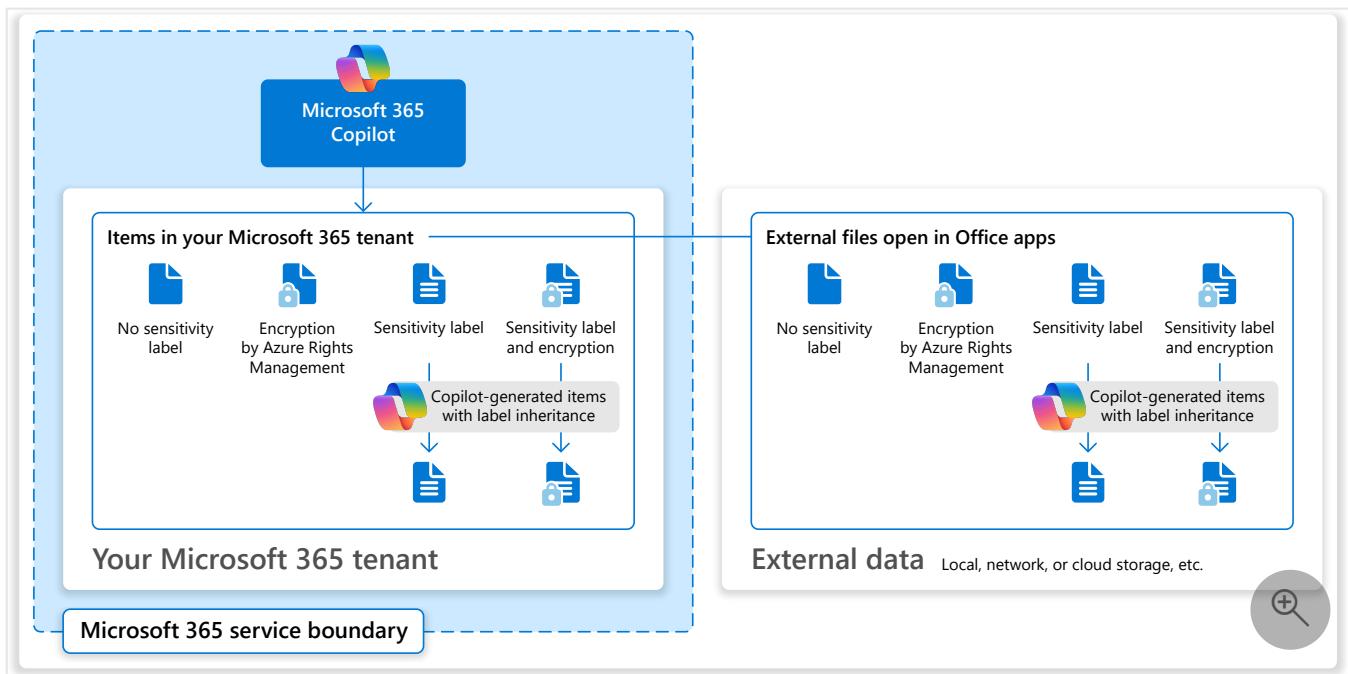
To learn more how Microsoft 365 Copilot uses your data, see:

- [Data, Privacy, and Security for Microsoft 365 Copilot](#)
- [AI security for Microsoft 365 Copilot](#) (includes info on honoring data residency requirements)

How Microsoft 365 Copilot works with sensitivity labels and encryption

Copilot works together with your Microsoft Purview sensitivity labels and encryption to provide an extra layer of protection.

The following diagram provides a visual representation of how Copilot honors your information protection controls using sensitivity labels and encryption.



Let's take a look:

- You open a file in a [supported Office app](#). When the file opens, the sensitivity label name and content markings that are configured for the label are shown.
 - When the sensitivity label applies encryption, the user must have the EXTRACT and VIEW usage rights for Copilot to summarize the data.
 - Items encrypted by the [Azure Rights Management](#) service without a sensitivity label still require EXTRACT or VIEW usage rights for the user for Copilot to summarize the data.
- In a prompt session with Copilot (called [Microsoft 365 Copilot Chat](#)), the labels are displayed for data that is returned. The current response shows the label with the highest priority.
- When you use Copilot to create new content based on items that have a sensitivity label, the new content automatically inherits the sensitivity label with the highest priority and that label's protection settings.
- Protection extends to data stored outside of your Microsoft 365 tenant when the file is opened in an Office app.

For example, there's a file using a sensitivity label you and your admin team created. An end user saves this file outside of your Microsoft 365 tenant, like on their personal device, a network share, or in cloud storage. When this file is opened in an Office app, the protection settings go with the file.

(!) Note

User-defined sensitivity label permissions can block Copilot from extracting and interacting with the file content. For example, Copilot agents can't read files that have user-defined sensitivity label permissions.

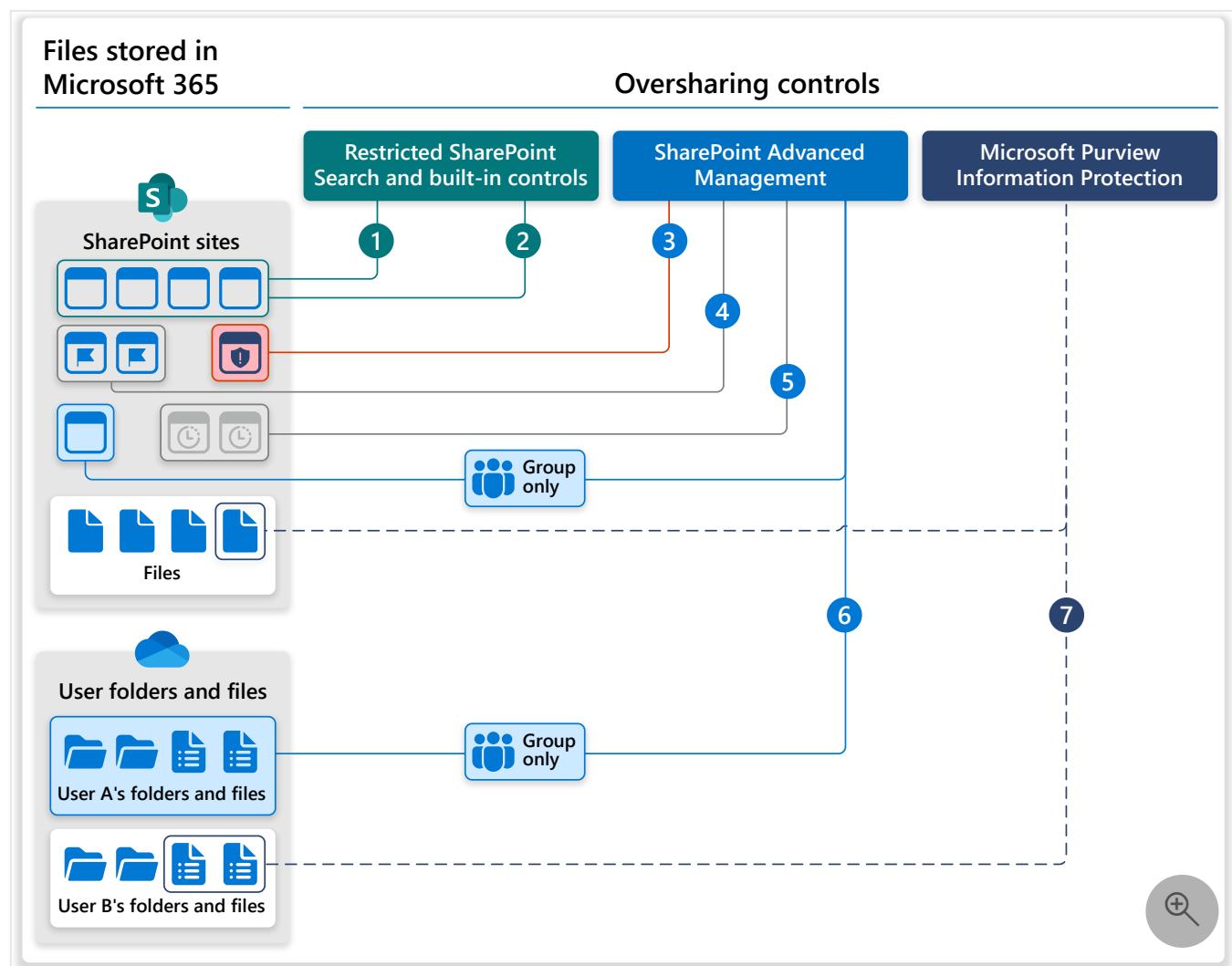
To learn more, see:

- [Get started with sensitivity labels](#)
- [Microsoft Purview strengthens information protection for Copilot](#)

Oversharing controls you can use with Microsoft 365 Copilot

Microsoft 365 includes controls to help you prevent oversharing data through Copilot.

The following diagram provides a visual representation of some of the features in your Microsoft 365 E3+ and SharePoint Advanced Management licenses that help you prevent oversharing.



Let's take a look:

1. [Restricted SharePoint Search](#) allows you to limit organization-wide search and Copilot experiences to selected SharePoint sites. By default, this setting is off and the [allowed list](#) is empty. It serves as a temporary solution to review and apply proper permission settings to your sites.

2. SharePoint includes more built-in controls:

- Use [Specific people links](#) instead of organization-wide sharing by default.
- Hide broad scoped permissions from users, like the [Everyone Except External Users](#) claim.
- Site admins can use site level controls to restrict member sharing, and ensure [Site Owners](#) handle access requests.

3. In SharePoint Advanced Management, use [data access governance reports](#) to identify sites that contain potentially oversharable or sensitive content.

4. With [Restricted Content Discovery](#), organizations can put a flag on sites so that users can't find them through Copilot or Org-wide search. Restricted content discovery doesn't change users' existing permissions. Users with access can still visit sites and open files.

5. In SharePoint Advanced Management, create an [inactive site policy](#) to automatically manage and reduce inactive sites.

6. In SharePoint Advanced Management, you can restrict access to SharePoint and OneDrive sites to users in a specific group by using the [restricted access control policy](#). Users that aren't members of the specified group can't access the site or content, even if they had prior permissions or a shared link. This policy can be used with Microsoft 365 Group-connected, Teams-connected, and non-group connected sites.

To learn more, see:

- [SharePoint restricted access control policy](#)
- [OneDrive restricted access control policy](#)

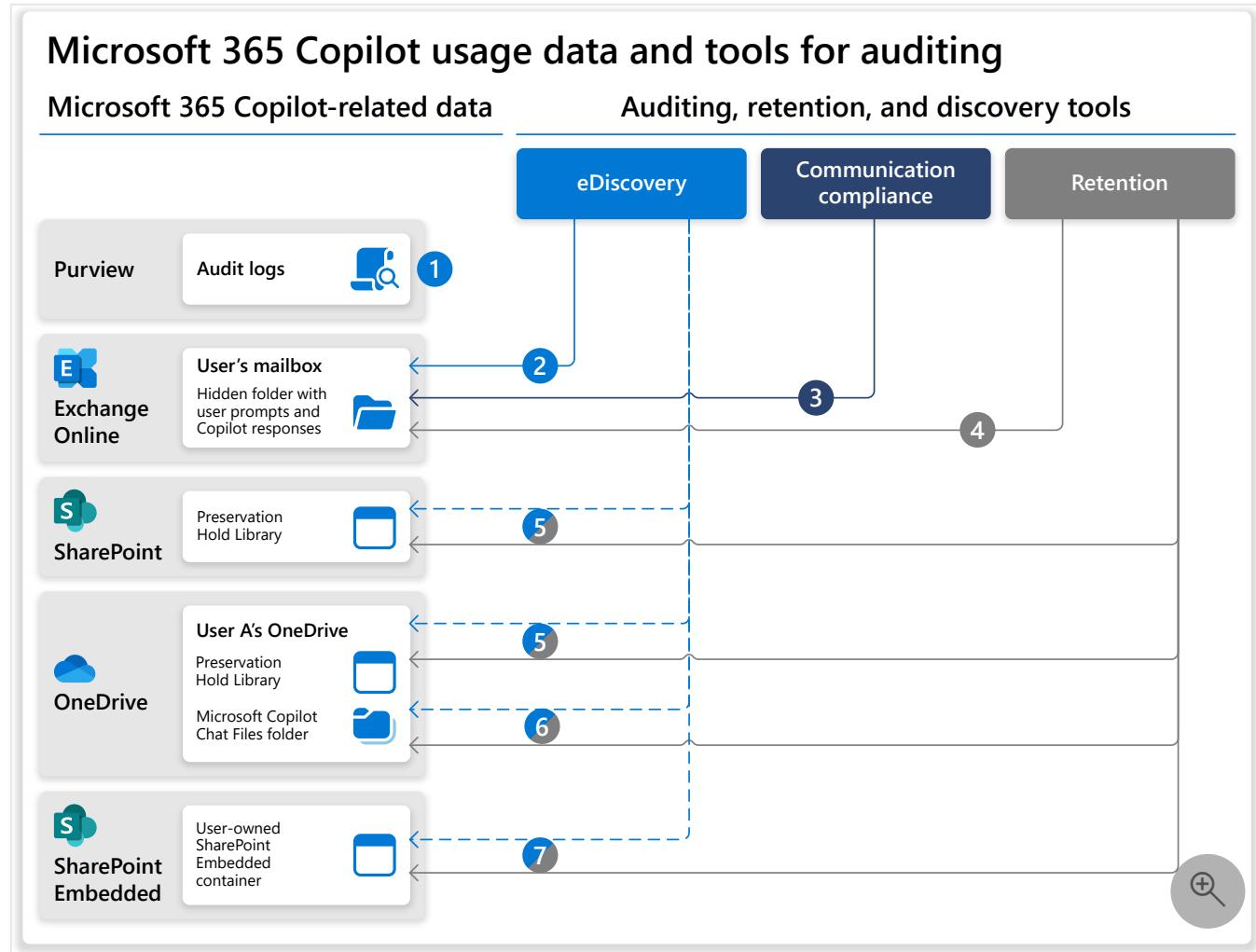
7. Microsoft Purview includes capabilities to limit oversharing:

- Use [Microsoft Purview sensitivity labels](#) that apply encryption to restrict which files Copilot can access. The user must have the EXTRACT and VIEW usage rights for Copilot to summarize the data.
- Use [Data Loss Prevention \(DLP\) for Microsoft 365 Copilot](#) to prevent Copilot from accessing content that has specific sensitivity labels applied.

Where Copilot usage data is stored and how you can audit it

Copilot usage data is stored in several places. You can use the tools provided with Microsoft 365 E5 to discover, audit, and apply retention policies.

The following diagram provides a visual representation of the different features in your Microsoft 365 E5 license that help you search and audit Copilot data.



Let's take a look:

1. Use [Microsoft Purview audit logs](#) to identify how, when, and where Copilot interactions occurred and which items were accessed, including any sensitivity labels on those items.
2. Use [Microsoft Purview eDiscovery](#) to search for keywords in Copilot prompts and responses that might be inappropriate. You can also include this info in an eDiscovery case to review, export, or put this data on hold for an ongoing legal investigation.
3. Use [Microsoft Purview Communication Compliance](#) to detect and alert inappropriate or risky Copilot prompts and responses, like personal data or highly confidential information.

4. Use [Microsoft Purview retention policies](#) to keep a copy of deleted Copilot conversations so they're available to eDiscovery.

Or, if you have a compliance requirement to delete data after a specific period of time, use retention policies to automatically delete Copilot prompts and responses.

5. During a Copilot prompt and response session (called interactions), Copilot can provide links to the source files. These embedded links are called [cloud attachments](#).

When a retention label is automatically applied, the specific version of the cloud attachments used in the interaction is retained. The version is kept even if the original file is edited or deleted from SharePoint or OneDrive.

This original or deleted version of the file is stored in the [Preservation Hold Library](#) in SharePoint or OneDrive. It remains accessible to eDiscovery searches.

6. In a Copilot interaction, users can upload local files. These uploaded files are automatically stored in the [Microsoft Copilot Chat Files folder](#) in the user's OneDrive.

As with other files in OneDrive, Copilot-related files are accessible for eDiscovery searches and can be automatically retained or deleted with a retention policy.

7. Content created by [Copilot Pages](#) is stored in a [user-owned SharePoint Embedded container](#) (one per user). As with other files in SharePoint, this Copilot-related content is accessible for eDiscovery searches and can be automatically retained or deleted with a retention policy.

To learn more, see [Learn about retention for Copilot](#).

Related content

- [Microsoft 365 Copilot architecture and how it works](#)
- [Read about Data, Privacy, and Security for Microsoft 365 Copilot](#)
- [Microsoft 365 license feature comparison list for Microsoft 365 Copilot](#)

Which Copilot is right for me or my organization?

Article • 05/01/2025 • Applies to: Microsoft 365 Copilot

Copilot is Microsoft's AI-powered virtual assistant. It uses large language models (LLMs) to answer your questions using a prompt and response interaction.

There are different Copilots available.

If you're an admin, this article describes the different Copilots and can help you decide the Copilots that are right for your organization.

If you're an end user, have a Copilot installed, and not sure what Copilot you have, then this article can help you understand the Copilot that's installed on your device.

Microsoft 365 Copilot Chat

- Secure with [enterprise data protection](#)
- Scalable with [pay-as-you-go](#)
- Included with a Microsoft 365 subscription

Microsoft 365 Copilot Chat is an AI prompt and response experience that's [grounded in the web](#) and powered by [large language models \(LLMs\)](#).

Copilot Chat is automatically included and available to organizations that have a Microsoft 365 subscription. With Copilot Chat:

- You can also create images and use [Copilot Pages](#) to save, edit, and share AI-generated content.
- You can use for work and education, and know that you're protected with [enterprise data protection](#).
- You can manage it using [IT controls for admins](#).

Microsoft 365 Copilot Chat is available on the web at <https://m365copilot.com>, in the [Microsoft 365 Copilot app](#), and in Teams, Outlook, & Microsoft Edge.

Tip

If you [pin Copilot Chat](#) in the Microsoft 365 Copilot app, when users go to <https://m365copilot.com>, then they're automatically redirected to <https://m365.cloud.microsoft/chat>.

If you want users in your organization to have prompt and response interchanges with information on the internet and [enterprise data protection](#), then use Microsoft 365 Copilot Chat.

To learn more, see:

- [Learn more about Microsoft 365 Copilot Chat](#)
- [Read about Copilot for all: Introducing Microsoft 365 Copilot Chat - blog ↗](#)

Microsoft 365 Copilot

- Use for work tasks
- Licensed by your work organization
- Use for personal tasks, with caution. This Copilot accesses work data.
- Personally licensed by end users

Microsoft 365 Copilot is licensed by your work organization. It includes features that can help end users and admins with work tasks, like:

- Use Microsoft 365 Copilot Chat for web-based (internet) and work-based ([Microsoft Graph](#)) chat.
- Get in-app experiences in your Microsoft 365 apps, like Teams, Word, Excel, PowerPoint, and Outlook.
- Create [Copilot Agents](#).
- Measure insights with [Copilot Analytics↗](#).

With a Microsoft 365 Copilot license, when you open Copilot Chat, it looks similar to the following image:

Work

Web

New chat



...



Copilot

Stand out on socials

What are some tips for writing a great LinkedIn post?

Going on holiday?

Write some funny Out of Office email responses to use while I'm on vacation from [January 25 to February 9]

Interview warning signs

What are some red flags to watch out for during an interview?

Code a binary search in Python

Write a Python script to perform binary search

Show me the result

Execute and explain this code...

Graph the data quickly

Create a pie chart showing the market share of smartphones in the United States

View prompts

Write a Python script to perform binary search

When users sign in with their Microsoft Entra work or school account (`user@contoso.com`), they can use Microsoft 365 Copilot Chat **work** or **web** version:

Work

Web

- When users select **work**, Copilot Chat is a work-based ([Microsoft Graph](#)) chat experience. It shows results that their Microsoft Entra work or school account can access.
- When users select **web**, Copilot Chat shows results that their Microsoft Entra work or school account can access, and also shows results from the internet.

To learn about data privacy, see:

- Data, privacy, and security for web search in Microsoft 365 Copilot and Microsoft 365 Copilot Chat
- Enterprise data protection in Microsoft 365 Copilot and Microsoft 365 Copilot Chat

Copilot accesses data that your Microsoft Entra account has access to, like your emails and files. So, you can use Microsoft 365 Copilot to:

- Find information in your Outlook emails and SharePoint documents
- Create summaries of long Word documents
- Summarize information into a Word document, PowerPoint presentation, or Outlook email
- Create meeting agendas and get a Teams meeting summary
- Create images and add these images to your work, like PowerPoint presentations
- Get answers to questions about your work or company, like the vacation policy

In the following example, Copilot filters and highlights the rows that list me in an Excel spreadsheet:

The screenshot shows a Microsoft 365 Copilot interface integrated into an Excel spreadsheet. On the left, there's a table with columns labeled 'CPM or lead', 'TopicType', and 'Url'. A single row is visible: 'Mandi Ohlinger' under 'CPM or lead', 'article' under 'TopicType', and a URL under 'Url'. The entire row is highlighted in yellow. To the right of the spreadsheet is the Copilot sidebar. At the top of the sidebar, a button says 'filter this spreadsheet so it only shows rows that list me as the cpm'. Below this, a message from 'Copilot' says 'Sure! Looking at A1:AL69, here's 1 change to review and apply:'. It lists a suggestion: 'Apply a filter on 'C1:C69' to show only rows where the value is equal to "Mandi Ohlinger"'. At the bottom of the sidebar is a green 'Apply' button.

CPM or lead	TopicType	Url
Mandi Ohlinger	article	https://learn.microsoft.com/en-us/copilot/microsoft-365/microsoft-365-copilot-ai-security

Microsoft 365 Copilot is available at <https://m365.cloud.microsoft.com>, in the [Microsoft 365 Copilot app](#) that can be installed on devices, in Microsoft Edge, when you use [Microsoft Bing](#), and in Microsoft 365 apps.

End users can also purchase their own license that includes Microsoft 365 Copilot.

If you want users in your organization to have prompt and response interchanges with work & internet information, and use AI features in their work apps, then use Microsoft 365 Copilot.

To learn more, see:

- [Microsoft 365 Copilot overview](#)

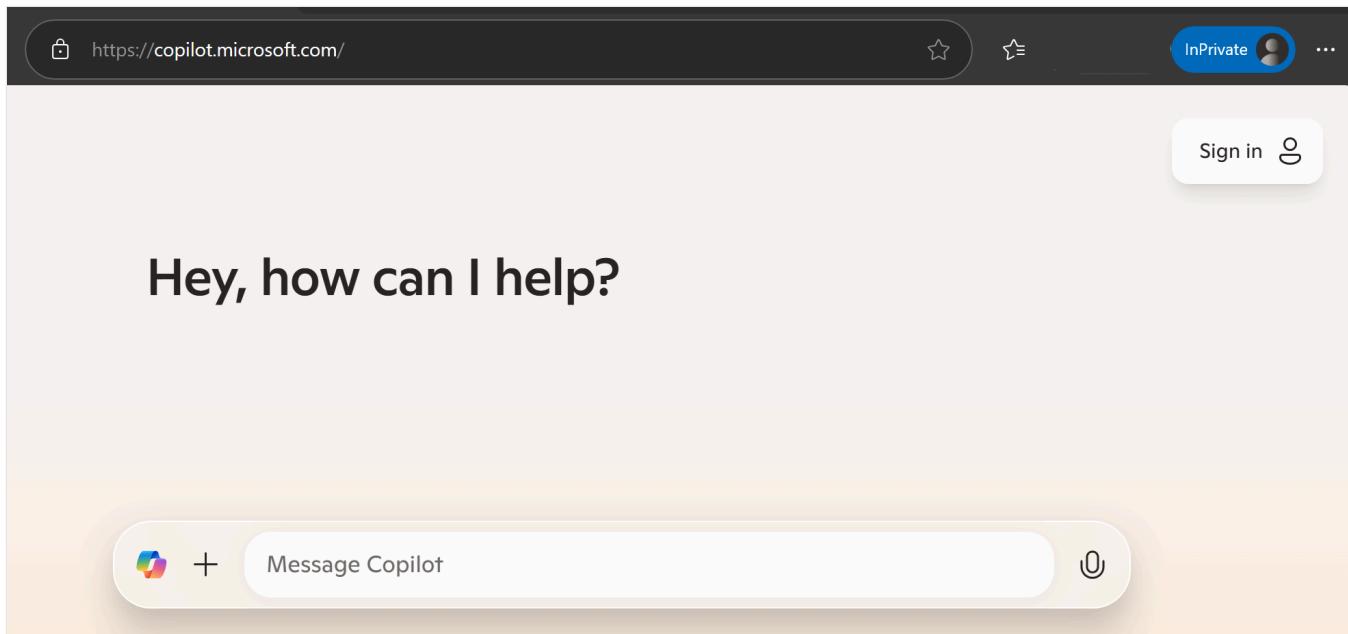
- Microsoft 365 Copilot architecture and how it works
- Copilot Prompt Gallery ↗
- Microsoft 365 Copilot plans ↗
- Add apps to Microsoft Intune and assign apps to groups

Microsoft Copilot

- Use for personal tasks
- Free consumer version

Microsoft Copilot is a consumer version and is available for free. It can help you with personal tasks and uses information from the internet. You can use it for nonsensitive work tasks, but be cautious. Never add sensitive or proprietary work information in a prompt.

When you open Microsoft Copilot, it looks similar to the following image:



You can use Microsoft Copilot to:

- Help you draft an email or get guidance on how to write an email, like creating an accessible email for different disabilities
- Create guidelines or rules for your office break area
- Get answers from the internet, like how to write a resume
- Create images for a specific task, like a birthday card for a colleague

Microsoft Copilot is available at copilot.microsoft.com ↗, in the [Microsoft Copilot app](#) ↗, in Microsoft Edge, and when you use [Microsoft Bing](#) ↗.

When users access this Copilot on their work devices, if Microsoft 365 Copilot is enabled for the users, then they can choose **work** or **personal**:



Which Copilot experience are you looking for?

Work

A secure and compliant Copilot integrated with your enterprise account.

[Go to copilot.cloud.microsoft.com/](https://copilot.cloud.microsoft.com/)

 MarkChingya@microsoft.com

Personal

A helpful AI companion for your everyday life outside of work.

[Switch to a personal account](#)

or [sign out](#) to preview personal Copilot without an account

- When users select **work**, Copilot redirects to Microsoft 365 Copilot and shows results that their Microsoft Entra work or school account can access.
- When users select **personal**, they can sign in with a personal account and Copilot shows results from the internet.

If you want to use AI on your personal devices or use for nonsensitive work tasks, then use Microsoft Copilot.

To learn more, see:

- [Overview of Microsoft Copilot](#)
- [Copilot is now included in Microsoft 365 Personal and Family ↗](#)
- [Data, privacy, and security for web search in Microsoft 365 Copilot and Microsoft Copilot](#)

Microsoft Security Copilot

- Used by security professionals
- Licensed by your work organization

Microsoft Security Copilot helps security professionals with incident response, threat hunting, intelligence gathering, posture management, and more. It can access work or school data that

the security professional's Microsoft Entra account has access to.

Microsoft Security Copilot also integrates with other services, like Microsoft Defender XDR, Microsoft Purview, Microsoft Intune, Microsoft Entra, and some non-Microsoft services.

You can use Security Copilot to:

- Get a summary of a threat incident and create incident reports
- Investigate a user account that might be compromised
- Get more information about organization devices, including compliance status
- Summarize data loss prevention (DLP) or insider risk management alerts

If you want the security team in your organization to get help identifying threats and compromised users & devices in your organization, then use Microsoft Security Copilot.

To learn more, see [What is Microsoft Security Copilot?](#).

GitHub Copilot

- Used by developers for writing code
- Licensed by your work organization
- Free for some people, like verified students and teachers

GitHub Copilot is an AI coding assistant that can help you write code faster. This Copilot is licensed by your work organization and is also free for some people, like verified students and teachers.

You can use GitHub Copilot to:

- Get code suggestions as you type
- Ask for help when writing your code

If you want developers in your organization to get AI help with writing code, then use GitHub Copilot.

To learn more, see:

- [What is GitHub Copilot?](#)
- [Set up Visual Studio Code with Copilot](#)

Microsoft Copilot Studio

- Licensed by your work organization

Microsoft Copilot Studio is a low code graphical tool that you can use to create agents and connect to other data sources. Agents let you customize your organization's Copilot experience. They can automate & execute business processes, like help desk, change management, and managing guests in meetings.

You can add existing agents and create your own agents.

You can use Copilot Studio to:

- Create a custom agent
- Connect to data sources
- Create a custom prompt for your agent

If you want users in your organization to create agents that resolve business needs, then use Microsoft Copilot Studio and agents.

To learn more, see:

- [Learn more about Copilot Studio](#)
- [Get started with agents for Microsoft 365 Copilot ↗](#)
- [Extend Microsoft 365 Copilot using agents](#)

Related articles

- [Microsoft 365 Copilot overview](#)
- [Microsoft 365 Copilot adoption ↗](#)
- [Unified cloud.microsoft domain for Microsoft 365 apps](#)
- [Get your data ready for Microsoft 365 Copilot - Admin guide for E3 + SAM licenses](#)

License plans for Microsoft 365 Copilot

Article • 05/20/2025 • Applies to: Microsoft 365 Copilot

Microsoft 365 Copilot is an AI-powered productivity tool that helps users with everyday tasks.

As part of your [Microsoft 365 Copilot adoption](#), make sure you have the right Microsoft 365 subscription plan.



Microsoft 365 Copilot is available as an [add-on plan](#) with one of the licensing prerequisites listed in this article. The [Microsoft 365 Copilot service description guide](#) is also a good resource.

Use the information in this article to determine if your organization has the correct Microsoft 365 subscription plan to add Microsoft 365 Copilot. If you or your account doesn't have the right plan, you can purchase a new plan or possibly upgrade your existing plan.

To learn more, see:

- For businesses - [Upgrade or change to a different Microsoft 365 for business plan](#)
- For home - [Switch between Microsoft 365 subscriptions](#)

To determine your current subscription, including canceling any subscriptions, sign into your [Microsoft account subscription](#).

- For pricing - [Microsoft 365 Copilot pricing and plans](#)

This article applies to:

- Microsoft 365 Copilot

 **Tip**

To learn more about Microsoft 365 Copilot, see [Microsoft 365 Copilot overview](#) and [Microsoft 365 Copilot architecture and how it works](#).

Microsoft 365 Copilot license

To add Microsoft 365 Copilot to your Microsoft 365 subscription, you need one of the following Microsoft 365 subscription plans. The Copilot license is available as an add-on.

Business and Enterprise licenses

- Microsoft 365 plans:
 - Microsoft 365 E5
 - Microsoft 365 E3
 - Microsoft 365 F1
 - Microsoft 365 F3
 - Microsoft 365 Business Basic
 - Microsoft 365 Business Premium
 - Microsoft 365 Business Standard
 - Microsoft 365 Apps for business
 - Microsoft 365 Apps for enterprise
- Office 365 plans:
 - Office 365 E5
 - Office 365 E3
 - Office 365 E1
 - Office 365 F3
- Microsoft Teams plans:
 - Microsoft Teams Essentials
 - Microsoft Teams Enterprise
 - Microsoft Teams EEA (European Economic Area)
- Exchange plans:
 - Exchange Kiosk
 - Exchange Plan 1
 - Exchange Plan 2

- **SharePoint plans:**
 - SharePoint Kiosk
 - SharePoint Plan 1
 - SharePoint Plan 2
- **OneDrive for work and school plans:**
 - OneDrive for work and school Plan 1
 - OneDrive for work and school Plan 2
- **Planner and Project plans:**
 - Microsoft Planner Plan 1 (formerly Project Plan 1)
 - Microsoft Project Plan 3
 - Microsoft Project Plan 5
 - Project Online Essentials
- **Visio plans:**
 - Visio Plan 1
 - Visio Plan 2
- **Other plans:**
 - Microsoft ClipChamp

Education Faculty and Higher Education Students Aged 18+ licenses

The following plans are only available using [Enrollment for Education Solutions \(EES\)](#) or Cloud Solution Provider (CSP).

- Microsoft 365 A1
- Microsoft 365 A3
- Microsoft 365 A5
- Office 365 A1
- Office 365 A3
- Office 365 A5

Note

Customers with Education or Business subscriptions that don't include Teams can purchase Microsoft 365 Copilot licenses.

Microsoft 365 Copilot Chat

[Copilot Chat](#) is an AI prompt and response experience that's automatically included and available to organizations that have a Microsoft 365 subscription. There are two Copilot Chat options available: web-based chat and work-based chat.

- Web-based chat:
 - Shows results from the internet.
 - Automatically included in your Microsoft 365 subscription with no extra cost.
- Work-based chat:
 - Shows results that the Microsoft Entra work or school account can access.
 - Is available with a Microsoft 365 Copilot license.

To learn more, see:

- [Learn more about Copilot Chat](#)
- [Manage Microsoft 365 Copilot Chat](#)
- [Select the Copilot that's right for your organization](#)

Setup help and guidance

In the Microsoft 365 admin center, there's a [Microsoft 365 Copilot setup guide](#). You can use this guide to step through the admin center to assign the required licenses.

The [Set up Microsoft 365 Copilot admin guide](#) describes other features that you should also configure, including reviewing your Microsoft 365 apps privacy settings, setting the update channels, and more.

For more information, see:

- [Assign licenses to users in the Microsoft 365 admin center](#)
- [Learn more about the Microsoft 365 Copilot requirements](#)

Related articles

- [Microsoft 365 Copilot adoption guide and overview for IT admins](#)
- [Which Copilot is right for my organization?](#)
- [Start using Copilot in your Microsoft 365 apps](#)

Microsoft 365 license feature comparison list to address oversharing for Microsoft 365 Copilot

Article • 01/28/2025 • Applies to: Microsoft 365 Copilot

[Microsoft 365 Copilot](#) is an AI-powered productivity assistant that can help users with different tasks, like finding information and creating content. You can use Copilot in your Microsoft 365 apps, like Word, Outlook, and Teams.

There are different features in the Microsoft 365 E3 and E5 licenses that can help you get your data ready for Copilot. These features can:

- Help prevent oversharing
- Declutter data sources
- Identify and label sensitive data in your Microsoft 365 and Office files

Use the information in this article to become familiar with the features available to you, based on your license. It can also help you decide which license is right for you based on the features your organization wants and needs.

If you're currently [licensed for Copilot](#) or plan to get it, this article can help.

This article applies to:

- Microsoft 365 Copilot
- Microsoft SharePoint Premium - SharePoint Advanced Management (SAM)
- Microsoft Purview

Microsoft 365 license feature table

The following table lists some of the features that can help get your data ready for Copilot. These features affect Copilot results and can help you manage Copilot interactions (prompts and responses).

[\[+\] Expand table](#)

	E3 + SAM license	E5 + SAM license
License requirements	- Microsoft 365 E3 or Office 365 E3 - Microsoft 365 Copilot	- Microsoft 365 E5 or Office 365 E5 - Microsoft 365 Copilot

	E3 + SAM license	E5 + SAM license
	<ul style="list-style-type: none"> - SharePoint Advanced Management (SAM) <p>Beginning in early 2025, SAM will be included with your Microsoft 365 Copilot license.</p>	<ul style="list-style-type: none"> - SharePoint Advanced Management (SAM) <p>Beginning in early 2025, SAM will be included with your Microsoft 365 Copilot license.</p>
Restricted SharePoint Search (RSS)		
Microsoft Purview features		
Sensitivity labels		
	You can:	You can:
	<ul style="list-style-type: none"> - Create custom labels. - Manually apply labels. 	<ul style="list-style-type: none"> - Create custom labels. - Create default labels and their policies. - Manually apply labels. - Automatically apply labels. - Apply labels to containers, like a SharePoint or Teams site
Data loss prevention (DLP)		
	Policies can target:	Policies can target:
	<ul style="list-style-type: none"> - SharePoint - Exchange - OneDrive 	<ul style="list-style-type: none"> - SharePoint - Exchange - OneDrive - Teams - Endpoints
	Also use DLP for Microsoft 365 Copilot .	
Adaptive Protection	n/a	
Data lifecycle management		
	You can:	You can:
	<ul style="list-style-type: none"> - Create retention policies - Manually apply retention labels - Use Content explorer 	<ul style="list-style-type: none"> - Create retention policies - Manually apply retention labels - Automatically apply retention

	E3 + SAM license	E5 + SAM license
		labels - Use Content explorer - Use Activity explorer - Use Data Lifecycle Management or Records Management
Communication Compliance	n/a	<input checked="" type="checkbox"/>
eDiscovery	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Can search.	Can search and delete.
Data Security Posture Management for AI (previously called AI Hub)	<input checked="" type="checkbox"/> You can: <ul style="list-style-type: none"> - View app info - Export activity - Turn on auditing 	<input checked="" type="checkbox"/> You can: <ul style="list-style-type: none"> - View app info - Export activity - Turn on auditing - View prompt & response
<hr/>		
SharePoint Advanced Management (SAM) features		
Site ownership policy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Site lifecycle management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Data access governance (DAG) reports	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Restricted access control (RAC)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Restricted content discoverability policy (RCD)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Change history report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

To learn more about these features and how they can prepare your data for Copilot, see:

- [Microsoft 365 Copilot admin guide for E3 licenses](#)
- [Microsoft 365 Copilot admin guide for E5 licenses](#)

To learn more about licensing, see:

- Microsoft 365 Copilot licensing
- Microsoft Purview service description
- Microsoft SharePoint Premium - SharePoint Advanced Management licensing

More features to help get your data ready for Copilot

Microsoft continues to invest in features that help you get ready for Copilot. This section describes some more services and features that are available to you.

Data Security Posture Management (DSPM) in Microsoft Purview

[Data Security Posture Management for AI](#) is a central location that helps you secure data for AI apps and proactively monitor AI use. It has preconfigured policies that focus on AI and reports that give information into AI use within your organization.

To access DSPM for AI (previously called AI Hub), use the following steps:

1. Sign into the [Microsoft Purview portal](#) as an admin in one of the groups listed at [Microsoft Purview Data Security Posture Management for AI - permissions](#).
2. Select Solutions > Data Security Posture Management for AI > Recommendations.
3. Create the recommended policies.
4. Select Reports to view details of the Copilot interactions.

To learn more about these policies, see [Data Security Posture Management for AI - one-click policies](#).

Copilot dashboard in Viva Insights

[Viva Insights](#) provides actionable insights to help your organization get ready to deploy AI, drive adoption, and measure the effect of Copilot.

The dashboard shows metrics on readiness, adoption, impact, and sentiment.

1. Open the Teams app.
2. In the Teams vertical toolbar, select the ellipses > **Viva Insights**.
3. On the navigation panel, select **Copilot Dashboard**.

To learn more, see [Microsoft Copilot Dashboard for Microsoft 365 customers](#).

Microsoft Security Copilot

[Security Copilot](#) is a natural language, assistive AI experience. It helps support security professionals in various end-to-end scenarios, like incident response, threat hunting, intelligence gathering, posture management, and more.

Security Copilot integrates with other services that help you manage device and data security, like Microsoft Purview, Microsoft Defender, and Microsoft Intune.

To learn more, see:

- [Get started with Microsoft Security Copilot](#)
- [Access training and more technical readiness resources at the Microsoft Security Copilot Adoption hub ↗](#)

Get started with your E3 or E5 features

The next step is to start using the features in your license:

- [Microsoft 365 Copilot admin guide for E3 licenses](#)
- [Microsoft 365 Copilot admin guide for E5 licenses](#)

Related content

- [Microsoft 365 Copilot licensing](#)
- [Microsoft 365 Copilot admin guide for E3 licenses](#)
- [Microsoft 365 Copilot admin guide for E5 licenses](#)
- [Microsoft 365 Copilot adoption resources ↗](#)

Feedback

Was this page helpful?

 Yes

 No

Microsoft 365 Copilot admin guide for E3 + SAM licenses

Article • 03/18/2025 • Applies to:  Microsoft 365 Copilot

When you're preparing your organization for [Microsoft 365 Copilot](#) or you're ready to start using Copilot, there are features in your E3 + SAM licenses that can help get your data ready.

When users enter a prompt, Copilot can respond with data that the user has permission to access. Overshared and outdated data can lead to inaccurate results from Copilot.

This article provides guidance for IT admins with **Microsoft 365 E3** and **SharePoint Advanced Management (SAM)** licenses. With the features included in these licenses, you:

- Use SharePoint Advanced Management (SAM) to help prevent oversharing, declutter data sources, restrict SharePoint searches, and monitor SharePoint site changes.
- Use Microsoft Purview to create sensitivity labels, identify and protect sensitive data, and delete the content you don't need.

Use this article to get started with Microsoft 365 Copilot in your organization. When you use the features described in this article, your organization is better prepared for Copilot, including getting more accurate results from Copilot.

This article applies to:

- Microsoft 365 Copilot
- Microsoft SharePoint Premium - SharePoint Advanced Management (SAM)
- Microsoft Purview

Note

If you have an E5 license, then see [Microsoft 365 Copilot admin guide for E5 licenses](#). For a comparison of the features in the licenses, see [Compare Microsoft 365 Copilot license feature overview](#).

Before you begin

- Microsoft recommends you also follow the steps in [Microsoft 365 Copilot - best practices with SharePoint](#). It helps you optimize your search in SharePoint, update sharing settings in SharePoint & OneDrive, and check permissions & site access on your SharePoint sites.
- The following licenses are required to use the features in this article:
 - [Microsoft 365 E3](#) or [Office 365 E3](#)
 - [Microsoft Purview](#) - Included with your E3 license

For a list of the features and services you get with your license, see [Microsoft 365, Office 365, Enterprise Mobility + Security, and Windows 11 Subscriptions](#).

- [Microsoft SharePoint Premium - SharePoint Advanced Management](#)

Beginning in early 2025, Microsoft SharePoint Premium - SharePoint Advanced Management (SAM) will be included with your Microsoft 365 Copilot license. To learn more about SAM licensing, see [Microsoft SharePoint Premium - SharePoint Advanced Management license](#).

- [Microsoft 365 Copilot](#)

Depending on your subscription plan, you might be able purchase Microsoft 365 Copilot licenses through the [Microsoft 365 admin center](#) ([Billing > Purchase services](#)), Microsoft partners, or your Microsoft account team.

Microsoft 365 Copilot licenses are also available as an add-on to other licensing plans. To learn more, see [Understand licensing for Microsoft 365 Copilot](#).

- This article uses the following admin centers. These admin centers require a specific role to complete the tasks in the article.
 - [SharePoint admin center](#): Sign in as the SharePoint administrator.
 - [Microsoft Purview portal](#): There are different roles, depending on the task you need to complete. To learn more, see:
 - [Permissions required to create and manage sensitivity labels](#)
 - [Roles and role groups in Microsoft Defender for Office 365 and Microsoft Purview](#)

SharePoint admin task - Use SharePoint Advanced Management (SAM) features

There are features in [SharePoint Advanced Management \(SAM\)](#) that can help you get ready for Copilot.

Copilot goals with SAM:

- Declutter data sources by finding and removing inactive SharePoint sites.
- Identify SharePoint sites with overshared or sensitive content.
- Use policy to restrict access to SharePoint sites that are business critical or have sensitive content.
- Monitor site changes.

This section walks you through different SAM features that can help you get your organization and your data ready for Copilot.

To learn more about SAM + Copilot, see [Get ready for Copilot with SharePoint Advanced Management](#).

Ensure all sites have valid owners

Run a [Site Ownership policy](#) that finds any sites that don't have at least two owners

A Site ownership policy automatically detects sites that don't have at least two owners and can help find potential owners. Set up the policy in simulation mode to identify owners based on your desired criteria. Then, upgrade the policy to Active mode to enable notifications to site owner candidates.

You need site owners to help confirm the site is still active, perform [Site access review](#), update content permissions, and control access when needed.

1. Sign in to the [SharePoint admin center](#) as a SharePoint administrator.
2. Expand **Policies** > select **Site lifecycle management**.
3. Select **Create a policy**, enter your parameters, and finish your policy.
4. When the policy runs, the report shows the number of sites that are noncompliant.
You can also download the report.

To learn more about this policy and report, see [Site ownership policy](#).

Find and cleanup inactive sites

Create a [site lifecycle management policy](#) that finds inactive sites

A [site lifecycle management policy](#) automatically detects inactive sites and sends a notification email to the site owners. When you use the email, the site owners can

confirm that the site is still active.

Copilot can show data from these inactive sites in user prompts, which can lead to inaccurate and cluttered Copilot results.

The policy also creates a report that you can download and review. The report shows the inactive sites, the last activity date, and the email notification status.

1. Sign in to the [SharePoint admin center](#) as a SharePoint administrator.
2. Expand **Policies** > select **Site lifecycle management**.
3. Select **Create a policy**, enter your parameters, and finish your policy.
4. When the policy runs and finds inactive sites, the policy automatically emails the site owners. The site owners should confirm if the site is still active.
5. If the site owners confirm the sites aren't needed, then put inactive sites in [read-only mode with SAM](#), or move the sites to [Microsoft 365 Archive with SAM](#).

To learn more about this policy and report, see [site lifecycle management policy](#).

Best practices for managing inactive SharePoint sites

- **Use the policy execution report** to keep track on site owner action status in response to the notifications.
- Select the Get AI insights button to [get AI insights](#) generated for the report to help you identify issues with the sites and possible actions to address these issues.
- **Give the site owners a timeline** to complete these tasks. If they don't complete the task within the timeframe, you can move the sites to [Microsoft 365 Archive](#) using [SAM Inactive Sites - Archive capability](#) so that you can reactive them later if needed.

This action helps reduce outdated content that clutters Copilot's data source, which improves the accuracy of Copilot responses.

💡 Tip

Sites moved to Microsoft 365 Archive are no longer accessible by anyone in the organization outside of Microsoft Purview or admin search. Copilot won't include content from these sites when responding to user prompts.

Identify sites with overshared or sensitive content

- ✓ Run [Data access governance \(DAG\) reports](#) in the SharePoint admin center

The DAG reports give more detailed information about site sharing links, sensitivity labels, and the **Everyone except external users** (EEEU) permissions on your SharePoint sites. Use these reports to find overshared sites.

Overshared sites are sites that are shared with more people than needed. Copilot can show data from these sites in responses.

1. Sign in to the [SharePoint admin center](#) as a SharePoint administrator.

2. Select **Reports > Data access governance**. Your report options:

[+] Expand table

Report	Description	Task
Sharing links	Shows the sites that have sharing links, including links shared with Anyone , shared with People in your organization , and shared with Specific people outside of your work or school .	Review these sites. Make sure the sites are shared with only the users or groups that need access. Remove sharing for unneeded users and groups.
Sensitivity labels applied to files	Shows sites with Office files that have sensitivity labels.	Review these sites. Make sure the correct labels are applied. Update the labels as needed. To learn more, see Identify and label sensitive data (in this article).
Shared with Everyone except external users (EEEU)	Shows the sites that are shared with everyone in your organization except external users.	Review these sites. Determine if EEEU permissions are appropriate. Many sites with EEEU are overshared. Remove the EEEU permission and assign to the users or groups as needed.
Oversharing Baseline Report for Sites, OneDrives and Files	Scans all sites in your tenant, and lists sites that share content with more than a specified number of users (you specify the number).	Sort, filter or download the report, and identify the sites with potentially overshared content.

You can run any of these reports individually or run all of them together. To learn more about these reports, see [Data access governance \(DAG\) reports](#).

Best practices for managing the DAG reports

- Run these reports weekly, especially in the beginning stages of adopting Copilot. As you become more familiar with the reports and the data, you can adjust the frequency.

If you have an admin team, create an admin task to run these reports and review the data.

Your organization is paying for the license to run these reports and use the data to make decisions. Make sure you're getting the most out of it.

- Select [Get AI insights](#) to generate a report that helps you identify issues with the sites and possible actions to address these issues.

Control access to overshared SharePoint sites

[Initiate Site access reviews](#) for site owners

In a Data access governance (DAG) report, you can select sites with oversharing risks. Then, initiate site access reviews. Site Owners receive notification for each site that requires attention. They can use the Site reviews page to track and manage multiple review requests.

The site owner reviews access in two main areas: SharePoint groups and individual items. They can determine if broad sharing is appropriate, or if a site is overshared and requires remediation.

If the site owner determines that the content is overshared, they can use the Access Review dashboard to update permissions.

[Use restricted access control policy \(RAC\)](#) in the SharePoint admin center

A [restricted access control policy](#) restricts access to a site with overshared content. It can restrict access to SharePoint sites and content to users in a specific group. Users not in the group can't access the site or its content, even if they previously had permissions or a shared link.

When users in the group have permissions to the content, then that content can show in Copilot results. Users not in the group don't see this info in their Copilot results. You can set up restricted access control for individual sites or OneDrive.

[Use restricted content discoverability policy \(RCD\)](#) in the SharePoint admin center

A [restricted content discoverability policy \(RCD\)](#) doesn't change the site access. Instead, it changes the site's content discoverability. When you apply RCD to a site, the site's content isn't discoverable by Copilot or organization-wide search results for all users.

The SharePoint Admin can set restricted content discoverability on individual sites.

Best practices for control access to overshared SharePoint sites

- If your organization has a [Zero Trust](#) mindset, then you can apply restricted access control (RAC) to all sites. Then, adjust the permissions as needed. If you have many sites, this action can help you quickly secure your sites. But, it can cause disruptions to users.
- If you use RAC or RCD, make sure you communicate the changes and the reasons for the changes.

💡 Tip

For business-critical sites, you can also:

- When you create new sites, configure a RAC or RCD policy as part of your custom site provisioning process. This step proactively avoids oversharing.
- Consider blocking downloads from selected sites using a block download policy. For example, [block the download of Teams meeting recordings and transcripts](#).
- Apply encryption with "extract rights" enforced on business-critical office documents. To learn more, see [Microsoft Purview data security and compliance protections for generative AI apps](#).

Monitor changes

Run the [change history report](#) in the SharePoint admin center

The [change history report](#) tracks and monitor changes, including what changed, when the change happened, and who initiated the change. The intent is to identify recent changes that could lead to oversharing, which impacts Copilot results.

Use this report to review the changes made to your SharePoint sites and organization settings.

1. Sign in to the [SharePoint admin center](#) as a SharePoint administrator.

2. Expand Reports > select Change history > New report.

3. Your report options:

[] [Expand table](#)

Report	Description	Task
Site settings report	Shows the site property changes and actions ran by Site Administrators and SharePoint Administrators.	Review the changes and actions. Make sure the actions meet your security requirements.
Organization settings report	Shows changes made to organization settings, like when a site is created and if external sharing is enabled.	Review the changes and actions. Make sure the changes meet your security requirements.

Best practices for managing the change history reports

- Run these reports weekly, especially in the beginning stages of adopting Copilot. As you become more familiar with the reports and the data, you can adjust the frequency.

If you have an admin team, create an admin task to run these reports and review the data.

Your organization is paying for the license to run these reports and use the data to make decisions. Make sure you're getting the most out of it.

- Create a report for the **site level changes and the organization level changes**. The site level reports show changes made to the site properties and actions. The organization level reports show changes made to the organization settings.
- Review the **sharing settings and access control settings**. Make sure the changes align with your security requirements. If they don't align, then work with the site owners to correct the settings.
- **Apply restricted access control (RAC)** to sites that appear to be overshared. Inform the site owners of the changes and why.

If your organization has a **Zero Trust** mindset, then you can apply RAC to all sites. Then, adjust the permissions as needed. If you have many sites, this action can help you quickly secure your sites. But, it can also cause disruptions to users. Make sure you communicate the changes and the reasons for the changes.

SharePoint admin task - Restrict SharePoint Search (RSS)

Copilot goal: Expand the RSS allowed list

As you get ready for Copilot, you review and configure the correct permissions on your SharePoint sites. The next step is to enable Restricted SharePoint Search (RSS).

RSS is a temporary solution that gives you time to review and configure the correct permissions on your SharePoint sites. You add the reviewed & corrected sites to an allowed list.

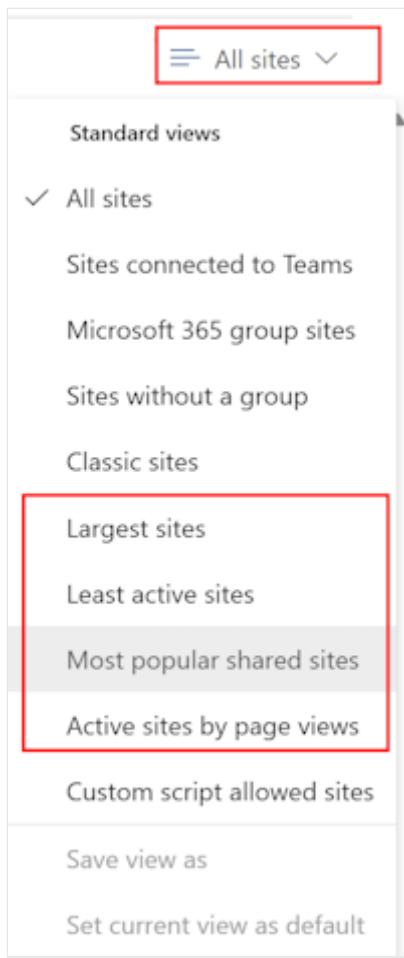
- If you enabled RSS, then add more sites to the allowed list. You can add up to 100 sites to the allowed list. Copilot can show data from the allowed list sites in user prompts.

To learn more, see:

- [Restricted SharePoint Search](#)
- [Curate the allowed list for Restricted SharePoint Search](#)
- [Blog - Introducing Restricted SharePoint Search to help you get started with Microsoft 365 Copilot ↗](#)

Add sites to the RSS allowed list

1. Get a list of the sites that you want to add to the allowed list.
 - **Option 1 - Use the Sharing links report**
 - a. Sign in to the [SharePoint admin center ↗](#) as a SharePoint administrator.
 - b. Select **Reports > Data access governance > Sharing links > View reports**.
 - c. Select one of the reports, like "Anyone" links. This report shows a list of sites with the highest number of **Anyone** links created. These links let anyone access files and folders without signing in. These sites are candidates to allow in tenant/org wide search.
 - **Option 2 - Use the sort and filter options for Active sites**
 - a. Sign in to the [SharePoint admin center ↗](#) as a SharePoint administrator.
 - b. Select **Sites > Active sites**.
 - c. Use the sort and filter options to find the most active site, including page views. These sites are candidates to allow in a tenant/organization wide search.



2. Use the `Add-SPOTenantRestrictedSearchAllowedList` PowerShell cmdlet to add the sites to the allowed list.

To learn more about this cmdlet, see [Use PowerShell Scripts for Restricted SharePoint Search](#).

Purview admin tasks - Use Microsoft Purview features

There are features in Microsoft Purview that can help you get ready for Copilot.

Copilot goals with Purview:

- Identify and label sensitive data in your Microsoft 365 and Office files.
- Detect and protect sensitive information from unauthorized sharing or leakage.
- Delete the content you don't need.
- Review and analyze Copilot prompts and responses.

To learn more about Microsoft Purview, see [Microsoft 365 Copilot in Microsoft Purview Overview](#).

Identify and label sensitive data

- Create and apply [sensitivity labels](#) to protect your data

[Sensitivity labels](#) are a way to identify and classify the sensitivity of your organization's data, adding an extra layer of protection to your data.

When sensitivity labels are applied to items, like documents and emails, the labels add the protection directly to this data. As a result, that protection persists, wherever the data is stored. When sensitivity labels are applied to containers, like SharePoint sites and groups, the labels add protection indirectly by controlling access to the container where the data is stored. For example, privacy settings, external user access, and access from unmanaged devices.

The sensitivity labels can also affect Copilot results, including:

- The label settings include protection actions, like access to sites, customizable headers and footers, and encryption.
- If the label applies encryption, Copilot checks the usage rights for the user. For Copilot to return data from that item, the user must be granted permissions to copy from it.
- A prompt session with Copilot (called Microsoft 365 Copilot Chat) can reference data from different types of items. Sensitivity labels are shown in the returned results. The latest response displays the sensitivity label with the [highest priority](#).
- If Copilot creates new content from labeled items, the sensitivity label from the source item is automatically inherited.

This section guides you through the steps to create and use sensitivity labels in Microsoft Purview. You create your own label names and configurations. To learn more about sensitivity labels, see:

- [Get started with sensitivity labels](#)
- [Use Microsoft Purview to strengthen information protection for Copilot](#)

1. Create sensitivity labels

1. Sign into the [Microsoft Purview portal](#) as an admin in one of the groups listed at [Sensitivity labels - permissions](#).
2. Select **Solutions > Information protection > Sensitivity labels > Create a label**.
3. In the scope, select **Files and other data assets**. This scope allows your labels to be applied to documents and emails.

4. Continue creating the sensitivity labels you need.

To learn more, see:

- [Create and configure sensitivity labels and their policies](#)

2. Enable and configure sensitivity labels for containers

You can apply sensitivity labels to containers, like Microsoft Teams or SharePoint sites, and Microsoft Loop workspaces. Items in a container don't inherit the sensitivity label.

Instead, the label settings can restrict access to the container. This restriction provides an extra layer of security when you use Copilot. If a user can't access the site or workspace, Copilot can't access it on behalf of that user.

For example, you can set the privacy setting to **Private**, which restricts site access to only approved members in your organization. When the label is applied to the site, it replaces any previous setting and locks the site for as long as the label is applied. This feature is a more secure setting than letting anybody access the site and allowing users to change the setting. When only approved members can access the data, it helps prevent oversharing of data that Copilot might access.

To configure any label settings for groups and sites, you must enable this feature in your tenant and then synchronize your labels. This configuration is a one-time configuration and uses PowerShell. To learn more, see [How to enable sensitivity labels for containers and synchronize labels](#).

You can then edit your sensitivity labels, or create new sensitivity labels specifically for groups and sites:

1. For the sensitivity label scope, select **Groups & sites**. Remember, you must have already run the PowerShell commands. If you didn't, you can't select this scope.

To learn more, see [How to enable sensitivity labels for containers and synchronize labels](#).

2. Select the groupings of settings to configure. Some of the settings have backend dependencies before they can be enforced, like Conditional Access that must be already configured. The privacy setting, which is included in **Privacy and external user access settings**, doesn't have any backend dependencies.

3. Configure the settings you want to use and save your changes.

For more information, including details of all the available label settings that you can configure for groups and sites, see [Use sensitivity labels to protect content in Microsoft](#)

Teams, Microsoft 365 groups, and SharePoint sites.

3. Publish your labels and educate your users

1. Add your labels to a publishing policy. When they're published, users can manually apply the labels in their Office apps. The publishing policies also have settings that you need to consider, like a default label and requiring users to label their data.

To learn more, see [Publish sensitivity labels by creating a label policy](#).

2. Educate your users and provide guidance on when to apply the correct sensitivity label.

Users should change a label if needed, especially for more sensitive content.

To help you with this step, see [End-user documentation for sensitivity labels](#).

3. Monitor your labels. Select **Information protection > Reports**. You can see the usage of your labels.

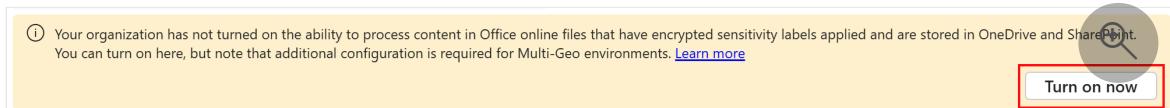
4. Enable sensitivity labels for files in SharePoint and OneDrive

This step is a one-time configuration that is required to enable sensitivity labels for SharePoint and OneDrive. It's also required for Microsoft 365 Copilot to access encrypted files stored in these locations.

As with all tenant-level configuration changes for SharePoint and OneDrive, it takes about 15 minutes for the change to take effect. Then users can select sensitivity labels in Office on the web and you can create policies that automatically label files in these locations.

You have two options:

- **Option 1:** Select **Information Protection > Sensitivity labels**. If you see the following message, select **Turn on now**:



- **Option 2:** Use the `[Set-SPOTenant] (/powershell/module/sharepoint-online/set-spotenant)` Windows PowerShell cmdlet.

To learn more about this configuration, see [Enable sensitivity labels for files in SharePoint and OneDrive](#).

Detect sensitive information and protect it from unauthorized sharing or leakage

- Use [data loss prevention \(DLP\) policies](#) to help protect against unintentional sharing

[Microsoft Purview Data Loss Prevention \(DLP\)](#) helps organizations protect sensitive information by helping guard against unauthorized sharing or leakage. The intent is to dynamically protect sensitive information, like financial data, social security numbers, and health records, from being overshared.

You can create DLP policies to protect sensitive information with your Microsoft 365 services, like Exchange, SharePoint, and OneDrive accounts.

This section introduces you to the DLP policy creation process. DLP policies are a powerful tool. Make sure you:

- Understand the data you're protecting and the goals you want to achieve.
- Take time to design a policy before you implement it. You want to avoid any unintended issues. We don't recommend you create a policy, and then only tune the policy by trial-and-error.
- Work through [Data loss prevention - Before you begin](#) before you start designing a policy. This step helps you understand the concepts and the tools you use to create and manage DLP policies.

1. Open the Microsoft Purview portal

1. Sign into the [Microsoft Purview portal](#) as one of the admins listed at [Create and deploy DLP policies - Permissions](#).
2. Select **Solutions > Data Loss Prevention**.

2. Create DLP policies

For Exchange Online, SharePoint Online, and OneDrive, you can use DLP to identify, monitor, and automatically protect sensitive information across emails and files, including files stored in Microsoft Teams file repositories.

- For the steps, see [Design a DLP policy](#) and [Create and Deploy data loss prevention policies](#).

3. Test and monitor your policies

For DLP policies, you can:

- **Test your policies** using [simulation mode](#). Simulation mode allows you to see the effect of an individual policy without enforcing the policy. Use it to find the items that match your policy.
- **Monitor your policies** with alerts and built-in reports, including risky user activities outside of DLP policies.

To learn more, see:

- [Viewing policy application results](#)
- [Get started with the data loss prevention analytics](#)

Delete the content you don't need

Use [data lifecycle management](#) for automatic data retention or deletion

[Data lifecycle management](#) uses retention policies and optionally, retention labels. They're typically used to retain content for compliance reasons and can also automatically delete stale information.

For example, your organization might have regulatory requirements that require you to keep content for a certain period of time. Or, you might have content that you want to delete because it's old, outdated, or no longer needed.

If you have stale data in your organization, then create and use retention policies. These policies help Copilot return more accurate information from your documents and emails.

Settings in a retention policy apply at the container level, like a SharePoint site or an Exchange mailbox. Data in that container automatically inherits these settings.

If you need [exceptions for individual emails or documents](#), then use retention labels. For example, you have a retention policy to delete data in OneDrive if the data is older than one year. But, users can apply retention labels to specific documents to keep these documents from automatic deletion.

1. To create retention policies, sign into the [Microsoft Purview portal](#) as a Compliance Administrator.

To learn more about the permissions, see [Data Lifecycle Management - Permissions](#).

2. Select **Solutions > Data Lifecycle Management > Policies > Retention policies**.

3. Select **New retention policy** and follow the instructions.

Retention policies manage automatic retention and deletion for Microsoft 365 workloads & Microsoft 365 Copilot interactions. To learn more, including the steps to create the policy, see [Create and configure retention policies](#).

4. Optional. Use retention labels when you need an exception to a retention policy. If you don't need an exception to a retention policy, then you don't need to create a retention label.

- In **Data Lifecycle Management**, select **Retention labels > Create a label**.

Follow the configuration instructions. To learn more, including the steps to create the policy, see [How to create retention labels for data lifecycle management](#).

After you create the retention labels, publish the labels and apply the labels to documents and emails. To learn more, see [Publish retention labels and apply them in apps](#).

5. If you applied retention labels, monitor them to see how they're being used.

- a. Sign into the [Microsoft Purview portal](#) as one of the admins listed at [Content explorer - Permissions](#).
- b. Use [content explorer](#) to get information on the items using retention labels.

There are a few ways to open content explorer:

- **Data Lifecycle Management > Explorers**
- **Data Loss Prevention > Explorers**
- **Information protection > Explorers**

To learn more, see:

- [Learn about retention policies and retention labels](#)
- [Common settings for retention policies and retention label policies](#)

Review and analyze Copilot prompts and responses

Use [eDiscovery](#) to analyze Copilot user prompts and responses

When users enter a prompt and get a response from Copilot, you can view and search these interactions. Specifically, these features help you:

- Find sensitive information or inappropriate content included in Copilot activities.

- Respond to a data spillage incident when confidential or malicious information is released through Copilot-related activity.

eDiscovery uses cases to identify, hold, export, and analyze content found in mailboxes and sites. You can use this feature to analyze Copilot prompts and responses.

1. Sign into the [Microsoft Purview portal](#) as an admin in one of the groups [eDiscovery - Permissions](#).
2. Select **Solutions > eDiscovery > Cases**.
3. Create a **case** and a **search query**. A search query searches in-place content, like email, documents, and instant messaging conversations.

When you create a search query, you enter the [Data sources that have Copilot data](#).

4. The data returned is the Copilot prompts and responses. You can review and export this information. If the data contains sensitive information, you can also delete it.

To learn more, see [Search for Copilot interactions in eDiscovery](#).

Technical and deployment resources available to you

- Organizations with a minimum number of Copilot licenses are eligible for a Microsoft co-investment in deployment and adoption through eligible Microsoft Partners.

To learn more, see [Microsoft 365 Copilot Partner Directory](#).

- Eligible customers can request technical and deployment assistance from Microsoft FastTrack. FastTrack provides guidance and resources to help you plan, deploy, and adopt Microsoft 365.

To learn more, see [FastTrack for Microsoft 365](#).

Related content

- [Microsoft 365 Copilot requirements and prerequisites](#)
- [Provision Microsoft 365 Copilot](#)
- [Microsoft 365 Copilot adoption resources](#)

- Watch: Oversharing Control at Enterprise Scale ↗
-

Feedback

Was this page helpful?

 Yes

 No

Microsoft 365 Copilot admin guide for E5 + SAM licenses

Article • 03/06/2025 • Applies to:  Microsoft 365 Copilot

When preparing your organization for [Microsoft 365 Copilot](#) or you're ready to start using Copilot, there are features in your E5 + SAM licenses that can help get your data ready.

When users enter a prompt, Copilot can respond with data that the user has permission to access. Overshared and outdated data can lead to inaccurate results from Copilot.

This article provides guidance for IT admins with **Microsoft 365 E5** and **SharePoint Advanced Management (SAM)** licenses. With the features included in these licenses, you:

- Use SharePoint Advanced Management (SAM) to help prevent oversharing, declutter data sources, and monitor SharePoint site changes.
- Use Microsoft Purview to enable sensitivity labels, identify and protect sensitive data, restrict endpoints, and delete the content you don't need.

To learn more, watch [Oversharing Control at Enterprise Scale](#)  (opens YouTube's website).

Use this article to get started with Microsoft 365 Copilot in your organization. When you use the features described in this article, your organization is better prepared for Copilot, including getting more accurate results from Copilot.

This article applies to:

- Microsoft 365 Copilot
- Microsoft SharePoint Premium - SharePoint Advanced Management (SAM)
- Microsoft Purview

Note

If you have an E3 license, then see [Microsoft 365 Copilot admin guide for E3 licenses](#). For a comparison of the features in the licenses, see [Compare Microsoft Copilot features in E3 and E5 licenses](#).

Before you begin

- Microsoft recommends you also follow the steps in [Microsoft 365 Copilot - best practices with SharePoint](#). It helps you optimize your search in SharePoint, update sharing settings in SharePoint & OneDrive, and check permissions & site access on your SharePoint sites.
- The following licenses are required to use the features in this article:
 - [Microsoft 365 E5](#) or [Office 365 E5](#)
 - [Microsoft Purview](#) - Included with your E5 license

For a list of the features and services you get with your license, see [Microsoft 365, Office 365, Enterprise Mobility + Security, and Windows 11 Subscriptions](#).

- [Microsoft SharePoint Premium - SharePoint Advanced Management](#)

Beginning in early 2025, Microsoft SharePoint Premium - SharePoint Advanced Management (SAM) will be included with your Microsoft 365 Copilot license. To learn more about SAM licensing, see [Microsoft SharePoint Premium - SharePoint Advanced Management](#).

- [Microsoft 365 Copilot](#)

Depending on your subscription plan, you might be able purchase Microsoft 365 Copilot licenses through the [Microsoft 365 admin center](#) ([Billing](#) > [Purchase services](#)), Microsoft partners, or your Microsoft account team.

Microsoft 365 Copilot licenses are available as an add-on to other licensing plans. To learn more, see [Understand licensing for Microsoft 365 Copilot](#).

- This article uses the following admin centers. These admin centers require a specific role to complete the tasks in the article.
 - [SharePoint admin center](#): Sign in as the SharePoint administrator.
 - [Microsoft Purview portal](#): There are different roles, depending on the task you need to complete. To learn more, see:
 - [Permissions required to create and manage sensitivity labels](#)
 - [Roles and role groups in Microsoft Defender for Office 365 and Microsoft Purview](#)

SharePoint admin task - Use SharePoint Advanced Management (SAM) features

There are features in [SharePoint Advanced Management \(SAM\)](#) that can help you get ready for Copilot.

Copilot goals with SAM:

- Declutter data sources by finding and removing inactive SharePoint sites.
- Identify SharePoint sites with overshared or sensitive content.
- Use policy to restrict access to SharePoint sites that are business critical or have sensitive content.
- Monitor site changes.

This section walks you through different SAM features that can help you get your organization and your data ready for Copilot.

To learn more about SAM + Copilot, see [Get ready for Copilot with SharePoint Advanced Management](#).

Ensure all sites have valid owners

Run a [Site Ownership policy](#) that finds any sites that don't have at least two owners

A Site ownership policy automatically detects sites that don't have at least two owners and can help find potential owners. Set up the policy in simulation mode to identify owners based on your desired criteria. Then, upgrade the policy to Active mode to enable notifications to site owner candidates.

You need site owners to help confirm the site is still active, perform [Site access review](#), update content permissions, and control access when needed.

1. Sign in to the [SharePoint admin center](#) as a SharePoint administrator.
2. Expand **Policies** > select **Site lifecycle management**.
3. Select **Create a policy**, enter your parameters, and finish your policy.
4. When the policy runs, the report shows the number of sites that are noncompliant.
You can also download the report.

To learn more about this policy and report, see [Site ownership policy](#).

Find and cleanup inactive sites

Create a [site lifecycle management policy](#) that finds inactive sites

A [site lifecycle management policy](#) automatically detects inactive sites and sends a notification email to the site owners. When you use the email, the site owners can

confirm that the site is still active.

Copilot can show data from these inactive sites in user prompts, which can lead to inaccurate and cluttered Copilot results.

The policy also creates a report that you can download and review. The report shows the inactive sites, the last activity date, and the email notification status.

1. Sign in to the [SharePoint admin center](#) as a SharePoint administrator.
2. Expand **Policies** > select **Site lifecycle management**.
3. Select **Create a policy**, enter your parameters, and finish your policy.
4. When the policy runs and finds inactive sites, the policy automatically emails the site owners. The site owners should confirm if the site is still active.
5. If the site owners confirm the sites aren't needed, then put inactive sites in [read-only mode with SAM](#), or move the sites to [Microsoft 365 Archive with SAM](#).

To learn more about this policy and report, see [site lifecycle management policy](#).

Best practices for managing inactive SharePoint sites

- **Use the policy execution report** to keep track on site owner action status in response to the notifications.
- Select the Get AI insights button to [get AI insights](#) generated for the report to help you identify issues with the sites and possible actions to address these issues.
- **Give the site owners a timeline** to complete these tasks. If they don't complete the task within the timeframe, you can move the sites to [Microsoft 365 Archive](#) using [SAM Inactive Sites - Archive capability](#) so that you can reactive them later if needed.

This action helps reduce outdated content that clutters Copilot's data source, which improves the accuracy of Copilot responses.

💡 Tip

Sites moved to Microsoft 365 Archive are no longer accessible by anyone in the organization outside of Microsoft Purview or admin search. Copilot won't include content from these sites when responding to user prompts.

Identify sites with overshared or sensitive content

- ✓ Run [Data access governance \(DAG\) reports](#) in the SharePoint admin center

The DAG reports give more detailed information about site sharing links, sensitivity labels, and the **Everyone except external users** (EEEU) permissions on your SharePoint sites. Use these reports to find overshared sites.

Overshared sites are sites that are shared with more people than needed. Copilot can show data from these sites in responses.

1. Sign in to the [SharePoint admin center](#) as a SharePoint administrator.

2. Select **Reports > Data access governance**. Your report options:

[+] Expand table

Report	Description	Task
Sharing links	Shows the sites that have sharing links, including links shared with Anyone , shared with People in your organization , and shared with Specific people outside of your work or school .	Review these sites. Make sure the sites are shared with only the users or groups that need access. Remove sharing for unneeded users and groups.
Sensitivity labels applied to files	Shows sites with Office files that have sensitivity labels.	Review these sites. Make sure the correct labels are applied. Update the labels as needed. To learn more, see Identify and label sensitive data (in this article).
Shared with Everyone except external users (EEEU)	Shows the sites that are shared with everyone in your organization except external users.	Review these sites. Determine if EEEU permissions are appropriate. Many sites with EEEU are overshared. Remove the EEEU permission and assign to the users or groups as needed.
Oversharing Baseline Report for Sites, OneDrives and Files	Scans all sites in your tenant, and lists sites that share content with more than a specified number of users (you specify the number).	Sort, filter or download the report, and identify the sites with potentially overshared content.

You can run any of these reports individually or run all of them together. To learn more about these reports, see [Data access governance \(DAG\) reports](#).

Best practices for managing the DAG reports

- Run these reports weekly, especially in the beginning stages of adopting Copilot. As you become more familiar with the reports and the data, you can adjust the frequency.

If you have an admin team, create an admin task to run these reports and review the data.

Your organization is paying for the license to run these reports and use the data to make decisions. Make sure you're getting the most out of it.

- Select [Get AI insights](#) to generate a report that helps you identify issues with the sites and possible actions to address these issues.

Control access to overshared SharePoint sites

[Initiate Site access reviews](#) for site owners

In a Data access governance (DAG) report, you can select sites with oversharing risks. Then, initiate site access reviews. Site Owners receive notification for each site that requires attention. They can use the Site reviews page to track and manage multiple review requests.

The site owner reviews access in two main areas: SharePoint groups and individual items. They can determine if broad sharing is appropriate, or if a site is overshared and requires remediation.

If the site owner determines that the content is overshared, they can use the Access Review dashboard to update permissions.

[Use restricted access control policy \(RAC\)](#) in the SharePoint admin center

A [restricted access control policy](#) restricts access to a site with overshared content. It can restrict access to SharePoint sites and content to users in a specific group. Users not in the group can't access the site or its content, even if they previously had permissions or a shared link.

When users in the group have permissions to the content, then that content can show in Copilot results. Users not in the group don't see this info in their Copilot results. You can set up restricted access control for individual sites or OneDrive.

[Use restricted content discoverability policy \(RCD\)](#) in the SharePoint admin center

A [restricted content discoverability policy \(RCD\)](#) doesn't change the site access. Instead, it changes the site's content discoverability. When you apply RCD to a site, the site's content isn't discoverable by Copilot or organization-wide search results for all users.

The SharePoint Admin can set restricted content discoverability on individual sites.

Best practices for control access to overshared SharePoint sites

- If your organization has a [Zero Trust](#) mindset, then you can apply restricted access control (RAC) to all sites. Then, adjust the permissions as needed. If you have many sites, this action can help you quickly secure your sites. But, it can cause disruptions to users.
- If you use RAC or RCD, make sure you communicate the changes and the reasons for the changes.

💡 Tip

For business-critical sites, you can also:

- When you create new sites, configure a RAC or RCD policy as part of your custom site provisioning process. This step proactively avoids oversharing.
- Consider blocking downloads from selected sites using a block download policy. For example, [block the download of Teams meeting recordings and transcripts](#).
- Apply encryption with "extract rights" enforced on business-critical office documents. To learn more, see [Microsoft Purview data security and compliance protections for generative AI apps](#).

Monitor changes

Run the [change history report](#) in the SharePoint admin center

The [change history report](#) tracks and monitor changes, including what changed, when the change happened, and who initiated the change. The intent is to identify recent changes that could lead to oversharing, which impacts Copilot results.

Use this report to review the changes made to your SharePoint sites and organization settings.

1. Sign in to the [SharePoint admin center](#) as a SharePoint administrator.

2. Expand Reports > select Change history > New report.

3. Your report options:

 Expand table

Report	Description	Task
Site settings report	Shows the site property changes and actions ran by Site Administrators and SharePoint Administrators.	Review the changes and actions. Make sure the actions meet your security requirements.
Organization settings report	Shows changes made to organization settings, like when a site is created and if external sharing is enabled.	Review the changes and actions. Make sure the changes meet your security requirements.

Best practices for managing the change history reports

- Run these reports weekly, especially in the beginning stages of adopting Copilot. As you become more familiar with the reports and the data, you can adjust the frequency.

If you have an admin team, create an admin task to run these reports and review the data.

Your organization is paying for the license to run these reports and use the data to make decisions. Make sure you're getting the most out of it.

- Create a report for the **site level changes and the organization level changes**. The site level reports show changes made to the site properties and actions. The organization level reports show changes made to the organization settings.
- Review the **sharing settings and access control settings**. Make sure the changes align with your security requirements. If they don't align, then work with the site owners to correct the settings.
- **Apply restricted access control (RAC)** to sites that appear to be overshared. Inform the site owners of the changes and why.

If your organization has a **Zero Trust** mindset, then you can apply RAC to all sites. Then, adjust the permissions as needed. If you have many sites, this action can help you quickly secure your sites. But, it can also cause disruptions to users. Make sure you communicate the changes and the reasons for the changes.

SharePoint admin task - Restrict SharePoint Search (RSS)

Copilot goal: Disable RSS

As you get ready for Copilot, you review and configure the correct permissions on your SharePoint sites. You might have enabled Restricted SharePoint Search (RSS).

RSS is a temporary solution that gives you time to review and configure the correct permissions on your SharePoint sites. You add the reviewed & corrected sites to an allowed list.

- If your SharePoint site permissions are set correctly, then disable RSS.

When disabled, SharePoint search accesses all your SharePoint sites. When users enter prompts, Copilot can show data from all your sites, which shows more relevant and complete information in the response.

The goal is to disable RSS and allow SharePoint search to access all your sites. This action gives Copilot more data to work with, which can improve the accuracy of the responses.

OR

- If you enabled RSS, then add more sites to the allowed list. You can add up to 100 sites to the allowed list. Copilot can show data from the allowed list sites in user prompts.

Remember, your goal is to review & configure the correct permissions on your SharePoint sites, and disable RSS.

To learn more, see:

- [Restricted SharePoint Search](#)
- [Curate the allowed list for Restricted SharePoint Search](#)
- [Blog - Introducing Restricted SharePoint Search to help you get started with Microsoft 365 Copilot](#)

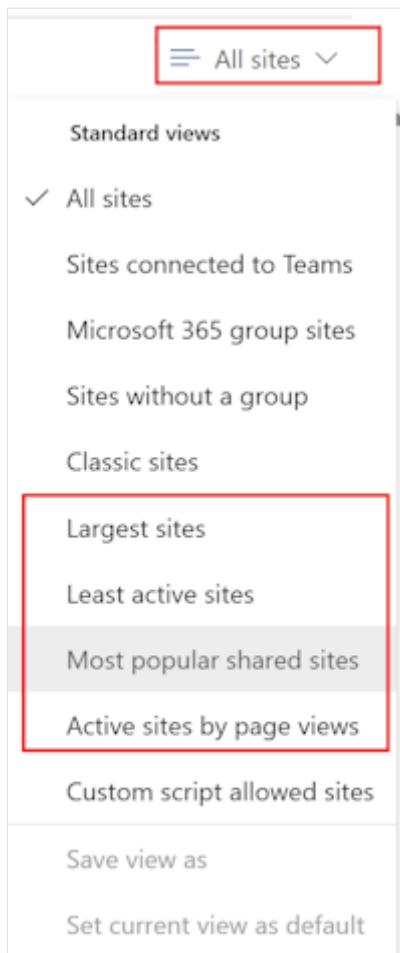
Disable RSS and remove sites from the allowed list

1. Use the `Set-SPOTenantRestrictedSearchMode` PowerShell cmdlet to disable RSS.
2. Use the `Remove-SPOTenantRestrictedSearchAllowedSite` PowerShell cmdlet to remove sites from the allowed list.

To learn more about these cmdlets, see [Use PowerShell Scripts for Restricted SharePoint Search](#).

Add sites to the RSS allowed list

1. Get a list of the sites that you want to add to the allowed list.
 - **Option 1 - Use the Sharing links report**
 - a. Sign in to the [SharePoint admin center](#) as a SharePoint administrator.
 - b. Select **Reports > Data access governance > Sharing links > View reports**.
 - c. Select one of the reports, like "Anyone" links. This report shows a list of sites with the highest number of Anyone links created. These links let anyone access files and folders without signing in. These sites are candidates to allow in tenant/org wide search.
 - **Option 2 - Use the sort and filter options for Active sites**
 - a. Sign in to the [SharePoint admin center](#) as a SharePoint administrator.
 - b. Select **Sites > Active sites**.
 - c. Use the sort and filter options to find the most active site, including page views. These sites are candidates to allow in a tenant/organization wide search.



2. Use the `Add-SPOTenantRestrictedSearchAllowedList` PowerShell cmdlet to add the sites to the allowed list.

To learn more about this cmdlet, see [Use PowerShell Scripts for Restricted SharePoint Search](#).

Purview admin tasks - Use Microsoft Purview features

There are features in [Microsoft Purview](#) that can help you get ready for Copilot.

Copilot goals with Purview:

- Identify and label sensitive data in Microsoft 365.
- Detect and protect sensitive information from unauthorized sharing or leakage.
- Delete the content you don't need.
- Detect sensitive data and noncompliant content in Copilot prompts and responses.
- Review and analyze Copilot prompts and responses.

To learn more about how Microsoft Purview can help you to govern, protect, and manage your data, see [Learn about Microsoft Purview](#).

Identify and label sensitive data

- Create and apply [sensitivity labels](#) to protect your data

[Sensitivity labels](#) are a way to identify and classify the sensitivity of your organization's data, adding an extra layer of protection to your data.

When sensitivity labels are applied to items, like documents and emails, the labels add the protection directly to this data. As a result, that protection persists, wherever the data is stored. When sensitivity labels are applied to containers, like SharePoint sites and groups, the labels add protection indirectly by controlling access to the container where the data is stored. For example, privacy settings, external user access, and access from unmanaged devices.

The sensitivity labels can also affect Copilot results, including:

- The label settings include protection actions, like access to sites, customizable headers and footers, and encryption.
- If the label applies encryption, Copilot checks the usage rights for the user. For Copilot to return data from that item, the user must be granted permissions to copy from it.
- A prompt session with Copilot (called Microsoft 365 Copilot Chat) can reference data from different types of items. Sensitivity labels are shown in the returned results. The latest response displays the sensitivity label with the [highest priority](#).
- If Copilot creates new content from labeled items, the sensitivity label from the source item is automatically inherited.

This section guides you through the steps to create and use the default sensitivity labels from Microsoft Purview. If you need to use your own label names and configurations, create the labels manually or edit the default labels. If you already created your own sensitivity labels, you can't create the default labels.

To learn more about sensitivity labels, see:

- [Get started with sensitivity labels](#)
- [Activate the default labels and policies to protect your data](#)
- [Learn some common scenarios for sensitivity labels](#)
- [Use Microsoft Purview to strengthen information protection for Copilot](#)

1. Create the default sensitivity labels

1. Sign into the [Microsoft Purview portal](#) as an admin in one of the groups listed at [Sensitivity labels - permissions](#).
2. Select Solutions > DSPM for AI > Overview.
3. In the Recommendations section, select **Information Protection Policy for Sensitivity Labels**. This step creates the default labels and their policies.
4. To see or edit the default labels, or to create your own labels, select **Information protection > Sensitivity labels**. You might have to select Refresh.

When you have the default sensitivity labels:

- The labels help protect your data and can affect Copilot results.
- Your users can start manually applying published labels to their files and emails.
- Admins can start creating policies and configuring features that automatically apply labels to files and emails.

At any time, you can create your own sensitivity labels. To learn more, see [Create and configure sensitivity labels and their policies](#).

2. Enable and configure sensitivity labels for containers

The default sensitivity labels don't include settings for groups and sites, which let you apply a sensitivity label to a SharePoint or Teams site, or Microsoft Loop workspace. Items in a container don't inherit the sensitivity label.

Instead, the label settings can restrict access to the container. This restriction provides an extra layer of security when you use Copilot. If a user can't access the site or workspace, Copilot can't access it on behalf of that user.

For example, you can set the privacy setting to **Private**, which restricts site access to only approved members in your organization. When the label is applied to the site, it replaces any previous setting and locks the site for as long as the label is applied. This feature is a more secure setting than letting anybody access the site and allowing users to change the setting. When only approved members can access the data, it helps prevent oversharing of data that Copilot might access.

To configure any label settings for groups and sites, you must enable this feature in your tenant and then synchronize your labels. This configuration is a one-time configuration and uses PowerShell. To learn more, see [How to enable sensitivity labels for containers and synchronize labels](#).

You can then edit your sensitivity labels, or create new sensitivity labels specifically for groups and sites:

1. For the sensitivity label scope, select **Groups & sites**. Remember, you must have already run the PowerShell commands. If you didn't, you can't select this scope.

To learn more, see [How to enable sensitivity labels for containers and synchronize labels](#).

2. Select the groupings of settings to configure. Some of the settings have backend dependencies before they can be enforced, like Conditional Access that must be already configured. The privacy setting, which is included in **Privacy and external user access settings**, doesn't have any backend dependencies.
3. Configure the settings you want to use and save your changes.

For more information, including details of all the available label settings that you can configure for groups and sites, see [Use sensitivity labels to protect content in Microsoft Teams, Microsoft 365 groups, and SharePoint sites](#).

3. Publish your labels and educate your users

1. If you're using the default sensitivity labels, the labels are automatically published to all users, even if you edit the labels.

If you created your own sensitivity labels, you must add your labels to a publishing policy. When they're published, users can manually apply the labels in their Office apps. For labels that include the **Groups & sites** scope, users can apply these labels to new and existing sites, teams, and Loop workspaces. The publishing policies also have settings that you need to consider, like a default label and requiring users to label their data.

To learn more, see [Publish sensitivity labels by creating a label policy](#).

2. Educate your users and provide guidance for when they should apply each sensitivity label.

In addition to manually applying labels, the default label policy includes applying the **General \ All Employees (unrestricted)** label as the default label for items. This label offers a base layer of protection. But, users should change the label if needed, especially for more sensitive content that requires encryption.

To help you with this step, see [End-user documentation for sensitivity labels](#).

3. Monitor your labels. Select **Information protection > Reports**. You can see the usage of your labels.

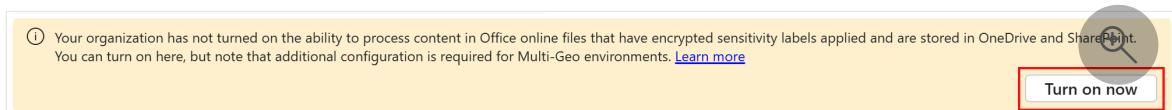
4. Enable sensitivity labels for files in SharePoint and OneDrive

This step is a one-time configuration that is required to enable sensitivity labels for SharePoint and OneDrive. It's also required for Microsoft 365 Copilot to access encrypted files stored in these locations.

As with all tenant-level configuration changes for SharePoint and OneDrive, it takes about 15 minutes for the change to take effect. Then users can select sensitivity labels in Office on the web and you can create policies that automatically label files in these locations.

You have two options:

- **Option 1:** Select **Information Protection > Sensitivity labels**. If you see the following message, select **Turn on now**:



- **Option 2:** Use the `[Set-SPOTenant] /powershell/module/sharepoint-online/set-spotenant` Windows PowerShell cmdlet.

To learn more about this configuration, see [Enable sensitivity labels for files in SharePoint and OneDrive](#).

💡 Tip

Although not related to Copilot, now is a good time to [enable coauthoring for encrypted files](#). This setting ensures the best user experience for collaboration and might be required for other labeling scenarios.

5. Set default sensitivity labels for your SharePoint document libraries

The default labeling policy is configured to apply the default sensitivity label of **General \ All Employees (unrestricted)** for unlabeled files, emails, and meetings. You might want to override that setting with location-based labeling for SharePoint document libraries. This labeling method applies a default label to a document library.

You have two automatic labeling options for files in the same document library:

[+] Expand table

Library option	When to use this option
<p>Option 1 - Default sensitivity label that can apply admin-defined permissions (the Assign permissions now encryption option), or no encryption.</p>	<p>Recommended for new document libraries and when the libraries store files that usually have the same level of known sensitivity. For exceptions, you want users to be able to select an alternative label that doesn't apply encryption.</p> <p>All new files that don't have a sensitivity label and uploaded to the library are labeled with this library default label.</p>
<p>Option 2 - Protects files that are downloaded and extends SharePoint permissions to the downloaded file copy. To configure this setting for the library, the sensitivity label must be configured with user-defined permissions (the Let users assign permissions encryption option).</p> <p>Currently in preview, this configuration requires PowerShell commands at the tenant-level and then the site level before you can select a sensitivity label.</p>	<p>Recommended for new and existing document libraries when you want to centralize permissions and continue to protect files when they're downloaded.</p> <p>This option is suitable when:</p> <ul style="list-style-type: none">- You haven't inspected the file contents for sensitivity.- You can't configure the user and group permissions for the label that defines who gets access to the content. In this scenario, the business owners should control access by using SharePoint permissions and access management capabilities. However, this label configuration provides more protection because the downloaded copy of the file is permissioned the same as its source copy in real time.

Both options provide a baseline level of protection that's specific to the document library, doesn't require content inspection, and doesn't rely on action from end users.

The SharePoint site admin can select a default label for the document library.

1. In your SharePoint site, select **Documents > Settings icon > Library settings > More library settings**.
2. In **Default sensitivity labels** (Apply label to items in this list or library):
 - a. For a standard default sensitivity label, from the drop-down box, select a sensitivity label that's suitable for most of the files in the library. It can be a sensitivity label that is configured for admin-defined permissions, such as **Confidential \ All Employees**. Or, a sensitivity label that doesn't apply encryption, such as **Public**. Don't select **Extend protection on download, copy, or move**.

- b. For a default sensitivity label that extends protection to files that are downloaded, copied, or moved, select **Extend protection on download, copy, or move**. Then from the drop-down box, select a sensitivity label that is configured for user-defined permissions, such as **Confidential \ Trusted People**.

 **Note**

The **Extend protection on download, copy, or move** checkbox isn't displayed until the prerequisite PowerShell commands are complete. To learn more, see [Configure SharePoint with a sensitivity label to extend permissions to downloaded documents](#).

3. Save your changes.

To learn more, including how to run the PowerShell commands for the checkbox, details about the labeling outcomes for each configuration, and any limitations:

- [Configure a default sensitivity label for a SharePoint document library](#)
- [Configure SharePoint with a sensitivity label to extend permissions to downloaded documents](#)

6. Automatically apply sensitivity labels to files and emails

You can automatically apply labels to files in SharePoint sites, OneDrive accounts, Exchange emails, and Office files. Automatic labeling helps to identify a higher priority label for more sensitive information that might need a more restrictive setting than a default label.

- For the specific steps and information that you need to know, including learning about simulation mode for autolabeling policies, see [Apply a sensitivity label to content automatically](#).

Client-side autolabeling vs. service-side autolabeling

- When you autolabel documents and emails in use by Word, Excel, PowerPoint, and Outlook, it's using client-side autolabeling. Users see the label automatically applied in their Office apps, or you can recommend the appropriate label to the user.
- When you autolabel documents stored in all SharePoint or OneDrive sites, and all emails sent using Exchange Online, it's using service-side autolabeling. There isn't

any user interaction. You can label at scale for files at rest in OneDrive and SharePoint, and all emails that are sent and received.

If you created the default sensitivity labels and policies, they include both [client-side autolabeling](#) and [service-side autolabeling](#) to detect credit card numbers and personal data. These default settings make it easy for you to test the autolabeling functionality.

You can edit or create your own autolabeling settings. This feature helps identify your organization data that needs a specific sensitivity label to apply protection actions, like encryption.

Detect sensitive information and protect it from unauthorized sharing or leakage

Use [data loss prevention \(DLP\) policies](#) to help protect against unintentional sharing

[Microsoft Purview Data Loss Prevention \(DLP\)](#) helps organizations protect sensitive information by helping guard against unauthorized sharing or leakage. The intent is to dynamically protect sensitive information, like financial data, social security numbers, and health records, from being overshared.

You can create DLP policies to protect sensitive information in the following locations:

- Microsoft 365 services, like Teams, Exchange, SharePoint, and OneDrive accounts
- Office applications, like Word, Excel, and PowerPoint
- Windows 10, Windows 11, and macOS (three latest released versions) endpoints
- Non-Microsoft cloud apps
- On-premises file shares and on-premises SharePoint
- Fabric and Power BI

When DLP policies find this data, it can act and help prevent the data from showing up in Microsoft 365 Copilot results. It can also help prevent Copilot from summarizing items that have specific sensitivity labels applied.

To learn more, see:

- [Create and Deploy data loss prevention policies](#)
- [Learn about the Microsoft 365 Copilot policy location](#)

With DLP policies, you can use [trainable classifiers](#), [sensitive information types](#), [sensitivity labels](#), and [retention labels](#) to identify sensitive information across your organization.

This section introduces you to the DLP policy creation process. DLP policies are a powerful tool. Make sure you:

- Understand the data you're protecting and the goals you want to achieve.
- Take time to design a policy before you implement it. You want to avoid any unintended issues. We don't recommend you create a policy, and then only tune the policy by trial-and-error.
- Work through [Data loss prevention - Before you begin](#) before you start designing a policy. This step helps you understand the concepts and the tools you use to create and manage DLP policies.

1. Open the Microsoft Purview portal

1. Sign into the [Microsoft Purview portal](#) as one of the admins listed at [Create and deploy DLP policies - Permissions](#).
2. Select **Solutions > Data Loss Prevention**.

2. Create DLP policies

For Exchange Online, SharePoint Online, and OneDrive, you can use DLP to identify, monitor, and automatically protect sensitive information across emails and files, including files stored in Microsoft Teams file repositories.

- For the steps, see [Design a DLP policy](#) and [Create and Deploy data loss prevention policies](#).

3. Create a DLP policy for Teams

By default, Purview includes some policies for Teams that you can enable. These policies are a quick way to get started with protecting information in Teams.

These policies can detect when sensitive info, like bank account numbers or passport numbers, are shared in Teams messages. Then, you can create policy tips to educate users or add actions that control sharing.

1. In **Data Loss Prevention**, select **Overview**.

2. Scroll down to see the following policies:

- Start monitoring unprotected sensitive info in Teams
- Automatically configure Teams DLP policies to protect files shared in team messages

You can turn on these policies and also review the settings in the policy:

Recommendation

Start monitoring unprotected sensitive info in Teams

Across Microsoft 365 organizations, the 5 sensitive info types below are usually included in DLP policies to protect Teams messages. Since your DLP policies don't currently include Teams, we prepared one for you that will detect these sensitive info types without impacting your users. You can either turn on this policy now or review its settings first.



Top 5 sensitive info types:

- U.S. Bank Account Number
- U.S. / U.K. Passport Number
- Credit Card Number
- U.S. Social Security Number (SSN)
- EU Debit Card Number

[Turn on policy](#) [Review settings](#)

For more information on using DLP policies to protect information in Teams, see:

- [Learn about the default data loss prevention policy for Microsoft Teams](#)
- [Data Loss Prevention and Microsoft Teams](#)

4. Create an endpoint DLP policy for your Windows and macOS devices

Endpoint data loss prevention (Endpoint DLP) extends DLP monitoring and protection capabilities to sensitive items that are physically stored on Windows 10/11 and macOS (the three latest released major versions) devices.

DLP can monitor and take protective actions on user activities, like:

- Copy to USB removable device
- Copy to a network share
- Print
- Upload to a restricted cloud service domain or access from an unallowed browser

These activities are only some of the activities that DLP can monitor and protect. For a full list, see [Learn about Endpoint Data Loss Prevention](#).

For more information on the prerequisites and steps to create an endpoint DLP policy, see:

- [Get started with endpoint data loss prevention](#)
- [Onboard Windows devices into Microsoft 365 overview](#)

- Onboard macOS devices into Microsoft 365 overview.

ⓘ Note

If you use a mobile device management (MDM) service to manage and help protect your devices, like [Microsoft Intune](#), then keep using your MDM provider. The endpoint DLP policies focus on data loss prevention with your Microsoft 365 data. MDM focuses on device management. You use them simultaneously.

5. Create Adaptive Protection

Adaptive Protection integrates information from **Insider Risk Management** with DLP. When [insider risk](#) identifies a user that's engaging in risky behavior, the user is dynamically assigned an [insider risk level](#), like **Elevated**.

[Adaptive Protection can automatically create DLP policies](#) that help protect the organization against the risky behavior associated with the insider risk level. As the insider risk level changes for users, the DLP policies applied to users can also adjust.

Turn on Adaptive Protection:

1. Sign into the [Microsoft Purview portal](#) as one of the admins listed at [Adaptive Protection - Permissions](#).
2. Select **Solutions > Insider Risk Management > Adaptive Protection**.
3. In **Dashboard**, select **Quick setup**.
 - [Adaptive Protection - Quick Setup](#) is the easiest and fastest way to get started with Adaptive Protection. It automatically creates and dynamically assigns the insider risk policies, DLP policies, and a Conditional Access policy. When the risk level is met, the policies automatically adjust to match the new risk level.
 - You can also create a [custom policy](#) instead of using the quick setup. If you create a custom policy, then you must also create the DLP and Conditional Access policies.

To learn more, see [Adaptive Protection policies](#).

6. Test and monitor your policies

- For DLP policies, you can:
 - **Test your policies** using [simulation mode](#). Simulation mode allows you to see the effect of an individual policy without enforcing the policy. Use it to find the items that match your policy.
 - **Monitor your policies** with alerts and built-in reports, including risky user activities outside of DLP policies.

To learn more, see:

- [Viewing policy application results](#)
- [Get started with the data loss prevention analytics](#)

- When you enable Adaptive Protection and your policies are configured, you can get:
 - Policy metrics
 - Users with an assigned risk level
 - Policies currently in-scope for the user

To learn more, see:

- [Help dynamically mitigate risks with Adaptive Protection](#)
- [Investigate insider risk management activities](#)

Delete the content you don't need

- Use [data lifecycle management](#) for automatic data retention or deletion

[Data lifecycle management](#) uses retention policies and optionally, retention labels. They're typically used to retain content for compliance reasons and can also automatically delete stale information.

For example, your organization might have regulatory requirements that require you to keep content for a certain period of time. Or, you might have content that you want to delete because it's old, outdated, or no longer needed.

If you have stale data in your organization, create and use retention policies. These policies help Copilot return more accurate information from your documents and emails.

Retention policies can also retain Copilot prompts and responses for compliance requirements, even if [users delete their Copilot activity](#). To learn more, see [Learn about retention for Copilot & AI apps](#).

Settings in a retention policy apply at the container level, like a SharePoint site or an Exchange mailbox. Data in that container automatically inherits these settings.

If you need [exceptions for individual emails or documents](#), use retention labels. For example, you have a retention policy to delete data in OneDrive if the data is older than one year. But, users can apply retention labels to specific documents to keep these documents from automatic deletion.

1. To create retention policies, sign into the [Microsoft Purview portal](#) as a Compliance Administrator.
To learn more about the permissions, see [Data Lifecycle Management - Permissions](#).
2. Select **Solutions > Data Lifecycle Management > Policies > Retention policies**.
3. Select **New retention policy** and follow the instructions. For more specific information, see [Create and configure retention policies](#).
4. If needed, create and apply retention labels.

You can use either **Data Lifecycle Management** or **Microsoft Purview Records Management** to create the labels. Records management includes more configuration options, like a [disposition review process](#). A disposition review is helpful if you need manual confirmation before items are automatically deleted.

Data Lifecycle Management

Use [Data Lifecycle Management](#) for retention policies that manage automatic retention and deletion for Microsoft 365 workloads & Microsoft 365 Copilot interactions, and retention labels for any exceptions.

- From **Data Lifecycle Management**, select **Retention labels > Create a label**.

Follow the configuration instructions and if you need more help, see [How to create retention labels for data lifecycle management](#).

After you create the retention labels, you can then apply the labels to documents and emails:

- [Publish retention labels and apply them in apps](#)
- [Automatically apply a retention label to retain or delete content](#)

5. If you applied retention labels, monitor them to see how they're being used.

a. Sign into the [Microsoft Purview portal](#) as one of the admins listed at:

- [Content explorer - Permissions](#)
- [Activity explorer - Permissions](#)

b. Use [Content explorer](#) to get information on the items using retention labels.

There are a few ways to open Content Explorer:

- Data Loss Prevention > Explorers
- Records Management > Explorers
- Information protection > Explorers

c. Use [activity explorer](#) to get a historical view of activities on your content that has retention labels. There are different filters you can use.

There are a few ways to open activity explorer:

- Data Lifecycle Management > Explorers
- Records Management > Explorers
- Data Loss Prevention > Explorers
- Information protection > Explorers

To learn more, see:

- [Learn about retention policies and retention labels](#)
- [Common settings for retention policies and retention label policies](#)

Detect sensitive data and noncompliant content in Copilot interactions

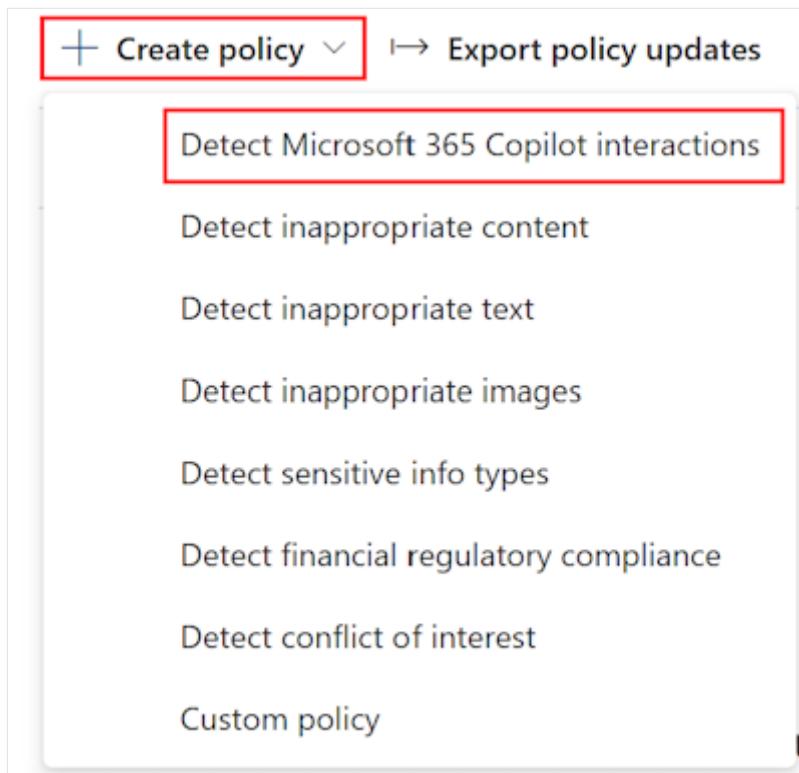
Create [Communication Compliance policies](#) to monitor interactions with Microsoft 365 Copilot

[Communication Compliance](#) can detect, capture, and act on potentially inappropriate messages in your organization. The inappropriate content includes sensitive or confidential information, harassing or threatening language, and sharing of adult content.

Communication Compliance comes with some predefined policies that help you get started. We recommend you use these predefined templates. You can also create your own custom policies.

These policies monitor and evaluate prompts and responses with Copilot.

1. Sign into the [Microsoft Purview portal](#) as one of the admins listed at [Communication Compliance - Permissions](#).
2. Select **Solutions > Communication Compliance > Overview**.
If there are some required steps listed, then complete them. To learn more about these steps, see [Set up and create communication compliance policy](#).
3. For the predefined policies, select **Create policy > Detect Microsoft 365 Copilot interactions**:



This Copilot policy helps you get started. There are also other predefined templates you can use. At any time, you can also create your own custom policies.

To learn more, see:

- [Configure a communication compliance policy to detect for Copilot interactions](#)
- [Create and manage communication compliance policies](#)

4. Monitor your policies. Regularly review the policy reports and audit logs to see any policy matches & resolved items, including activity by users.

To learn more, see [Use communication compliance reports and audits](#).

To learn more, see:

- [Learn about communication compliance](#)

- Get started with communication compliance
- Create Communication Compliance policies

Review and analyze Copilot prompts and responses

Use [Data Security Posture Management \(DSPM\) for AI or eDiscovery](#) to analyze Copilot user prompts and responses

When users enter a prompt and get a response from Copilot, you can view and search these interactions. Specifically, these features help you:

- Find sensitive information or inappropriate content included in Copilot activities.
- Respond to a data spillage incident when confidential or malicious information is released through Copilot-related activity.
- With eDiscovery, you can remove sensitive information or inappropriate content included in Copilot activities.

There are two ways to review and analyze Copilot prompts and responses - [Data Security Posture Management for AI](#) and [eDiscovery](#).

DSPM for AI

[Data Security Posture Management \(DSPM\) for AI](#) (previously called AI Hub) is a central location in the Microsoft Purview portal that proactively monitors AI use. It includes eDiscovery and you can use it to analyze and review Copilot prompts and responses.

1. Sign into the [Microsoft Purview portal](#) as an admin in one of the groups listed at [Data Security Posture Management for AI - Permissions](#).
2. Select **Solutions > DSPM for AI > Activity explorer**.
3. Select an existing activity in the list. For example, if there's a **Sensitive info types** activity, select it.
4. Select **View related AI interaction activity**. In **Interaction details**, you can see the app, and the prompt & response. You can also export an activity.

To learn more, see:

- [Microsoft Purview Data Security Posture Management for AI](#)
- [Data Security Posture Management for AI - Activity explorer events](#)

Technical and deployment resources available to you

- Organizations with a minimum number of Copilot licenses are eligible for a Microsoft co-investment in deployment and adoption through eligible Microsoft Partners.

To learn more, see [Microsoft 365 Copilot Partner Directory](#).

- Eligible customers can request technical and deployment assistance from Microsoft FastTrack. FastTrack provides guidance and resources to help you plan, deploy, and adopt Microsoft 365.

To learn more, see [FastTrack for Microsoft 365](#).

Related content

- [Microsoft 365 Copilot requirements and prerequisites](#)
- [Provision Microsoft 365 Copilot](#)
- [Microsoft 365 Copilot adoption resources](#)
- [Watch: Oversharing Control at Enterprise Scale](#)

Feedback

Was this page helpful?

 Yes

 No

Address oversharing concerns in Microsoft 365 Copilot deployment blueprint

07/22/2025 Applies to:  Microsoft 365 Copilot

[Microsoft 365 Copilot](#) works with different Microsoft services to help you get your data ready for Copilot.

For Copilot administrators, it can be overwhelming to know where to start. Existing administrators can also be unfamiliar with how some features can enhance their data security.

To address the need for shorter, actionable, and prescriptive guidance, you can use this deployment blueprint.

In this deployment blueprint, we provide a recommended approach to address oversharing concerns throughout a Microsoft 365 Copilot deployment.

The blueprint breaks the deployment into three phases:

- Pilot (optional)
- Deploy
- Operate

The blueprint provides:

- An overview of the most common causes of oversharing in Microsoft SharePoint
- A recommended, staged approach to avoid oversharing in a Microsoft 365 Copilot deployment
- Recommended actions specific to E3 or E5 licenses at each stage
- Detailed guidance for using the tools in the SharePoint Admin Center, SharePoint Advanced Management (SAM), and Microsoft Purview to identify and mitigate oversharing and ongoing governance concerns.

Address internal oversharing concerns for M365 Copilot deployment

	Pilot (Optional)	Deploy	Operate
Activities	<ul style="list-style-type: none">Identify most popular sites & assess oversharingGrant Copilot access to popular, low risk sitesTurn on proactive audit and protection	<ul style="list-style-type: none">Discover oversharing risksRestrict sensitive info from Copilot access and/or processingIncrease site privacy	<ul style="list-style-type: none">Further reduce risk and simplify oversightFurther secure sensitive dataImprove Copilot responses
Outcomes	<p>Deploy copilot to sub-set of users with up to 100 sites</p>	<p>Copilot fully deployed in your organization</p>	<p>Continuous improvement of data security practices</p>
Effort*	<p>2–4 days</p>	<p>2–4 weeks</p>	<p>More than one month</p>

*Suggested efforts should be reviewed into timelines based on your tenant size and organizational complexity

Last updated December 10, 2024



Download the blueprint and documentation

[Expand table](#)

Deployment model	Description
<p>Address internal oversharing concerns for M365 Copilot deployment</p> <p>Pilot (Optional) Deploy Operate </p>	<p>Use this deployment model to assist organizations in identifying and mitigating oversharing risks.</p> <p>This model includes</p> <ul style="list-style-type: none">Blueprint with high level activities and presentation <p>PDF PowerPoint</p>

Documentation resources

- E3 customers – prepare your data for Copilot

Learn how to use the features included in your E3 license to prepare your data for Microsoft 365 Copilot.

- E5 customers – prepare your data for Copilot

Learn how to use the features included in your E5 license to prepare your data for Microsoft 365 Copilot.

Related content

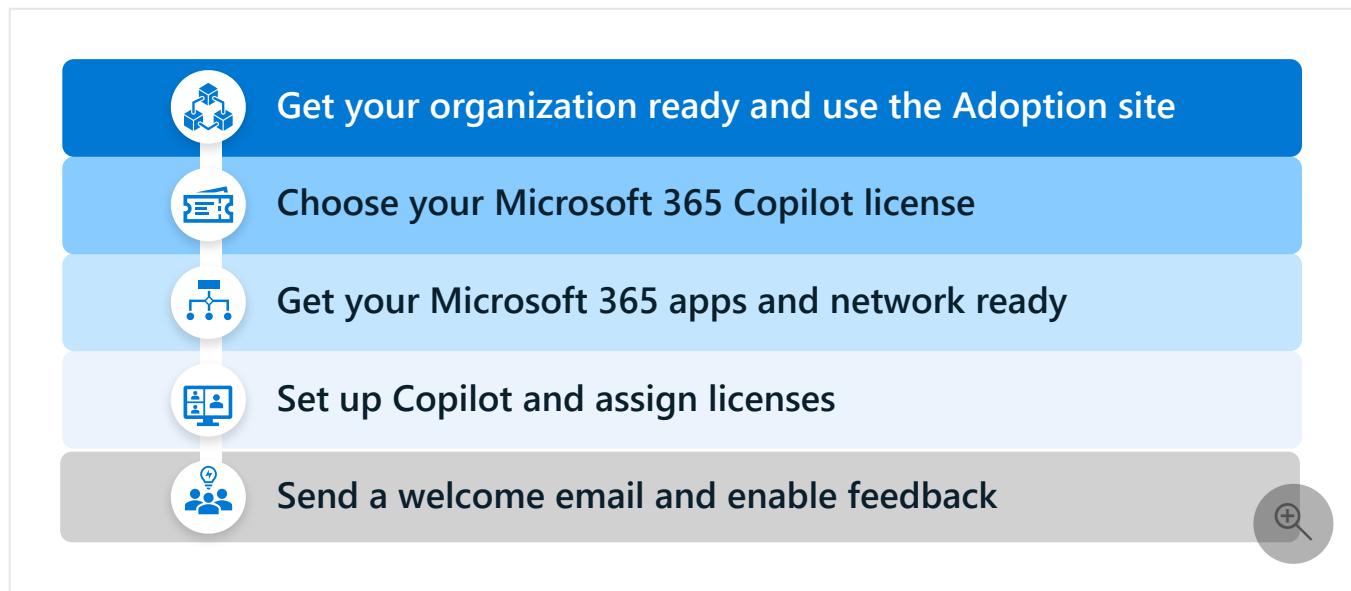
- [Microsoft Purview blueprint: Secure by default](#)

Microsoft 365 Copilot adoption guide and overview for IT admins

Article • 05/20/2025 • Applies to: Microsoft 365 Copilot

[Microsoft 365 Copilot](#) is an AI tool that can find information, get answers to questions, and help with tasks. To help you onboard and adopt Microsoft 365 Copilot in your organization, use the steps in this article.

This article provides an overview of the steps and resources that can help you enable and start using Microsoft 365 Copilot in your organization.

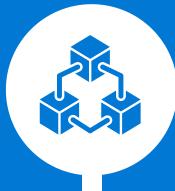


This article applies to:

- Microsoft 365 Copilot

Step 1 - Get your organization ready and use the Microsoft Adoption site

Get your organization ready and use the Microsoft Adoption site



- Use the Microsoft 365 Copilot Optimization Assessment
- Get your data ready
- Use the resources on the Microsoft Adoption site



Choose your Microsoft 365 Copilot license



Get your Microsoft 365 apps and network ready



Set up Copilot and assign licenses



Send a welcome email and enable feedback



Use the Microsoft 365 Copilot Optimization Assessment

The [Microsoft 365 Copilot Optimization Assessment](#) can help you understand your organization's readiness for Microsoft 365 Copilot. It evaluates your data governance maturity and data security controls.

Microsoft recommends you complete the assessment before deploying Microsoft 365 Copilot in your organization. Based on the outcomes of the assessment, you can determine your path forward so your organization is ready for Copilot.

Get your data ready

Use the features in your Microsoft 365 subscription and SharePoint Advanced Management (SAM) licenses to help get your data ready for Copilot.

- [Microsoft 365 Copilot admin guide for E3 + SAM licenses](#)
- [Microsoft 365 Copilot admin guide for E5 + SAM licenses](#)

Use the Microsoft Adoption site

[Microsoft Adoption](#) includes resources that help you enable and use Copilot in your organization, including:

- A downloadable **Success Kit** to help drive user enablement and technical readiness in your organization.
- A **Launch Day** kit to help create hype around your rollout.

- The **Interactive Scenario Library** with example outcomes and success measures for several different industries and roles.
- Instructor-led **QuickStart training** sessions to learn how AI can help.

To get started, go to [Microsoft 365 Copilot adoption](#) ↗ to explore and download resources.

Step 2 - Choose your Microsoft 365 Copilot license

There are different license options for Microsoft 365 Copilot. The license you choose depends on your organization's needs and any existing Microsoft 365 subscriptions you have.

To learn more, see:

- [Microsoft 365 Copilot license plans](#)

Step 3 - Get your Microsoft 365 apps and network ready

Microsoft 365 Copilot integrates with your Microsoft 365 apps, including Microsoft Teams. To use Microsoft 365 Copilot with your apps, make sure that your Microsoft 365 apps and network meet the requirements, and that your app privacy settings allow Copilot.

To learn more, see:

- [Microsoft 365 app and network requirements for Microsoft 365 Copilot](#)

Step 4 - Set up Copilot and assign licenses

In this step, you assign Copilot licenses to your users and can configure some Microsoft 365 Copilot features.

To learn more and get started:

- [Set up Microsoft 365 Copilot - Admin guide on Learn](#)
- [Set up Microsoft 365 Copilot - Setup guide in the Microsoft 365 admin center](#) ↗

Step 5 - Send a welcome email and enable feedback

After your licenses are assigned, you can send a welcome email to your users. This email can include information about Microsoft 365 Copilot, how to use it, and any training resources you

have available.

You can also enable feedback for Microsoft 365 Copilot users.

To learn more, see:

- [Welcome end users to Microsoft 365 Copilot](#)

Related articles

- [Copilot Prompt Gallery](#)
- Microsoft 365 Copilot [E3](#) and [E5](#) implementation guides
- [Microsoft 365 Copilot reports](#)

License plans for Microsoft 365 Copilot

Article • 05/20/2025 • Applies to: Microsoft 365 Copilot

Microsoft 365 Copilot is an AI-powered productivity tool that helps users with everyday tasks.

As part of your [Microsoft 365 Copilot adoption](#), make sure you have the right Microsoft 365 subscription plan.



Microsoft 365 Copilot is available as an [add-on plan](#) with one of the licensing prerequisites listed in this article. The [Microsoft 365 Copilot service description guide](#) is also a good resource.

Use the information in this article to determine if your organization has the correct Microsoft 365 subscription plan to add Microsoft 365 Copilot. If you or your account doesn't have the right plan, you can purchase a new plan or possibly upgrade your existing plan.

To learn more, see:

- For businesses - [Upgrade or change to a different Microsoft 365 for business plan](#)
- For home - [Switch between Microsoft 365 subscriptions](#)

To determine your current subscription, including canceling any subscriptions, sign into your [Microsoft account subscription](#).

- For pricing - [Microsoft 365 Copilot pricing and plans](#)

This article applies to:

- Microsoft 365 Copilot

 **Tip**

To learn more about Microsoft 365 Copilot, see [Microsoft 365 Copilot overview](#) and [Microsoft 365 Copilot architecture and how it works](#).

Microsoft 365 Copilot license

To add Microsoft 365 Copilot to your Microsoft 365 subscription, you need one of the following Microsoft 365 subscription plans. The Copilot license is available as an add-on.

Business and Enterprise licenses

- Microsoft 365 plans:
 - Microsoft 365 E5
 - Microsoft 365 E3
 - Microsoft 365 F1
 - Microsoft 365 F3
 - Microsoft 365 Business Basic
 - Microsoft 365 Business Premium
 - Microsoft 365 Business Standard
 - Microsoft 365 Apps for business
 - Microsoft 365 Apps for enterprise
- Office 365 plans:
 - Office 365 E5
 - Office 365 E3
 - Office 365 E1
 - Office 365 F3
- Microsoft Teams plans:
 - Microsoft Teams Essentials
 - Microsoft Teams Enterprise
 - Microsoft Teams EEA (European Economic Area)
- Exchange plans:
 - Exchange Kiosk
 - Exchange Plan 1
 - Exchange Plan 2

- **SharePoint plans:**
 - SharePoint Kiosk
 - SharePoint Plan 1
 - SharePoint Plan 2
- **OneDrive for work and school plans:**
 - OneDrive for work and school Plan 1
 - OneDrive for work and school Plan 2
- **Planner and Project plans:**
 - Microsoft Planner Plan 1 (formerly Project Plan 1)
 - Microsoft Project Plan 3
 - Microsoft Project Plan 5
 - Project Online Essentials
- **Visio plans:**
 - Visio Plan 1
 - Visio Plan 2
- **Other plans:**
 - Microsoft ClipChamp

Education Faculty and Higher Education Students Aged 18+ licenses

The following plans are only available using [Enrollment for Education Solutions \(EES\)](#) or Cloud Solution Provider (CSP).

- Microsoft 365 A1
- Microsoft 365 A3
- Microsoft 365 A5
- Office 365 A1
- Office 365 A3
- Office 365 A5

Note

Customers with Education or Business subscriptions that don't include Teams can purchase Microsoft 365 Copilot licenses.

Microsoft 365 Copilot Chat

[Copilot Chat](#) is an AI prompt and response experience that's automatically included and available to organizations that have a Microsoft 365 subscription. There are two Copilot Chat options available: web-based chat and work-based chat.

- Web-based chat:
 - Shows results from the internet.
 - Automatically included in your Microsoft 365 subscription with no extra cost.
- Work-based chat:
 - Shows results that the Microsoft Entra work or school account can access.
 - Is available with a Microsoft 365 Copilot license.

To learn more, see:

- [Learn more about Copilot Chat](#)
- [Manage Microsoft 365 Copilot Chat](#)
- [Select the Copilot that's right for your organization](#)

Setup help and guidance

In the Microsoft 365 admin center, there's a [Microsoft 365 Copilot setup guide](#). You can use this guide to step through the admin center to assign the required licenses.

The [Set up Microsoft 365 Copilot admin guide](#) describes other features that you should also configure, including reviewing your Microsoft 365 apps privacy settings, setting the update channels, and more.

For more information, see:

- [Assign licenses to users in the Microsoft 365 admin center](#)
- [Learn more about the Microsoft 365 Copilot requirements](#)

Related articles

- [Microsoft 365 Copilot adoption guide and overview for IT admins](#)
- [Which Copilot is right for my organization?](#)
- [Start using Copilot in your Microsoft 365 apps](#)

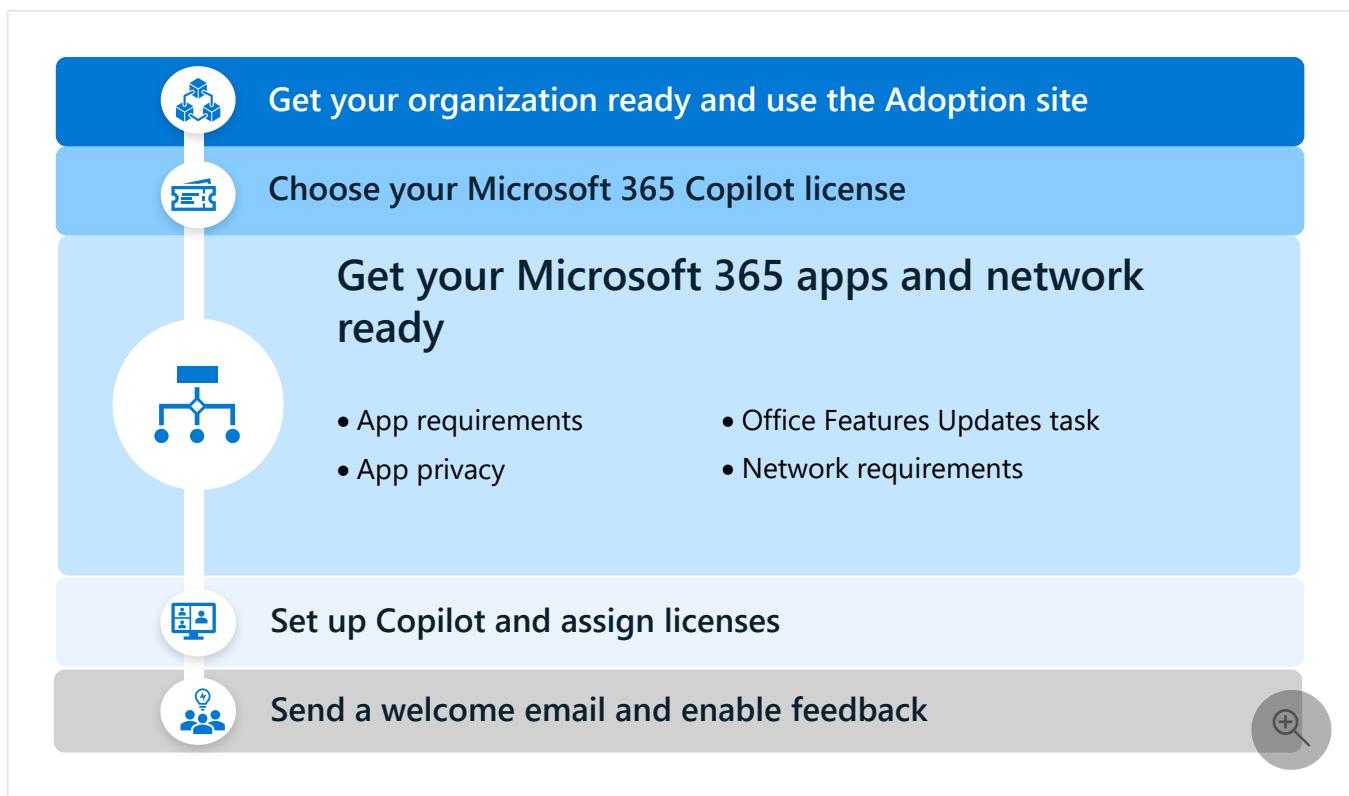
Microsoft 365 app and network requirements for Microsoft 365 Copilot

Article • 05/20/2025 • Applies to: Microsoft 365 Copilot

[Microsoft 365 Copilot](#) is an AI-powered productivity tool that integrates with Microsoft 365 Apps. This integration allows users to use Copilot in individual apps, such as Word, PowerPoint, Teams, Excel, Outlook, and more. The Copilot experiences are designed to provide users with an AI assistant in the apps they use every day.

As a result of this integration, there are some app and network requirements for Microsoft 365 Copilot to integrate with your Microsoft 365 apps. These requirements are nearly identical to the requirements for using Microsoft 365 Apps.

As part of your [Microsoft 365 Copilot adoption](#), make sure you configure the app and network requirements that allow the app integration.



This article lists the Microsoft 365 app and network requirements to use Microsoft 365 Copilot in your Microsoft 365 apps.

This article applies to:

- Microsoft 365 Copilot

Prerequisites

- Users must have a Microsoft 365 license assigned to them. You can find the list of eligible base licenses in [Microsoft 365 Copilot license options](#) or in the [Microsoft 365 Copilot service description guide](#).
- Users must have [Microsoft Entra ID](#) accounts. You can add or sync users using the [onboarding wizard in the Microsoft 365 admin center](#).

App requirements

- **Microsoft 365 Apps** - The apps must be deployed. You can use the [Microsoft 365 Apps setup guide in the Microsoft 365 admin center](#) to deploy to your users.

Note

- For Copilot to work in Word Online, Excel Online, and PowerPoint Online, you must enable third-party cookies.
- Review your privacy settings for Microsoft 365 Apps. These settings might affect the availability of Microsoft 365 Copilot features. For more information, see [Microsoft 365 Copilot and privacy controls for connected experiences](#).
- Copilot isn't available when using device-based licensing for Microsoft 365 Apps for enterprise.

- **Microsoft OneDrive** - Some features in Microsoft 365 Copilot, such as file restore and OneDrive management, require that users have a [OneDrive account](#). You can use the [OneDrive setup guide in the Microsoft 365 admin center](#) to enable OneDrive for your users.
- **Microsoft Outlook** - Microsoft 365 Copilot works with classic Outlook and new Outlook (for [Windows](#) and [Mac](#)). Users can switch to the new Outlook by selecting [Try the new Outlook](#) in their existing Outlook client.

Important

Microsoft 365 Copilot is only supported on primary mailboxes that are hosted on Exchange Online. It isn't available on a user's archive mailbox, group mailboxes, or shared and delegate mailboxes that they have access to.

- **Microsoft Teams** - You can use the [Microsoft Teams setup guide in the Microsoft 365 admin center](#) to configure popular Teams settings, including external access, guest

access, team creation permissions, and more. Copilot in Teams is available on Windows, Mac, web, Android, and iOS.

To enable Copilot in Teams to reference meeting content after the meeting ends, enable transcription or meeting recording. To learn more about configuring transcription and recording, see [Configure transcription and captions for Teams meetings](#) and [Teams meeting recording](#).

- **Microsoft Teams Phone** - Copilot in [Teams Phone](#) supports voice over Internet Protocol (VOIP) and public switched telephone network (PSTN) calls.
 - For support across VoIP calls, you need a Microsoft 365 Copilot license.
 - To use Copilot for PSTN calls, you need a Teams Phone license, a calling plan, and a Microsoft 365 Copilot license.
 - To enable Copilot in Teams Phone, you need to turn on transcription or recording.

For VoIP callers, all participants see a notification that the call is being transcribed or recorded. For PSTN callers, all participants hear an announcement that the call is being recorded.

- **Microsoft Loop** - To use Microsoft 365 Copilot with Microsoft Loop, you must have Loop enabled for your tenant. You enable Loop in the [Microsoft 365 admin center](#) or the [Microsoft 365 Apps admin center](#) under **Customization | Policy Management**.

To learn more, see:

- [Manage Loop workspaces in Syntex repository services](#)
- [Learn how to enable the Microsoft Loop app](#).

- **Microsoft Whiteboard** - To use Microsoft 365 Copilot with Microsoft Whiteboard, you must have Whiteboard enabled for your tenant. To learn more about Microsoft Whiteboard, see [Manage access to Microsoft Whiteboard for your organization](#).

Review app privacy

Review your Microsoft 365 apps privacy settings. The privacy settings in your Microsoft 365 apps can affect the availability of Microsoft 365 Copilot features. To ensure that users can access Copilot features, review the privacy settings in your Microsoft 365 apps.

To learn more, see [Microsoft 365 Copilot and privacy controls for connected experiences](#).

Run the Office Feature Updates task

The Office Feature Updates task is required for core Copilot experiences in apps such as Word, PowerPoint, Excel, and OneNote, to work properly. This task should be allowed to run on its regular schedule, and allowed to access the required network resources.

For more information about the Office Feature Updates task, see [Office Feature Updates task description and FAQ](#).

For more information about the network resources that should be allowed, see [Network requirements](#) (in this article).

Network requirements

Configure your network for Microsoft 365 Copilot. Copilot experiences are deeply integrated with Microsoft 365 applications and often use the same [network connections and endpoints that Microsoft 365 apps use](#).

Baseline network configuration customers should:

- Make sure that the Microsoft 365 endpoints listed in this section aren't blocked within their environment.
- Verify that their network setup follows [Microsoft 365 network connectivity principles and best practices](#).

Network endpoint requirements:

- Allow the [worldwide Microsoft 365 URLs and IP address ranges](#).
- Allow traffic to the following domains:
 - `copilot.microsoft.com`, `*.copilot.microsoft.com`
 - `*.bing.com`, `*.bingapis.com`

These network endpoints (domains) allow some Copilot scenarios to enable richer integrations, like Copilot experiences for the Web.

- Allow the [Copilot Chat network requirements](#).

WebSockets (WSS) protocol requirements:

Verify that your network supports full WSS connectivity from user devices running Microsoft 365 applications to the following domains:

- Microsoft 365 Copilot enterprise experiences: `*.cloud.microsoft`, `*.office.com`
- Other Copilot experiences, including consumer: `*.bing.com`, `copilot.microsoft.com`,
`*.copilot.microsoft.com`

Several Copilot integrations rely on WebSockets (WSS) to deliver a streamlined user experience. Some customer networks might not be configured to handle WSS connections properly, which can result in Copilot application failures. Typical network configurations that affect WSS include:

- The network perimeter blocks the WSS protocol
- Network devices attempting to perform Transport Layer Security (TLS) inspection of connections
- Proxy servers enforcing aggressive connection timeouts

 **FQDNs and subdomains:**

Some organization might prefer to use granular definitions of endpoints, like individual FQDNs, instead of wildcards to configure their network settings. Due to hyperscale and the dynamic nature of its services, Microsoft 365 can't provide specific FQDNs used by individual features and scenarios. Doing so would result in unmanageable configuration surface, constant customer network changes, and connectivity incidents.

When you review and implement the recommended network configurations, consider all the FQDNs and subdomains where wildcards are specified. These wildcards include functionally that the referenced scenarios require.

 **cloud.microsoft domain:**

Microsoft plans to consolidate Copilot experiences for Microsoft 365 under the `*.cloud.microsoft` domain. And, Copilot network requirements and associated required customer network configurations can be further simplified.

To learn more, see [Unified cloud.microsoft domain for Microsoft 365 apps](#).

Related content

- [Microsoft 365 Copilot setup guide in the Microsoft admin center](#) ↗
- [Copilot Prompt Gallery](#) ↗
- [Microsoft 365 Copilot - Microsoft Community Hub](#) ↗
- [Microsoft 365 Copilot adoption guide and overview for IT admins](#)

Set up Microsoft 365 Copilot admin guide

Article • 05/20/2025 • Applies to:  Microsoft 365 Copilot

[Microsoft 365 Copilot](#) is an AI-powered productivity tool that uses large language models (LLMs). It integrates with your data, with Microsoft Graph, and with Microsoft 365 Apps.

Copilot works alongside popular Microsoft 365 Apps, like Word, Excel, PowerPoint, Outlook, Teams, and more. Copilot provides real-time intelligent assistance, enabling users to enhance their creativity, productivity, and skills.

As part of your [Microsoft 365 Copilot adoption](#), use this article to enable some security features, configure the update channel, and assign Copilot licenses to users.



This article provides guidance for administrators on preparing their organization for Microsoft 365 Copilot. It covers foundational implementation and readiness activities, licensing, and steps to ensure a secure and compliant deployment.

Prerequisites

- This article uses the following admin centers. These **admin centers require a specific role** to complete the tasks in the article.
 - [Microsoft 365 admin center](#): There are different roles depending on the task you need to complete. To learn more about roles, see [Commonly used Microsoft 365 admin center roles](#).
 - [SharePoint admin center](#): Sign in as the [SharePoint administrator](#).

- [Microsoft Purview portal](#) : There are different roles depending on the task you need to complete. To learn more, see:
 - [Permissions required to create and manage sensitivity labels](#)
 - [Roles and role groups in Microsoft Defender for Office 365 and Microsoft Purview](#)
- Make sure you have an appropriate **subscription plan to purchase Microsoft 365 Copilot**. Microsoft 365 Copilot licenses are available as an add-on to other licensing plans. To learn more, see [Microsoft 365 Copilot license options](#).

You can purchase Microsoft 365 Copilot licenses through the [Microsoft 365 admin center](#) (Billing > Purchase services), Microsoft partners, or your Microsoft account team.

More licenses might be required to use some of the features described in this article, like [Microsoft Purview](#) and [Microsoft SharePoint Premium - SharePoint Advanced Management overview](#).

- Step through and [configure the Microsoft 365 app and network requirements for Microsoft 365 Copilot](#).

Readiness activities

To ensure a smooth transition to Microsoft 365 Copilot, admins should undertake the following readiness activities:

- **Set up a test environment** - Establish a test environment with necessary licenses to validate configurations and test scenarios.
- **Conduct pilot testing** - Perform pilot testing with a select group of users to identify any issues and gather feedback.
- **Develop a communication plan** - Create a communication plan to inform users about the upcoming changes and provide them with the necessary resources and support.
- **Review Conditional Access policies** - Ensure that conditional access policies are appropriately configured. Microsoft 365 Copilot supports tenant-level Conditional Access Policies in SharePoint Online. To learn more, see [Conditional Access](#).
- **Review SharePoint Search and Advanced Management Policies** - Use SharePoint Advanced Management (SAM) to control access to content, prevent oversharing, and manage content lifecycle. For detailed steps, see [Get ready for Microsoft 365 Copilot with SharePoint Advanced Management \(SAM\)](#). Additionally, consider implementing restricted SharePoint search to limit the discoverability of sensitive content. To learn more, see [Address internal oversharing concerns in Microsoft 365 Copilot deployment blueprint](#).
- **Ensure network compliance** - Review and ensure that your network meets the requirements for Microsoft 365 Copilot services. To learn more, see [Microsoft 365 Copilot](#)

network requirements.

Security measures

To ensure a secure and compliant environment for Microsoft 365 Copilot, it's crucial to implement robust security measures. Some key components are Multifactor authentication (MFA), audit logging, and restricting sensitive information. These measures help protect against unauthorized access and provide visibility into user and admin activities.

Multifactor authentication (MFA)

Multifactor authentication (MFA) is a critical security measure that requires users to provide two or more verification factors to gain access to a resource such as an application or online account. Implementing MFA helps protect against unauthorized access and enhances the security of your organization's data. To learn more, see [Microsoft Entra multifactor authentication](#).

Steps to implement MFA

- **Enable MFA for all users** - Ensure that MFA is enabled for all users in your organization. You can use the Microsoft 365 admin center. To learn more, see [Set up multifactor authentication for Microsoft 365](#).
- **Configure Conditional Access policies** - Set up Conditional Access policies to enforce MFA based on user risk, location, and device compliance. For a tutorial, see [Secure user sign-in events with Microsoft Entra multifactor authentication](#).
- **Educate users** - Provide training and resources to help users understand the importance of MFA and how to use it effectively.

Audit logging

Audit logging is essential for tracking and monitoring activities within your Microsoft 365 environment. It helps administrators detect and respond to potential security incidents and ensures compliance with regulatory requirements. To learn more, see [Audit logging and monitoring overview](#).

Steps to implement audit logging

- **Enable unified audit logging** - Turn on unified audit logging in the Microsoft Purview portal to capture all user and admin activities.

- **Configure audit log retention** - Set up retention policies to ensure that audit logs are retained for the required period based on your organization's compliance needs.
- **Monitor and review logs** - Regularly monitor and review audit logs to identify any suspicious activities or potential security threats.

Restrict sensitive info from Copilot

To protect sensitive information during the deployment and use of Microsoft 365 Copilot, follow these steps to identify, assess, and mitigate oversharing risks. These measures help maintain data security and compliance within your organization:

- **Identify most popular sites and assess oversharing** - Export the top 100 most used sites from the SharePoint admin center and run the SharePoint Advanced Management (SAM) permission state report. To learn more, see [Secure by default with Microsoft Purview and protect against oversharing](#).
- **Grant Copilot access to popular, low-risk sites** - Cross-reference the report results from SAM and the Microsoft Purview Data Security Posture Management (DSPM) Oversharing posture assessment with the top 100 used sites.
- **Turn on proactive audit and protection** - Disable **everyone except external users (EEEU)** at the tenant level and enable Purview Audit to monitor Copilot interaction activity. To learn more, see [Protect your sensitive data with Microsoft Purview](#).
- **Implement access controls and labeling** - Initiate SAM Access Review for all sites that are overshared and apply SAM restricted access control on business-critical sites. To learn more, see [Get ready for Microsoft 365 Copilot with SharePoint Advanced Management \(SAM\)](#).

For detailed steps, see [Address internal oversharing concerns in Microsoft 365 Copilot deployment blueprint](#).

Get started and deploy

Step 1 - Update channels

- Use the Current Channel or Monthly Enterprise Channel to update apps**

Microsoft 365 Copilot follows the Microsoft 365 Apps standard practice for deployment and updates. It's available in all update channels, *except* for Semi-Annual Enterprise Channel.

Your options:

- **Production** channels include **Current Channel** and **Monthly Enterprise Channel**.

- **Current Channel** provides your users with the newest Microsoft 365 app features as soon as they're ready. It provides the best experience for a fast-moving product, like Copilot.
- **Monthly Enterprise Channel** gives more predictability of when these new Microsoft 365 app features are released each month. It's a good option for organizations that want to validate the new features before they're released to the Current Channel.
- Preview channels include **Current Channel (Preview)** and **Beta Channel**.

Preview channels are a great option to validate the product before rolling out to the rest of organization. To learn more, see [Overview of update channels](#) and [Microsoft 365 Insider channels](#).

There are multiple ways you can manage channels for user devices. To learn more, see [Change update channel of Microsoft 365 to enable Copilot](#).

Step 2 - Provision Microsoft 365 Copilot licenses

Assign Copilot licenses using the Microsoft 365 admin center

Before you assign Copilot licenses, make sure that you provision users and assign Microsoft 365 licenses to users in your tenant. Your options:

- Use the [Microsoft 365 Copilot setup guide in the Microsoft 365 admin center](#) ↗
- Use the Microsoft 365 admin center features to [Add users and assign licenses](#).
- [Use PowerShell to assign Microsoft 365 licenses](#).

Next, assign Copilot licenses so users can start using it. You can manage Microsoft 365 Copilot licenses in the Microsoft 365 admin center. You can assign to individual users or to groups of users, and also reassign licenses to other users.

1. Sign in to the [Microsoft 365 admin center](#) ↗ and go to **Billing > Licenses**.
2. Select **Microsoft 365 Copilot**.
3. In the product details page, assign licenses to users and manage their access to Copilot and other apps and services.
4. To check if a user is added, go to **Users** and then **Active Users**. The user and any active licenses are shown.

When licenses are assigned, Copilot shows up in your Microsoft 365 apps, like Word and Excel. For some apps, users might need to wait up to 24 hours for Copilot to appear, and they may need to restart or refresh the app. Once enabled, Copilot appears across the apps.

To use Copilot, users sign into the app with their work or school account and the file must be editable (not read-only). In some experiences, like Word, a Copilot dialog shows when you create a new document. In other experiences, Copilot is accessible on the Ribbon.

Note

- It's not supported to assign Copilot licenses to cross-tenant users, including guest users.
- For Education customers, the Copilot license is listed under **Microsoft 365 A3 Extra Features for faculty** or **Microsoft 365 A5 Extra Features for faculty**.

To learn more, see:

- You can assign licenses in bulk to [groups of users through the Azure admin center](#) or [assign licenses to users with PowerShell](#). For more information, see [Assign Microsoft 365 licenses to users](#).
- You can also manage licenses from the Copilot page in the Microsoft 365 admin center. To learn more, see [Microsoft 365 Copilot scenarios in the Microsoft 365 admin center](#).

Step 3 - Configure settings for Copilot

Configure more Copilot features

You can manage settings using the Copilot Control System, which provides centralized access to admin features and controls that benefit your organization.

To access it, go to the [Microsoft 365 admin center](#)  > **Copilot**.

With the Copilot Control System, you can:

- View the status of Copilot license assignments
- Access the latest information on Copilot
- Manage data security and compliance controls
- Submit feedback on behalf of users
- Configure plugins and permissions
- Enable the use of web data as grounding data in Copilot

To learn more, see [Manage Microsoft 365 Copilot scenarios](#) and [configure the Microsoft 365 Copilot app](#).

Step 4 - Deploy to some users and measure adoption

When you're ready to assign Copilot licenses to your users, there are three phases that you can follow:

1. **Pilot**: Assign licenses to a small group of users to test the deployment and gather feedback.
2. **Deploy**: Assign licenses to a larger group of users.
3. **Operate**: Monitor usage and adoption, and make adjustments as needed.

To learn more about these phases, and possible actions you can take in each phase, see the [Microsoft deployment blueprint to address oversharing in Microsoft 365 Copilot](#).

Pilot

Create a group of early adopters

There are many uses of Microsoft 365 Copilot across the various Microsoft 365 productivity apps. And, there are opportunities for users to find value in different ways.

To help drive adoption, create a group of early adopters. This group can help you understand how users are using Copilot and how it's valuable to them.

1. Identify users across various business groups in your organization, ideally with high usage of existing Microsoft 365 features. You can identify these users by [reviewing usage metrics](#) in the [Microsoft 365 admin center](#).
2. Assign these users Microsoft 365 Copilot licenses and onboard them using the resources available at the [Microsoft 365 Copilot adoption hub](#), including the [user onboarding kit](#).
3. As these users get more comfortable with using Copilot, they can speak to how they use it best, and where it's most valuable for them. This information provides you with product champions that can help other users adopt and use Copilot across your organization.

With your established community of early adopters or Champions, they can better speak to their peers within their organization and contextualize the value of Copilot to best suit their needs. This framework also provides IT departments with a scalable way to handle questions through Champions, developing a team of experts across your organization.

To learn more about driving adoption, visit the [Microsoft 365 Copilot adoption hub](#).

Deploy

Fully deploy Copilot licenses to all users in your organization

To deploy Copilot licenses to all users in your organization, follow these steps:

1. Use the Microsoft 365 admin center to assign licenses to individual users or groups of users, depending on your needs.
2. Make sure that all users have the appropriate licenses assigned to them before you begin using Copilot. This step makes sure that everyone has access to the features they need and can participate fully in the Copilot experience.

During this phase, you might also want to:

- Focus on preventing oversharing by limiting external sharing, restricting access to certain files or folders, and setting up alerts to notify you of any unusual activity. To learn more, see [Site governance, permission, and sharing for site owners](#).
- Use sensitivity labels to classify and protect sensitive information. These labels allow you to automatically encrypt files containing sensitive data or restrict access to files marked as "confidential." To learn more, see [Get started with sensitivity labels](#).

Operate

Get insights and user sentiment

To measure the impact of Copilot on your organization, use the [Copilot Dashboard from Viva Insights](#), and the [Microsoft 365 usage reports in the admin center](#). These tools provide organizational leaders and IT decision makers with insights into readiness, adoption, impact, and user sentiment.

To learn more, see:

- [Open the Microsoft Copilot Dashboard \(Preview\) from Viva Insights](#)
- [Learn more about the Microsoft Copilot Dashboard \(Preview\) from Viva Insights](#)
- [Microsoft 365 reports in the admin center – Microsoft 365 Copilot usage](#)
- [Microsoft 365 reports in the admin center – Microsoft 365 Copilot readiness](#)

Microsoft 365 Copilot Chat

To enhance data security, enable Microsoft 365 Copilot Chat for all users in your organization:

- [Log in to Copilot Access Copilot on copilot.microsoft.com](#) and ensure that Microsoft 365 Copilot Chat is enabled.

More resources

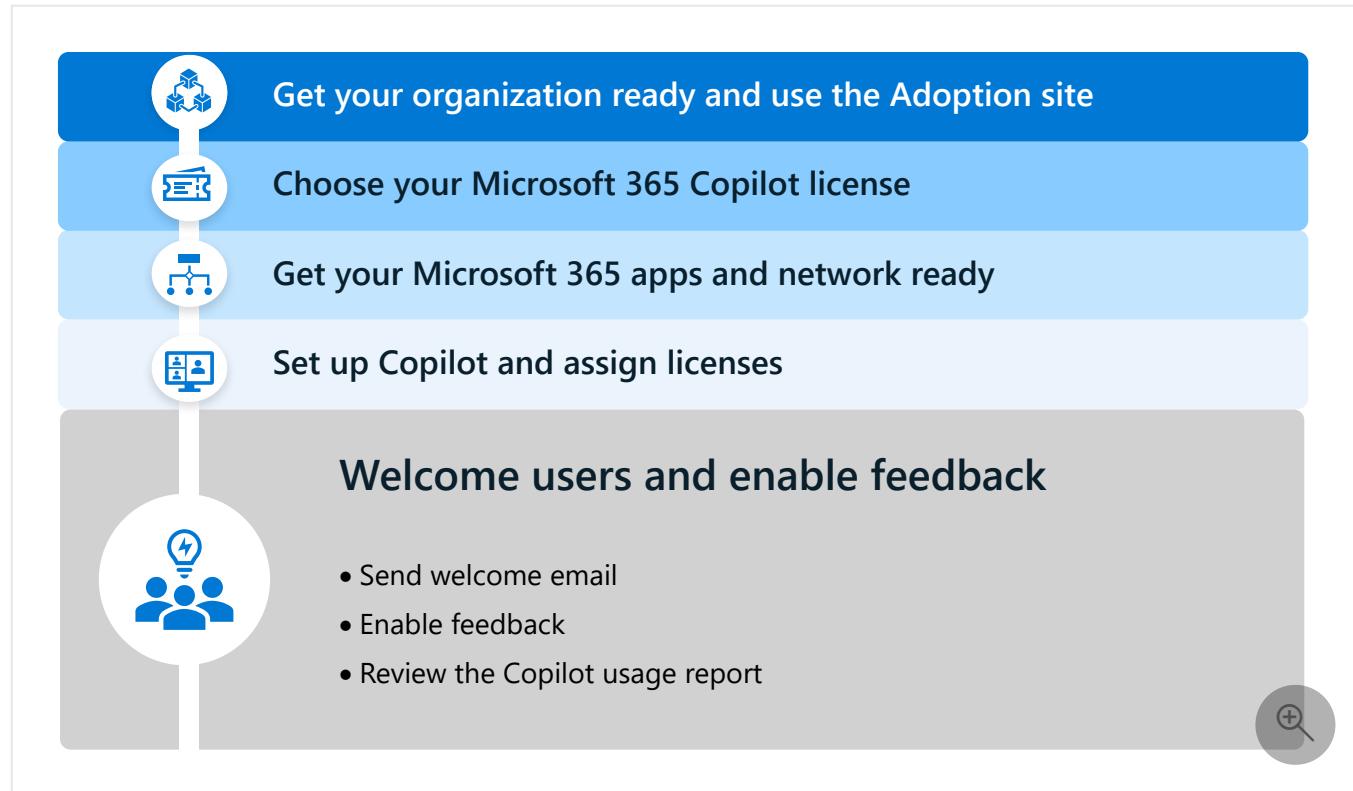
- Microsoft 365 Copilot setup guide in the Microsoft 365 admin center [↗](#)
- Microsoft 365 Copilot help and learning [↗](#)
- Microsoft 365 Copilot – Microsoft Adoption [↗](#)
- Microsoft 365 Copilot - Microsoft Community Hub [↗](#)
- Microsoft 365 Copilot technical documentation hub

Welcome users and enable feedback for Microsoft 365 Copilot

Article • 05/20/2025 • Applies to: Microsoft 365 Copilot

[Microsoft 365 Copilot](#) is an AI-powered productivity tool that helps users with everyday tasks.

As part of your [Microsoft 365 Copilot adoption](#), you can send a welcome email to your Microsoft 365 Copilot users that announces Microsoft 365 Copilot and its features. You can also enable feedback for Microsoft 365 Copilot users.



This article provides information about how to send users a welcome email, enable feedback, and review the Microsoft 365 Copilot usage activity report.

This article applies to:

- Microsoft 365 Copilot

Send welcome email

After you [set up Microsoft 365 Copilot and assign licenses](#) to your users, we recommend you send your users a welcome email. The email should introduce them to Microsoft 365 Copilot and help them understand what Copilot can do for them.

- To send a welcome email, use the [Microsoft 365 Copilot setup guide in the Microsoft 365 admin center](#).

This guide includes an option for sending a welcome email to your Copilot users. For example, your email can look like the following email:



Welcome to Microsoft 365 Copilot!

Microsoft 365 Copilot is here to work alongside you, turning your ideas into action faster and more efficiently than ever before. Start your Copilot journey with the [Copilot help & learning center](#), a place to find helpful articles, training videos, and how-tos.

What's in store for you?

Copilot combines the power of large language models (LLMs) with your content in the Microsoft Graph and Microsoft 365 apps to turn your words into the most powerful productivity tool on the planet. You will soon have access to Copilot within the following apps, with more to come:



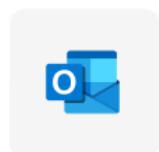
Copilot Chat

"Help me prepare for my next meeting."



Microsoft Teams*

"What decisions were made at the meeting, and what were the suggested next steps?"



Microsoft Outlook

"Draft a response to this email thread with a professional tone that conveys the following points..."



Microsoft Word

"Write an article on the importance of creating work/life balance."



Microsoft Excel

"Show me insights about my data."



Microsoft PowerPoint

"Create a presentation about team icebreaker activities. For each one, explain how it works and how long it takes."



Microsoft Loop

"Brainstorm strategies my team can use to increase user engagement with my product."



Microsoft OneNote

"Summarize this page as an email."



Microsoft Whiteboard

"Suggest inexpensive ways to optimize website for organic search without using social media?"

*Some Microsoft 365 and Office 365 suites in the European Economic Area and Switzerland do not include Microsoft Teams. [Learn more on our licensing page](#)

Get the mobile app

Experience the convenience of Microsoft 365 Copilot right at your fingertips! Download the Microsoft 365 Copilot [mobile app](#), and sign in with your work account today.

Give us feedback!

To improve the Copilot experience, we need your feedback. If allowed by your admin, we'll occasionally ask you a few quick questions about your experience using certain Copilot features. You may also receive an in-app invitation to provide deeper feedback to our Microsoft team.

Send feedback from the app

Use thumbs up & thumbs down buttons at the bottom of your Copilot results while using apps. We will read every comment.



Join the Copilot community forum

The Copilot forum is home to Copilot community feedback. Upvote and comment on feedback of others or leave your own feedback on Copilot features at the [feedback portal](#).

[Privacy Statement](#)

Microsoft Corporation, One Microsoft Way, Redmond, WA 98052 USA



The welcome email also includes a link to [Microsoft Copilot help and learning](#).

Enable feedback

We recommend that you enable all feedback settings for the Microsoft 365 Apps.

This option allows Microsoft 365 Copilot users to provide details with a thumbs up or thumbs down reaction to a Copilot prompt response.

- To enable the feedback for your users, you can use the [cloud policy service](#) or group policies.

When all the policies are enabled, users can provide logs, screenshots, and a contact email address for their feedback submission.

Review the Copilot usage activity report

After your users start using Copilot, we recommend running and reviewing the [Microsoft 365 Copilot usage report](#). This report summarizes user adoption, retention, and engagement with Microsoft 365 Copilot.

- The report is in the [Microsoft 365 admin center](#) > Reports > Usage.

To learn more about the Microsoft 365 Copilot reports, see [Microsoft 365 Copilot reporting options for admins](#).

Related articles

- Microsoft 365 Copilot adoption guide and overview for IT admins
- Advanced deployment guides for Microsoft 365 and Office 365 products

Microsoft 365 Copilot pay-as-you-go overview for IT admins

07/24/2025 Applies to:  Microsoft 365 Copilot

The Microsoft 365 Copilot pay-as-you-go plan offers a flexible and cost-effective way for organizations to access Copilot services. This plan allows administrators to enable usage-based billing for specific Copilot scenarios, providing users with the ability to use Copilot features without committing to a full license.

This article provides an overview of the pay-as-you-go plan, its benefits, and pricing details.

Why pay-as-you-go?

The Microsoft 365 Copilot pay-as-you-go plan offers a flexible and scalable solution for organizations looking to use AI capabilities without the commitment of a full license. When you enable usage-based billing, administrators can better manage costs and provide users with access to Copilot features as needed.

The following services are available for pay-as-you-go billing:

- Microsoft 365 Copilot Chat
- SharePoint agents

Common use cases

- **Establish usage patterns** - Understand adoption patterns for new apps to determine if prepaid licenses make financial sense for your business.
- **Scalability** - Organizations can scale their usage based on demand, paying only for the usage.

How does it work?

The pay-as-you-go plan allows administrators to set up billing and enable users to access declarative agents on a usage basis. You can manage billing, view costs, set spending budgets, and turn off services as needed.

The following administrator roles in the [Microsoft 365 admin center](#)  can view and manage pay-as-you-go:

- Global administrator

- Billing administrator
- AI administrator
- Global reader (read-only access)

Billing process

The billing process requires two steps:

1. Add a billing policy
2. Connect billing policy to Copilot services

Add a billing policy

The billing policy acts as a distinct billing identifier that can be associated with a group responsible for the incurred cost. The main objectives of a pay-as-you-go billing policy are:

- To allocate billing responsibilities across departments
- To facilitate the reuse of billing configurations across various pay-as-you-go scenarios
- To enable administrators to enforce governance
- To link users to a policy, establishing billing rules for a group of users

As an admin, you can add a budget limit to a billing policy and configure the budget to send email notifications when certain percentage milestones are reached.

For the steps to add or update a billing policy and add a budget, see [Set up pay-as-you-go for Microsoft 365 Copilot](#).

What you need to know

- **Creating a billing policy** defines the billing infrastructure for pay-as-you-go that consists of an Azure subscription and a set of users. Creating a billing policy doesn't complete the billing setup. The billing policy must be connected to the Copilot service to complete the setup.
- **Deleting a billing policy** removes the billing infrastructure. Any connected services are disconnected from pay-as-you-go billing.

Connect billing policy to Copilot services

After you create a billing policy, the admin must link it to a Copilot service, such as Microsoft 365 Copilot Chat or SharePoint agents. This connection enables all users covered by the billing

policy to access the Copilot service.

Admins can disconnect a billing policy when it's no longer needed for the service. Upon disconnection, users linked to that billing policy lose access to the metered agents in the Copilot service.

The following conditions apply when managing billing policies:

- Admins can connect or disconnect a billing policy one at a time.
- Disconnect an existing "all users" billing policy before connecting to a user-specific billing policy.

Process for new feature releases

In the future, new features using pay-as-you-go billing are announced in a [message center](#) post. When the features become available, users in your organization can take advantage of those capabilities. Pay-as-you-go billing is disabled by default. A global admin or owner to the subscription can enable or disable Microsoft 365 pay-as-you-go features in the [Microsoft 365 admin center](#) ↗.

Pricing details

When you use a Microsoft pay-as-you-go service linked to an Azure subscription, the service gets billed using the Azure subscription that you specified when you set up pay-as-you-go billing. The Azure subscription uses the Azure meter set up for the service.

To learn more about meters, see [Meters for Microsoft 365 pay-as-you-go](#).

Monitoring and billing

The organization's usage of the pay-as-you-go service can be monitored in the [Microsoft 365 admin center](#) ↗ > [Cost Management](#) page for each Microsoft 365 pay-as-you-go service that you use.

Administrators can also view the cost breakdown and analysis in [Microsoft Cost Management](#).

To learn more, see [View costs and billing for Microsoft 365 Copilot pay-as-you-go](#).

Related articles

- [Set up pay-as-you-go for Microsoft 365 Copilot](#) (article)
- [Meters for Microsoft 365 Copilot pay-as-you-go](#) (article)

- [View costs and billing for Microsoft 365 Copilot pay-as-you-go \(article\)](#)

Set up pay-as-you-go for Microsoft 365 Copilot services for IT admins

07/24/2025 Applies to:  Microsoft 365 Copilot

The Microsoft 365 Copilot pay-as-you-go service offers a usage-based option for organizations to access Copilot services, like Microsoft 365 Copilot Chat. To learn more about the pay-as-you-go service, see [Microsoft 365 Copilot pay-as-you-go overview](#).

You can set up the pay-as-you-go plan directly in the Microsoft 365 admin center. This article provides step-by-step instructions on how to set up and manage pay-as-you-go billing.

This article applies to:

- Microsoft 365 Copilot Chat
- SharePoint agents

Prerequisites

To set up pay-as-you-go, you must have the following prerequisites:

- Azure subscription and resource group:
 - You must have an owner or contributor Azure role to an Azure subscription to set up the pay-as-you-go service.
 - You must have an owner or contributor Azure role to an Azure resource group linked to the same Azure subscription to set up the pay-as-you-go service.

To learn more, see [Use the Azure portal and Azure Resource Manager to Manage Resource Groups](#).

- One of the following Microsoft 365 administrator roles:
 - Global administrator
 - Billing administrator
 - AI administrator

To learn more about these roles, see [Microsoft 365 admin roles](#).

Add a billing policy

To set up pay-as-you-go billing for Microsoft 365 Copilot, you must first add a billing policy in the Microsoft 365 admin center. You can create up to 10 billing policies for your tenant.

1. In the [Microsoft 365 admin center](#), go to the **Copilot > Billing & usage** page.
2. On the **Billing policies** tab, select **Add a billing policy**.
3. On the **Billing details** page, enter a name for the policy. Under **Subscription details**, select the Azure subscription, resource group, and region for the policy. Under **Terms of service**, select the checkbox next to **I accept the pay-as-you-go billing terms or service**, then select **Next**.
4. On the **Choose users** page, select a user scope for the billing policy, then select **Next**. You can choose from the following user scopes:
 - **All Users**: All users in the tenant are included in the billing policy
 - **Specific group**: Assign a specific security group to include in the billing policy
5. On the **Budget** page, select the checkbox next to **Set a budget for this policy**. This option lets you specify a spending budget for your user's Copilot usage.
 - Enter a value for the budget limit.
 - Select when to reset the budget spending: first day of the month, first day of the quarter, or first day of the year.
 - To send budget spending alerts, in the **Recipients** box, select the name of one or more groups that you want to receive alert messages.
 - Under the **Send alerts when usage reaches this percentage of budget** section, the default value is 100%. To add other percentages, select **Add more**, then enter the percentage at which you want an alert sent.

 **Note**

It can take up to 24 hours for recipients to receive budget alert notifications.

- When you're finished configuring the budget, select **Next**.

6. On the **Review and finish** page, review the details, then select **Create policy**.

 **Important**

When you set a budget amount, it triggers email notifications based on your organization's spending relative to that limit. However, the system doesn't enforce the

budget or prevent your organization from exceeding it. Usage can continue uninterrupted even after the budget is surpassed, ensuring no disruption to the service.

Connect a billing policy

After the billing policy is created, you must connect the policy to the Copilot pay-as-you-go service.

1. In the [admin center](#), go to the **Copilot > Billing & usage** page, then select the **Pay-as-you-go services** tab.
2. Select **Microsoft 365 Copilot Chat** or **SharePoint agents** and select the billing policy you created.

To learn how to set up a billing policy for SharePoint agents, see [Use agents with pay-as-you-go billing](#).

Add a budget to an existing billing policy

If you have an existing billing policy that doesn't have a budget assigned to it, you can add one in the Microsoft 365 admin center.

1. In the [admin center](#), go to the **Copilot > Billing & usage** page.
2. On the **Billing policies** tab, select an existing billing policy.
3. In the flyout panel, select the **Budget** tab, then select **Settings**.
4. To set a budget, select the checkbox next to **Set a budget for this policy**. This option lets you specify a spending budget for Copilot usage by your users.
 - Enter a value for the budget limit.
 - Select when to reset the budget spending: first day of the month, first day of the quarter, or first day of the year.
 - To send budget spending alerts, in the **Recipients** box, select the name of one or more groups that you want to receive alert messages.
 - Under the **Send alerts when usage reaches this percentage of budget** section, the default value is 100%. To add other percentages, select **Add more**, then enter the percentage at which you want an alert sent.

 Note

It can take up to 24 hours for recipients to receive budget alert notifications.

- When you're finished configuring the budget, select **Save**.

Important

When you set a budget amount, it triggers email notifications based on your organization's spending relative to that limit. However, the system doesn't enforce the budget or prevent your organization from exceeding it. Usage can continue uninterrupted even after the budget is surpassed, ensuring no disruption to the service.

View spending for your organization

If you previously set up a budget for your organization, you can view the spending report in the Microsoft 365 admin center.

1. In the [admin center](#), go to the **Copilot > Billing & usage** page.
2. On the **Billing policies** tab, select an existing billing policy.
3. In the flyout panel, select the **Budget** tab, then select **Spending**.

Disable pay-as-you-go

Disabling pay-as-you-go for a Copilot service involves disconnecting the billing policies associated with the service, like Microsoft 365 Copilot Chat or SharePoint agent.

1. In the [admin center](#), go to the **Copilot > Billing & usage** page.
2. Select the **Pay-as-you-go services** tab, then select the Copilot service, like Microsoft 365 Copilot Chat or SharePoint agent.
3. Clear the checkboxes of the billing policies that you want to disconnect.
4. Read and accept the confirmation. This step completes the disconnection.

When you turn off pay-as-you-go, it can take up to two hours for users to stop being able to use the agents. If the agent is unused, it stops being available when pay-as-you-go is turned off.

Delete a billing policy

After you disable pay-as-you-go, you can also delete the billing policy.

1. In the [admin center](#), go to the **Copilot > Billing & usage** page.

2. On the **Billing policies** tab, select a billing policy, then select **Delete billing policy**.
3. Accept the confirmation dialogue. Any services connected to the billing policy are disconnected.

What if pay-as-you-go is already set up in the Power Platform admin center?

If you already set up a pay-as-you-go billing policy in the Power Platform admin center, you can create another policy in the Microsoft 365 admin center. Both policies can coexist and you're only billed once. The billing system ensures that you're only billed once for your organization's usage, regardless of the billing policy location.

Although the policies can coexist, we recommend that you turn off any pay-as-you-go billing policy in the Power Platform admin center before you enable it in the Microsoft 365 admin center. By disabling the policy in the Power Platform admin center, you can manage your pay-as-you-go policies from single location.

Related articles

- [Microsoft 365 Copilot pay-as-you-go service overview](#) (article)
- [Meters for Microsoft 365 Copilot pay-as-you-go](#) (article)
- [View costs and billing for Microsoft 365 Copilot pay-as-you-go](#) (article)

Meters for Microsoft 365 Copilot pay-as-you-go for IT admins

06/17/2025 Applies to:  Microsoft 365 Copilot

The Microsoft 365 Copilot pay-as-you-go service offers a consumption-based option for organizations to access Copilot services, like Microsoft 365 Copilot Chat and SharePoint agents. To learn more about the pay-as-you-go service, see [Microsoft 365 Copilot pay-as-you-go overview](#).

When you choose to use pay-as-you-go, usage of Microsoft 365 Copilot Chat agents or SharePoint agents is billed to your Azure subscription using Azure meters. This article provides information about the meters used for billing Microsoft 365 Copilot pay-as-you-go services.

This article applies to:

- Microsoft 365 Copilot
- SharePoint agents

Meter details table

The following table describes the meter that is used for measuring usage.

 Expand table

Meter	What is counted?	What is billed?
Copilot Studio	A billable Copilot Studio message is a request or message sent to the Copilot triggering an action or response. Any agent or custom Copilot usage is billed through Copilot Studio message meter.	\$0.01 per message

To learn more about meters, see [Pay-as-you-go-meters](#).

Related articles

- [Microsoft 365 Copilot pay-as-you-go service overview](#) (article)
- [Set up pay-as-you-go for Microsoft 365 Copilot](#) (article)
- [View costs and billing for Microsoft 365 Copilot pay-as-you-go](#) (article)

View costs and billing for Microsoft 365 Copilot pay-as-you-go

06/17/2025 Applies to: Microsoft 365 Copilot

The [Microsoft 365 Copilot pay-as-you-go service](#) offers a flexible and cost-effective way for organizations to access Copilot services.

Your organization's consumption of the pay-as-you-go service can be monitored in the [Microsoft 365 admin center](#)  > [Cost Management](#) page for each Microsoft 365 pay-as-you-go service that you use, including Microsoft 365 Copilot Chat and SharePoint agents.

This article explains how administrators can view cost and billing details for pay-as-you-go.

This article applies to:

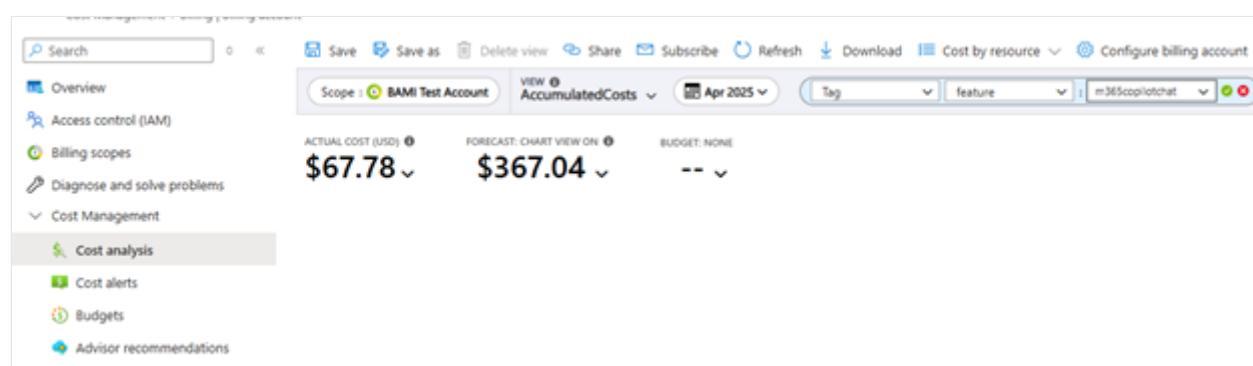
- Microsoft 365 Copilot
- SharePoint agents

Access usage and billing information

To view detailed reports on Copilot usage and the associated costs, use the following steps:

1. Sign in to the [Microsoft 365 admin center](#)  with one of the following administrator roles:
 - Global administrator
 - Billing administrator
2. Go to [Billing](#) > [Cost Management](#).
3. On the [Cost Management](#) page, under **Service family**, you can see a service-level view of costs based on Copilot usage.

You can also view costs in the Azure portal using [Microsoft Cost Management](#). You can filter the accumulated costs using tags, like `m365copilotchat`:



The screenshot shows the Microsoft Cost Management service in the Azure portal. The left sidebar has a tree view with 'Overview' selected, followed by 'Access control (IAM)', 'Billing scopes', 'Diagnose and solve problems', 'Cost Management' (which is expanded), 'Cost analysis' (selected), 'Cost alerts', 'Budgets', and 'Advisor recommendations'. The main area has a 'Scope' dropdown set to 'BAM! Test Account' and a 'VIEW' dropdown set to 'AccumulatedCosts'. It shows three summary cards: 'ACTUAL COST (USD)' at '\$67.78', 'FORECAST: CHART VIEW ON' at '\$367.04', and 'BUDGET: NONE'. Below these are two dropdown menus: 'Tag' and 'feature'. A search bar is at the top left, and a 'Configure billing account' button is at the top right. The URL in the address bar is `https://portal.azure.com/#blade/Microsoft_Azure_CostManagement/CostAnalysisBlade/`.

Billed amounts are updated daily and sometimes more frequently. It can take 24 hours after usage of a service to show in Microsoft Cost Management.

Related articles

- [Microsoft 365 Copilot pay-as-you-go service \(article\)](#)
- [Set up pay-as-you-go for Microsoft 365 Copilot \(article\)](#)
- [Meters for Microsoft 365 Copilot pay-as-you-go \(article\)](#)

Manage Microsoft 365 Copilot scenarios in the Microsoft 365 admin center

Article • 04/09/2025 • Applies to:  Microsoft 365 Copilot

When [Microsoft 365 Copilot](#) is available in a tenant, there are some Copilot scenarios that admins can configure using the Copilot Control System in the Microsoft 365 admin center.

The admin center also gives shortcuts to other services that can affect how Copilot is used in your organization.

This article is for IT administrators, and lists some of the Copilot scenarios you can control in the Microsoft 365 admin center.

This article applies to:

- Microsoft 365 Copilot

Note

- If you're an end user on a work device, then it's possible your IT admin group turned on Copilot for you. The [Copilot Prompt Gallery](#)  can help you get started.
- If you're an end user on a personal device, then you might automatically get Microsoft Copilot, which is the free consumer version. To learn more, see [How can Copilot help you?](#)  and [Welcome to Copilot on Windows](#) .

Before you begin

- The Copilot experience in the Microsoft 365 admin center depends on the Copilot license you have.

If your organization has a Microsoft 365 Copilot license, then you see settings that can manage some Microsoft 365 Copilot scenarios. If your organization doesn't have a Copilot license, then your configuration options apply to Microsoft Copilot, which is the consumer version of Copilot.

For more information, see:

- [Which Copilot is right for your organization?](#)
- [Get started with Microsoft 365 Copilot](#)

- There are different role requirements, depending on your task.

To view and make changes to the Copilot scenarios in the Microsoft 365 admin center, sign in with the following account:

- Global Administrator
- AI Administrator

To view the Copilot scenarios in the Microsoft 365 admin center, sign in with the following account:

- Global Reader

To learn more about these roles, see [About admin roles in the Microsoft 365 admin center](#).

Tip

Microsoft recommends you sign in with the least privileged role that you need to complete your task. Typically, the Global Administrator role is too powerful for most tasks, including managing the Copilot scenarios described in this article.

- The admin center only shows the services licensed in your tenant. So, this article lists more scenarios than what you might see.

For example, if you have a Microsoft Viva license, then you see some Viva scenarios. If you have a Power Platform license, then you see some Power Platform scenarios.

Some services are shortcuts to other admin centers, like Teams. For these services, you need the appropriate role to access those admin centers, like Teams administrator.

To learn more about the different roles in the admin center, see [Microsoft 365 admin center admin roles](#).

- Your agreement for Online Services governs Microsoft 365 Copilot used with Microsoft Entra ID. For more information, see the [Microsoft Online Services Terms](#).
- The Microsoft 365 admin center changes frequently. So the scenarios in this article can be different than what you see in the Microsoft 365 admin center.

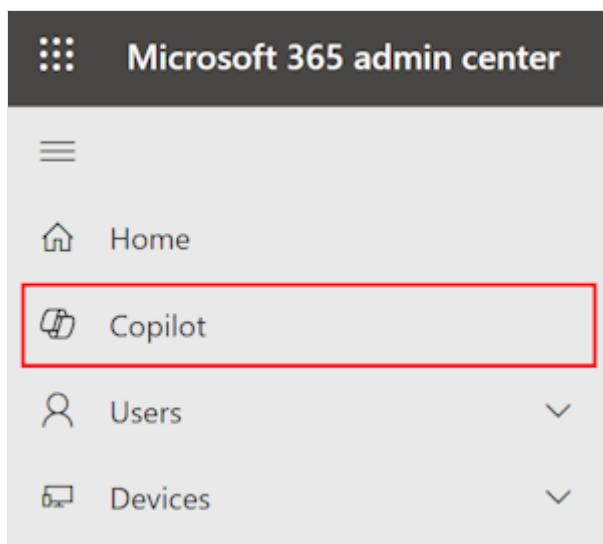
Open the Copilot Control System

This section lists the steps to open the Copilot Control System in the Microsoft 365 admin center.

Make sure you sign in with the appropriate role needed for your task. In our example, we want to change the settings. So, we sign in with the Global Administrator role.

1. Sign in to the [Microsoft 365 admin center](#) as the Global Administrator. For more information on this role, see [About admin roles in the Microsoft 365 admin center](#).

2. In the left navigation, select **Copilot**.



3. If your tenant has a Copilot license, you can select **Overview**, **Discover**, and **Settings**:

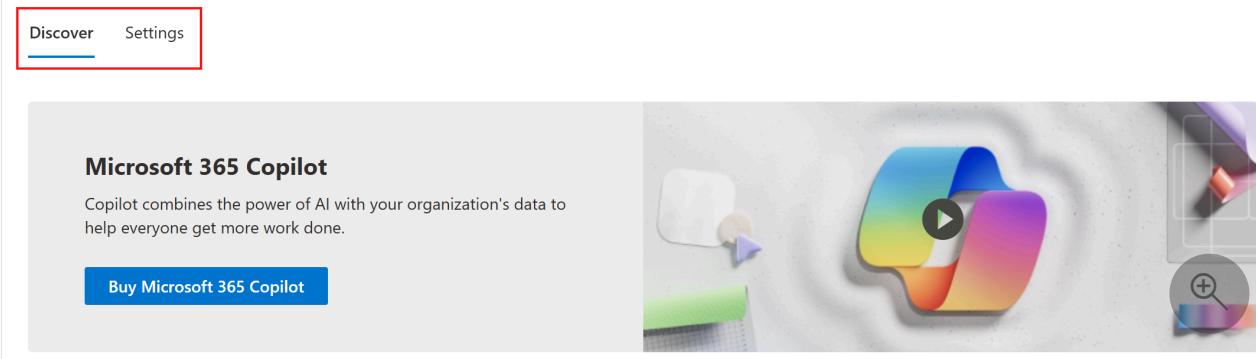
The screenshot shows the "Copilot" management page. At the top is a large title "Copilot". Below it is a descriptive text: "Manage everything related to Copilot. View insights about how people are using and learning about Copilot, assign licenses, find training, change settings, and more." Underneath this is a horizontal navigation bar with three tabs: "Overview", "Discover", and "Settings". The "Discover" tab is highlighted with a red box and has a blue underline. Below the tabs is a section titled "Explore Copilot capabilities" with the subtext: "Create powerful prompts in your most used Microsoft 365 apps, or get going fast with Microsoft Copilot and the Copilot mobile app." To the right of this text is a circular icon containing a magnifying glass and a question mark.

4. If your tenant doesn't have a Copilot license, then you can select **Discover** and **Settings**.

In **Discover**, you can purchase Copilot:

Copilot

Manage everything related to Copilot. View insights about how people are using and learning about Copilot, assign licenses, find training, change settings, and more.



The screenshot shows the Microsoft 365 Copilot Overview page. At the top, there are two tabs: "Discover" (which is highlighted with a red border) and "Settings". Below the tabs, the title "Microsoft 365 Copilot" is displayed, followed by a brief description: "Copilot combines the power of AI with your organization's data to help everyone get more work done." A blue "Buy Microsoft 365 Copilot" button is present. To the right of the text area is a large, colorful icon of the Copilot logo (a stylized play button inside a multi-colored shape). Below the main text area are three smaller, semi-transparent icons representing different features: a document with a play button, a magnifying glass over a document, and a gear.

Scenarios you can manage

This section lists some of the scenarios shown in the Microsoft 365 admin center. Some scenarios are configured in the admin center, while others are shortcuts to other admin centers.

Remember, only the services licensed for your tenant are shown in your admin center experience.

Reports and licenses

In the [Microsoft 365 admin center](#) > **Copilot** > **Overview** page, you can view reports and assign (or unassign) Copilot licenses. You can also view the number of active users and the number of licenses that are available.

This view lists some of the popular scenarios that are available in Microsoft 365 Copilot. It also provides shortcuts to more in-depth settings in the admin center, like more usage reports ([Reports > Usage](#)) and license management ([Billing > Licenses](#)).

To learn more, see:

- [Microsoft 365 reports in the admin center](#)
- [Set up Microsoft 365 Copilot and Enable users for Microsoft 365 Copilot](#)

Copilot agent consumption meter

- Shortcut to the Power Platform pay-as-you-go plan

In the [Microsoft 365 admin center](#), select **Copilot** > **Settings** > **Copilot agent consumption meter**.

In the admin center, this scenario is a shortcut to the [Power Platform pay-as-you-go plan](#). You don't configure this scenario in the Microsoft 365 admin center.

This scenario creates a billing plan that tracks and manages Microsoft 365 Copilot Chat consumption. When you set up a billing plan, you also select an Azure subscription, and link the necessary environments. This configuration helps manage message capacity, monitor usage, and handle overages, which can help with costs.

To learn more, see:

- [Learn more about the Power Platform pay-as-you-go plan](#)
- [Set up a Power Platform pay-as-you-go plan](#)

Copilot diagnostics logs

Configure in the Microsoft 365 admin center

In the [Microsoft 365 admin center](#), select **Copilot > Settings > Copilot diagnostics logs**.

When users have an issue and aren't able to send Copilot feedback logs to Microsoft, you can submit feedback logs on their behalf. The data includes prompts and generated responses, relevant content samples, and log files. When you use this scenario to send feedback logs, it temporarily overrides any user level feedback policy.

Copilot diagnostic logs

When users have an issue and aren't able to send feedback and diagnostic logs to Microsoft, you can submit verbose logs on their behalf. The data will include prompts and generated responses, relevant content samples, and additional log files.

If feedback is turned off for your organization, you can turn it back on in the apps admin center. [Go to apps admin center](#)

Collect and send logs on behalf of a specific user to Microsoft

You'll collect the data, submit it to Microsoft, and then the user will be notified about the data collection. [Learn more about what's collected](#)

To learn more, see:

- [Submit admin-initiated Copilot feedback from the Microsoft 365 admin center](#)
- [Search for and delete Copilot data in eDiscovery](#)

Copilot image generation

Enable in the Microsoft 365 admin center

In the [Microsoft 365 admin center](#), select **Copilot > Settings > Copilot image generation**.

When this scenario is allowed, end users can ask Copilot to create, design, and edit images. Users can add these images to their work.

Copilot image generation

With Copilot image generation, users can ask Copilot to create, design, and edit images to visualize ideas and enhance their projects.

[Learn more about Copilot image generation and Responsible AI](#)

- Copilot image generation uses Responsible AI to prevent the upload or generation of harmful images.

Allow Copilot image generation (recommended)

Users can create images in Microsoft 365 apps and Designer.

Don't allow

Copilot will only provide stock or brand images when prompted.

To learn more, see:

- [How to Create AI Art with Copilot](#)
- [Learn about Data, Privacy, and Security for Microsoft 365 Copilot](#)

Copilot in Bing, Edge, and Windows

- Includes information about Copilot Chat that admins should know

In the [Microsoft 365 admin center](#), select **Copilot > Settings > Copilot in Bing, Edge, and Windows**.

This scenario refers to AI-powered **Copilot Chat** and is automatically available to Bing, Microsoft Edge, and Windows users. You don't configure this scenario in the Microsoft 365 admin center. But, you should know that Copilot Chat for the web is available to everyone.

- For **organizations with a Microsoft 365 subscription**, you get **Microsoft 365 Copilot Chat**. It gives your users internet-based chat and work-based chat with [enterprise data protection](#). Enterprise data protection applies to Copilot Chat prompts and responses when users sign in with a Microsoft Entra account, and is designed for work and education.

To ensure that users in your organization access Copilot Chat, see [Manage Microsoft 365 Copilot Chat](#).

- For users signed with a personal account, they can use **Microsoft Copilot**, which is the consumer version of Copilot Chat (copilot.microsoft.com and bing.com/chat).

To learn more, see:

- [Manage Copilot Chat](#)
- [Look at the Copilot Chat FAQ](#)
- [Determine which Copilot is right for you and your organization](#)
- [Update Windows and Microsoft 365 Copilot Chat experience](#)

Copilot in Edge



In the [Microsoft 365 admin center](#), select **Copilot > Settings > Copilot in Edge**.

This scenario is a shortcut to create a Microsoft Edge configuration profile in the Microsoft 365 admin center (**Settings > Microsoft Edge > Configuration Profiles**). In a configuration profile, you create a policy that includes settings that configure some Copilot features in Microsoft Edge. You can also upload settings in a JSON file.

To learn more, see [Configure Copilot in Microsoft Edge with configuration profiles](#).

Copilot in Power Platform and Dynamics 365



In the [Microsoft 365 admin center](#), select **Copilot > Settings > Copilot in Power Platform and Dynamics 365**.

This scenario is a shortcut to the Power Platform admin center. You don't configure this scenario in the Microsoft 365 admin center.

In the Power Platform admin center, you can manage settings specific to Microsoft Copilot, agents, and Copilot agents in Power Platform and Dynamics 365 products.

To learn more, see:

- [Copilots and generative AI in Power Platform](#)
- [Copilot features in Power Platform](#)

Copilot in Teams meetings



In the [Microsoft 365 admin center](#), select **Copilot > Settings > Copilot in Teams meetings**.

This scenario is a shortcut to the [Microsoft Teams admin center](#). You don't configure this scenario in the Microsoft 365 admin center.

In the Teams admin center, you can manage how Copilot interacts with some Teams features, including meeting transcripts.

To learn more, see:

- [Microsoft 365 Copilot in Teams meetings and events](#)
- [Teams Rooms and Copilot overview](#)

Copilot in Viva

Configure in the Microsoft 365 admin center

In the [Microsoft 365 admin center](#), select **Copilot > Settings**. There are several Viva options.

Microsoft Viva is an integrated employee experience in Microsoft 365 and Microsoft Teams.

There are several ways to use Copilot in Microsoft Viva:

- **Copilot in Viva Engage** provides conversation starters and writing assistance to help people create Engage posts. Use a combination of the **Org-wide setting** and custom policies to refine access for the people in your organization.

To learn more, see [Copilot in Viva Engage](#).

- **Copilot in Viva Goals** helps people brainstorm new goals, refine and improve existing ones, and summarize key information. Use a combination of the **Org-wide setting** and custom policies to refine access for the people in your organization.

To learn more, see [Copilot in Viva Goals](#).

- **Copilot in Viva Insights** simplifies the query building process for analysts by suggesting a template, metrics, filters, and attributes relevant to their analysis. Use a combination of **Org-wide setting** and custom policies to refine access for the people in your organization.

To learn more, see [Copilot queries in Viva Insights](#).

- **Copilot in Viva Pulse** integrates with the [Microsoft Copilot Dashboard](#) to capture sentiment data and measure Microsoft 365 Copilot's effectiveness. You can use a research-backed template to send surveys and gather team feedback directly from the dashboard or within Viva Pulse.

To learn more, see [Copilot and Viva Pulse](#).

Data, security, and compliance

- Shortcut to the Microsoft Purview portal

In the [Microsoft 365 admin center](#), select **Copilot > Settings > Data, Security, and Compliance**.

This scenario is a shortcut to the [Microsoft Purview portal](#). You don't configure this scenario in the Microsoft 365 admin center.

Microsoft Purview has several features that can help get your data ready for Copilot. You can create sensitivity labels and apply them to your data, create retention policies to remove outdated data, and analyze Copilot prompts and responses.

To learn more, see:

- [Protect and manage Microsoft 365 Copilot interactions with Microsoft Purview](#)
- [Microsoft 365 Copilot admin guide for E3 + SAM licenses](#)
- [Microsoft 365 Copilot admin guide for E5 + SAM licenses](#)

Extensions

- Configure in the Microsoft 365 admin center

In the [Microsoft 365 admin center](#), select **Copilot > Settings > Extensions**.

This setting lets you allow (or block) user access to [Copilot agents](#). It also provides a shortcut to more in-depth settings in the admin center ([Settings > Integrated apps](#)).

Extensions

i You don't have permission to save changes. [Learn more](#)

Manage who can use Copilot with installed apps and extensions from Microsoft or other providers.

[Go to Integrated apps to manage installed apps and extensions](#)

Allow the following users access to Copilot agents (Preview i)

All users

No users

Specific users/groups

Search for users or groups to add

Agents are interactions (chats and responses) with Microsoft 365 Copilot that focus on a specific task. You can create your own agents and include sample prompts that users can ask Copilot. For example, you can create agents that help users create meeting agendas or write blog posts.

End users can ask questions not related to the task, but agents are designed to help users with specific tasks.

You can also learn how to control the integration of non-Microsoft apps and first-party apps.

To learn more, see:

- [Manage Copilot agents in Integrated Apps](#)
- [Introducing Copilot agents ↗](#)

Microsoft 365 Copilot self-service purchases

✓ Configure in the Microsoft 365 admin center

In the [Microsoft 365 admin center ↗](#), select **Copilot > Settings > Microsoft 365 Copilot self-service purchases**.

This setting lets you allow (or block) users from purchasing Microsoft 365 Copilot licenses without admin approval or help. This scenario can help admins understand and manage the demand.

Microsoft 365 Copilot self-service purchases

Give users the flexibility to acquire this product without an administrator's help. This can help admins understand and manage the demand.

[Go to self-service settings for other products](#)

[Learn which products offer self-service trials](#)

Allow

Users can try or buy this product on their own.

Allow trials only

Users can try this product for free, but cannot buy it themselves. When the trial ends, it does not convert to a paid subscription, but users might be able to request a paid license from an admin.

Do not allow

No self-service purchases are allowed for this product, but in some cases, free trials might still be available, and users might be able to request a paid license from an admin.

To see a list of all self-service trials and purchases in the [Microsoft 365 admin center](#), select **Home > Settings > Org settings**.

To learn more, see:

- [Self-service purchase FAQ](#)
- [Use AllowSelfServicePurchase for the MSCommerce PowerShell module](#)

Microsoft Security Copilot

Shortcut to Microsoft Security Copilot

In the [Microsoft 365 admin center](#), select **Copilot > Settings > Microsoft Security Copilot**.

This scenario is a shortcut to the Security Copilot portal. You don't configure this scenario in the Microsoft 365 admin center.

Security Copilot is a separate product and license from Microsoft 365 Copilot. If it's available in your tenant, you can use this link to go to Security Copilot.

To learn more, see [Security Copilot](#).

Pin Copilot Chat

- Configure in the Microsoft 365 admin center

In the [Microsoft 365 admin center](#), select **Copilot > Settings > Pin Copilot Chat**.

This setting lets you pin Microsoft 365 Copilot Chat to the navigation bar in Teams, Outlook, and the Microsoft 365 Copilot app. By default, Copilot Chat might be pinned for users with a Microsoft 365 Copilot license.

On the navigation bar

Pin Copilot Chat to the navigation bar to make it easier for people in your organization to access it in Teams, Outlook and the Microsoft 365 Copilot app on web, desktop, and mobile. Users with a license for Microsoft 365 Copilot will have it pinned by default.

Microsoft Copilot used with Entra ID is governed by your agreement for Online Services.

- Pin Copilot Chat to the navigation bar (recommended)
- Do not pin Copilot Chat to the navigation bar [\(i\)](#)
- Allow users to be asked whether they want to pin it

On the Windows taskbar

You can pin Microsoft 365 Copilot, or any app, to the Windows taskbar so that it's easy to find outside of the apps.



[Learn more how to manage this setting](#)

When Copilot Chat is pinned, it makes it easier for people in your organization to access Copilot Chat.

To learn more, see:

- [Pin Microsoft 365 Copilot Chat to the navigation bar](#)
- [Pin apps to the taskbar](#)

Web search for Microsoft 365 Copilot and Microsoft Copilot

- Shortcut to create a cloud policy in the Microsoft 365 Apps admin center

In the [Microsoft 365 admin center](#), select **Copilot > Settings > Web search for Microsoft 365 Copilot and Microsoft Copilot**.

This scenario is a shortcut to create a cloud policy in the Microsoft 365 Apps admin center. You don't configure this scenario in the Microsoft 365 admin center.

When the `Allow web search in Copilot` policy is enabled, Copilot can reference web content to improve the quality of its responses.

To learn more, see:

- [Overview of Cloud Policy service for Microsoft 365](#)
- [Data, privacy, and security for web search in Microsoft 365 Copilot and Microsoft 365 Copilot Chat](#)

Related articles

- [Learn about the admin roles in the Microsoft 365 admin center](#)
- [Compare the Microsoft 365 license feature list for Microsoft 365 Copilot](#)
- [Remove or prevent installation of the Copilot app](#)

Get started with the Microsoft 365 Copilot app

Article • 05/19/2025 • Applies to:  Microsoft 365 Copilot

Note

The updated Microsoft 365 Copilot app is rolling out to Microsoft 365 Copilot users. If you don't see the feature, it might not be available in your organization yet. The feature should be fully rolled out in June 2025.

The Microsoft 365 Copilot app is an everyday AI productivity app for work or school. It helps Microsoft 365 users be more productive by providing a single place to access [Microsoft 365 Copilot](#) features and capabilities, including search, chat, agents, and more.

The app is available as a website ([M365Copilot.com](#)), as a desktop app that can be installed on [Windows](#), and a mobile app for [Android](#) and [iOS](#) devices.

This article lists the app's features and benefits, and compares the features available with a Microsoft 365 subscription and a Microsoft 365 Copilot license.

This article applies to:

- Microsoft 365 Copilot

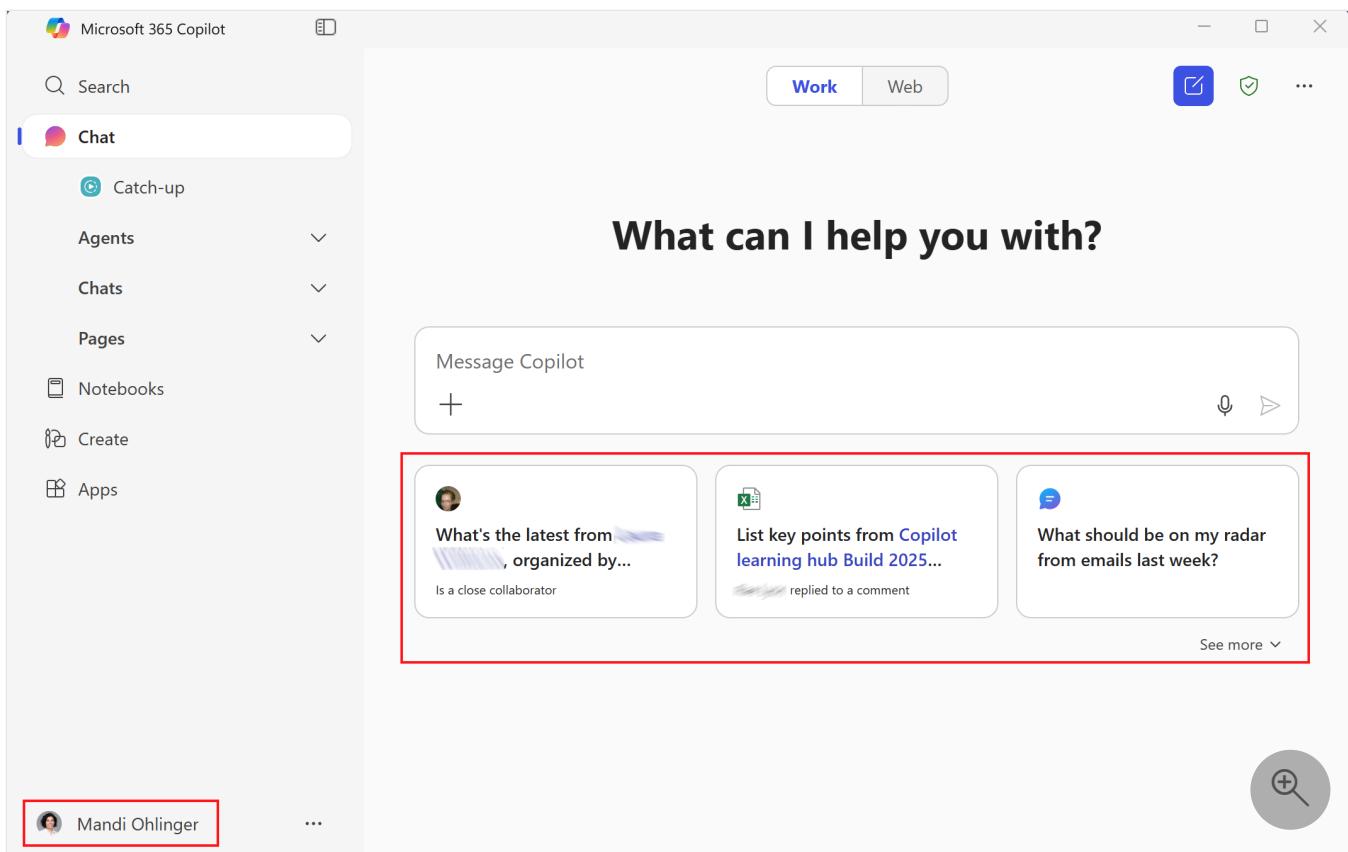
Tip

Microsoft 365 subscribers in your organization might get the Copilot app automatically.

You can also use a mobile device management (MDM) service like [Microsoft Intune](#) to deploy apps to devices in your organization. To learn more, see [add apps to Intune](#) and [assign apps using Intune](#).

App features and benefits

When you sign in to the app, you get a personalized experience:



Users can use the app to:

- **Search** for information, like finding emails and files
- **Chat** with AI to help you prepare for a meeting or get answers to questions using work-based chat and/or web-grounded chat
- Use **Agents** to get help with tasks, including agents your organization creates
- Create **Notebooks** to organize information and get insights
- Create and edit content, like images, videos, and brand kits
- Access your **Apps**, including Microsoft 365 apps like Teams, Excel, and SharePoint

End users can learn more about the Copilot app at [Get started with the Microsoft 365 Copilot app ↗](#).

Microsoft 365 Copilot license vs. Microsoft 365 subscription

The Copilot app is available to Microsoft Entra accounts (work and school) and personal Microsoft user accounts with a:

- Microsoft 365 Copilot license
- Microsoft 365 subscription

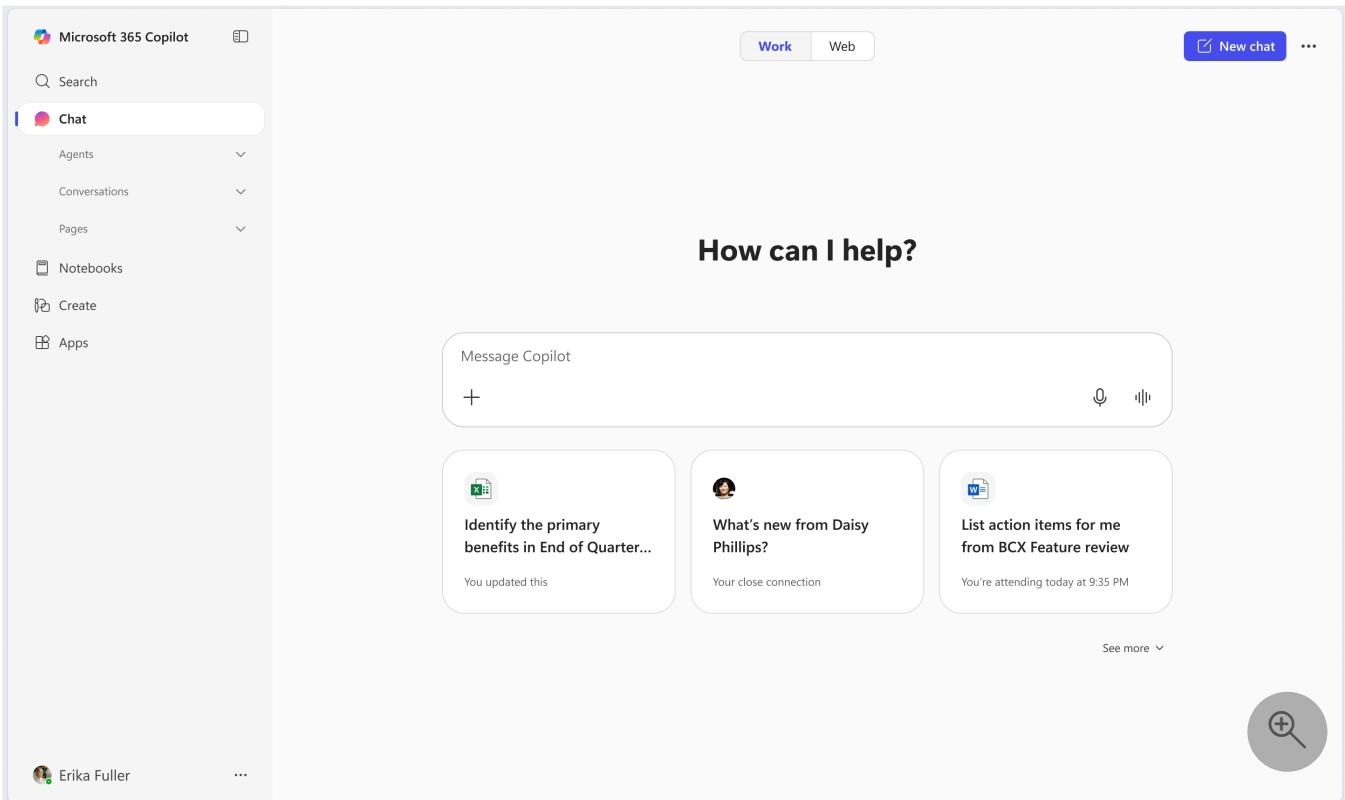
The available app features depend on the license. Users with a Copilot license get the full Microsoft 365 Copilot app experience.

The following table shows the feature differences with a Microsoft 365 Copilot license and a Microsoft 365 subscription.

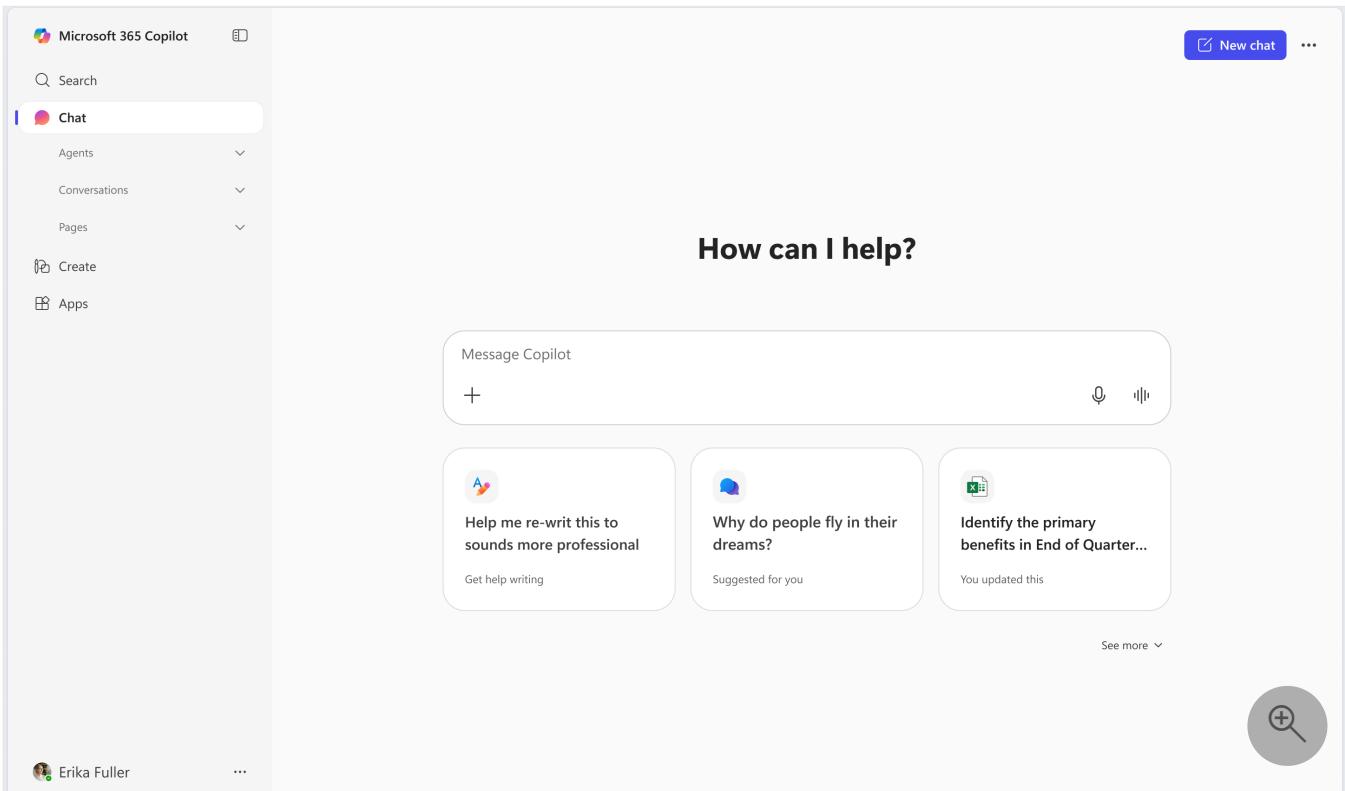
 Expand table

Feature	Copilot license	Microsoft 365 subscription	
Search			
Chat		 Work-based and web-grounded chat Automatically enabled in the Copilot app and is the Copilot app's default landing page	Web-grounded chat only; No work-based chat Can pin the Chat app to the Copilot app.
Agents		 Agents are metered.	
Pages			
Notebooks			
Create		 Use AI and templates to create and edit images, posters, banners, videos, and more.	Use templates to create and edit images, posters, banners, videos, and more.
Apps		 Users can get and pin apps.	Users can get and pin apps.

When users with a Microsoft 365 Copilot license open and sign in to the Copilot app, the app looks similar to the following image:



When users with only a Microsoft 365 subscription (no Copilot license) open and sign in to the Copilot app, the app looks similar to the following image:



Customizable app settings for IT admins

The Microsoft 365 Copilot app has some settings and features that IT admins can configure. To learn more, see [Microsoft 365 Copilot app features that admins can control](#).

Related articles

- [Microsoft 365 Copilot overview](#)
- [Microsoft 365 Copilot app features that admins can control](#)
- [End users can get started with the Microsoft 365 Copilot app ↗](#)

 **Note:** The author created this article with assistance from AI. [Learn more](#)

Microsoft 365 Copilot app features that admins can control

07/15/2025 Applies to:  Microsoft 365 Copilot

The [Microsoft 365 Copilot app](#) is an everyday AI productivity app for work or school.

The app includes some settings and features that IT admins can configure, including pinning Microsoft 365 Copilot Chat, allowing or blocking agents, and more.

This article:

- Lists and describes the different settings that affect the Microsoft 365 Copilot app.
- Provides article links that have more information about configuring the feature.

This article applies to:

- Microsoft 365 Copilot

Prerequisites

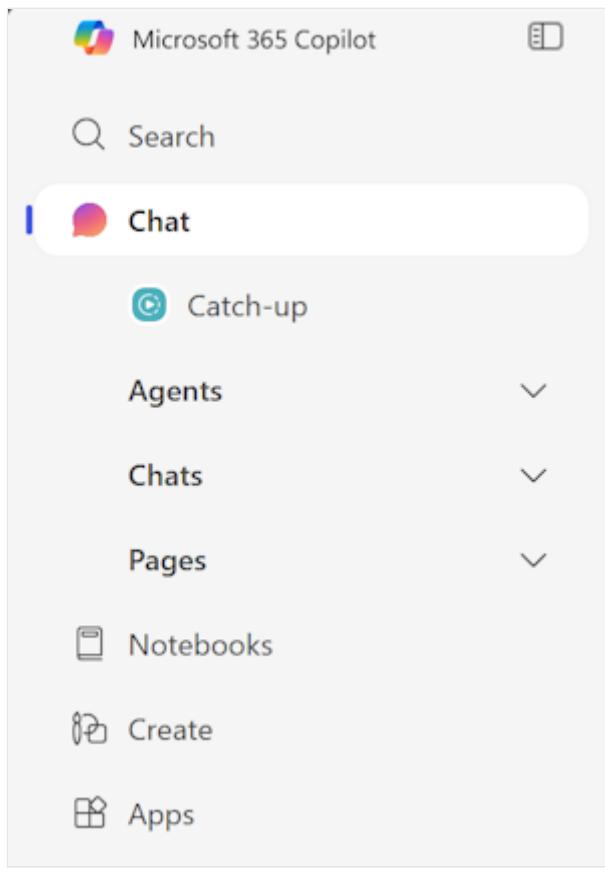
To use the features in this article, you need the following role-based access control (RBAC) roles:

- **Global Administrator** - This role can configure the Microsoft 365 admin center features.
- **Office Apps admin** - This role can create the Cloud policies for the Microsoft 365 Copilot app.

To learn more, see [Admin roles in the Microsoft 365 admin center](#).

Settings that configure the app experience

When users open the Microsoft 365 Copilot app, there's a navigation bar. You can show or hide some features on the navigation bar, depending on your license.



The following table lists the Copilot app settings that you can configure.

[Expand table](#)

Setting	Description	Related content
Search	<p><input checked="" type="checkbox"/> Turned on by default</p> <p>In the Microsoft 365 admin center > Settings > Search & intelligence, you can turn on Microsoft Search in the Copilot app. By default, Microsoft Search is allowed and turned on.</p> <p>You can also enable Item insights and show recommended files. Users can turn off Item insights, but we recommend that it stays on.</p>	<ul style="list-style-type: none">- Set up Microsoft Search- Item insights in Microsoft 365
Chat	<p><input checked="" type="checkbox"/> Pinned by default, depending on license.</p> <p>Depending on your license, Microsoft 365 Copilot Chat might be automatically pinned in the Copilot app. If not, you can pin Chat to the Copilot app.</p>	<p>Pin Microsoft 365 Copilot Chat to the navigation bar.</p> <p>There are Chat features you can configure that affect the Chat experience in the Copilot app, like allowing web searches. To learn more, see Manage Microsoft 365 Copilot Chat.</p>

Setting	Description	Related content
Agents	<p><input checked="" type="checkbox"/> Built-in agents turned on by default</p> <p>In the Microsoft 365 admin center > Settings > Integrated Apps, admins can deploy or block agents from showing in the Copilot app. End users can also add agents to their Copilot app experience.</p>	Manage agents for Microsoft 365 Copilot
Pages	<p><input checked="" type="checkbox"/> Allowed by default</p> <p>Use Cloud Policy to allow users to create and view Copilot Pages in the Copilot app.</p>	Admin policies for Copilot Pages and Copilot Notebooks
Notebooks	<p><input checked="" type="checkbox"/> Allowed by default</p> <p>Use Cloud Policy to allow users to create and view Copilot Notebooks in the Copilot app.</p>	Admin policies for Copilot Pages and Copilot Notebooks
Create	<p><input checked="" type="checkbox"/> Built-in.</p> <p>The built-in features aren't configurable.</p> <p>You can use Cloud Policy to set up and publish organization brand kits that are shown when users select Create.</p>	Create enterprise brand manager policy and allow organizational asset library (OAL) access
Copilot Key and Windows + C shortcut	<p><input checked="" type="checkbox"/> Configured by default</p> <p>Admins can map the Copilot key to the Microsoft 365 Copilot app. End users can also manually configure.</p>	Policy CSPs to manage the Copilot key You can also use the Microsoft Intune settings catalog (Windows AI category) to configure the hardware key on the keyboard.

Related content

- [What is the Microsoft 365 Copilot app?](#)
- [Updated Windows and Microsoft 365 Copilot Chat experience](#)

ⓘ Note: The author created this article with assistance from AI. [Learn more](#)

Enterprise brand manager policy and organizational asset library (OAL) access

Article • 05/30/2025

Your organization can enable their brand managers to set up and publish organization or official brand kits via create.microsoft.com. These brand kits can contain multiple logos, color palettes, fonts, images, and templates pertaining to a certain brand.

Once published, the brand kit is available to all users in the organization on create.microsoft.com. They can use these brand kits to generate branded artifacts or manually add brand content to existing designs and images.

To enable this functionality, admins must configure the Enterprise Brand Manager policy, which involves:

- Defining a security group that includes the brand managers.
- Assigning responsibility to these brand managers for creating, managing, and publishing the official or organizational brand kits.

Beyond brand kits, Copilot also supports access to an organization's designated [organizational asset library \(OAL\)](#). OALs provide broad, centralized access to brand content and support images, logos and illustrations. OALs need to be configured as searchable by an admin.

Setting up Enterprise Brand Manager policy

Prerequisite Create a security group with identified brand managers who have access and permission to create, publish, and manage brand kits available to all users within the organization.

Policy setup Follow these steps to create and enable the Enterprise Brand Manager policy for your organization:

1. Navigate to Config.office.com and sign in using an Administrator account.
2. Under Customization, select **Policy Management**.
3. Select your existing tenant level policy with scope set to **Apply to all users** or create a new tenant policy with scope set to **Apply to all users**.
4. Go to the **Policies** tab.
5. Use the search box to search for **Brand Manager**. Select the **Elevated role for Brand Managers** policy.

The screenshot shows the Microsoft Intune Policy Management interface. On the left, there's a navigation sidebar with icons for Home, Cloud Update, Customization, Device Configuration, Policy Management (which is selected and highlighted in blue), Health, Inventory, Learn More, and Setup. Below the navigation is a tree view with nodes: Basics, Scope, Policies (selected and highlighted in blue), and Review and publish. The main content area is titled "Configure Settings" and has a sub-header "Select policy settings for this configuration". At the top right of this area are "Notifications" and a message icon. Below the title are four status indicators: Total 1, Security Baseline 0, Accessibility Baseline 0, and Configured 1. A search bar with a magnifying glass icon is located at the top right. The main table displays one policy named "Elevated role for enterprise brand managers" across four columns: Policy, Platform (+3), Application, and Status (✓ Conf). A large circular button with a magnifying glass icon is positioned at the bottom right.

6. Set the policy to **Enabled**. By default, it's set as **Not configured**.
7. In the Security group email address field, provide the email address for the brand managers security group for your tenant.

Elevated role for enterprise brand managers

Platforms

Windows, Mac, iOS, Android, Office on the web

Applications

Office

This policy controls whether your organization will use the elevated security group for Brand Managers. Members of the Brand Man...

[Show more](#)

Configuration setting

Enabled

**Additional setting**

Security group email address:

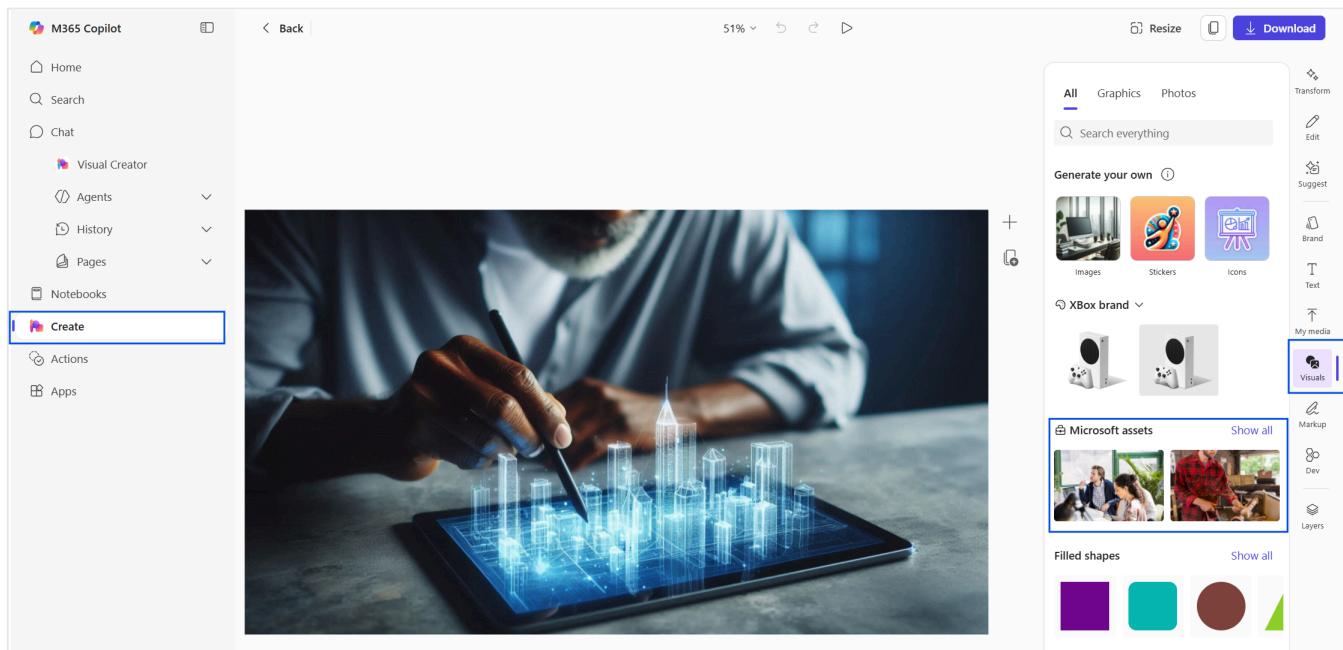
brandmanagers@contoso.onmicrosoft.com



8. Select **Apply**.

Setting up an OAL to be accessible in the *Create* experience of the Microsoft 365 Copilot app

Connecting an OAL to Copilot enables brand content access in the **Create** experience of the Microsoft 365 Copilot app, while also enabling Copilot Chat access in PowerPoint and Word.



To learn more, see [Connect organizational asset libraries to Copilot for an on-brand experience](#).

What happens after setup

Once the OAL is provisioned and configured as searchable by an admin, the following capabilities become available to your organization:

- **Organization-wide access to brand content** All users in your tenant can browse and use the brand assets stored in the designated OAL. These assets include logos, illustrations, and other approved visuals that support your brand identity.
- **Seamless integration in the *Create* experience** Within the Microsoft 365 Copilot app, users can access these assets directly from the **Create** tab. The integration makes it easy to incorporate brand visuals into new content without needing to search external sources or local folders.
- **Visuals pane support for editing images** When editing an image in the Create experience, users can open the **Visuals** pane to explore available assets. The visuals appear under a label that reflects your tenant name, making it clear that the content is organization-approved.

Pin Microsoft 365 Copilot app to the Windows taskbar

08/05/2025

As an admin, you can pin the Microsoft 365 Copilot app to the Windows taskbar of managed devices. This behavior gives users quick access to the Microsoft 365 Copilot app, which includes Copilot Chat, Search, Agents, and more, if these capabilities are already available to them. If your organization uses Microsoft Intune, use the Microsoft 365 admin center to automatically pin the app on all Windows 10 and Windows 11 Intune-managed devices with the Copilot app installed. This single toggle simplifies the pinning process instead of manually creating and deploying a Start layout policy. The setting is off by default.

Note

The information in this article is specific to the Microsoft 365 Copilot app and the Windows taskbar. You can also [pin the Copilot Chat experience to the navigation bar](#) in Microsoft 365 apps. The **Microsoft 365 Copilot app** is a standalone application that provides access to Chat, Search, Agents (if enabled), Notebooks, and Create. **Copilot Chat** is an integrated chat experience available within Microsoft 365 apps. To understand the difference between the Copilot app and Copilot Chat, see [Decide which Copilot is right for you](#).

Prerequisites

- To configure Copilot taskbar pinning in the Microsoft 365 admin center, you need to be assigned the **Intune Administrator** role.
- To configure this setting in the Microsoft 365 admin center, your tenant must have at least one active Intune license.

Tip

If you don't have an Intune license, you can pin the app by directly using the StartLayout configuration. For more information, see [Configure the Windows Taskbar Pinned Apps with Policy Settings](#).

- Install the Microsoft 365 Copilot app before you configure this policy. For more information, see the [Microsoft 365 Copilot adoption guide and overview for IT admins](#)

and [Add Microsoft Store apps to Microsoft Intune](#). If the app isn't installed, this setting has no effect.

- To allow users to keep their preference to unpin the app, their device must be running one of the following versions of Windows 11 or later:
 - Windows 11, version 24H2 with [KB5058499](#)
 - Windows 11, version 23H2 with [KB5058502](#)

For more information, see [Windows 11 - release information](#).

! Note

These updates aren't required to use the setting to pin the app.

Configure settings

The screenshot shows the Microsoft 365 admin center interface. On the left, there's a navigation sidebar with various categories like Home, Copilot, Overview, Discover, Agents & Connectors, and Settings. Under Settings, there are sections for Users, Devices, Teams & groups, Roles, Resources, Billing, Support, Settings, Setup, Reports, and Health. The main content area is titled 'Settings' and describes managing Copilot settings. It includes tabs for User access, Data access, and Copilot actions. A specific setting is highlighted: 'Pin Microsoft 365 Copilot app to the Windows Taskbar'. This setting is described as providing users with a new AI first way of working to boost productivity and streamline workflows. It notes that this setting applies to Intune-managed Windows 10 and 11 devices. There are two options: 'Pin the Microsoft 365 Copilot app to the Windows taskbar (recommended)' and 'Do not pin the Microsoft 365 Copilot app to the Windows taskbar'. The 'recommended' option is selected. At the bottom right of the settings pane, there's a 'Save' button and a magnifying glass icon for search.

To configure this setting:

1. Sign in to the [Microsoft 365 admin center](#).
2. Go to **Copilot** > **Settings** > **User access**.
3. Select the setting to **Pin Microsoft 365 Copilot app to the Windows taskbar**.
4. Choose one of the following options and then select **Save**:
 - **Pin the Microsoft 365 Copilot app to the Windows taskbar for all eligible devices (recommended)**

Select this option to automatically pin the Microsoft 365 Copilot app to the Windows taskbar. When you enable this setting, this Copilot app appears to the right of other apps that are already pinned on the taskbar. The user isn't notified when this action is applied on the device.



If the user previously pinned the app to their taskbar, this policy doesn't change their configuration.

The user can manually unpin the app from the taskbar. Their preference is respected during future policy refreshes on the following versions of Windows 11 or later:

- Windows 11, version 24H2 with [KB5058499](#)
- Windows 11, version 23H2 with [KB5058502](#)
- **Do not pin Copilot app to the Windows taskbar**

This option is the default setting. When you select this option, managed policy doesn't affect the user's taskbar. In other words, the Microsoft 365 Copilot app isn't pinned to the Windows taskbar unless you take action. Users can still pin the app themselves.

You can change these settings at any time. Changes take up to 48 hours to apply on devices and might require a restart.

Troubleshoot

Use the following information to help troubleshoot use of this setting.

The setting isn't available

This behavior assigns a Start layout policy to Intune-managed devices. Intune is a prerequisite to manage this setting. If the setting isn't available, you likely don't have any Intune licenses assigned. For more information, see [Microsoft Intune licensing](#).

The options to configure the setting are greyed out

There are several instances where you can't change the configuration of the setting in the Microsoft 365 admin center:

- Manage this policy in Intune. You used the Intune admin center to configure a policy for Start layout, so you can't now manage it in the Microsoft 365 admin center. To configure this policy, go to the [Intune admin center](#). For more information on how to add or edit the Microsoft 365 Copilot app to your existing policy, see [Deploy the toolbar configuration](#).
- The policy's filter was removed and you can't make changes.
- Your organization has a large number of device policies. The Microsoft 365 admin center isn't able to determine your current Start layout configuration.

More resources

- [Pin Microsoft 365 Copilot Chat to the navigation bar](#)
- [Configure the Windows Taskbar Pinned Apps with Policy Settings](#)
- [Create a policy using settings catalog in Microsoft Intune](#)

Pin Microsoft 365 Copilot Chat to the navigation bar

07/10/2025

ⓘ Note

Starting in July 2025 and rolling out over time, Microsoft 365 Copilot Chat will be available in other Microsoft 365 apps like Word, Excel, PowerPoint, and more. The Pin Microsoft 365 Copilot Chat setting will also expand to govern Copilot Chat across all Microsoft 365 apps where available.

As an admin, you can pin Microsoft 365 Copilot Chat to the navigation bar of Teams, Outlook, and the Microsoft 365 Copilot app across the web, desktop, and mobile. Pinning makes it easy for users to access Copilot Chat as the secure and compliant generative AI chat solution that's available to them on their work identity (signed in with a Microsoft Entra account).

ⓘ Note

This information is specific to the Copilot Chat experience in the navigation bar of Microsoft 365 apps. You can also pin the Copilot app to the Windows taskbar. For more information, see [Pin Microsoft 365 Copilot to the Windows taskbar](#). To understand the difference between Copilot Chat and the Copilot app, see [Decide which Copilot is right for you](#).

Before you begin

The screenshot shows the Microsoft 365 Admin Center interface. On the left, there's a navigation sidebar with various options like Home, Copilot, Users, Teams & groups, Roles, Resources, Billing, Support, Settings, Setup, Reports, Health, Customize navigation, and Show all. The main content area is titled "Copilot Control System". At the top, there are links for "About Copilot Control System" and "What's new in Copilot". Below that, there are two tabs: "Discover" and "Settings", with "Settings" being the active one. The main content area displays a list of pinned items, each with a small icon, a name, and a brief description. The items listed are: Copilot image generation (Manage whether), Copilot in Bing, Edge, and Windows (Manage how you), Copilot in Edge (Copilot in Edge), Copilot in Power Platform and Dynamics 365 (Manage more set), Copilot in Teams meetings (Go to the Microsoft 365 Copilot), Copilot in Viva Engage (Manage Copilot in Viva Engage), Copilot in Viva Goals (Manage Copilot in Viva Goals), Copilot pay-as-you-go billing (Set up pay-as-you-go billing), Extensions (Choose who can use), Microsoft 365 Copilot self-service purchases (Control product purchases), Pin Microsoft 365 Copilot Chat (Choose whether users can pin experiences), and Web search for Microsoft 365 Copilot and Microsoft 365 Copilot Chat (Provide Copilot web search results). At the bottom right of the list area is a blue "Save" button.

The following role can access the pinning setting in the Microsoft 365 admin center:

- AI Administrator

To get to this setting, go to the [Copilot settings page](#), or:

1. Sign in to the [Microsoft 365 admin center](#).
2. Go to **Copilot > Settings**.
3. Select **Pin Microsoft 365 Copilot Chat**.

Note

Only users who are authenticated with a Microsoft Entra account will have Copilot Chat pinned to their navigation bar.

Pinning options

Copilot Chat is pinned by default to the navigation bar of Teams, Outlook, and the Microsoft 365 Copilot app for most users eligible for Copilot Chat across web, mobile, and desktop.

Admins can change the pinning settings for Copilot Chat by selecting one of the following options under Settings on the Copilot Control System page in the [Microsoft 365 admin center](#).

- **Pin Copilot to the navigation bar (recommended)**: Copilot Chat is automatically pinned for all users. Users aren't prompted.

Pin Microsoft 365 Copilot Chat

Copilot Chat is the secure and compliant generative AI chat experience that's already available to everyone in your organization. Pin Copilot Chat to the navigation bar and Windows taskbar to make it easier for people to find and use it.

[Learn how users can be more productive with the Copilot Chat and agent starter kit](#)

On the navigation bar

Pin Copilot Chat for your users in Teams, Outlook and the Microsoft 365 Copilot app on web, desktop, and mobile. Users with a license for Microsoft 365 Copilot will have it pinned by default. [Learn more about how this setting works](#)

- Pin Copilot Chat to the navigation bar (recommended)
- Do not pin Copilot Chat to the navigation bar (i)

- **Do not pin Copilot Chat to the navigation bar:** Copilot Chat is not automatically pinned to the navigation bar. Copilot Chat also no longer appears in the app launcher. In addition, users are blocked from acquiring or installing the Microsoft 365 Copilot app from the MetaOS store (this restriction doesn't apply to Teams or Outlook).

If you previously selected **Do not pin Copilot to the navigation bar** in the Microsoft 365 admin center and unchecked **Allow users to be asked whether they want to pin it**, your setting configuration is now **Do not pin** and users still don't have Copilot Chat pinned to their navigation bar. Also, if you switch the setting to **Do not pin**, Copilot honors that choice.

If a user sees Copilot Chat pinned to their navigation bar and chooses to unpin it, Copilot Chat respects that choice in future sessions and unpins Copilot Chat from the navigation bar.

On the navigation bar

Pin Copilot to the navigation bar to make it easier for people in your organization to access it in Teams, Outlook and the Microsoft 365 app on web, desktop, and mobile. Users with a license for Microsoft 365 Copilot will have it pinned by default.

Microsoft Copilot used with Entra ID is governed by your agreement for Online Services.

- Pin Copilot to the navigation bar (recommended)
- Do not pin Copilot to the navigation bar i
- Allow users to be asked whether they want to pin it

You can make changes to Copilot Chat pinning settings at any time. Changes take up to 48 hours to go into effect.

Pin at a group or user level

For large enterprises with complex needs, you can set up the Pinning policy to apply to specific groups of users. This option isn't recommended for most customers due to management complexity.

1. Sign in to the [Microsoft 365 Apps admin center](#).
2. In the **Office policies** card, select [Go to Microsoft 365 Cloud Policy](#).
3. Select **Create**.
4. Customize the basics and scope of the policy.
5. In policies, look for "Pin Microsoft Copilot to the navigation bar."
6. The flyout panel displays the configuration options. Select an option and apply.
7. Review final changes.
8. Publish.

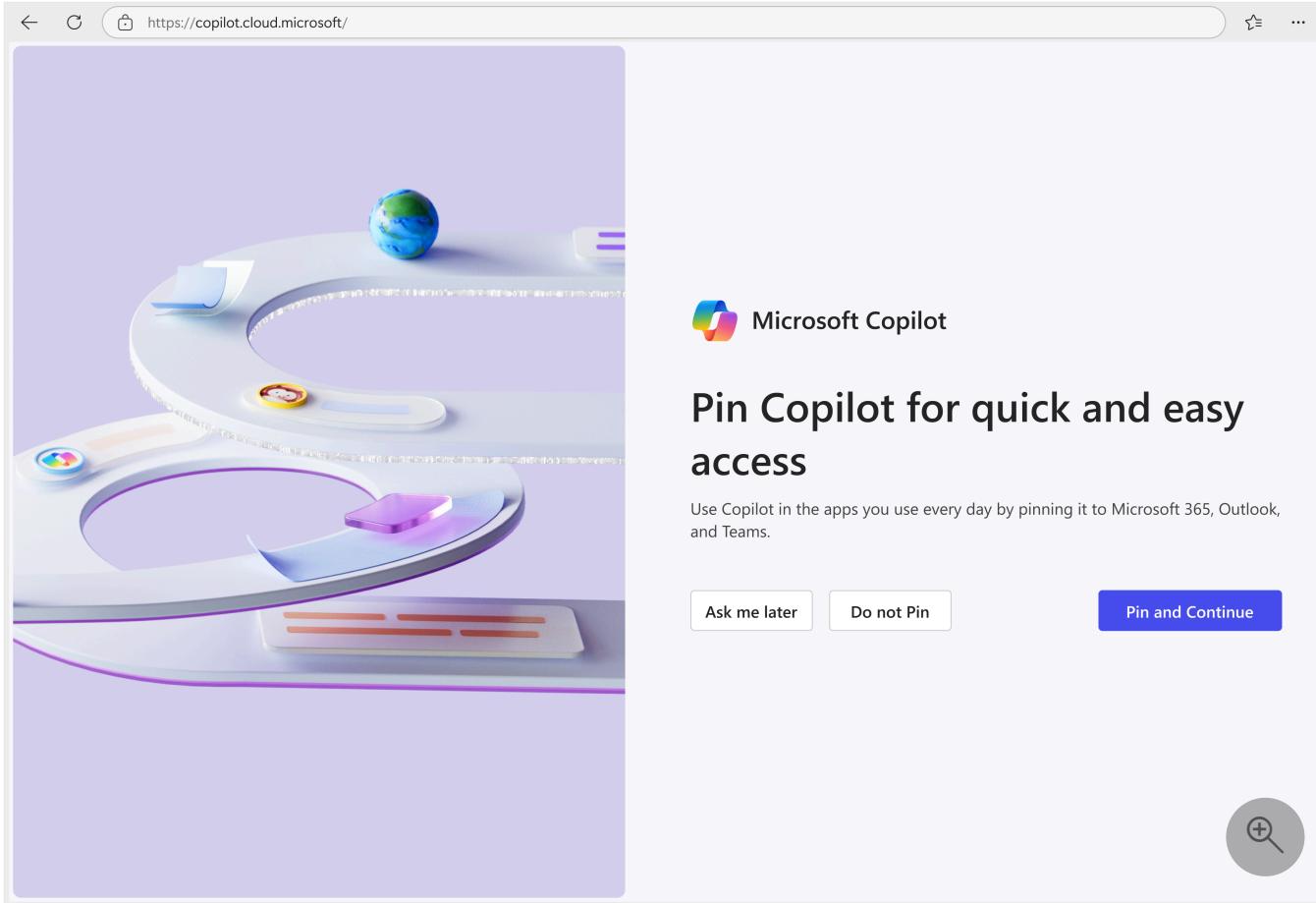
User experience

Users can personalize their navigation bar by choosing to pin or unpin Copilot Chat. Users can also adjust the pinning settings within their application preferences, and these choices are specific to Teams, Outlook, the Microsoft 365 Copilot web app ([microsoft365.com](#) and [m365.cloud.microsoft](#)), Microsoft 365 Copilot desktop app, and Microsoft 365 Copilot mobile app.

A message asking to pin Microsoft 365 Copilot Chat can appear if a user:

- Navigates to <https://microsoft.com/copilot>, <https://microsoft365.com>, or <https://m365.cloud.microsoft/>, and selects **Settings > Pin Copilot**.
- Opens Outlook, Teams, or the Microsoft 365 app on web or desktop.

In the selected pinning scenarios described previously, users see a prompt for pinning Copilot Chat to the navigation bar in the Microsoft 365 Copilot app on web and mobile:



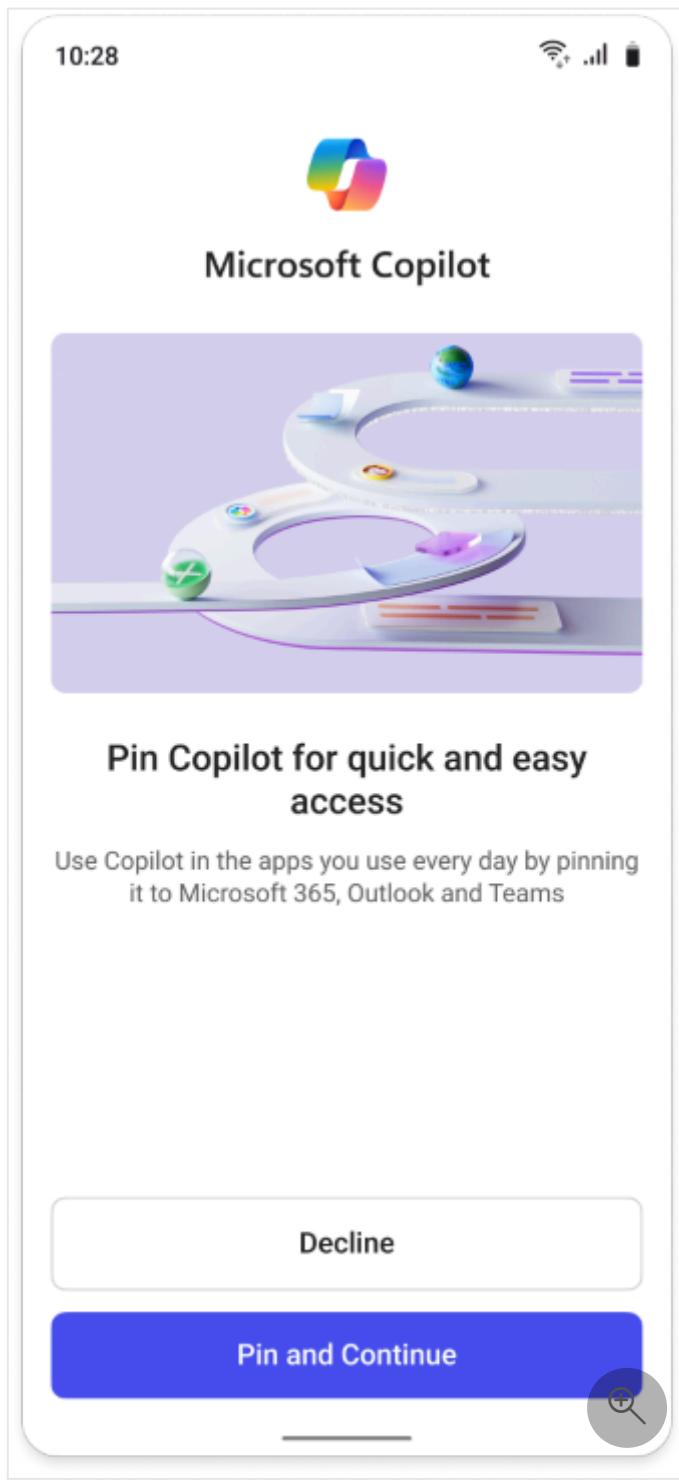
The Copilot Chat pinning notification provides users with three options:

- **Ask me later**
- **Do not Pin**
- **Pin and Continue**

If a user selects **Ask me later**, the same message is shown to the user up to three more times, with the pinning dialog shown for a maximum of once per user session. On the final message, the **Don't show again** button replaces the **Ask me later** button. If the user selects **Don't show again**, there are no more notifications to pin Copilot Chat.

If a user selects **Do not Pin**, there are no more notifications to pin Copilot Chat.

If a user opens the Microsoft 365 Copilot mobile app, they see two options: **Pin and Continue** and **Decline**:



Users with a Microsoft 365 Copilot license don't see any pinning messages. Instead, they see a welcome screen when they use Copilot for the first time.

Pin Copilot Chat in Microsoft Teams through the Teams admin center

You can change the pinning settings of Copilot Chat for your users in Microsoft Teams only through the Teams admin center. In the Teams admin center, create or modify [App setup policies](#) by adding the Copilot app to the policy's Pinned apps. When you assign the policy to users with a Microsoft Entra account, the Copilot app is pinned for them. Like pinning any

other app in Teams, Copilot Chat also needs to be allowed for those users through [App permission policies](#) or [App centric manage](#) if you migrated to it.

If you select **Pin Copilot** on the **Copilot > Settings** page in the Microsoft 365 admin center, and you have Copilot-pinned App setup policies assigned to users with a Microsoft Entra account, those users have Copilot Chat pinned in the position defined by the App setup policy. Everyone else is pinned in a default position.

If you select **Do not pin Copilot** on the **Copilot > Settings** page in the Microsoft 365 admin center, and you have Copilot-pinned App setup policies assigned to users with a Microsoft Entra account, only those users have Copilot Chat pinned.

More resources

- [Pin Microsoft 365 Copilot to the Windows taskbar](#)
- [Data, Privacy, and Security for Microsoft 365 Copilot](#)
- [Microsoft 365 Copilot technical documentation hub](#)
- [Copilot Prompt Gallery](#)

Copilot in Microsoft 365 admin centers

08/04/2025

Copilot in Microsoft 365 admin centers harnesses the value of generative AI to boost IT admins' productivity by simplifying administration of Microsoft 365 and Microsoft 365 Copilot, and empowering you to focus on more strategic priorities. Copilot in Microsoft 365 admin centers helps admins perform tasks across different Microsoft 365 services using natural language interactions, contextual guidance, and proactive suggestions. Copilot in Microsoft 365 admin centers also leverages the power of Copilot to provide transferable skills across different admin centers and surfaces, breaking the barriers of switching between multiple admin tools and interfaces.

Microsoft 365 Copilot in the Microsoft 365 admin center

Watch the following video to see the different Microsoft 365 Copilot settings and configuration options in the Microsoft 365 admin center.

[https://learn-video.azurefd.net/vod/player?id=28be8725-2d69-4d93-a07d-8324c5083c46&locale=en-us&embedUrl=%2Fcopilot%2Fmicrosoft-365%2Fcopilot-for-microsoft-365-admin ↗](https://learn-video.azurefd.net/vod/player?id=28be8725-2d69-4d93-a07d-8324c5083c46&locale=en-us&embedUrl=%2Fcopilot%2Fmicrosoft-365%2Fcopilot-for-microsoft-365-admin)

Before you begin

You must have a Microsoft 365 Copilot license enabled for your tenant. To learn more about Copilot licensing, see [Set up Microsoft 365 Copilot](#).

Get started

To use Copilot in Microsoft 365 admin centers, follow these steps:

1. Sign in to the Microsoft 365 admin center, or one of the specialized admin centers like Teams, SharePoint, or Exchange.
2. Select the Copilot button in the upper right shell to launch Copilot in Microsoft 365 admin centers.

How can I use Copilot in Microsoft 365 admin centers?

You can use Copilot to help manage your organization and focus on what's important.

The following table describes what you can do with Microsoft:

[Expand table](#)

Functionality	Description	Example prompts
Search users and groups	Search your users and groups based on natural language queries. Copilot returns a list where you can view the results in active users or group lists, and export them to a CSV file for further analysis.	"Show me users in Australia with Teams license assigned" "Identify all groups in my organization without an owner" "Identify all users who are unlicensed"
Mailbox search	Find insights about your users' mailboxes through natural language queries.	"Find all the mailboxes which are hidden from address lists" "Show me all mailboxes put on litigation hold date before 13th August 2017"
Navigate admin center	Navigate to different pages, features, and experiences within the admin center. Copilot provides a breadcrumb trail and direct link to your desired page, and you can use a wayfinding query to be brought directly to that page with the Copilot chat pane still open.	"Where do I manage role assignments?" "Where can I see my meeting policies?"
Get support	Get support for any challenges or questions that you have related to administering Microsoft 365 for your tenant. Copilot can also give you an alert for a service incident ongoing for your organization if your question is relevant to that incident, along with a self-help insight. For certain issues, Copilot can give you diagnostic solutions that will leverage the information and details you provide to help diagnose and solve your problems.	"How do I view my bill?" "How do I set up Multi-factor Authentication?" "How do I restore a deleted user?"
Discover products	Discover products to help take advantage of value from Microsoft 365. Copilot can help you find the right product to suit your needs. When applicable, you can initiate trials and purchases directly from the Copilot response.	"What is included in Business Premium?" "What is the price of Viva Goals?" "How do I get email?"
Identity management	Use Copilot to guide you in managing various aspects of identity and security within your organization's ecosystem.	"How many hybrid users am I syncing?" "Which authentication

Functionality	Description	Example prompts
		<p><i>"methods do I have on?"</i></p> <p><i>"Perform a guest access review"</i></p>
Device management	Copilot can help you locate resources to provision mobile app protections policies. Get deployment guidance for setting up and managing various aspects of identity and security within the tenant.	<p><i>"What is the status of my security defaults?"</i></p> <p><i>"What is the identity user status in my org?"</i></p>
Service health	Surface general status of Microsoft services, tenant health status, health advice, and recommendations.	<p><i>"Are there any service issues right now?"</i></p> <p><i>"Show me health of teams"</i></p>
Copilot guidance	Get Microsoft 365 Copilot guidance to help you with your Copilot onboarding and deployment journey with the help of guidance and insights.	<p><i>"How do I give access to Copilot?"</i></p> <p><i>"See Copilot requirements for my organization"</i></p> <p><i>"How many Copilot licenses have I assigned?"</i></p> <p><i>"Review Copilot user readiness"</i></p>
Onboard users	Onboard users to your organization with one prompt. Copilot can help with adding a new user by leveraging the information you provide in a prompt in combination with the data it has about the tenant (like domains and licenses). Copilot can seamlessly recommend a configuration for this new user, which saves time.	<p><i>"Onboard John Smith as a new user to my organization"</i></p>
Admin recap	See Admin recap to get a personalized and concise summary of key insights and trends across admin areas, such as Service Health, Message Center, Experience Insights, and more to save valuable time. Admin recap is personalized based on your role and usage patterns. You can copy the text for easier sharing and also personalize what shows in the recap.	<p><i>"Recap the latest admin info for me"</i></p>

Try using the prepopulated prompt options in the Copilot pane for the best results. You can also explore the [Copilot Prompt Gallery](#), which provides a library of prompts specifically designed for Copilot in Microsoft 365 admin centers. With Copilot Prompt Gallery, you can experiment with Copilot's capabilities, easily filter prompts by categories, and even save your favorite prompts for later use.

To maintain your security and privacy, Copilot doesn't make any configuration changes on your behalf. To learn more about security and privacy with Copilot, see [Data, Privacy, and Security for Microsoft 365 Copilot](#).

Frequently asked questions

How can IT admins enable the feature?

Copilot is automatically enabled for select customers who have purchased Microsoft 365 Copilot.

How can IT admins disable the feature?

If you would like to exclude certain admins from this functionality, you can do so via a security group. Start by creating a security group with the following name: "CopilotForM365AdminExclude", no description or additional settings are required. The Copilot in Microsoft 365 admin centers experience will then be disabled for any admins added to this group.

Which admin roles can use Copilot in Microsoft 365 admin centers?

It will be available to all admins, and respect role-based access controls (RBAC) within the admin center, only surfacing information and controls that the particular admin has access to. Copilot doesn't make any configuration changes on behalf of an admin, keeping security integrity intact.

Does Copilot in Microsoft 365 admin centers support audit logging?

Copilot in Microsoft 365 admin centers is aligned with our commitment to providing enterprise-grade compliance capabilities for all Copilot products. These capabilities include auditing, eDiscovery & legal hold, data retention controls, and more.

How much does Copilot in Microsoft 365 admin centers cost?

Microsoft 365 Copilot is rolling out to the Microsoft 365 admin center now. Organizations that have purchased and assigned any number of Microsoft 365 Copilot licenses for their tenant can

take advantage of these new Microsoft 365 Copilot-powered administration capabilities to streamline and enhance the Microsoft 365 management experience.

Multiple account access to Copilot for work and school documents

07/09/2025

(!) Note

- Multiple account access to Copilot is available for some apps on specific types of devices. For more information, see [Apps where multiple account access to Copilot is available](#).
- For information about turning off multiple account access by using a policy setting, see [Manage multiple account access to Copilot using Cloud Policy](#).

What is multiple account access to Copilot?

In Microsoft 365 apps that support signing in with multiple accounts (desktop versions and mobile versions, if available, of Word, Excel, PowerPoint, Outlook, and OneNote), users can use their Copilot access from one account on documents from a different account.

This means that when multiple account access to Copilot is enabled, your users can use Copilot on work documents without a Copilot license assigned from your organization.

When multiple account access to Copilot is disabled, if the user only has access to Copilot through an account outside of your organization, such as from a personal Microsoft 365 subscription, they can't use Copilot on work or school documents.

(!) Note

Multiple account access to Copilot is always disabled for the following customers: Microsoft 365 GCC (Government Community Cloud), Microsoft 365 GCC High, Microsoft 365 DoD, and Microsoft 365 operated by 21Vianet.

Data protection

Copilot data protection is always based on the identity used to access the file. This ensures enterprise data protection for files in your organization, regardless of which account grants Copilot access.

The setting for [web grounding in Copilot](#) is also based on the identity used to access the file. If you disable web grounding in Copilot for a user in your organization, that user isn't able to use web grounding even when using Copilot access from another account.

Users using multiple account access to Copilot on work and school documents also have limited access to Copilot as shown in the following table.

[+] Expand table

Copilot capability	When multiple account access to Copilot is enabled	When the user has been assigned an internal Microsoft 365 Copilot license
Access the organization's Microsoft Graph	No	Yes
Ask Copilot questions about the current open document and make Copilot assisted edits	Yes	Yes
Ask Copilot questions about other documents that aren't the currently opened document	No	Yes
Ask Copilot questions that can be answered through web searches (if web search is enabled)	Yes	Yes
Generate drafts by referencing specific documents the active user has access to	Yes	Yes

Manage multiple account access to Copilot using Cloud Policy

You can use the "Multiple account access to Copilot for work documents" policy setting to control whether your users can use multiple account access to Copilot on work and school documents. This policy only applies to Microsoft 365 apps that allow signing in with multiple accounts (Word, Excel, PowerPoint, Outlook, and OneNote desktop and mobile apps).

To configure this policy setting, you need to use [Cloud Policy service for Microsoft 365](#).

! Note

- The policy setting is available in Cloud Policy as of January 30, 2025.

- Microsoft 365 GCC customers can see the policy setting in Cloud Policy, but the policy has no effect on them because multiple account access to Copilot is always disabled for Microsoft 365 GCC customers.

If you enable or don't configure this policy setting, your users can use Copilot on work and school documents with a Copilot license that is from outside your organization.

If you disable this policy setting, your users can't use Copilot on work and school documents with a Copilot license that is from outside your organization.

The end-user experience for blocked users viewing work and school documents is as follows:

- All on-canvas Copilot UX is removed, both on-canvas Copilot entry points and proactive features, such as Word summary.
- If the user is signed in with an account with Copilot, the Copilot button in the ribbon remains active. However, your users can't use any Copilot capabilities; clicking the button displays an error message indicating that multiple account access to Copilot is blocked.

Apps where multiple account access to Copilot is available

Multiple account access is available in the following apps, starting with the version listed.

On Android devices

- Outlook: Version 4.2511.0
- PowerPoint: Version 16.0.18623.20090
- Word: Version 16.0.18920.20000

On iOS devices

- OneNote: Version 16.96 (25040710)
- Outlook: Version 4.2511.0
- PowerPoint: Version 2.95.25030623
- Word: Version 2.95.305.0

On iPad devices

- Excel: Version 2.95.224.0

- PowerPoint: Version 2.95.224.0

On Mac devices

- Excel: Version 16.95
- OneNote: Version 16.96
- Outlook: Version 16.95.303.0
- PowerPoint: Version 16.95
- Word: Version 16.95.3

On Windows devices

- Excel: Version 2503
- OneNote: Version 2504
- Outlook (new): Version 20250320055
- PowerPoint: Version 2503
- Word: Version 2503

Manage scheduled prompts for Microsoft 365 Copilot

06/02/2025

Scheduled prompts in Microsoft 365 Copilot allow users to automate Copilot prompts to run at set times and frequencies in Microsoft Teams, Office.com/chat, and Microsoft Outlook for the web and desktop. As an admin, you can manage this feature for your organization.

Before you begin

You must have both of the following licenses to manage scheduled prompts:

- Microsoft 365 Copilot license (in the Copilot subscription)

Before you start using the scheduled prompts feature, ensure that optional connected experiences are enabled for your users. Optional connected experiences are enabled by default, but one way you can check is by reviewing the "Allow the use of additional optional connected experiences in Office" policy setting in [Cloud Policy service for Microsoft 365](#).

Admin controls

If you prefer to not have this feature available to your organization, you can use [Cloud Policy](#) to set the "Allow the use of additional optional connected experiences in Office" policy setting to Disabled. For more information, see [Admin controls for optional connected experiences](#).

If you disable optional connected experiences, this action prevents anyone in your organization from seeing scheduled prompts in Copilot. Be aware that disabling optional connected experiences turns off other features in Microsoft 365 apps (such as Word, Excel, and PowerPoint) that your users might be using. For a list of those features, see [Overview of optional connected experiences in Office](#).

Note

Your users can individually turn off optional connected experiences by changing their account privacy settings, even if you have enabled optional connected experiences for your users. For more information, see [Your privacy settings](#).

Scheduled prompts are supported by the Microsoft 365 environment in Power Platform. This environment is automatically created when a user creates a scheduled prompt for the first time.

To learn more, see [Microsoft 365 environment for Scheduled Prompts](#)

Disabling scheduled prompts

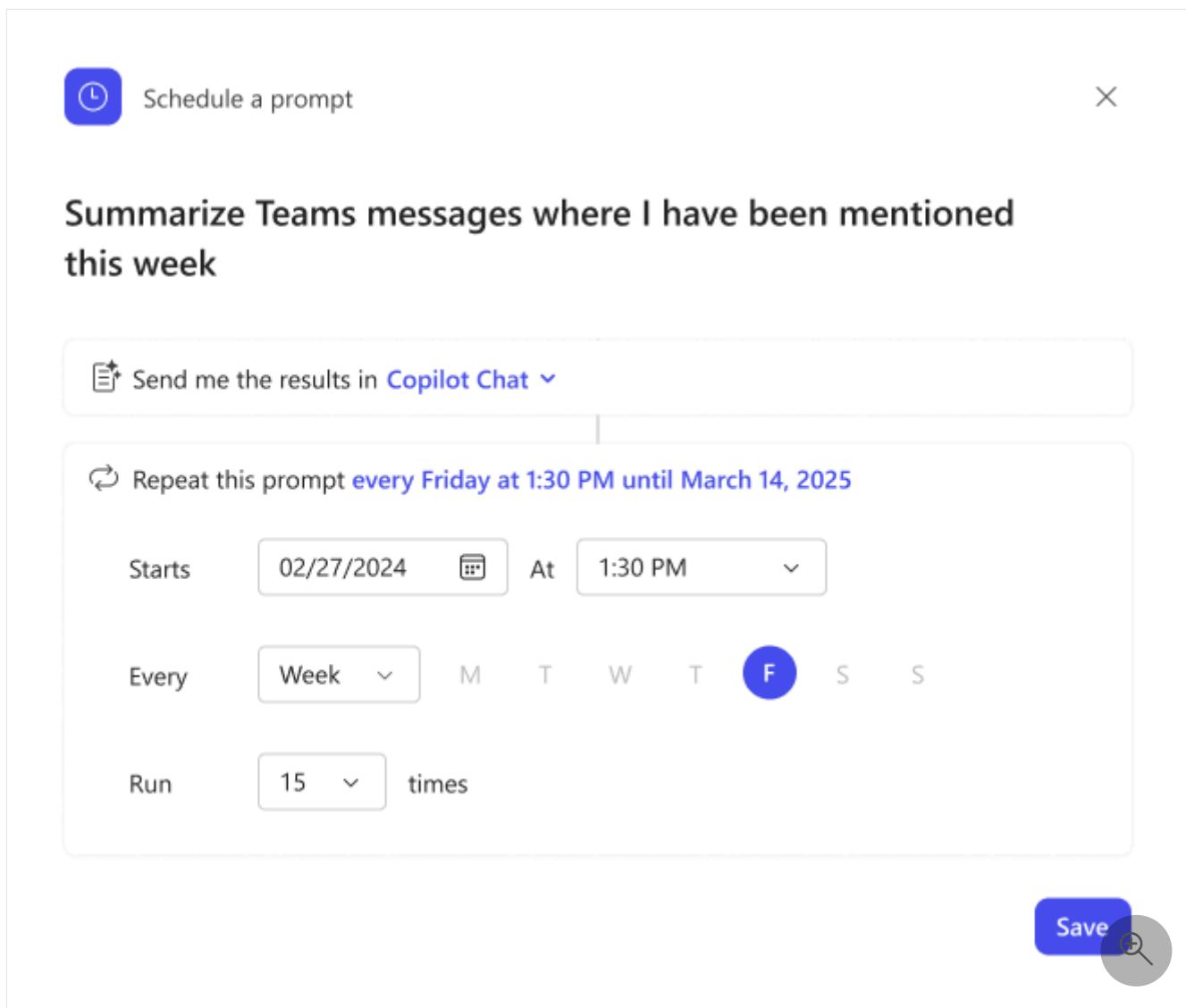
If you disable this feature after someone in your organization has already used it:

- Users will no longer be able to manage previously scheduled prompts.
- Sessions for previously run scheduled prompts continue to exist.
- Previously scheduled prompts continue to execute until their schedule finishes.
- Users will no longer see the scheduled prompts icon or the prompt management menu if optional connected experiences are disabled.

Inventory scheduled prompts

For admins with Global Administrator and Power Platform Administrator roles, you can use a PowerShell script to inventory the scheduled prompts created by users in your organization. For instructions on how to do this, see [Inventory for scheduled prompts](#).

User controls



Your users can find the scheduled prompts feature by hovering over a prompt they submit to Copilot. When a user selects the **Save** button to confirm the scheduled prompt, a user's prompt information is sent to the Power Automate and Power Platform system, and the [Power Automate terms of service and privacy policy](#) apply.

To manage their scheduled prompts, users can follow these steps:

1. In the Copilot chat window, select the dropdown menu (...), and then **Scheduled prompts**.
2. Select the prompt management pane.
3. From there, users can view and delete their scheduled prompts.

Users signed in with their work/school account can also turn off optional connected experiences, even if their admin has the setting on. For more details, reference [Your privacy settings with optional connected experiences](#).

The screenshot shows the Microsoft Copilot Chat interface with a sidebar titled "Scheduled prompts". It lists several scheduled prompts under the "Active" section:

- Summarize Teams messages where I have been mentioned this week.** Status: Creating... (indicated by a blue circle with a dot)
- Draft email notes for all my meetings with Danny. Use these sections: Key takeaways, Decisions, Action Items.** Status: Active (indicated by a blue circle with a dot)
- Ask my team for weekly updates and send it to me through email.** Status: Active (indicated by a blue circle with a dot)
- Lorem tincidunt ultrices interdum elementum nunc gravida scelerisque proin.** Status: Active (indicated by a blue circle with a dot)
- Viverra magna est pellentesque cursus.** Status: Active (indicated by a blue circle with a dot)

Below the active section, there is an "Inactive" section with one item:

- Help me prepare for my day. Send me a daily brief in a Teams message.** Status: Complete (indicated by a green checkmark)

A search icon is located in the bottom right corner of the sidebar.

Users can schedule up to 10 prompts to run at specific times, with responses delivered to the Chat pane of their Microsoft 365 Copilot Chat experience. These prompts can be set to run on a recurring basis, ensuring users receive necessary information aligned with their workflow. Responses from scheduled prompts are bolded and have a recurring icon to help users identify them easily.

To learn more about prompts for your users, see [Learn about Copilot prompts](#).

Legacy prompts

With the general availability of the new scheduled prompts feature, we transitioned to a new backend that no longer relies on Power Automate flows.

As a result, scheduled prompts created during the public preview continue to run until their set expiration, but won't appear in the new management pane. To view or manage these legacy prompts, use Power Automate directly.

Microsoft 365 environment for Scheduled Prompts

06/02/2025

The Microsoft 365 environment is a Production Power Platform environment type that is automatically created when users in your tenant first use Scheduled Prompts. This environment supports runtime operations required by Scheduled Prompts and is provisioned and governed differently than typical environments.

This article provides details about the environment's characteristics, behavior, permissions, and limitations to help Power Platform and Microsoft 365 administrators understand and manage the environment appropriately.

Environment provisioning

The Microsoft 365 environment is automatically created when a user with a Copilot license uses Scheduled Prompts for the first time. The environment is created in the region closest to the default region of the Microsoft Entra tenant.

You don't need to take any manual steps to create it. Only one environment is created per tenant, and its name will appear as Microsoft 365 in the Power Platform admin center.

If the environment is deleted and Scheduled Prompts are used again, it's automatically recreated.

Permissions and access

App and connection usage

A security role `M365 Copilot Actions Access` is created in the environment and is assigned to the default team which provides users with the permissions to use Scheduled Prompts.

Note

By default, users aren't given Environment Maker permissions.

Users don't have direct access to:

- Create, execute, or share Connections

- Create Apps, Flows, Custom Connectors, Dataflows, or Bots
- Runtime operations are strictly limited to Microsoft-owned (first-party) apps

Data loss prevention (DLP)

The Microsoft 365 environment has a fixed DLP policy:

- All connectors are blocked, except for a set of connectors used by Scheduled Prompts that include:
 - Microsoft 365 Copilot Actions
 - Microsoft Teams
 - Outlook (Office 365 Outlook)

 **Important**

Tenant-level and environment-level DLP policies don't apply to the Microsoft 365 environment.

Lifecycle and operations

The Microsoft 365 environment is treated as a standard production environment with certain exceptions in lifecycle operations:

- Restore to same org
- Restore from backup
- Copy from other environments
- VNet/private link integration
- Identity configuration

Frequently asked questions (FAQ)

What triggers the creation of the Microsoft 365 environment?

The environment is created when a licensed user in the tenant uses Scheduled Prompts for the first time.

What License or App does the user require?

The user must be assigned a Microsoft 365 Copilot license with the Microsoft Copilot with Graph-grounded chat app for the user to be provisioned in the environment.

Can the environment be deleted?

Yes. Admins can delete the Microsoft 365 environment through the Power Platform admin center. However, if Scheduled Prompts are used again, the environment is automatically recreated.

Does this environment consume storage from my tenant's entitlement?

No. Storage used by this environment is excluded from your tenant's capacity calculations and doesn't appear on capacity pages.

Can I apply custom DLP policies to this environment?

No. This environment is governed by a fixed DLP policy, and tenant or environment-level policies do not apply to this environment.

Can users create custom apps, flows, or bots in this environment?

No. All app, flow, and connection creation are blocked by default. Only runtime operations by Microsoft-owned apps are permitted.

Export prompts that users saved, liked, or shared in Copilot Prompt Gallery

Article • 04/16/2025

In [Copilot Prompt Gallery](#), users can save or share prompts they created, including sharing prompts with a specific team (in Microsoft Teams) that they're a member of. Users can also like prompts created by others. As an admin, you can use Windows PowerShell to export data to a file about either of the following types of prompts in Copilot Prompt Gallery:

- The saved, liked, and shared prompts of a specific user.
- The prompts shared with a specific team.

! Note

The user account running the PowerShell script to export the data needs to be assigned the Global Admin role.

Configure your Windows PowerShell environment

Before you can export prompts that users saved, liked, or shared in Copilot Prompt Gallery, you need to configure your PowerShell environment by doing the following steps:

1. [Download the CopilotLabDSR PowerShell script](#)
2. [Install the MSAL.PS module](#)
3. [Load the CopilotLabDSR module](#)

Download the CopilotLabDSR PowerShell script

1. To get started, you need to [download the CopilotLabDSR PowerShell script](#).
2. In File Explorer, go to the location where you saved the CopilotLabDSR.psm1 file.
3. Right-click on the CopilotLabDSR.psm1 file and select **Properties**.
4. On the **General** tab, select **Unblock** checkbox, and then select **Ok**.

You need to unblock the file because, by default, executing scripts downloaded from the internet isn't allowed.

Install the MSAL.PS module

1. Check if the MSAL.PS module is installed by running the following command in PowerShell:

```
PowerShell  
  
Get-Module -ListAvailable MSAL.PS
```

2. If the module isn't installed, install the module by running the following command in PowerShell:

```
PowerShell  
  
Install-Module -Name MSAL.PS -Scope CurrentUser
```

Load the CopilotLabDSR module

1. Run the following command in PowerShell to enable running scripts downloaded from the internet for this session only. It might prompt you to confirm by typing "Y."

```
PowerShell  
  
Set-ExecutionPolicy -ExecutionPolicy Unrestricted -Scope Process
```

2. Run the following command to import the module with all available cmdlets.

```
PowerShell  
  
Import-module "<location where you saved the CopilotLabDSR.psm1 file>"
```

For example, if your file is saved in C:\AdminScripts, you would type:

```
PowerShell  
  
Import-module "C:\AdminScripts\CopilotLabDSR.psm1"
```

Export the saved, liked, and shared prompts of a specific user

1. From Windows PowerShell, use the `Export-PromptsUserContent` cmdlet to export the saved, liked, or shared prompts of a specific user from Copilot Prompt Gallery.

PowerShell

```
Export-PromptsUserContent -UserAadIdOrPrincipalName <Entra ID or UPN of user> -  
ExportDirectory <output location> -PromptType <type of prompt>
```

[+] Expand table

Parameter	Description
UserAadIdOrPrincipalName	Use either the Microsoft Entra ID or the User Principal Name (UPN) of the user for which you want to export content.
ExportDirectory	Location to store your output files. The folder should already exist. If not specified, the export files are saved to the current folder.
PromptType	Specify "saved" to export the prompts saved by the user. Specify "shared" to export the prompts for which a shareable link to the prompt was generated. Specify "liked" to export prompts liked by the user.

For example, the following exports Reed Smith's saved prompts in Copilot Prompt Gallery using his UPN and downloads the export files to the location C:\PromptsExportReedSmith.

PowerShell

```
Export-PromptsUserContent -UserAadIdOrPrincipalName reedsmith@contoso.com -  
ExportDirectory C:\PromptsExportReedSmith -PromptType saved
```

2. When prompted to authenticate, sign in with an account that is assigned the Global Admin role, not as the user you want to export.
3. After the PowerShell cmdlet runs successfully, go to your export location to view your exported files.

Export prompts shared with a specific team

1. From Windows PowerShell, use the `Export-PromptsGroupContent` cmdlet to export the prompts published to the specific team in Copilot Prompt Gallery.

PowerShell

```
Export-PromptsGroupContent -M365TeamsGroupId <team ID> -ExportDirectory <output  
location>
```

Parameter	Description
M365TeamsGroupId	ID of the team to which the prompts were shared.
ExportDirectory	Location to store your output files. The folder should already exist. If not specified, the export files are saved to the current folder.

For example, the following exports the prompts shared in Copilot Prompt Gallery to the team with an ID of "d0efcad2-6744-0de6-0624-ea467d4293af" and downloads the export files to the location C:\PromptsExportReedSmith.

PowerShell

```
Export-PromptsGroupContent -M365TeamsGroupId d0efcad2-6744-0de6-0624-ea467d4293af  
-ExportDirectory C:\PromptsExportReedSmith
```

💡 Tip

To find the ID of the team, go to **Teams > Manage teams** in the [Teams admin center](#).

- When prompted to authenticate, sign in with an account that is assigned the Global Admin role.
- After the PowerShell cmdlet runs successfully, go to your export location to view your exported files.

Properties contained in the export file and their descriptions

After running the PowerShell cmdlet to export your user's data from Copilot Prompt Gallery, you'll receive one file in your download location folder. You can use the information in the following sections to help you understand the properties you see in the file you received.

Export file for the saved, liked, and shared prompts of a specific user

The file name is prefixed with "User" and the Microsoft Entra ID of the user followed by the prompts type used for export. The file has the properties listed in the following table.

Property	Description
Prompts	An array of users saved or shared prompts information.
Prompt.Title	Title of the prompt given by user while saving or sharing the prompt.
Prompt.PromptText	Prompt text
Prompt.Products	A list containing the product in which user saved or shared the prompt.
Prompt.IsFavorite	Boolean (true or false) indicating that a user has saved or liked the prompt.
Prompt.UserActivity.Favorite.IsFavorite	Boolean (true or false) indicating that a user has saved or liked the prompt.
Prompt.UserActivity.Favorite.ActivityDateTimeInUtc	Time when user saved or liked the prompt.
Prompt.CreatedTime	Time when the user saved the prompt.
Prompt.SharedTime	Time when the user shared the prompt
Prompt.HydratedEntities	List of entities with type and entity information.
Prompt.HydratedEntities.Type	Currently People, File, and Meeting entity types are supported.
Prompt.HydratedEntities.Entity	Entity information based on entity type.
Prompt.HydratedEntities.Entity.Id	Unique entity ID.
Prompt.HydratedEntities.Entity.DisplayName	Person entity display name.
Prompt.HydratedEntities.Entity.EmailAddresses	List of email addresses for person entity.
Prompt.HydratedEntities.Entity.ReferenceId	Unique ID for instrumentation mapping.
Prompt.HydratedEntities.Entity.FileName	Name of the file entity.
Prompt.HydratedEntities.Entity.AccessUrl	Access URL of file entity.
Prompt.HydratedEntities.Entity.Spold	SharePoint Document Identifier for File entity.
Prompt.HydratedEntities.Entity.OriginalId	Meeting ID of event entity.
Prompt.HydratedEntities.Entity.Subject	Subject of event entity.
Prompt.HydratedEntities.Entity.SkypeTeamsMeetingUrl	URL of event entity.
Prompt.HydratedEntities.Entity.Start	Start time of event entity.

Property	Description
Prompt.HydratedEntities.Entity.End	End time of event entity.
Prompt.HydratedEntities.Entity.OrganizerName	Organizer Name of event entity.
Prompt.HydratedEntities.Entity.OrganizerAddress	Organizer Address of event entity.
Prompt.HydratedEntities.Entity.Attendees	Attendees list of event entity.

Export file for the prompts shared with a specific team

The file name is prefixed with "Group" and the ID of the team. The file has the properties listed in the following table.

[Expand table](#)

Property	Description
Prompts	An array of users saved or shared prompts information.
Prompt.Title	Title of the prompt given by user while saving or sharing the prompt.
Prompt.PromptText	Prompt text
Prompt.Products	A list containing the product in which user saved or shared the prompt.
Prompt.PublishedTime	Time when prompt was published to the team.
Prompt.PublishedBy	UPN of the user who published the prompt to the team.
Prompt.HydratedEntities	List of entities with type and entity information.
Prompt.HydratedEntities.Type	Currently People, File, and Meeting entity types are supported.
Prompt.HydratedEntities.Entity	Entity information based on entity type.
Prompt.HydratedEntities.Entity.Id	Unique entity ID.
Prompt.HydratedEntities.Entity.DisplayName	Person entity display name.
Prompt.HydratedEntities.Entity.EmailAddresses	List of email addresses for person entity.
Prompt.HydratedEntities.Entity.ReferenceId	Unique ID for instrumentation mapping.

Property	Description
Prompt.HydratedEntities.Entity.FileName	Name of the file entity.
Prompt.HydratedEntities.Entity.AccessUrl	Access URL of file entity.
Prompt.HydratedEntities.Entity.Spold	SharePoint Document Identifier for File entity.
Prompt.HydratedEntities.Entity.OriginalId	Meeting ID of event entity.
Prompt.HydratedEntities.Entity.Subject	Subject of event entity.
Prompt.HydratedEntities.Entity.SkypeTeamsMeetingUrl	URL of event entity.
Prompt.HydratedEntities.Entity.Start	Start time of event entity.
Prompt.HydratedEntities.Entity.End	End time of event entity.
Prompt.HydratedEntities.Entity.OrganizerName	Organizer Name of event entity.
Prompt.HydratedEntities.Entity.OrganizerAddress	Organizer Address of event entity.
Prompt.HydratedEntities.Entity.Attendees	Attendees list of event entity.

Inventory for scheduled prompts

06/02/2025

Admins can take inventory of scheduled prompts created in their organization by running PowerShell scripts. The following instructions enable admins to connect to their accounts and view, list, or delete scheduled prompts.

Prerequisites

To take inventory of scheduled prompts created by users in your organization, you need the following prerequisites:

- Have the Global Administrator and Power Platform Administrator roles assigned to your user in Azure portal for the tenant on which you want to do operations.
- Use [PowerShell v7.0+](#).
- Have `Az.Accounts` and `Microsoft.PowerApps.Administration.PowerShell` [modules installed](#).
- Have all scripts in the same folder and run the scripts while being in that folder.

To get the System Administrator role on the Copilot scheduled prompts environment, follow these steps:

- Go to [Power Platform admin center](#).
- Find the **Microsoft 365** environment and select it. (This is the default name for Copilot Actions environment; some tenants might use a different name).
- Select **Membership**.
- Select **Add me** to add the System Administrator role to your user. It might take around 30 minutes for the role to be reflected everywhere.

More details and options, see [Manage High-Privileged Admin Roles](#).

Connect to your Azure Account

Before running any of the following scripts, you must sign in to your administrator account. To sign in, run the following script:

```
PowerShell
```

```
Connect-AzAccount
```

General operations

1. To get the environment name for Copilot scheduled prompts, run the following script and connect with the admin account if requested:

```
PowerShell
```

```
Get-AdminPowerAppEnvironment 'Microsoft 365'
```

Enter your display name (`Microsoft 365` by default). Note the `EnvironmentName` value indicates your environment name.

2. You can also identify a user ID by running this script, using the appropriate user email (`user@domain.com` in the following example). Note the `Id` field value in the output and that indicate the user's ID:

```
PowerShell
```

```
Connect-Entra
```

```
Get-EntraUser -UserId 'user@domain.com'
```

List Copilot scheduled prompts

There are different ways to run a script to list scheduled prompts created in your tenant.

Get a list of Copilot scheduled prompts for the whole tenant

1. Get the `EnvironmentId` using the script provided earlier.
2. Run the following script, replacing the placeholder with your actual `EnvironmentId`, and connect with the admin account if prompted:

```
PowerShell
```

```
.\Get-CopilotActions.ps1 -EnvironmentId abc123-a100-xyz000-12345
```

The list of Copilot scheduled prompts should display in the console.

Get a list of Copilot scheduled prompts for a single user

1. Get the `EnvironmentId` and `UserId` using the scripts provided earlier.

2. Run the following script using the appropriate `EnvironmentId` and `UserId` to replace the placeholders and connecting with admin account if requested:

```
PowerShell
```

```
.\Get-CopilotActions.ps1 -EnvironmentId abc123-a100-xyz000-12345 -UserId  
abc123-a100-xyz000-12345
```

The list of Copilot scheduled prompts belonging to that user should display in the console.

Export the list to an Excel/CSV file

Add the following to the end of the command:

```
PowerShell
```

```
| Export-Csv -Path C:\temp\resultFile.csv
```

Example:

```
PowerShell
```

```
.\Get-CopilotActions.ps1 -EnvironmentId abc123-a100-xyz000-12345 | Export-Csv -  
Path C:\temp\resultFile.csv
```

Delete Copilot scheduled prompts

Delete a single Copilot Action

1. Get the `EnvironmentId` and the `DataverseId` of the action you wish to delete.
2. Run the following script:

```
PowerShell
```

```
.\Remove-CopilotAction.ps1 -EnvironmentId abc123-a100-xyz000-12345 -  
DataverseId abc123-a100-xyz000-12345
```

Delete multiple Copilot Scheduled Prompts from a single user

1. Complete Getting the Copilot Scheduled Prompts environment ID.
2. Complete Getting the Microsoft Entra user object ID.
3. Run the following script using the appropriate `EnvironmentId` and `UserId` and connecting with admin account if requested:

PowerShell

```
.\\Clear-CopilotActions.ps1 -EnvironmentId abc123-a100-xyz000-12345 -UserId  
abc123-a100-xyz000-12345
```

Overview of People Skills

07/21/2025

People Skills is an AI-driven service that uses state-of-the-art AI to generate personalized skill profiles for your users mapped to a customizable, built-in taxonomy. This service provides a data layer that fuels the Skills agent, and enhances Microsoft 365 Copilot, Microsoft 365, and Viva services with contextualized data and skills-driven experiences.

People Skills:

- Equips leaders with critical workforce skill insights to prepare and accelerate their AI transformation.
- Empowers employees with personalized skill profiles and experiences to help them connect with others and discover opportunities.

For more information, see [how skills AI inferencing works](#).

Licensing

People Skills comes with your Microsoft 365 Copilot or Viva licenses and doesn't need a separate license. People Skills AI inferencing and experiences are based on a user's Microsoft 365 Copilot, Microsoft 365, Office 365, and Viva plans.

- **People Skills - Foundation service plan:** Customers with the "People Skills – Foundation" service plan (Microsoft 365 commercial customers without a Microsoft 365 Copilot license, excluding education and government) can access the People Skills service excluding AI inferencing and Microsoft 365 Copilot capabilities. Users with this service plan can search to add skills from your taxonomy or imported skills to create a skills profile using the Microsoft 365 profile editor.
- **People Skills - Advanced service plan:** Customers with the "People Skills – Advanced" service plan (including Microsoft Viva Suite, Viva Insights, Workplace Analytics and Feedback customers, and Viva Learning customers) can access the People Skills service with AI inferencing, excluding Microsoft 365 Copilot capabilities.
- **Microsoft 365 Copilot in Productivity Apps service plan:** Customers with the "Microsoft 365 Copilot in Productivity Apps service plan" can use People Skills, including AI-inferencing and related Copilot experiences, excluding education and government licenses.

People Skills functionality access by license

For a detailed list of People Skills experiences and their corresponding license requirements, see the following table.

If you have questions about licensing or access, contact your Microsoft representative.

[Expand table](#)

Release	Functionality	Base SKU (ME3/ME5)*	M365 Copilot	Viva Suite	Viva Insights	Viva Learning
GA	Skills on M365 profile card	✓	✓	✓	✓	✓
GA	Skills editor in M365 profile editor	✓	✓	✓	✓	✓
GA	Skills in Traditional People Search (SharePoint people search)	✓	✓	✓	✓	✓
GA	Skills in Org Explorer	✓	✓	✓	✓	✓
GA	Skills in People Companion	✓	✓	✓	✓	✓
GA	Ingress and egress of confirmed user skills	✓	✓	✓	✓	✓
GA	Taxonomy ingress	✓	✓	✓	✓	✓
GA	People Skills taxonomy (powered by LinkedIn)	✓	✓	✓	✓	✓
GA	Skills inferencing	✗	✓	✓	✓	✓
GA	Taxonomy egress	✗	✓	✓	✓	✓
GA	Editing out of the box taxonomy	✗	✓	✓	✓	✓
GA	Skills in M365 Copilot	✗	✓	✗	✗	✗
GA	Viva Learning - Skills based learning experience	✗	✓	✓	✗	✓
Post GA	Skills agent	✗	✓	✗	✗	✗
Post GA	Copilot Analytics - Skill landscape report in Analyst Workbench	✗	✓	✓	✓	✗
Post GA	Copilot Analytics - Leader scenarios in M365 Copilot +	✗	✓	✗	✗	✗

Release	Functionality	Base SKU (ME3/ME5)*	M365 Copilot	Viva Suite	Viva Insights	Viva Learning
	agent					

*People skills are available in the Microsoft 365 commercial public cloud, excluding EDU

Where does People Skills data appear?

People Skills data appears in Microsoft 365 for employees, leaders, and organizations:

- [Skills in the Microsoft 365 profile card](#): Users can view and manage their skills with others directly from the profile card in Microsoft 365 to share their skills and learn more about others. People Skills is available today on the profile card in the new Outlook desktop for Windows, Outlook Web App, Microsoft 365 Copilot, Office.com, SharePoint, and People Companion, and will expand to other applications where you see the profile card in future releases.
- [Skills in Microsoft 365 Copilot](#): If you use Microsoft 365 Copilot, shared skills surface in people related queries in Copilot to help form connections and find people with the skills you need.
- [Skills in Org Explorer and People Companion](#): Tools like [Org Explorer](#) and [People Companion](#) help users quickly find the right person based on their shared skills data.
- [Skills in Viva Learning](#): Users can now manage skills they want to develop within Viva Learning, and receive personalized course recommendations based on those skills.
- [Skills in Copilot Analytics \(Viva Insights\)](#): The Skills landscape report allows organizational analysts to discover top skills in their workforce, assess their distribution across groups, identify potential gaps, and explore related skill insights.
- [Skills for Leaders in Microsoft 365 Copilot](#) (coming soon): Copilot enables leaders to ask targeted or broad questions about their team's skills and receive instant, data-driven answers.
- [Skills Agent](#) (coming soon): The Skills agent helps employees and leaders explore, manage, and use organizational skills for personal growth and strategic planning.

People Skills AI inferencing and experiences are based on a user's Microsoft 365 Copilot, Microsoft 365, Office 365, and Viva plan. Read more about [licensing in People Skills](#).

Sharing and management of skills data

Users can now manage and share their skills directly from the profile card in Microsoft 365. Learn more about [People Skills capabilities for users](#)

For more information on how to set up People Skills, and control how People Skills data is shared and managed, see [Set up skills](#) and [Manage your skills library](#).

User Profile Application (UPA) Skills

If your organization depends on skills data that appears in About Me on the Microsoft 365 profile card and editor (formerly in Delve), or on the skills field in the UPA API or Graph API, those skills are hidden from the Microsoft 365 profile card and editor when you deploy People Skills, and replaced with this new experience.

People Skills migrates shared UPA user skills data to this new experience at a future date.

When you deploy People Skills, skills from these other sources continue to be accessible to your users to edit. They can edit using the SharePoint user profile editor and surface in some experiences, such as Microsoft 365 Copilot chat and people search.

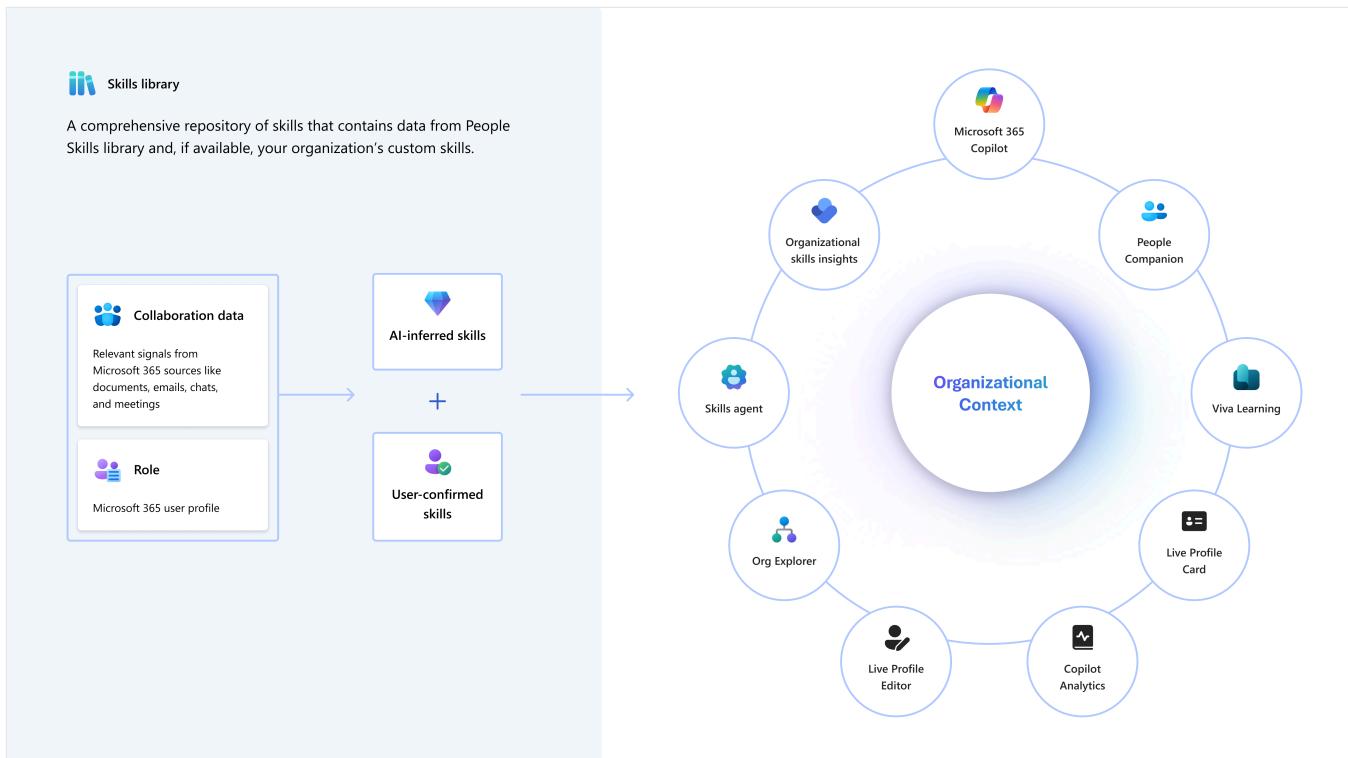
We'll update this article with more information on handing your requirements for existing dependencies.

If you have an existing dependency on UPA skills or other solutions for ingesting skills into Microsoft 365 experiences, [let us know using this form](#). We'll follow up with you to understand your requirements and discuss options.

People Skills AI Inference engine

06/05/2025

The People Skills inference engine uses Microsoft 365 profile and activity signals from the Microsoft Graph to create personalized skill profiles for users in your organization. Profile and activity signals include documents, emails, chats, and meetings.



We use various data sources to infer skills accurately. The following are representative sources and may change as the model evolves:

- **Microsoft Graph** and AI Graph: Includes data from user profiles, job titles, collaboration signals, key phrases from emails, meetings, and documents.
- **Microsoft Skills Graph**: Provides a base skills taxonomy and semantic descriptions for skills.
- Microsoft 365 user profiles: Offers information on job titles and top contacts.

The inference engine uses advanced OpenAI LLM models and a proprietary inferencing approach with relevant Microsoft Graph data. The skill inferencing engine associates users with a representative set of skill names based on the above-referenced sources available to People Skills to keep user skill profiles fresh and relevant. They aren't intended to be a comprehensive reflection of a person's capabilities.

The skill inferencing engine operates under the following constraints:

- Currently, we only infer skills from Microsoft 365 sources and don't use user activity in other line of business applications.
- People Skills uses large language models to assign skills. The skills assigned to users are skills most closely matched in the taxonomy for the user profile and activity. For example, if a user creates a document on front-end development, we might tag the user with front-end development, web development, React, or Angular based on the closest content match.
- Inferences are impacted by the skill name and description uploaded by customer administrators.
- Read [AI transparency in People Skills](#) to learn how we use the inferencing data.

AI inferences availability and refresh cycle

People Skills inferencing follows a refresh cycle, typically every 30 days, to ensure that recent changes in a user's Microsoft 365 work activity are reflected in their inferred skills.

For the initial computation, we expect most users receive AI-generated skill inferences in 48 hours, although this may take up to a maximum of five days. After this initial computation, the system will refresh the skills inferencing every 30 days to keep the skills data up-to-date.

AI restricted skills

You can mark confidential, sensitive, or proprietary skills as AI-restricted. Use the Microsoft 365 admin center to mark specific skills as AI restricted. For more information, see [how to mark skills as AI restricted](#).

Our inference engine ensures that any AI restricted skills identified by the admin will be updated and removed from user profiles within 24 hours after being marked as restricted. AI restricted skills aren't added by AI to user profiles in your tenant. A user can manually add any skill from the taxonomy, including AI-restricted skills.

Turning off skills AI inferencing

An organization can turn off People Skills AI inferencing for all or a group of users by using [Feature Access Management](#). For more information, see [how to turn off skills AI inferencing](#).

Individual users can also opt out of using AI to generate skills within their Microsoft 365 profile editor settings.

Improving AI inferencing performance

Customers can understand/improve the quality of their organization's AI-generated skills by reviewing the below guide.

- **Manage missing or incomplete job titles:** Job titles play a crucial role in skills inferencing because they provide context about an employee's role and responsibilities within an organization. This context helps the inferencing system accurately match and suggest relevant skills.

If a user has empty primary and secondary job titles, the system uses advanced AI algorithms to infer the most appropriate job title based on the user's collaboration signals, and documents job title at runtime. The system also has fallback mechanisms to handle cases where job titles are missing or of poor quality. This ensures that every user has a relevant job title that accurately reflects their role. However, the accuracy of skill inferences in this situation could be lower compared to the good quality job title information.

If your organization has incomplete or missing job title data, you can use the organization upload tool to upload a secondary job title which our system will use instead of the Microsoft Entra job titles. To do this, use the Organization data upload tool and upload a .csv file with users matched to their secondary job title. [Learn more about uploading organization data](#).

- **Review Microsoft 365 user activity:** We rely on Microsoft 365 user activity to generate signals for AI inferencing. Performance may be limited for users who don't spend considerable time in the Microsoft 365 ecosystem (for example, frontline, field workers). Performance may also be limited for soft skills, whereby activity about a skill may not be a clear indication of skill application.
- **Review AI restricted skills:** Microsoft restricts certain skills from being returned by AI to comply with responsible AI best practices. AI-generated skills may be limited for customers in industries which inherently deal with skills that could be sensitive when associated with users. [Learn more about our commitment to responsible AI](#). ↗

Set up People Skills

06/05/2025

This section walks you through setting up People Skills for the first time in your organization. After initial setup is complete, admins can edit their skill library or share settings using the steps in the [Manage your skills library](#) page.

Admin roles required for setup

The following roles have permission to set up People Skills:

- AI administrator
- Knowledge administrator

For more information, see [assigning roles](#).

Quick setup with out-of-the-box skill library

Most organizations can quickly set up skills using our out-of-the-box People Skills library of over 16,000+ skills. If you prefer to curate your own library by importing custom skills, refer to the next section [Advanced setup](#).

1. Go to the Copilot page in the [Microsoft 365 admin center](#) and select **People Skills** in **Microsoft 365 Copilot**. Alternatively, you can find People Skills page under **Settings > Viva > Data Management**.

The screenshot shows the Microsoft 365 Admin Center interface. On the left, there's a navigation sidebar with various admin centers like Home, Users, Devices, Teams & groups, Roles, Resources, Billing, Copilot, Support, Settings, Setup, Reports, and Health. Under Admin centers, it lists Security, Compliance, Device Management, Azure Active Directory, Exchange, Sharepoint, and Teams. The main content area is titled 'Copilot' and shows the 'Copilot' page with the 'Settings' tab selected. It has sections for Overview, Discover, and Settings. Below these are tables for 'Copilot agent consumption meter', 'Copilot diagnostic logs', 'Copilot for Sales', 'Copilot in Bing, Edge, and Windows', 'Copilot in Teams meetings', 'Copilot in Viva Engage', 'Copilot in Viva Goals', 'Data security and compliance', and 'Extensions'. The 'People Skills in Microsoft 365 Copilot' extension is highlighted with a red box. At the bottom right of the page, there are icons for Microsoft 365 Copilot Chat, Microsoft 365 app, Outlook, Microsoft Teams, and a magnifying glass icon.

Name	Description	Applies to
Copilot agent consumption meter	Setup and configure consumption meters for Copilot Agents.	Microsoft 365 Copilot
Copilot diagnostic logs	Send diagnostic logs for Copilot on behalf of individual users who are having issues.	Microsoft 365 Copilot
Copilot for Sales	Choose whether users can see Sales Copilot content in Microsoft apps, and more.	Copilot for Sales
Copilot in Bing, Edge, and Windows	Manage how your organization uses Copilot, your AI-powered chat for the web.	Bing, Microsoft Edge, Windows
Copilot in Teams meetings	Go to the Microsoft Teams admin center to change how Copilot is used in meetings.	Copilot in Microsoft Teams
Copilot in Viva Engage	Manage Copilot in Viva Engage.	Copilot in Viva
Copilot in Viva Goals	Manage Copilot in Viva Goals.	Copilot in Viva
Data security and compliance	Manage how Copilot references documents and sites in the Microsoft Purview compliance portal.	Microsoft 365 Copilot
Extensions	Go to Integrated apps to choose who can use apps designed for Copilot.	Microsoft 365 Copilot
People Skills in Microsoft 365 Copilot	Allow Microsoft 365 Copilot to reference People Skills data in Copilot experiences.	Microsoft 365 Copilot
Improved responses with web content in Microsoft 365 Copilot	Allow Microsoft 365 Copilot to reference web content in its chat responses.	Microsoft 365 Copilot
Microsoft 365 Copilot self-service purchases	Control product trials and purchases to enable for end users in your organization.	Microsoft 365 Copilot
Pin Microsoft Copilot to the navigation bar	Choose whether users have Copilot pinned to the navigation bar in Microsoft 365 and more.	Microsoft 365 Copilot Chat, Microsoft 365 app, Outlook, Microsoft Teams

2. Select **Being quick setup**.

3. Choose the skills you want to use from the out-of-the-box library.

 **Tip**

The more skills you include from the default library, the more specific AI-generated skills will be for users. All skills in the library, including all 16,000 skills are preselected by default.

- If you want to remove skills from your library, you can select **View and edit People Skills**.
- You may add or remove skills later after setting up People Skills. For more information, see [Manage your skills library](#).

4. You can choose whether to **share skill data with Viva Insights** (Recommended). People Skills in Viva Insights allows organizations and leaders to discover skills within their workforce and assess skill distribution across groups. Learn more about the [skills landscape report in Viva Insights](#). This selection can be updated later from People Skills settings.

5. Select **Confirm** to finish quick setup.

 **Note**

People Skills initial AI-inferences should start showing up for users within 48 hours and may take up to five days to complete for all users in your tenant.

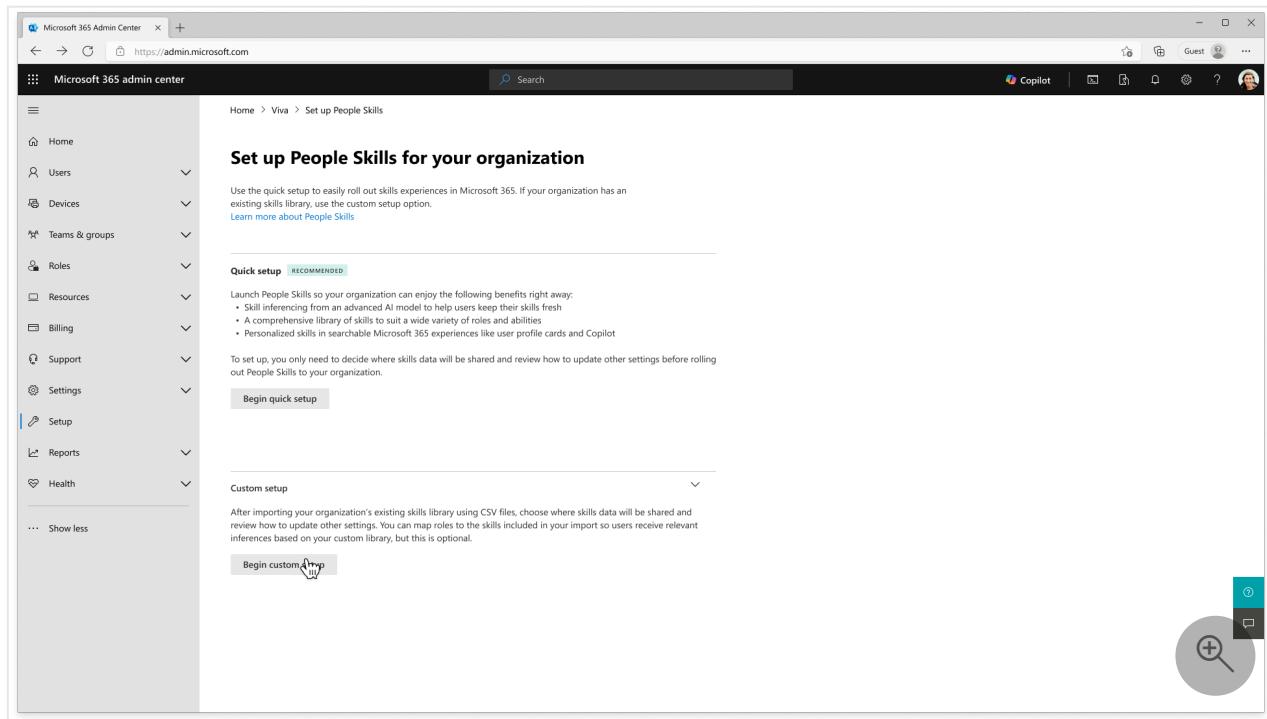
You can change the settings confirmed during this setup [by Managing your skills library](#) in the settings page. Learn more about [sharing controls](#) to manage which skills are shared across your organization.

Advanced setup using custom skills library

Organizations can build their own custom skills library with a combination of skills from the out-of-the-box skills library and by importing your own custom skills.

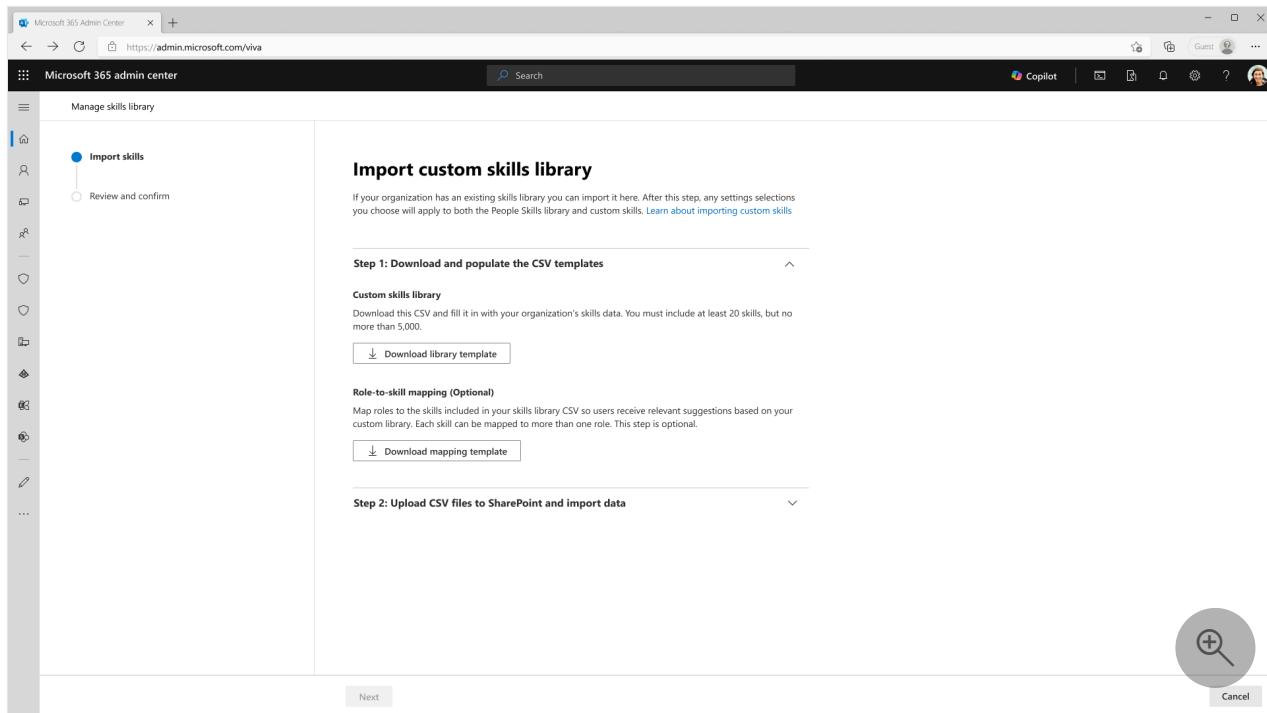
1. Got to the Copilot page in the [Microsoft 365 admin center](#) and select **People Skills** in **Microsoft 365 Copilot**. Alternatively, you can find People Skills page under **Settings > Viva > Data Management**.

2. Under Custom Setup, select Begin custom setup.



3. To use a custom skills library, download the template files. Select Download library template and Download mapping template.

This step is optional if you're only using skills from the out-of-the-box People Skills library. You can skip this step by selecting **Next**.



4. Fill out the templates as described in [Create the custom skills files](#) to create the library and mapping files. Then, get the paths to those completed files.

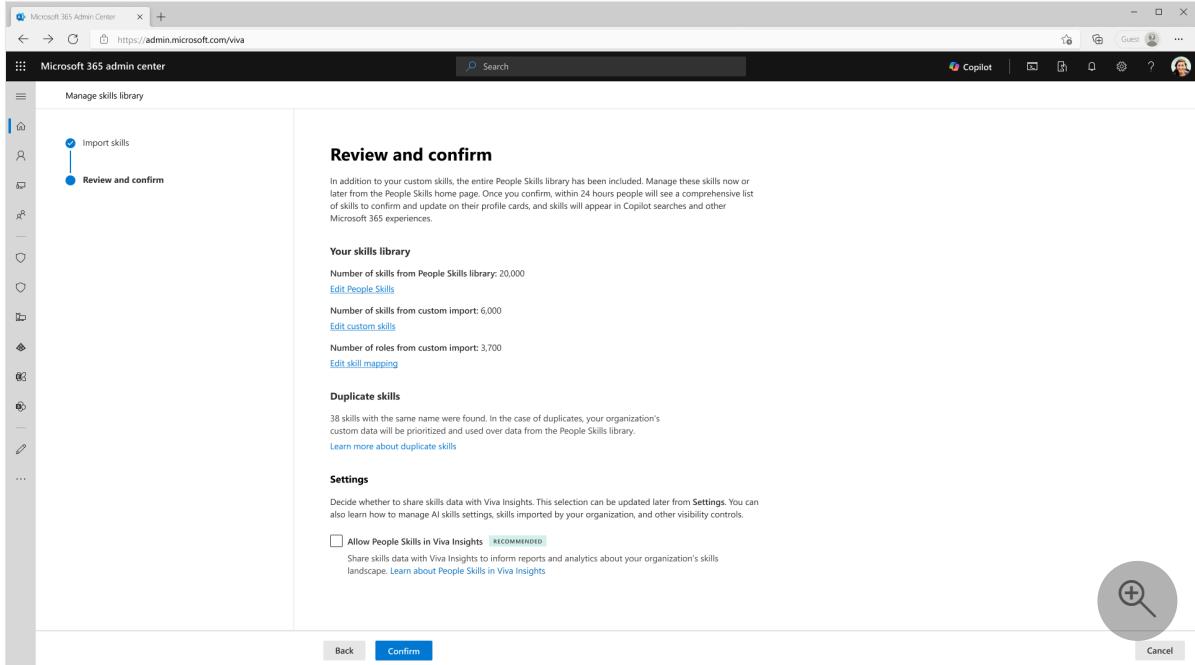
- Paste the file paths for both files into the **Skills library file path and Skill mapping file path fields.

- b. Select **Next** to begin file validation.
 - c. If there's a problem with the file, you see an error message at this step.
5. Review your organization's skills library details.
- The number of skills from the out-of-the-box library.

① Note

You can select which skills you want to include from our default library of 16,000 skills by clicking "Edit People Skills." You can also do this later after the initial setup, see [Manage your skills library](#).

- The number of skills and number of roles/job titles from your custom import.
- The number of duplicate skills identified in your selection. If you have duplicates, your organization's custom data is prioritized over data from the out-of-the-box library.



6. Select **Turn on People Skills in Viva Insights**, if it's available for your tenant. Skills in Viva Insights allows organizations and leaders to discover skills within their workforce and assess skill distribution across groups. Learn more about the [skills landscape report in Viva Insights](#).
7. If everything looks correct, select **Confirm**.
8. Review People Skills settings. You can disable skill AI inferencing or set default skill sharing for specific users, groups, or your entire tenant by using an access control policy.

Configure these settings through People Skills settings. For more information, see [Manage which skills are shared and use of skills AI inferencing](#).

9. Review your skills library and settings information. If there are any changes you want to make, go back to those steps and edit.

10. When you're ready, select **Done**.

Your skills library is created, and your settings are saved. Initial AI-inferences display to users within 48 hours for up to a maximum of five days. You can change the setting confirmed during this setup [by Managing your skills library](#) in the settings page.

Learn more about [sharing controls](#) to manage which skills are shared across your organization.

Create custom skills files

To import custom skills into your skills library, create a file that lists those custom skills and their descriptions. Optionally, you can also create a file that maps skills to specific jobs in your organization.

Before you get started, ensure you review these guidelines:

- Minimum of 20 skills are required to import custom skills.
- Each file must be under 100 mb.
- Certain characters can't be used as a prefix in any imported field, such as '+', '-', '@', '=', '\t', '\r'.
- Save your template files as .csv files (comma separated), with no spaces in the file name.
- Use only comma as the delimiter. Your system might default to a different delimiter. In European countries, for example, it's often set to a semicolon.

To create your custom skills files:

1. Open the template files you downloaded during People Skills setup.

2. Enter the skills for your custom skills library into the library template.

- Required fields: *Skill ID (externalCode)*, *Skill Name (name.en_US)*
- Recommended fields: *Skill Description (description.en_US)*
- Optional field: *Restricted Skill tag* (mark Yes or No)

See example input below, replicate this for each custom skill in your file:

- *Skill ID*: SN0001
- *Skill Name*: Customer Insights

- *Skill Description*: The ability to understand customer needs and validate that their needs are being met.
- *Restricted Skill*: Yes

[Learn more about restricted skills.](#)

3. Save the templates as .csv files in a secure SharePoint location.
4. Get the file paths for your .csv files.
 - a. Select the file, and then select the ellipsis (...).
 - b. Select **Details**, and then scroll to find the Path.
 - c. Select the option to copy the selected file's path to the Clipboard. The file path should be formatted like this: `https://contoso.sharepoint.com/TeamAdmin/Shared%20Documents/Skills_Library.csv`.

Create role to skill mapping file (Optional)

Admins can upload a file to map your custom skills to specific roles or jobs in your organization.

Before you get started, review the following information:

- Skill ID (*externalCode*) in the library file must map to *Skill ID (SkillExternalCode)* in the role to skill mapping file.
- Certain characters can't be used as a prefix in any imported field, such as '+', '-', '@', '=', '\t', '\r'.
- Save your template files as .csv files (comma separated), with no spaces in the file name.
- Use comma as the delimiter. Your system might default to a different separator. In European countries, for example, it's often set to a semicolon.

To create your role to skill mapping file:

1. Open the template file you downloaded during People Skills setup.
2. Enter the role and skills information into the library template.
 - Required fields: *Job Title*, *Skill ID (externalCode)*
 - Recommended fields: *Skill Name* (Name.en_US)

See example input below, replicate this for each custom skill in your file:

- *Job Title* - Software Engineer II
- *Skill ID* - SN0001

- *Skill Name* - Cloud Security

3. Save the templates as .csv files in a secure SharePoint location.
4. Get the file paths for your .csv files.
 - a. Select the file, and then select the ellipsis (...).
 - b. Select **Details**, and then scroll to find the Path.
 - c. Select the option to copy the selected file's path to the Clipboard. The file path should be formatted like this

`https://contoso.sharepoint.com/TeamAdmin/Shared%20Documents/Skill_Mapping.csv`.

Manage privacy and sharing controls in People Skills

07/22/2025

As an admin, you can set privacy and skill sharing controls for users, groups, or the entire tenant. By using these controls, you can meet your organization's needs and comply with local or business requirements. These settings can also be used to selectively deploy People Skills to a small group of pilot users, while restricting functionality to the rest of your tenant. People Skills provides access controls using [Feature Access Management](#).

To view your skills sharing and privacy settings, you can navigate to the People Skills setup page and select **Settings**. Access controls can be created before, during or after People Skills setup.

Important

Privacy controls detailed here can be used to set up access policies to meet Works Council requirements and to pilot People Skills with small groups. Admins can configure inferencing and visibility controls (individually or in combination) to restrict skills inferencing or skills sharing for users outside the pilot or in restricted regions. For more details on piloting People Skills, review our [deployment guide](#) ↗.

Skills AI Inferencing Controls

Will users receive AI-based skill suggestions?

Admins will have the option to:

Enable _____ Users can opt-out
(Default behavior)

Disable AI inferencing _____ Users can opt-in

Turn off inferencing _____ No user controls

Skills Visibility Controls

Will user's skills be shared with others in M365?

Visibility controls are offered at 3 levels

Skills profile (Parent)
Includes all skills in user profile, including confirmed, AI-inferred and imported skills

AI inferred skills only (Child)
Includes all skills in user profile, including confirmed, AI-inferred and imported skills

Imported skills only (Child)
Sharing is disabled if Skills profile (parent) is opted-out/disabled

Admins will have the options to:

Enable _____ Users can opt-out sharing
(Default behavior)

Disable sharing _____ Users can opt-in to sharing

Turn off sharing* _____ No user controls*

*Turning off sharing completely (no user controls) is only available for the 2 child controls (AI-inferred and Imported skills) and not possible for Skills profile

Skills AI inferencing control overview

Skills inferencing controls are enabled by default, but you can let users opt in or out or disable inferencing entirely either before or after setting up People Skills.

- Admins can turn skills inferencing auto-on. Individual users can opt out.

- Admins can turn skills inferencing auto-off. Individual users can opt in.
- Admins can disable skills inferencing for their tenant.

Skills visibility controls overview

Skills visibility controls whether users can see their colleagues' skills on surfaces like the people card or in Copilot. All skills in a user's profile are shared and visible by default once you set up People Skills in your tenant. You can also change these visibility controls before or after setting up People Skills.

- Admins can turn skills visibility auto-on. Individual users can opt out.
- Admins can turn skills visibility auto-off. Individual users can opt in.
- Admins can disable skills visibility of some skills (AI-generated or imported skills) for their tenant.

We offer three levels of controls to control skill visibility. Each of these controls can be enabled or disabled using their own access policy.

- **(Parent control) Visibility of entire skills profile:** An individual's skills profile consists of AI-generated skills, user-confirmed skills, and imported skills (if applicable). If sharing is disabled, all user skills are private and not shared in any user, leader, or organizational analyst experiences.
- **(Child control) Visibility of AI-generated skills:** AI-generated skills are skills based on AI inferencing that are relevant to a user's role. These skills can only be shown if the skills profile (parent) is also set to visible. Separate controls for both admins and for users to allow them to share skills, even if the user's profile is set to visible.
- **(Child control) Visibility of imported skills:** User skills from third-party applications can be imported by your organization. Skills from these apps might need to be confirmed by users before they're shown in experiences as skills. A user might need to confirm these skills, similar to AI-generated skills. These skills can only be shown if the skills profile (parent) is also set to visible. Separate controls for both admins and for users to share skills, even if the user's profile is set to visible.

Important

When multiple policies apply to the same user, the most specific policy takes precedence. User-specific policies override group policies, which override organization-wide policies.

Example: If you create two policies - one that disables a feature for everyone in your organization, and another that enables the feature for people in a specific group - the

feature will be enabled for group members because the group policy takes precedence over the organization-wide policy.

The following sections will walk you through on how to set up each of the controls in detail, and the expected functionality when they're enabled or disabled.

Manage skills data sharing with Viva Insights

When checked, skills data is passed on to Viva Insights. Skills in Viva Insights allows organizations and leaders to discover skills within their workforce and assess skill distribution across groups. Learn more about [People Skills in Viva Insights](#).

You can stop skills data from being shared with Viva Insights by unchecking this setting.

Manage skills AI inferencing

Select **Skill inferencing by AI** under **Settings** to see details about the AI inferencing settings. People Skills provides access controls using [Feature Access Management](#) to ensure you comply with user privacy and local regulations.

When inferencing is enabled, users receive AI-generated skills relevant to their role. When skills AI inferencing is turned off, no AI computation is processed for that user. The user can still create a skill profile by manually searching to add skills from your taxonomy. They can also confirm any imported skills that an admin in your organization adds for them.

Create an access control policy if you need to disable skill suggestions for specific users, groups, or your entire tenant. For more information on how to create and manage policies, see [control access to features](#).

Note

Policies for People Skills can only be created in PowerShell at this time. You can't create or manage policies through the interface in Admin center.

You have the following options for creating an access control policy in PowerShell to manage skills inferencing:

- **Enable skills inferencing (Default):** When inferencing is enabled, users receive skill suggestions relevant to their role. Users have the option to turn it off for themselves in the Microsoft 365 profile editor, on the Data and privacy tab.

- **Keep skills inferencing enabled but default off:** Skills inferencing is available in your tenant, but users in this access policy will be "opted-out," and won't receive inferencing suggestions. Users have the option to turn it on for themselves in the Microsoft 365 profile editor, on the Data and privacy tab.

To create this policy, run the following PowerShell cmdlet:

PowerShell

```
Add-VivaModuleFeaturePolicy -ModuleId PeopleSkills -  
    FeatureId SkillsInferencing -Name SoftDisable -IsFeatureEnabled $true -  
    IsUserControlEnabled $true -IsUserOptedInByDefault $false -Everyone
```

- **Completely disable skills inferencing:** With this policy, skills inferencing is disabled for your tenant and users can't opt in to receiving skill inferencing suggestions.

To create this policy, run the following PowerShell cmdlet:

PowerShell

```
Add-VivaModuleFeaturePolicy -ModuleId PeopleSkills -  
    FeatureId SkillsInferencing -Name HardDisable -IsFeatureEnabled $false -  
    Everyone
```

ⓘ Note

In the PowerShell script, the **ModuleId** is *PeopleSkills*, and the **featureId** is *SkillsInferencing*. Replace `-Everyone` with your desired scope:

- `-Everyone` (entire organization)
- `-GroupIds "group1@contoso.com", "group2@contoso.com"` (specific groups)
- `-UserIds "user1@contoso.com", "user2@contoso.com"` (specific users)

For more details on PowerShell syntax, refer to [our Feature Access Management documentation](#).

Control visibility of entire user skills profile (Parent control)

This control can be used to control visibility of a user's entire skills profile. An individual's skills profile consists of AI-generated skills, user-confirmed skills, and imported skills.

By default, a user's skills profile is shown to others in their organizations and shared with other Microsoft 365 experience. If you need to disable sharing for specific users, groups, or your entire tenant, create an access control policy.

 **Note**

If sharing is disabled or "opted-out" by a user, all user skills will be private and won't be shown to other users or shared with any Microsoft 365 experiences.

You have the following options for creating an access control policy in PowerShell to manage visibility of entire user skills profile:

- **Enable profile visibility (Default):** When visibility is enabled, users skills profile is shared across Microsoft 365. Users have the option to turn it off for themselves in their skill settings.
- **Keep profile visibility default off:** Users in this access policy will be "opted-out," and their skills won't be shared across Microsoft 365. Users have the option to turn it on for themselves in their skill settings.

To create this policy, run the following PowerShell cmdlet:

PowerShell

```
Add-VivaModuleFeaturePolicy -ModuleId PeopleSkills -  
FeatureId SkillsProfileVisibility -Name SoftDisable -IsFeatureEnabled $true -  
IsUserControlEnabled $true -IsUserOptedInByDefault $false -Everyone
```

 **Note**

In the PowerShell script, the **ModuleId** is *PeopleSkills*, and the **featureId** is *SkillsProfileVisibility*. Replace `-Everyone` with your desired scope:

- `-Everyone` (entire organization)
- `-GroupIds "group1@contoso.com", "group2@contoso.com"` (specific groups)
- `-UserIds "user1@contoso.com", "user2@contoso.com"` (specific users)

For more details on PowerShell syntax, refer to [our Feature Access Management documentation](#).

We don't offer the option to completely disable skills profile visibility. A user can always opt in to sharing their skills profile from their personal skills settings in Profile Editor. Admins can disable sharing of some skills such as AI-generated, or org. added skills

Control visibility of AI-generated skills

AI-generated skills are provided to users based on their role and Microsoft 365 activity.

By default, a user's AI-generated skills are shown to others in their organizations and shared with other Microsoft 365 experiences. People Skills provides access controls using [Feature Access Management](#) to ensure you comply with user privacy and local regulations.

! Note

These skills are only shared if Skills Profile visibility is also enabled or shared. If sharing is disabled, AI-generated skills won't be shown to other users or shared with any Microsoft 365 experiences.

If you need to disable sharing for specific users, groups, or your entire tenant, create an access control policy.

You have the following options for creating an access control policy in PowerShell to manage the visibility of AI-generated skill:

- **Enable sharing of AI-generated skills (Default):** When visibility is enabled, AI-generated skills are shared across Microsoft 365. Users have the option to turn it off for themselves in their settings. Users can also manage how they can share AI-generated skills for themselves in the Microsoft 365 profile editor on the Data and privacy tab.
- **Keep the default sharing off for AI-generated skills:** Users in this access policy will be "opted-out," and their AI-generated skills won't be shared across Microsoft 365. Users have the option to turn it on for themselves in their skill settings.

To create this policy, run the following PowerShell cmdlet:

PowerShell

```
Add-VivaModuleFeaturePolicy -ModuleId PeopleSkills -FeatureId ShowAISkills -  
Name SoftDisable -IsFeatureEnabled $true -IsUserControlEnabled $true -  
IsUserOptedInByDefault $false -Everyone
```

- **Completely disable sharing of AI-generated skills:** With this policy, AI-generated skills aren't shared with anyone but themselves and users can't opt in to sharing their AI skill suggestions before confirming them those skills.

To create this policy, run the following PowerShell cmdlet:

PowerShell

```
Add-VivaModuleFeaturePolicy -ModuleId PeopleSkills -FeatureId ShowAISkills -  
Name HardDisable -IsFeatureEnabled $false -Everyone
```

ⓘ Note

In the PowerShell script, the **ModuleId** is *PeopleSkills*, and the **featureId** is *ShowAISkills*. Replace `-Everyone` with your desired scope:

- `-Everyone` (entire organization)
- `-GroupIds "group1@contoso.com", "group2@contoso.com"` (specific groups)
- `-UserIds "user1@contoso.com", "user2@contoso.com"` (specific users)

For more details on PowerShell syntax, refer to [our Feature Access Management documentation](#).

Control visibility of third-party imported skills

Imported skills added by an admin in your organization from external systems display in a user's skills profile alongside AI-generated skills. Like AI-generated skills, these skills are available for the user to confirm in the Microsoft 365 profile editor. By default, third-party skills are displayed to others in their organizations and shared with other Microsoft 365 experiences. If sharing is disabled, imported skills won't display to others in the organization.

ⓘ Note

These skills are only shared if Skills Profile visibility is also enabled or shared. If sharing is disabled, third-party skills won't display to other users or get shared with any Microsoft 365 experiences.

If you need to disable sharing for specific users, groups, or your entire tenant, create an access control policy. For more information, see [Feature Access Management](#).

You have the following options for creating an access control policy in PowerShell to manage third-party skills visibility imported by your organization:

- **Enable third-party skills visibility (Default):** When visibility is enabled, third-party skills are shared across Microsoft 365. Users have the option to turn it off for themselves in their settings.
- **Keep imported skill sharing default off:** Users in this access policy will be "opted-out," and their third-party skills won't be shared across Microsoft 365. Users have the option to turn it on for themselves in their skill settings.

To create this policy, run the following PowerShell cmdlet:

```
PowerShell  
  
Add-VivaModuleFeaturePolicy -ModuleId PeopleSkills -  
    FeatureId ShowOrgAddedSkills -Name SoftDisable -IsFeatureEnabled $true -  
    IsUserControlEnabled $true -IsUserOptedInByDefault $false -Everyone
```

- **Completely disable imported skill sharing:** With this policy, third-party skills aren't shared with Microsoft 365 experience in your tenant and users can't opt in to sharing their third-party skills.

To create this policy, run the following PowerShell cmdlet:

```
PowerShell  
  
Add-VivaModuleFeaturePolicy -ModuleId PeopleSkills -  
    FeatureId ShowOrgAddedSkills -Name HardDisable -IsFeatureEnabled $false -  
    Everyone
```

ⓘ Note

In the PowerShell script, the **ModuleId** is *PeopleSkills*, and the **featureId** is *ShowOrgAddedSkills*. Replace `-Everyone` with your desired scope:

- `-Everyone` (entire organization)
- `-GroupIds "group1@contoso.com", "group2@contoso.com"` (specific groups)
- `-UserIds "user1@contoso.com", "user2@contoso.com"` (specific users)

For more details on PowerShell syntax, refer to [our Feature Access Management documentation](#).

Manage your skills library in People Skills

06/05/2025

After completing the [initial setup](#), you can return to the People Skills page in the Microsoft 365 Admin Center to manage the skills library and admin settings.

You can find People Skills setup page by visiting the Copilot page in the [Microsoft 365 admin center](#) and selecting **People Skills** in Microsoft 365 Copilot. Alternatively, you can find People Skills page under **Settings > Viva > Data Management**.

If you're looking for how to set up People Skills for the first time, see [Set up People Skills](#).

Options to manage your skills library

You can manage your skills library in the following ways:

- [Manage out-of-the-box library](#): Add and delete skills from a previously selected list of skills from the out-of-the-box library.
- [Manage custom skills](#): Add custom skills if you haven't previously added them during the initial setup. You can also reimport custom skills, add new ones, or delete custom skills at any point.
- [Manage AI-restricted skills](#): Mark certain skills as sensitive to restrict them from being returned by skills AI inferencing.
- [Import or export skills](#): Import user skills from third-party platforms and export your custom skills library or confirmed user skills for each individual user in your tenant.

Manage out-of-the-box skills library

You can view, add, or delete the skills that you selected from the out-of-the-box library. The more skills you include from the out-of-the-box library, the more specific AI-generated skill profiles are for the users. Our recommendation is to use all 16,000 skills, with a minimum of 500 skills.

To view, add, or delete the skills that you selected from the out-of-the-box library, follow these steps:

1. Navigate to the People Skills setup page and select **Skills*** to manage your skills library.
2. Under **Skills**, select **People Skills Library**.

3. Review the list. You can also filter the list by domain or search by skill name.
4. To add skills, select **Add Skills**. You can filter by domain or search by skill name. Select **Add**.
5. To delete skills, select the skills you want to delete. You can filter by domain or search by skill name. Select **Delete skills**. Select **Delete** again to confirm you want to delete the selected skills.

 **Note**

Deleting skills removes the skills and associated skills data from your organization and from your users' experience.

6. Select **Done**.

Manage custom skills

06/05/2025

If you didn't import custom skills as a part of your initial setup, you can add it later by following the steps mentioned in this article. You can also delete or export custom skills.

View your custom skills

If custom skills were imported during initial setup, follow these steps to view them:

1. Under **Skills**, select **People Skills Library**, and then select **Custom skills**. You can filter by role and search by skill name.
2. Select **View details** to see an overview of your imported files, who completed the import, and the import date.

Import custom skills library

Follow these steps to either import your custom skills library for the first time or to reimport with changes to your initial custom import:

1. Under **Skills**, select the **Import custom skills** tab.
2. Select **Download library template** and **Download mapping template**.
3. Open the template files you downloaded. Follow the steps mentioned in [Custom skills files](#) to create your skills library and for mapping files.
4. Paste the file paths for both files into the **Skills library file path** and **Skill mapping file path** fields.
5. Select **Next** to begin file validation. If there's a problem with the file, you'll see an error message at this step.
6. Review your custom skills data.
 - The number of skills from the out-of-the-box library.
 - The number of skills and number of roles/job titles from your custom import.
 - The number of duplicate skills identified in your selection. If you have duplicates, your organization's custom data is prioritized over data from the out-of-the-box library.

7. Acknowledge that importing custom skills will immediately impact your users' experience if skills is turned on.

8. Select **Confirm** to import.

Export your skills library

You can export the custom skills that you've set up in your skills library.

1. Under **Skills**, select **Export library**.

2. Select **Export custom skills** to export your custom skills imported files.

Delete custom skills

Deleting custom skills immediately removes all of these skills from user experiences and deletes all data associated with those skills.

1. Under **Skills**, select **People Skills Library**, and then select **Custom skills**.

2. Select **Delete custom skills**.

3. Select **Delete** to confirm that you want to delete your custom skills.

Manage AI-restricted skills

06/05/2025

Admins can mark certain skills as AI-restricted, such as the skills that might be considered as confidential or sensitive in nature. These skills can be related to specific projects, proprietary technologies, or other areas that an organization might want to exclude from being used in AI based skill inferencing.

AI restricted skills won't be suggested to users in your tenant. Our inference engine ensures that any AI restricted skills identified by the admin will be updated and removed from user profiles within 24 hours. However, a user is able to manually add any skill from taxonomy to their profile, including AI restricted skills.

To mark skills in the default library as AI-restricted, follow these steps:

1. Select **Skills** and select **People Skills Library**.
2. Select one or more skills that need to be tagged as AI-restricted using the check box.
3. On the window pop-up, select **Add AI restricted tag**.

The screenshot shows the Microsoft 365 Admin Center interface. On the left, the navigation menu is visible with sections like Home, Users, Devices, Teams & groups, Roles, Resources, Billing, Support, Settings, Domains, Search & intelligence, Edge, Org settings, Integrated apps, and Viva. Under Viva, 'Partner relationships' is expanded, showing Setup, Reports, and Health. In the center, the 'Manage the People Skills library' page is displayed. It features a table with columns for Skill name, Description, and AI RESTRICTED status. Several skills are listed, each with a checkbox and a 'View details' link. A filter bar at the top right shows '5 of 20,000 total skills' and a 'Filters' dropdown. On the right, a modal window titled 'Account Reconciliation' is open. It contains fields for 'Skill name' (set to 'Account Reconciliation') and 'Description' (set to 'Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore...'). Below these, there's a section for 'AI restricted tag' with a note: 'AI cannot add this skill to people's profiles. However, individuals can still confirm and add it to their profiles. If people should not be able to add this skill to their profiles, delete it from your skills library.' A 'Learn more about AI restricted skills' link is also present. At the bottom of the modal are 'Close' and a magnifying glass icon.

- To view all skills tagged as AI restricted in your skills library, you can use the **AI restricted** filter.

The screenshot shows the Microsoft 365 Admin Center interface. On the left, there's a navigation sidebar with links for Home, Users, Devices, Teams & groups, Roles, Resources, Billing, Support, Settings (which is expanded to show Domains, Search & intelligence, Edge, Org settings, and Integrated apps), Viva (which is expanded to show Partner relationships, Setup, Reports, and Health), Admin centers (Security, Compliance, Device Management), and Azure Active Directory. The main content area is titled "Manage the People Skills library". It says, "The People Skills library provides a comprehensive list of skills for people to explore in Microsoft 365 experiences. You can use the entire library, or narrow down to a subset of skills." Below this is a search bar and a table with columns for Skill name, Description, and Supported languages. The table contains several rows, each with a checkbox, a skill name, a description (all showing placeholder text), and a "Supported languages" column with a count of 30. One row is highlighted with an orange "AI RESTRICTED" tag. At the bottom right of the main area is a circular icon with a magnifying glass and a plus sign.

- To remove a skill as AI-restricted, select the skill and select the Remove AI-restricted tag.

This screenshot is similar to the one above, but it includes a modal dialog box over the main content area. The modal is for the "Account Reconciliation" skill, which is currently marked as "AI RESTRICTED". The modal has a "Remove AI restricted tag" button and a "Delete skill" button. It also displays the skill's name ("Account Reconciliation"), description (placeholder text), and an "AI restricted tag" section with explanatory text about why it cannot be added to profiles. A "Learn more about AI restricted skills" link is also present. At the bottom right of the modal is a "Close" button.

Import or export People Skills

06/05/2025

You can import skills for a user from third-party platforms and export a user's confirmed skills using the Microsoft Graph API. Also, you can export a user's confirmed skills.

Import user skills

You can import user skills from third party systems. The imported skills display on that user's skills profile as *Imported by your organization* and can be confirmed by a user. Once confirmed, imported skills behave the same as all confirmed skills.

User skills from external systems can be imported as an attribute while uploading organizational data into Microsoft 365.

Review the below guideline on how you can use the tool to import user skills:

1. Open the [Organization data ingestion tool](#) in the admin center and download the .csv template. In the admin center, click **Setup > Migration and imports**.
2. In the organization data ingestion tool template, list all the users for whom you need skills to be imported, and list each user's skills under the attribute **Microsoft_UserSkillNames**. For more information, see [organization data field in the template](#).
3. Make a copy of all the user skills and add them to People Skills library as custom skills. For more information, see [how to add custom skills](#).
4. Import the user skills data into Microsoft 365 using the .csv upload.

Export user skills

Admins can export a user's confirmed skills by using the Profile endpoint in the Microsoft Graph API. For more information, see [List skills](#) about the skills endpoint and specific GET requests to access this data from the Microsoft Graph API.

 **Note**

Only a user's confirmed skills can be exported. AI-generated skills can't be exported.

Our commitment to responsible AI

07/23/2025

Microsoft is committed to responsibly designing, building, and releasing AI technologies—keeping humans at the center and guided by our principles.

User data privacy controls

[Review the data privacy controls we offer for admins](#) to control default AI inferencing and skill visibility settings for their tenant or groups of users.

Users can also opt out of AI inferencing or skill sharing on their profile. For more information, see [Manage AI and sharing options](#).

Data location

You can find the actual location of your data in Microsoft 365 Admin Center. As a tenant administrator, you can find the actual data location for committed data by navigating to **Admin > Settings > Org Settings > Organization Profile > Data Location**.

Related articles

- [AI transparency in People Skills](#)
- [Microsoft's commitment to Responsible AI](#)
- [Microsoft Responsible AI standard](#)

Microsoft 365 Copilot Search

08/08/2025

Microsoft 365 Copilot Search is an AI-powered universal search experience optimized for your organization. It provides a familiar search experience that helps users quickly find relevant results from your organization. It offers a simple user experience that helps you find what you need, when you need it in a fast and secure unified search.

ⓘ Note

Microsoft 365 Copilot Search is generally available as both a Targeted and Standard release as of July 23, 2025. Learn more about [Standard and Targeted releases](#).

Unified search across all applications: Copilot Search delivers comprehensive insights into your organization's data by interpreting content across Microsoft 365 applications and beyond. With over 100 connectors now in the Microsoft Catalog, support for custom connectors, and hundreds of connectors from integrated software vendors (ISVs), Copilot Search is the single place for quick information across all your Microsoft and non-Microsoft data sources. Learn more about the [Microsoft 365 Copilot connectors gallery](#).

What to use when: Because it's integrated with Microsoft 365 Copilot, users can find the results they need with search, then seamlessly transition to chat for deeper exploration or follow-up task completion.

The screenshot shows the Microsoft 365 Copilot Search interface. On the left is a sidebar with navigation links: M365 Copilot, Chat (selected), Agents, Chats, Pages, Notebooks, Create, and Apps. The main area has a header "Find content across your organization" and a search bar. Below is a "Recommended" section with three cards: "Product patent & analysis" (by Daisy Philip's files), "BioFabric Kick-off" (by Daisy Philip's files), and "Feature clusters scoping grid" (by MJ Price's files). Under "Quick access", there are tabs for Recent (selected), Shared, and Favorites. Below are buttons for All, Type, Copilot chats (Work), Pages, Notebooks, and a plus sign. At the bottom, there are news items: "Gene Diversity labs" (by Neta Taylor's files), "Ship-room biweekly status update triad..." (by Microsoft Teams meeting), and "Mona Kane + 2 others edited this" (by Aadi Kapoor shared with you). A magnifying glass icon with a plus sign is in the bottom right corner.

How Copilot Search works with Microsoft 365 Copilot

Copilot Search is integrated into the Microsoft 365 Copilot app as a dedicated **Search** module. This integration makes Copilot Search:

- **Comprehensive:** A universal search experience that allows users to search across all their Microsoft 365 and third-party data sources to find what they need quickly
- **Fast:** Delivers fast responses at scale across your organizational content
- **Relevant:** Uses semantic understanding for highly contextual and precise results
- **Simple:** Features an intuitive, modern user experience
- **Connected:** Copilot answers and summaries link Search to Chat
- **Personalized:** Tailored to individual users and tenants
- **Secure:** Offers enterprise-grade security and privacy

This design positions search as the organizing layer for AI, while chat remains the workspace for task execution and deeper interactions. For example, if a user searches for **what's the status of the Q2 report**, Copilot Search may return a summarized answer and offer to continue the conversation in chat for more nuanced exploration or follow-up actions.

The screenshot shows the Microsoft 365 Copilot app interface. On the left is a sidebar with navigation links: Search, Chat, Agents, Chats, Pages, Notebooks, Create, and Apps. The main area is titled "Search" and contains a search bar with the query "q3 marketing report". Below the search bar are filters for "Modified", "Type", and "Person". The results section displays several items: "Q3 Marketing Report" (modified this morning by Kevin Sturgis), "Bug 3476551 Skip Cache Refresh as much as possible" (status: In review - Azure DevOps), "Phase 1: Q3 Marketing Phases" (edited last week by Mona Kane), "Marketing Guidelines" (created last month by Chris Naidoo), "Bug 968547 Skip Cache Refresh as much as possible" (status: In review - Azure DevOps), and "Program Audit" (created yesterday by Mona Kane). To the right of the results is a sidebar titled "Results" with a "All results" button and a count of 1.2K. At the bottom right is a circular icon with a magnifying glass and a plus sign.

Access and eligibility

Copilot Search is available to users with an eligible Microsoft 365 Copilot license at no additional cost. It can be accessed through the Microsoft 365 Copilot app on desktop, web, and mobile platforms. The app is available to users with Entra accounts (work or school).

No action is required by admins or users to set up Copilot Search. If a user has an eligible Microsoft 365 Copilot license, Copilot Search appears as a tab in the Microsoft 365 Copilot app.

Privacy and security

Microsoft 365 Copilot Search adheres to the same data protection, privacy standards, and security configurations as Microsoft 365 Copilot. Learn more about [data, privacy, and security in Microsoft 365 Copilot](#).

Natural language search

Copilot Search supports natural language queries, allowing users to type questions or requests in everyday language. For example, you can search for, **show me emails from John about Q4 forecasting sent last week or where is the spreadsheet that breaks down marketing ROI by region?**, and Copilot Search will understand your intent and return relevant results from across Microsoft 365, including emails, files, chats, meetings, and more.

Copilot Search goes beyond keyword matching by using AI to interpret context, relationships, and meaning, helping you find what you need faster and more intuitively. It also supports traditional keyword queries for specific words or short phrases, relying on exact or partial matches. But a natural language query can engage AI to better interpret the context of the query, leading to more relevant results.

Answer types

A Copilot Answer in Microsoft 365 Copilot Search is a concise, AI-generated response that's powered by Microsoft 365 Copilot Chat. It appears at the top of the search results page when you enter specific natural language queries.

Copilot Answers may include references and information from external sources, including optional connected cloud-backed services and the web. Its grounding is consistent with the grounding you've enabled for Copilot Chat. Learn more about how Copilot Search and Copilot Chat [use the Bing search service](#) to ground some answers and responses in the latest information from the web.

Copilot Search also allows admins to curate answers that provide concise, authoritative results that are especially relevant to your organization. These answers are delivered directly in search results and convey information about your organization's acronyms, bookmarks, and people.

- **Acronyms:** Define terminology used in the workplace.
- **Bookmarks:** Promote key resources in your organization.

- **People:** Surface coworkers' roles and show how they fit into the organization.

For more information, see [how to curate answers for Copilot Search](#).

How is Microsoft 365 Copilot Search different from Microsoft 365 Copilot Chat?

The following table shows some of the key differences between Microsoft 365 Copilot and Microsoft 365 Copilot Chat.

[+] [Expand table](#)

Feature	Microsoft 365 Copilot Search	Microsoft 365 Copilot Chat
Best for	Find what you need quickly	Generate deeper answers, create content and get the task done
Interaction style	Query-based (search box)	Conversational (chat-based)
Data sources	Microsoft Graph & third-party connectors	Microsoft Graph, third-party connectors, web

How is Microsoft 365 Copilot Search different from Microsoft Search?

The following table shows a summary of key comparisons between Microsoft 365 Copilot Search (Paid) and Microsoft Search (Free), focusing on the most relevant features:

[+] [Expand table](#)

Feature/Capability	Microsoft Copilot Search (paid)	Microsoft Search (free)
UI Entry Point	Microsoft 365 Copilot App (Web, Desktop, Mobile) Microsoft 365 Copilot App (Web, Desktop, Mobile), SharePoint (organizational tab)	Microsoft 365 Copilot App (Web, Desktop, Mobile). SharePoint (organizational tab)
User Eligibility	Requires Microsoft 365 Copilot license	Available to unpaid Entra ID users
Search Experience	AI-powered, semantic search; universal search across M365 & non-M365 sources; modern UX	Keyword-based search; interleaved results; Teams/Outlook in Messages vertical

Feature/Capability	Microsoft Copilot Search (paid)	Microsoft Search (free)
Graph Connector Support (3P)	Instant support for all tenant-enabled connectors with semantic search & personalization	Requires admin setup for connectors to appear as verticals with result-types and filters. No semantic search.
Integration with Copilot Chat	Deep integration with Chat —via Copilot Chat answers	No integration
Security & Privacy	Enterprise-grade security and privacy; sensitivity labels in UX	Same baseline security; sensitivity labels in UX. Already available as default
Integrations	Native Edge integration (people-centric, tenant-scoped search)	Native Edge integration (people-centric, tenant-scoped search)
Administration	No setup required; admin can configure bookmarks/acronyms; Admin analytics reports will be available starting August 2025	Admin config for bookmarks/acronyms; Admin analytics available
Future Updates	Document-level AI summary, enhanced people search, Ranking/Relevance and natural language improvements and more	N/A

ⓘ **Note:** The author created this article with assistance from AI. [Learn more](#)

Manage Microsoft 365 Copilot Search

06/13/2025

No action is required by admins to set up Microsoft 365 Copilot Search. If a user has a Microsoft 365 Copilot license, they can access Copilot Search from the **Search** module in the Microsoft 365 Copilot app across web, desktop, and mobile. Users who don't have the Microsoft 365 Copilot app will receive the Microsoft Search experience when clicking the **Search** module in the Microsoft 365 app.

Learn more about [setting up Microsoft 365 Copilot](#) for your users.

 **Note**

Microsoft 365 Copilot Search becomes available in a Targeted release beginning late June 2025. It will become generally available as a Standard release in Q3 2025. Learn more about [Standard and Targeted releases](#).

Copilot Search and third-party systems

Copilot Search can access data in third-party systems as well as Microsoft 365 apps and other systems in the Microsoft Graph. This is achieved through Microsoft 365 Copilot connectors, which allow organizations to ingest data from external platforms like Salesforce, ServiceNow, Confluence, and more.

Learn more about [Microsoft 365 Copilot connectors](#).

Privacy and security

Microsoft 365 Copilot Search adheres to the same data protection, privacy standards, and security configurations as Microsoft 365 Copilot. Learn more about [data, privacy, and security in Microsoft 365 Copilot](#).

Microsoft 365 Copilot extension

The Microsoft 365 Copilot extension is a cross-browser add-on that enhances your Copilot Search results. This extension brings together information from tickets, files, documents, and tasks across multiple work-related third-party sites, providing highly relevant and personalized search results.

The Microsoft 365 Copilot extension works in the background without any manual steps after installation. It is enabled by your organization through the Microsoft Edge Add-Ons website or the Chrome Web store (extensions). The extension only uses activity from third-party apps or sites configured by your organization and doesn't track your general web browsing. Data captured is stored securely and used only to improve your Copilot Search experience and is not shared with others.

For the preview program, we support the following third-party apps or connectors: ADO, ServiceNow KB, ServiceNow Catalog, ServiceNow Tickets, Jira, Google Drive, Confluence, and GitHub.

Learn more about [Microsoft 365 Copilot extension](#).

Bookmarks and acronyms

Admins can configure authoritative information for their tenants using bookmarks and acronyms for Copilot Search just as they can for Microsoft Search. Curating bookmarks and acronyms helps surface organization-specific answers directly in search results. These features are designed to:

- Promote key resources - [Bookmarks](#)
- Define internal terminology - [Acronyms](#)
- Improve discoverability and reduce confusion across teams and departments

Manage access to files and sites

Organizations can restrict end users from searching for files in certain SharePoint sites by enabling Restricted Content Discovery. This setting prevents these sites from appearing in organization-wide search results and Microsoft 365 Copilot answers unless a user owns or has recently interacted with content on those sites.

Learn more about [Restricted Content Discovery in SharePoint](#).

In addition, if you're a SharePoint Administrator or above in Microsoft 365, Restricted SharePoint Search is a setting that helps you maintain a list of SharePoint sites, known as the **allowed list**. With this list, you allow access to these designated sites after checking permissions and applying data governance. The allowed list specifies which SharePoint sites can be included in organization-wide search and Copilot experiences. By default, the Restricted SharePoint Search setting is turned off and the allowed list is empty.

Restricted SharePoint Search allows you to restrict both organization-wide search and Copilot experiences to a curated set of SharePoint sites of your choice. Even if you enable Restricted

SharePoint Search, users in your organization are still able to interact with files and content they own or that they have previously accessed in Copilot.

Learn more about [Restricted SharePoint Search](#).

Admins can also manage access to other sensitive organizational data using tools and policies tailored to their needs. Microsoft offers solutions to prevent the oversharing of sensitive data and identify sites with the most sensitive documents.

Learn more about [managing access to files and sites](#).

 **Note:** The author created this article with assistance from AI. [Learn more](#)

Microsoft 365 Copilot Search admin experience

06/25/2025

The Microsoft 365 Copilot Search admin experience is a new capability in the Microsoft 365 admin center designed to empower you to manage, customize, and optimize the Copilot Search experience across your organization.

Accessing Copilot Search in the Microsoft 365 admin center

No action is required to set up Microsoft 365 Copilot Search. If a user has an eligible Microsoft 365 Copilot license, they can access Copilot Search from the **Search** module in the Microsoft 365 Copilot app. Users who don't have an eligible Microsoft 365 Copilot license will receive the Microsoft Search experience when selecting the **Search** module in the Microsoft 365 app.

Configure Copilot Search for your organization

You can create a customized Copilot Search experience that delivers more relevant results for your users. For example, you can manage connectors, bookmarks and acronyms for Copilot Search just as you can for Microsoft Search. If you've already configured bookmarks and acronyms for Microsoft Search, no further action is required to enable curated bookmarks and acronyms for Copilot Search.

The Copilot Search admin experience enables admins to:

- Configure frequently searched content within your organization like bookmarks and acronyms.
- Customize search results and filters.
- Monitor usage, adoption, and performance metrics.
- Manage all your data sources with over 100 connectors within the Microsoft Catalog, custom connectors and hundreds of connectors from integrated software vendors (ISVs). For more information, see [Microsoft 365 Copilot connectors gallery](#).

Manage acronyms in Copilot Search

You can manage acronyms for Copilot Search just as you can for Microsoft Search. If you've already configured acronyms for Microsoft Search, you're all set.

Curating acronyms for your users helps remedy a common workplace frustration. Users often encounter unfamiliar acronyms and abbreviations used in their organizations. Terms specific to organizations or teams might be confusing to people who move from one team to another, collaborate with partner teams, or are new to the organization.

Lack of a single reference source makes it hard to find definitions for these acronyms. Copilot Search solves that problem by allowing admins to curate acronyms for optimized search results.

Set up Copilot Search admin experience

In the Microsoft 365 admin center:

1. Go to admin.microsoft.com.
2. From the left navigation menu, select **Copilot** from the dropdown menu and select **Search**.

Copilot Search user experience

In the **Search** box, users looking to understand an acronym might enter queries like:

- KPI
- Define KPI
- KPI definition
- Expand KPI

- KPI expansion
- Meaning of KPI
- KPI means
- KPI stands for

If KPI has been curated by the organization's admin, Copilot Search results include all the meanings of KPI identified by the user's organization.

 Note

Acronym queries are not case sensitive.

Set up acronym answers

In the Microsoft 365 admin center:

1. Go to the **Copilot** drop down menu.
2. Select **Search** and then **Acronyms**.
3. Select **Add Acronyms**.

Set up admin curated acronyms

Search administrators can add acronyms on the **Acronyms** tab in the Copilot Search admin experience. You can add acronyms from any internal site or repository to the admin center. These acronyms can be added to the **Published** state or **Draft** state.

- **Published state:** Acronyms are available to the organization's users through Copilot Search.
- **Draft state:** If you want to review an acronym before making it available in Copilot Search, you can add the acronym in a Draft state. Acronyms in the Draft state don't appear in search results. You'll need to move the acronym to the **Published** state to make it appear in search results.
- **Excluded state:** If you want to prevent an acronym from appearing in Microsoft Search, use **Exclude an acronym** to do so. To stop an acronym from being excluded, you'll need to delete the excluded acronym and add it or verify it's in your published list.

Import acronyms

You can add acronyms individually or bulk import them in a .csv file. Upload a .csv file with the fields shown in the following table:

 Expand table

Acronym (Mandatory)	Stands For (Mandatory)	URL	Description	State (Mandatory)	Last Modified	Last Modified By	ID
KPI	Key Performance Indicator	Source of this information	Key performance indicators (KPIs) are quantifiable measurements...	Published, Draft, or Excluded			

CSV fields

- **Acronym:** Contains the actual short form or acronym. An example is KPI.
- **Stands for:** Contains the definition of the acronym. An example is Key Performance Indicator.
- **Description:** A brief description of the acronym that gives users more info about the acronym and its definition. For example, A KPI is a measurable value that helps organizations track and evaluate their progress toward achieving specific goals.
- **Source:** The URL of the page or website where you want users to go for more information about the acronym.

- **State:** This field can take three values:
 - **Draft:** Adds the acronym to the Draft state.
 - **Published:** Adds the acronym to the Published state and makes it available in Copilot Search results.
 - **Excluded:** Adds the acronym to the Excluded state and prevents it from appearing in Copilot Search results.
- **Last Modified:** The date the acronym was last changed. Don't edit the data in this field.
- **Last Modified By:** The user who made the last change to the acronym. Don't edit the data in this field.
- **ID:** The unique identifier for the acronym. Don't edit the data in this field. If you include the ID of an existing acronym, it will be replaced with the information in the import file.

Manage Bookmarks in Copilot Search

Bookmarks help people find sites and tools that are especially important in an organization with just a quick search. Each bookmark includes a title, URL, a set of user-friendly keywords to trigger the bookmark, and a category.

What makes a great bookmark

A great bookmark has four key elements:

- **A strong, informative title:** Aim for no more than eight words or about 60 characters maximum. You want your users to select the title and view the content but avoid obvious clickbait because it loses trust in your users. Consider these examples:
 - **Good:** Try this week's tasty favorites from the cafeteria menu. Title is clear, concise, and interesting, but could be over-promising.
 - **Better:** This week's cafeteria menu. Doesn't over-promise or sound like an ad.
 - **Avoid:** You won't believe what's coming on the cafeteria menu this week. Uses clickbait that sound like an ad.
- **A succinct description:** About 300 characters, that summarizes the purpose or functionality of the linked resource.
- **A collection of keywords:** To help people find the bookmark when they search. We suggest a minimum of at least five keywords. Also, include variations that people in your organization might use. For example, dining menu, lunch menu, and caf menu could all be variations on cafeteria menu.
- **A helpful set of categories:** That makes it easier to sort and filter bookmarks in the admin center. Your users never see the assigned categories.

Create bookmark answers

In the Microsoft 365 admin center:

1. Go to the **Copilot Control System** and select **Search**.
2. Select **Bookmarks** and choose how you want to create new bookmarks:
 - **Add bookmarks**
 - **Import SharePoint results**
 - **Import bookmarks**

Add bookmarks

Admins can add bookmarks in the Microsoft 365 admin center and either publish or save them to a draft state. Publishing a bookmark immediately refreshes the search index, making it discoverable to users right away. You can also schedule a bookmark by specifying the date and time it will be published.

- **Published:** Bookmarks are available to the organization's users through Copilot Search results.

- **Draft:** Bookmarks saved as drafts aren't available to your users. Use this status if you or other stakeholders want to review or update bookmarks before publishing.
- **Scheduled:** Bookmarks to be published on the specified date and time.

Import bookmarks

You can add bookmarks individually or bulk import them in a .csv file. Upload a .csv file with the fields shown in the following table:

[Expand table](#)

Title	Url	Keywords	Match Similar Keywords	State	Description	Reserved Keywords	Categories	Last Modified By	ID
Yammer	https://www.yammer.com/office365	Yammer Online, Yammer login	Automatic manually add	Published, Draft, Scheduled, Excluded, Expired, Suggested	Yammer is a collaboration tool that helps you connect with colleagues.	Microsoft Suggests, Microsoft Recommends	Name of the admin	Unique ID	

Prevent import errors

You'll get an error if any required data is missing or invalid. Also, a log file is generated with more information about the rows and columns to be corrected. Make necessary edits and try importing the file again. You can't import or save any bookmarks until all errors are resolved.

To prevent errors, make sure your import file is properly formatted and:

- Includes the header row and all the columns that were in the import template
- The column order is the same as the import template
- All columns have values, except the three that can be empty: ID, Last Modified, and Last Modified By
- The **State** column isn't empty, it requires information
- For Published, Suggested, Scheduled, or Draft bookmarks, the Title, URL, and Keywords columns are required
- For Excluded bookmarks, the URL column is required

To prevent bookmark-to-bookmark duplication errors:

- Don't use the same URL in different bookmarks. You'll get an error if you try to import a bookmark with a URL used in an existing one. This also applies to duplicate URLs in other types of answers.
- When updating existing bookmarks, use the bookmark ID column. You can update any other property of an existing bookmark, such as keyword or description, but you should make sure the bookmark ID is in the appropriate column of the import file. If the bookmark ID is present, it won't be treated as a new addition and won't be processed as an error.

ⓘ Note: The author created this article with assistance from AI. [Learn more](#)

Microsoft 365 Copilot Search frequently asked questions

Microsoft 365 Copilot Search delivers an AI-powered, unified search experience optimized for work and school. It retrieves content across Microsoft 365 apps and third-party apps, using the Microsoft Graph to interpret user context, behavioral signals, and organizational relationships. This enables it to return highly personalized, context-aware answers to complex queries.

General

What is Microsoft 365 Copilot Search?

Microsoft 365 Copilot Search delivers an AI-powered, unified search experience optimized for work and school. It retrieves content across Microsoft 365 apps as well as third-party apps, leveraging the Microsoft Graph to interpret user context, behavioral signals, and organizational relationships. This enables it to return highly personalized, context-aware answers to complex queries.

Does Microsoft 365 Copilot Search support natural language and Keyword queries?

Yes, Microsoft 365 Copilot Search supports traditional keyword queries and also natural language queries. You can type in simple terms like "Project Juno docs" or questions in everyday language—like "show me the latest updates from John Smith about budget planning" or "find the presentation Rachel shared last week"—and Copilot Search will understand your intent and return relevant results from across Microsoft 365 (emails, files, chats, meetings, and all connected data sources).

What languages are supported by Microsoft 365 Copilot Search?

Copilot Search supports the same languages as Microsoft 365 Copilot generally. See the [list of supported languages ↗](#).

What types of content can Microsoft 365 Copilot Search access?

It can search across Microsoft 365 apps and services, Viva Learning, Engage, and PowerBI in addition to third-party systems integrated via Copilot connectors. Learn more about [Microsoft 365 connectors](#).

Can I use Microsoft 365 Copilot Search to find information from third-party systems?

Yes, Microsoft 365 Copilot Search integrates with third-party systems. This is primarily achieved through Microsoft 365 Copilot connectors, which allow organizations to bring in data from external platforms like Salesforce, ServiceNow, Confluence, and more. Learn more about [Microsoft 365 connectors](#).

How is Microsoft 365 Copilot Search different from Microsoft 365 Copilot Chat?

Copilot Search helps you find the right information across your organization quickly. Copilot Chat helps you get work done by generating deeper answers, creating content and assisting with tasks in context. Microsoft 365 Copilot Search helps you find what you need quickly, provides a query-based search box experience, and uses the Microsoft Graph and third-party connectors. Microsoft 365 Copilot generates deeper answers, creates content, and gets the task done in a conversational, chat-based experience, and can access Microsoft Graph, third-party connectors, and the web. See [How is Microsoft 365 Copilot Search different from Microsoft 365 Copilot Chat?](#) for more details.

What are data source filters in Copilot Search?

The data source filter is in the right rail of Copilot Search. It enables users to filter the search results, narrowing results to specific data sources in Microsoft 365 like SharePoint (and OneDrive for Business), Teams, Outlook Emails, and additional data sources connected via Copilot Connectors that include PowerBI, Viva Engage, Viva Learning or third-party sources.

Does Copilot Search support customizations?

Currently, Copilot Search is designed to deliver a seamless and intuitive experience right out of the box, minimizing the need for complex customizations. Our focus is on providing immediate access to the most relevant information across your data sources, ensuring ease of use for everyone. We're committed to continuously enhancing this experience, and we welcome your feedback on how we can make Copilot Search even more effective for your needs.

What are the differences between Microsoft 365 Copilot Search and Microsoft Search?

Microsoft 365 Copilot Search is designed as an AI-powered, enterprise-grade search assistant. It understands semantics of the user intent, considers user context and relationships, learns from user behaviors to deliver personalized, relevant results. It goes beyond keyword matching to interpret intent and provide AI-generated answers with references and follow-up options. [Microsoft Search](#), by contrast, is a more traditional search experience. It relies on keyword-based queries and returns a list of links or documents. While it integrates with Microsoft 365, it doesn't integrate in a single result information from all available data sources, like Team, emails, calendar, etc. Both Copilot Search and Microsoft Search adhere to the same data protection, privacy standards, and security configurations. Learn more at [How is Microsoft 365 Copilot Search different from Microsoft Search?](#).

Can a user licensed with Microsoft 365 Copilot still use Microsoft Search?

A user level toggle is available on Microsoft 365 Copilot Search experience. By default, this is ON which enables Microsoft 365 Copilot Search experience. However, in situations where users want to revert to the Microsoft Search Experience, they can turn the toggle OFF. The toggle is specific to the application and endpoint and won't persist across web, desktop and mobile. The toggle will be removed after 60 days of Microsoft 365 Copilot Search general availability.

What are the differences between Microsoft 365 Copilot Search and Copilot Search in Bing?

Microsoft 365 Copilot Search is an AI-powered universal search experience optimized for work and school. It's available to users with a Microsoft 365 Copilot license and is accessed through the Microsoft 365 app and Microsoft Edge. It helps you quickly find relevant results from your organization, searching across all your Microsoft 365 apps and any third-party apps integrated via Microsoft 365 Copilot connectors. It also adheres to the same data protection, privacy standards, and security configurations as Microsoft 365 Copilot. [Copilot Search in Bing](#), by contrast, is an AI-powered search engine designed for searching the web. It's intended for individual users who aren't necessarily using it for work or school. It's accessed through a web browser and doesn't require a Microsoft 365 Copilot license.

Licensing and access

Where can I access Microsoft 365 Copilot Search?

Microsoft 365 Copilot Search is available through the Microsoft 365 Copilot app. The Microsoft 365 Copilot app is available across web, mobile (iOS, Android), and Windows.

Who can use Microsoft 365 Copilot Search?

Users with an eligible Microsoft 365 Copilot license see the Copilot Search experience in the Microsoft 365 Copilot app on desktop, web, and mobile. Users who don't have an assigned and eligible Microsoft 365 Copilot license will continue to see the classic search experience in Microsoft 365 (also known as [Microsoft Search](#)).

Is there an additional cost for Microsoft 365 Copilot Search?

No, there's no additional cost for Microsoft 365 Copilot Search itself. It's included as part of the Microsoft 365 Copilot license. However, some advanced features that enhance Copilot Search—such as Microsoft Copilot connectors—may incur additional costs. These connectors allow organizations to index and search content from third-party systems (like ServiceNow, Salesforce, or Confluence) within the Microsoft 365 ecosystem. Microsoft 365 Copilot connectors are licensed separately and may require Microsoft 365 E5, Microsoft Viva, or additional capacity units depending on the volume and type of data being indexed. Learn more about [Microsoft 365 connectors](#). Microsoft 365 enterprise customers with eligible licenses (for example, Microsoft 365 E5) are entitled to unlimited index quota for ingesting content through Microsoft 365 Copilot connectors.

Is Microsoft 365 Copilot Search available with Microsoft 365 Copilot Chat?

No, Microsoft 365 Copilot Search is not included with Microsoft 365 Copilot Chat. While both are part of the broader Microsoft Copilot ecosystem, they are licensed and delivered differently.

Is Microsoft 365 Copilot Search available in SharePoint or other Microsoft 365 apps?

Microsoft 365 Copilot Search is limited to the Microsoft 365 Copilot app.

Connectors

What are Microsoft 365 Copilot connectors?

Microsoft 365 Copilot connectors increase the discoverability and engagement of your enterprise data by deeply integrating your data into the Microsoft 365 Copilot experience, including Microsoft 365 Copilot Search. With over 100 Copilot connectors available, organizations can ingest and unify data from platforms like Salesforce, ServiceNow, Confluence, Jira, GitHub, and Google Drive into Microsoft Graph. Connectors give Copilot the ability to find, access, and summarize your diverse datasets from different sources, enabling more comprehensive insights. See this overview of [Microsoft 365 connectors](#).

How do I set up a Microsoft 365 Copilot connector?

There are three main steps to set up a Copilot connector. You'll need to create a connection, register your schema, and ingest your content to the Microsoft Graph. Each item is sent with properties that match the schema you registered to power your content as discoverable in the Microsoft 365 App. For more information, see [Set up Microsoft 365 Copilot connectors in the Microsoft 365 admin center](#).

What are Copilot-offered connectors?

Copilot-offered connectors are prebuilt connectors provided by Microsoft that allow you to integrate various third-party content sources into Microsoft 365. These connectors help you bring external data into Microsoft 365, making it searchable and accessible within your organization. Learn more about the [Copilot connectors gallery](#).

Can I build custom connectors?

Microsoft 365 Copilot custom connectors allow you to integrate your own data sources into Microsoft Graph, enabling you to bring external data into Microsoft 365 experiences. It helps in making your data searchable and accessible within your organization. To get started building your first custom connector, see [these instructions](#). For more detailed instructions about building a custom connector using graph APIs, see these guidelines on working with the [Copilot connectors API](#).

Data handling, privacy, and security

Does Microsoft 365 Copilot Search follow the same data, privacy, and security commitments as Microsoft 365 Copilot?

Microsoft 365 Copilot Search is compliant with our existing privacy, security, and compliance commitments to Microsoft 365 commercial customers, including the General Data Protection Regulation (GDPR) and European Union (EU) Data Boundary. For additional information refer to [Data, Privacy, and Security for Microsoft 365 Copilot](#).

What information does Microsoft 365 Copilot Search have access to?

Microsoft 365 Copilot accesses and reasons over the data you already have permission to see within your Microsoft 365 environment. This includes Microsoft Graph (Emails, chats, calendar events, files in OneDrive and SharePoint, meetings), Microsoft 365 apps (Word, Excel, PowerPoint, Outlook, Teams, OneNote, Loop), Third-party systems (Salesforce, ServiceNow, Confluence, etc. via [Microsoft 365 Copilot connectors](#)), and web content. Copilot only returns information that the user already has access to—respecting existing permissions and security boundaries.

How can I manage what information Microsoft 365 Copilot Search can find?

With Restricted Content Discovery, organizations can limit the ability of end users to search for files from specific SharePoint sites. Enabling Restricted Content Discovery for each site prevents the sites from surfacing in organization-wide search and Microsoft 365 Copilot Business Chat, unless a user had a recent interaction. Learn more at [Restrict discovery of SharePoint sites and content](#). In addition, Restricted SharePoint Search is a setting that helps you as a [SharePoint Administrator](#) or [above](#) in Microsoft 365 to maintain a list of SharePoint sites ("allowed list") that you have checked the permissions and applied data governance for. The allowed list defines which SharePoint sites can participate in organization-wide search and Copilot experiences. By default, the Restricted SharePoint Search setting is turned off and the allowed list is empty. Restricted SharePoint Search allows you to restrict both organization-wide search and Copilot experiences to a curated set of SharePoint sites of your choice. Additionally, whether you have enabled Restricted SharePoint Search, users in your organization are still able to interact with files and content they own or that they have previously accessed in Copilot. Learn more at [Restricted SharePoint Search](#).

Miscellaneous

What is the Microsoft 365 Copilot Extension and how does it work with Microsoft 365 Copilot Search?

The Microsoft 365 Copilot Extension is a cross-browser add-on that enhances your Microsoft 365 Copilot search results. This extension brings together information from tickets, files, documents, and tasks across multiple work-related third-party sites, leading to relevant and personalized Copilot Search results.

How does the Microsoft 365 Copilot Extension work?

The Microsoft 365 Copilot Extension works in the background without any manual steps after installation. It is enabled by your organization through the Microsoft Edge Add-Ons website or the Chrome Web store (extensions). The extension only uses activity from third-party apps or sites configured by your organization and does not track your general web browsing. Data captured is stored securely and used only to improve your own Copilot Search experience. It is not shared with others. Learn more about the [Microsoft 365 Copilot extension](#).

Overview of AI in Microsoft Teams for IT admins

07/01/2025 Applies to: Microsoft Teams

Microsoft has introduced an ever-growing catalog of AI tools and features for Microsoft Teams, starting with features like voice isolation and suggested replies. Today, this catalog includes a powerful, personal AI assistant called Copilot in Teams and task-tailored agents like Facilitator.

This article is for IT admins and discusses the AI tools and features available in Teams along with links to their related documentation.

In this article, learn about:

- [Standard AI features in Microsoft Teams](#)
- [Microsoft 365 Copilot features in Teams](#)
- [Microsoft 365 Copilot app in Teams](#)
- [Microsoft Copilot in Teams](#)
- [Microsoft 365 agents in Teams](#)
- [AI features included with Teams Premium](#)

Standard AI features in Microsoft Teams

Required licenses:

- ✓ *Microsoft Business (Basic, Standard, and Premium) or Microsoft 365 (E3/E5/F1/F3/A3/A5/G3/G5)*
- ✓ *Teams Enterprise or Teams Enterprise (EEA)*

Microsoft Teams includes some AI features that don't require any extra licenses, just a Microsoft 365 subscription and a Teams license. These features enhance your users' Teams experience in their workflow, chats, and meetings, including:

- **Microsoft Copilot Chat app:** The Copilot Chat app in Teams allows users to ask Copilot open-ended questions, request help creating new content, and use [Copilot Pages](#). Without a Microsoft 365 Copilot license, Copilot's responses are only grounded in public web data.
- **Suggested replies:** Teams can suggest replies to users based on the previous conversation in 1:1 and group chats.
- **Video optimization:** Teams can optimize users' video feeds through AI-assisted adjustments, like auto-brightness and facial recognition.

- **Voice isolation for calls and meetings:** Teams can use AI to separate a user's voice from other sounds and voices in Teams calls and meetings, displaying the user's name when they speak and identifying them as the speaker in a transcript. Voice isolation is also used to reduce background noise.
- **Intelligent media quality classifiers in Call Quality Dashboard (CQD):** Teams can monitor call quality using Machine Learning (ML) algorithms with intelligent media quality classifiers in CQD, which provide advanced analysis into causality, media degradation, and root cause to address and prevent call quality issues.

[+] [Expand table](#)

Feature	Admin articles	End-user articles
Microsoft Copilot Chat app	Overview of Microsoft Copilot Chat	Microsoft Copilot Chat
Suggested replies	None	Use suggested replies to respond to messages
Facial recognition	Create Recognition profiles for Microsoft IntelliFrame	Create Recognition profiles for Microsoft IntelliFrame
Voice isolation for calls and meetings	Manage voice isolation for your users' Microsoft Teams calls and meetings	Voice isolation in Microsoft Teams calls and meetings
		Reduce background noise in Microsoft Teams meetings
Intelligent media quality classifiers in CQD	Intelligent media quality classifiers in Call Quality Dashboard (CQD)	None

Microsoft 365 Copilot features in Teams

Required licenses:

- ✓ *Microsoft Business (Basic, Standard, and Premium) or Microsoft 365 (E3/E5/F1/F3/A3/A5/G3/G5)*
- ✓ *Teams Enterprise or Teams Enterprise (EEA)*
- ✓ *Microsoft 365 Copilot*

(i) Important

All prompts, files, and responses using Microsoft Copilot, including the Microsoft Copilot Chat app and the Microsoft 365 Copilot app, never leave your organization's Microsoft

365 service boundary. This includes prompts and responses that access public web data. Your data is always secured and private within your service boundary.

Microsoft 365 Copilot and Microsoft 365 Copilot Chat are ISO/IEC 42001:2023 certified to further ensure that we develop, deploy, and use AI systems responsibly. For more information, see [Microsoft 365 Copilot Achieves ISO/IEC 42001:2023 Certification](#).

The Microsoft 365 Copilot license is the foundation for many AI tool sets in Teams, like Copilot in Teams and Facilitator. If you want your users to access a robust set of AI features, purchase and assign Microsoft 365 Copilot licenses to them.

Review the following resources for more information about Microsoft 365 Copilot:

- [What is Microsoft 365 Copilot?](#)
- [Which Copilot is right for me or my organization?](#)
- [Set up Microsoft 365 Copilot](#)
- [Copilot Prompt Gallery](#)

Microsoft 365 Copilot app in Teams

The Microsoft 365 Copilot license upgrades your users' Microsoft Copilot Chat app experience. The Microsoft 365 Copilot app is like the Microsoft Copilot Chat app, where users can ask open-ended questions, get help creating new content, and explore ideas. However, The Microsoft 365 Copilot app is also grounded in users' work data. Users can then toggle between whether they want their prompts grounded in work data or public web data.

Microsoft Copilot in Teams

Microsoft 365 Copilot in Teams is your users' personal Copilot, helping them in their workflows with skills like file and chat summarization, open-ended question and answer, task generation, and intelligent feedback and suggestions.

- **Copilot in Teams chats and channels:** Copilot in your users' chats and channels helps them catch up on conversations quickly and help contribute intelligently.
- **Copilot in Teams meetings and events:** Copilot in meetings and events uses recording, transcription, and meeting chat data to ensure participants get the most out of meetings.
- **Copilot in Teams Phone:** Copilot in Teams Phone empowers your users to have more productive calls or catch up on ones they missed.
- **Copilot in Teams Rooms:** Copilot enhances Teams Rooms experiences with features like responding to open-ended questions, recapping what was discussed in the room, and

providing meeting insights.

- **Copilot in Teams for multitenant organizations** - B2B members who are licensed with Microsoft 365 Copilot can access Copilot in Teams across their multitenant organization.
- **Custom dictionaries for Teams meetings and events:** You can upload a custom dictionary in the Microsoft 365 admin center to improve the quality of transcription for Teams meetings and events.

[+] [Expand table](#)

Feature	Admin articles	End-user articles
Copilot in Teams chats and channels	None	Use Copilot in Microsoft Teams chat and channels
Copilot in Teams meetings and events	Manage Microsoft 365 Copilot in Teams meetings and events	Use Copilot in Microsoft Teams meetings
Copilot in Teams Phone	Manage Microsoft 365 Copilot in Teams calls	Get started with Copilot in Microsoft Teams Phone
Copilot in Teams Rooms	Teams Rooms and Copilot overview	None
Copilot in Teams for multitenant organizations	Manage Copilot access for B2B members within multitenant organizations (MTO) in Teams	None
Custom dictionaries for Teams meetings and events	Manage custom dictionaries for Microsoft Teams meetings and events	None

Microsoft 365 agents in Teams

Microsoft 365 agents are designed to help your users with unique work tasks, grounded in scoped knowledge, like extending a project plan or capturing unanswered questions during a meeting. With a Microsoft 365 Copilot license, users can access the following agents in Teams:

- **Facilitator:** Facilitator is a Teams collaboration agent in group chats and meetings where all users can interact with Facilitator like it's another member.
- **Facilitator for Teams Rooms:** Facilitator can also aid collaboration during in-person, unscheduled meetings via Teams Rooms.

[+] [Expand table](#)

Feature	Admin articles	End-user articles
Facilitator	Set up Facilitator in Microsoft Teams	Keep track of chats with AI notes in Microsoft Teams 
		Automate notetaking in Microsoft Teams meetings 
Facilitator for Teams Rooms	Facilitator in Microsoft Teams Rooms	None

AI features included with Teams Premium

Required licenses:

- ✓ *Microsoft Business (Basic, Standard, and Premium) or Microsoft 365 (E3/E5/F1/F3/A3/A5/G3/G5)*
- ✓ *Teams Enterprise or Teams Enterprise (EEA)*
- ✓ *Teams Premium*

Some AI features in Teams can be acquired through the [Teams Premium add-on license](#). Teams Premium enhances users' Teams experience through intelligent, customizable, and secured collaboration scenarios.

- **Decorate my background:** Your users can use AI to decorate their backgrounds.
- **Intelligent call and meeting recap:** Provide your users with AI-powered insights and recaps of Public Switched Telephone Network (PSTN) calls (if they're [connected to the PSTN](#)), 1:1 Teams calls, and meetings.
- **Live translated captions:** Allow your users to see captions translated into the language they're most comfortable with.
- **Live translated transcription:** Your users can understand each other better during a meeting or event by translating the meeting transcript into the language they're most comfortable with.

 Expand table

Feature	Admin articles	End-user articles
Decorate my background	None	Change your background in Microsoft Teams meetings 
Intelligent call and	Intelligent recap for Teams calls and	Recap in Microsoft Teams 

Feature	Admin articles	End-user articles
meeting recap	meetings	
Live translated captions	Manage transcription and captions for Teams meetings	Use live captions in Microsoft Teams meetings
Live translated transcription	Manage transcription and captions for Teams meetings	View live transcription in Microsoft Teams meetings

Related articles

- [Copilot in Microsoft Teams help & learning](#)
- [Frequently asked questions about Copilot in Microsoft Teams](#)
- [Frequently asked questions about Facilitator in Microsoft Teams](#)

Set up Facilitator in Microsoft Teams

06/10/2025 Applies to: Microsoft Teams

Important

The following Facilitator capabilities are currently in public preview:

- AI-generated notes for chats and meetings
- Moderation for meetings
- Questions and answers for meetings

Features in preview might not be complete and could undergo changes before becoming available in the public release. They're provided for evaluation and exploration purposes only.

For more information about Teams features in public preview, see [Microsoft Teams Public preview](#).

Facilitator is a collaborative communication agent available to your users in Teams conversations. It combines the power of large language models (LLMs) and Teams data to help users be productive during collaboration.

Use Facilitator in peer-to-peer:

- Chats
- Meetings
- [Teams Rooms](#)

How Facilitator behaves in Teams

Facilitator behaves differently than Copilot in Teams.

A user's prompts to Copilot in Teams and Copilot's responses are private to that individual user. Copilot in Teams also has its own set of features and use cases.

However, Facilitator acts like an assistant sitting in your users' chats and meetings. If a user prompts Facilitator, all users can view that communication, just like if the user was talking with another person in the chat. Facilitator then displays its response within the group's conversation for everyone to see.

Facilitator also continuously updates as the conversation progresses. For example, Facilitator displays the options the team is considering and then replaces those options with a single

choice once the group decides.

Users are shown a notice when their prompts are private or shared with others.

Security, Compliance, and Privacy

Facilitator, Copilot, and Microsoft 365 are built on Microsoft's comprehensive approach to security, compliance, and privacy.

To learn how Microsoft Purview supports your security and compliance management for Facilitator and some recommended getting started steps, see [Use Microsoft Purview to manage data security & compliance for Microsoft Facilitator](#).

For more information about the security and privacy standards used to develop Microsoft 365 Copilot and AI agents like Facilitator, see the following articles:

- [Data, Privacy, and Security for Microsoft 365 Copilot](#) for Microsoft 365 Copilot in your organization (work or school).
- [Microsoft Purview data security and compliance protections for generative AI apps](#).
- [Copilot Pro: Microsoft 365 apps and your privacy](#) for Microsoft 365 Copilot apps at home.

Facilitator licensing and permission requirements

The following list contains the prerequisites for users to be able to access Facilitator features in Teams chats and meetings. Users must meet all of the following requirements:

Licensing requirements

- An eligible *Microsoft 365* base license.
 - For the list of eligible base licenses, see [Understand licensing requirements for Microsoft 365 Copilot](#).
- Have an eligible *Microsoft Teams* license.
 - Teams licenses might be included in your *Microsoft 365* subscription. If you have *Microsoft 365 (no Teams)* licenses, you need to purchase separate Teams licenses.
- Have a *Microsoft 365 Copilot* license.
 - For information on how to acquire *Microsoft 365 Copilot* licenses, see [Where can I get Microsoft Copilot?](#).

User requirements

- Be a Microsoft Teams Public preview participant.
 - For information on how to access Teams Public preview features, see [Microsoft Teams Public preview](#).
- [Have Loop experiences in Teams for Facilitator in meetings turned on](#).
- Have transcription enabled, and keep it on for Facilitator in meetings.

Facilitator data storage

Facilitator data in meetings is stored as a `.loop` file in a OneDrive folder titled **Meetings** of the user who initiated Facilitator in Teams. This data is treated as meeting transcript data. To learn more about how this data is handled, see [Summary of governance, lifecycle, and compliance capabilities for Loop experiences](#).

Facilitator data in chats is stored as messaging data in each users' Exchange mailbox. This data is treated like all other Teams chat data.

Allow Facilitator for chats and meetings

As an admin, you control whether Facilitator is available to your entire organization or to a certain group of users.

Facilitator is allowed by default. However, if all apps are blocked for your organization, Facilitator is also blocked.

To allow or block Facilitator for users, complete the following steps:

1. Allow Facilitator in the Teams admin center

1. Sign in to the [Teams admin center](#) with your Teams admin credentials.
2. In the left rail navigation, select **Teams apps > Manage apps**.
3. In the apps list's search box, search for **Facilitator**.
4. Select **Facilitator** from the app list.
5. In the actions menu, select **Allow** or **Block**.
6. In the pop-up, select the **Allow** or **Block** button.

You can also use [app centric management](#) to allow and block, create policies, and assign users.

For more information about managing apps in Teams, see [Manage apps](#).

2. Allow Facilitator for a group of users

To allow Facilitator for users, a new app policy needs to be created and then assigned to users.

Follow the instructions at [Use app permission policies to control user access to apps](#) to create a new app policy for Facilitator.

You can then assign the policy to your entire tenant or to a select group of users. Follow the instructions at [Add or modify app availability for users](#) to assign the policy to users using app-centric management.

3. Turn on Loop experiences in Teams for Facilitator in meetings

Loop experiences in Teams need to be turned on in order for Facilitator to be used in meetings.

To turn on Loop experiences in Teams, follow the instructions at [Settings management for Loop functionality in Teams](#).

Manage users' access to Facilitator skills

If there are certain Facilitator skills you would like to manage for your users, review the following details.

Turn off AI-generated notes for chats

AI-generated notes for chats are turned on by default.

You can turn off Facilitator's ability to take notes in chats by completing the following steps.

1. Sign in to the [Teams admin center](#) with your Teams admin credentials.
2. In the left-side menu, expand the **Messaging** section and select **Messaging settings**.
3. On the **Messaging settings** page, find the **Messaging notes** toggle.
4. Change the toggle to the **Off** position to turn off AI-generated notes for chats.
5. Select the **Save** button.

You can also use PowerShell to manage the `MessagingNotes` setting with the [Set-CsTeamsMessagingConfiguration](#) cmdlet. For information about using PowerShell to manage users' Teams experience, see [Assign policies to users and groups](#).

Turn off AI-generated notes for meetings

Loop experiences in Teams control AI-generated notes for meetings, which are enabled by default.

You can manage this control using the `IsCollabMeetingNotesFluidEnabled` setting in PowerShell. This setting applies to your entire tenant and can't be configured at the user level. This means that if you disable this setting, AI-generated notes for meetings is turned off for all users in your organization.

For instructions on managing this setting, see [Settings management for Loop functionality in Teams](#).

Facilitator limitations

Facilitator currently has the following limitations:

- Only [licensed users](#) can initiate Facilitator.
 - Unlicensed users can't prompt Facilitator, but they can see others' prompts to Facilitator and Facilitator's responses.
 - Unlicensed users can't see Facilitator's notes in chats, but they can see Facilitator's notes in meetings.
- If a licensed user doesn't have the full chat history, they can't @mention Facilitator.
- Currently, Facilitator isn't supported in [external chats and meetings](#).
- Retention labels aren't supported for cloud attachments in AI-generated notes.
- Facilitator only supports the languages listed at [Supported languages for Microsoft Copilot](#).

Facilitator for meetings limitations

- Facilitator's AI-generated notes for meetings aren't automatically collected as cloud attachments in [Microsoft Preview eDiscovery](#) because it isn't currently supported.
- When a user turns on AI-generated notes during a meeting, they're prompted to select the language participants are speaking during the meeting. The language selected must match the spoken language during the meeting, or notes aren't generated.
- Currently, AI-generated notes for meetings only support meetings where a single language is spoken. If multiple languages are spoken during the meeting, notes are only taken for the portions of the meeting that are spoken in the selected meeting language.
- Meeting settings like [Prevent copy and paste](#) and [Watermarks](#) aren't applied to Facilitator's responses or AI-generated notes in meetings.
- AI-generated notes for meetings don't inherit the meeting's sensitivity label; however, a sensitivity label can be applied to the notes' Loop component in the [Loop app](#) or [OneDrive](#). If a sensitivity label is applied to the notes outside of Teams, the note's file can't be accessed in Teams.

Related articles

- [Frequently asked questions about Facilitator in Microsoft Teams ↗](#)
- [Keep track of chats with AI notes in Microsoft Teams ↗](#)
- [Automate note-taking in Microsoft Teams meetings ↗](#)
- [What is responsible AI? ↗](#)
- [Providing feedback about Microsoft Copilot with Microsoft 365 apps ↗](#)

Manage Microsoft 365 Copilot in Teams meetings and events

Article • 04/30/2025 • Applies to: Microsoft Teams

APPLIES TO:  Meetings  Webinars  Town halls

Microsoft 365 Copilot in Teams meetings and events is an artificial intelligence (AI) tool that captures important conversation points. Each meeting and webinar participant with a Microsoft 365 Copilot license can ask prompts that are only visible to them. Participants and organizers can learn things like who said what and where people agree or disagree. Microsoft 365 Copilot in Teams can also recommend follow-up tasks, all in real time during a meeting. Organizers, co-organizers, and presenters can use Copilot during town hall events. As an admin, you can manage how users in your org use Copilot for Teams meetings and events.

There are two ways for users in your organization to use Copilot in meetings and events:

Important

When organizers turn off Copilot for their meeting or event, recording and transcription are also turned off.

1. During and after the meeting

When organizers create a meeting or event, they can set Copilot's value to **During and after the meeting** from the dropdown in their meeting options. Once someone starts transcription, licensed users can select the Copilot button for use during, and after the meeting or event.

To learn more about how organizers can use Copilot during and after the meeting, see [Get started with Microsoft 365 Copilot in Teams in Microsoft Teams meetings](#).

2. Only during the meeting

When organizers create a meeting or event, they can set Copilot's value to **Only during the meeting** from the dropdown in their meeting options. Once someone with a Microsoft 365 Copilot license selects the Copilot button during the meeting or event, Copilot runs for all licensed users. This option relies on speech-to-text audio processing data that isn't saved after the meeting or event ends. Users can't access Copilot in Teams and its history after the meeting or event.

To learn more about how organizers can use Copilot only during the meeting, see [Use Microsoft 365 Copilot in Teams without recording a Teams meeting](#).

Meeting or event organizers can also set Copilot's value to **Off** to prevent anyone in the meeting from using Copilot. This option disables recording and transcription for the meeting. You have a policy to set the default to **Off**, but your organizers can manage this setting on a per-meeting basis.

ⓘ Important

Microsoft 365 Copilot in Teams meetings and events isn't available in end-to-end encrypted meetings. For more information on end-to-end encryption, see [Require end-to-end encryption for sensitive Teams meetings](#).

ⓘ Note

Microsoft 365 Copilot in Teams isn't currently available for GCC High and DoD.

Prerequisites

- An add-on Microsoft 365 Copilot license for intended users. To learn more about the Microsoft 365 Copilot license, see [Microsoft 365 Copilot documentation](#).

Transcription

You can use the **Recording & Transcription** section in the Teams admin center or the **-AllowTranscription** parameter in the **CsTeamsMeetingPolicy** PowerShell cmdlet to manage your transcription policy. This setting's value impacts how, or if Copilot works for your users. The following table shows how the transcription policy works with the organizer's Copilot in Teams meeting options:

 Expand table

Admin's transcription policy value	Organizer's Copilot meeting option	Behavior
On	Only during the meeting	Licensed users can select the Copilot button for use only during this meeting with temporary speech-to-text data. To use Copilot during, and after the meeting, these users can start a transcript.
Off	Only during the meeting	Licensed users can select the Copilot button for use during this meeting or event with temporary speech-to-text data. If another participant who can transcribe enables transcription, Copilot is

Admin's transcription policy value	Organizer's Copilot meeting option	Behavior
		available during, and after the meeting for the portion that is transcribed.
On	During and after the meeting	Once licensed users turn on transcription, they can select the Copilot button for use during, and after this meeting or event.
Off	During and after the meeting	Licensed users can't interact with Copilot unless another participant with permission to transcribe turns on transcription for this meeting.
Any	Off	Licensed users can't interact with Copilot in Teams. No one can record or transcribe.

To learn more about managing transcription, see [Configure transcription and captions for Teams meetings](#).

Manage Copilot for Teams meetings and events

You can use the Teams admin center or PowerShell to manage how users in your org use Copilot in Teams meetings and events.

The following table shows the behaviors of the settings for the `-Copilot` parameter:

[] [Expand table](#)

Teams admins center policy value	PowerShell setting value	Behavior
On	Enabled	When organizers with this policy create meetings and events, Copilot's default value in their meeting options is Only during the meeting . Organizers can change this value to During and after the meeting , and Off .
On with saved transcript required	EnabledWithTranscript	This is the default value. When organizers with this policy create meetings and events, Copilot's default value in their meeting options is During and after the meeting . This option is enforced; organizers can't change this value.
On with transcript	EnabledWithTranscriptDefaultOn	When organizers with this policy create meetings and events, Copilot's default value in their meeting

Teams	PowerShell setting value	Behavior
admins center policy value		
saved by default		options is During and after the meeting . Organizers can change this value to Only during the meeting , and Off .
Off	Disabled	When organizers with this policy create meetings and events, Copilot's default value in their meeting options is Off . Organizers can change this value to Only during the meeting or During and after the meeting .

Manage Copilot for Teams meetings and events in the Teams admin center

1. Open the Teams admin center.
2. Expand **Meetings** from the navigation pane.
3. Under **Meetings**, select **Meeting Policies**.
4. Either select an existing policy or create a new one.
5. Navigate to the **Recording & transcription** section and find the **Copilot** setting.
6. Select **On**, **On with saved transcript required**, **On with transcript saved by default**, or **Off** from the dropdown.
7. Select **Save**

You can apply your Copilot meeting policies to groups or individual users. You can also add Copilot to your meeting templates. To learn how to apply Copilot to meeting templates, see [IT admins - Create a custom meeting template in Microsoft Teams](#).

Manage Copilot for Teams meetings and events using PowerShell

To manage how users in your org use Copilot in Teams meetings and events, use the **-Copilot** parameter within the PowerShell **CsTeamsMeetingPolicy** cmdlet.

To allow users to use Copilot **Only during the meeting** in meetings and events created by organizers with this policy:

PowerShell

```
Set-CsTeamsMeetingPolicy -Identity <policy name> -Copilot Enabled
```

To set the organizer's default Copilot option to **During and after the meeting** and allow them to change it, use the following script:

```
PowerShell
```

```
Set-CsTeamsMeetingPolicy -Identity <policy name> -Copilot  
EnabledWithTranscriptDefaultOn
```

To set the organizer's default Copilot option to **Off** and allow them to change it, use the following script:

```
PowerShell
```

```
Set-CsTeamsMeetingPolicy -Identity <policy name> -Copilot Disabled
```

Related articles

- [Microsoft 365 Copilot documentation](#)
- [Configure transcription and captions for Teams meetings](#)
- [Plan for Teams meetings](#)
- [Plan for Teams webinars](#)
- [Plan for Teams town halls](#)

Introduction to Microsoft 365 Copilot in Microsoft Viva

Article • 01/09/2025

Microsoft 365 Copilot is an AI assistant that uses the power of large language models to help you streamline work, amplify creativity, and boost productivity. Microsoft 365 Copilot in each Viva app has unique AI-powered features and capabilities. [Learn how to manage access to Copilot in Viva from your Microsoft 365 admin center.](#)

Microsoft 365 Copilot in Viva Amplify

Copilot in Viva Amplify helps you find the best wording to make sure your publications communicate your message effectively. Copilot is available in the Text web part and all rich text editors in Viva Amplify, including the campaign brief.

[Learn more about Copilot in Viva Amplify.](#)

Microsoft 365 Copilot in Viva Engage

Copilot in Viva Engage helps you communicate more effectively with your communities. Conversation Starters provide suggestions about what to post where based on your activity and your organization's trending topics. Copilot in Viva Engage also helps you write and edit your posts to ensure your posts meet your goals.

[Learn more about Copilot in Viva Engage.](#)

Microsoft 365 Copilot in Viva Insights

Copilot for analysts

Copilot in Viva Insights can help analysts choose a Power BI report or custom person query, and simplify the query building process by suggesting metrics, filters, and attributes relevant to their analysis.

[Learn more about Copilot for analysts in Viva Insights.](#)

Copilot reports

Viva Insights includes Power BI report templates to help business leaders and analysts understand Copilot usage in their organization.

[Microsoft 365 Copilot adoption report](#)

[Microsoft 365 Copilot impact report](#)

[Copilot for Sales adoption report](#)

[Copilot Business Outcome \(Copilot Business Impact\) report](#)

Microsoft 365 Copilot in Viva Glint

HR users and leaders of large organizations spend valuable time interpreting Glint survey results and comments. Copilot in Viva Glint enables them to understand and act on employee feedback by quickly summarizing large quantities of comments. Copilot in Viva Glint is available for all enabled users whose teams meet the threshold for verbatim comment results.

[Learn more about Copilot in Viva Glint.](#)

Microsoft 365 Copilot in Viva Goals

Copilot in Viva Goals applies AI to create, share, and summarize your organizational goals. With Copilot in Viva Goals, you can draft high-quality goals, import goals from existing strategy documents, PowerPoint presentations, or Excel sheets, to quickly start your goals programs. Additionally, Copilot enables you to monitor progress, generate summaries, and proactively identify any potential risks related to your goals.

[Learn more about Copilot in Viva Goals.](#)

Microsoft Copilot Dashboard in Viva Insights

Note

The Microsoft Copilot Dashboard in Viva Insights is available to any customer with a Microsoft 365 or Office 365 subscription for business or enterprise. A paid Viva Insights license is not required.

Note

The Microsoft Copilot Dashboard is currently not available for national/regional cloud deployments including but not limited to Microsoft's U.S. Government clouds and Office 365 operated by 21Vianet.

The Microsoft Copilot Dashboard in Viva Insights helps organizations maximize the value of Copilot for Microsoft 365. The dashboard provides actionable insights to help your organization get ready to deploy AI, drive adoption based on how AI is transforming workplace behavior, and measure the impact of Copilot.

[Learn more about the Microsoft Copilot Dashboard.](#)

Measure Copilot impact in your organization with Viva Pulse

Measure employee sentiment and feedback to find out how employees are experiencing Microsoft 365 Copilot. Viva Pulse integrates with the Microsoft Copilot Dashboard so leaders and admins can send their own surveys to gain insights into how Copilot impacts their workforce.

[Learn more about measuring Copilot impact in Viva Pulse.](#)

Feedback

Was this page helpful?



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Control access to Microsoft 365 Copilot in Viva

Article • 02/12/2025

ⓘ Note

This feature is currently rolling out to customers.

Access management through the UI is not yet available for all Viva apps.

You can control which users in your organization have access to Microsoft 365 Copilot in each applicable Viva app. You can turn access on or off for everybody, or choose specific people or groups to give access to. If you want to learn how to control access to other Viva features, see [feature access management](#).

Turn Copilot access on or off for everyone in your organization

1. From your Microsoft 365 admin center, select **Copilot**.
2. Then choose the app for which you want to control access.
3. Your **Org-wide setting** shows whether access is enabled for your entire organization.
4. To turn this setting on or off, choose **Manage**.
5. Select **On** to enable access for everyone, or **Off** to disable access for everyone.
6. Select **Save**.

Your change can take up to 24 hours to go into effect.

Enable access for select people or groups

You can enable or disable Copilot in Viva apps for individuals or groups. You can create multiple custom policies to suit your organization's needs.

1. Go to the Copilot settings page in your Microsoft 365 admin center.
2. Choose the app for which you want to control access.
3. Under **Custom policies for people and groups** select **Create policy**.
4. Give your policy a descriptive name. For example, "Disable for users in office X".

5. Choose **Off** for specific people if you want to disable access to Copilot in the Viva app for only people you select. Choose **On** for specific people if you want to enable access to Copilot in Viva app for only the people you select.
6. Add the people or groups you want the policy to apply to.
7. Select **Save**.

Your change can take up to 24 hours to go into effect.

You can view the details of your policy by selecting it from the list in the Manage access pane. View everyone your policy applies to by selecting **View details**.

Edit an existing custom policy

1. Go to the Copilot settings page in your Microsoft 365 admin center.
2. Choose the app for which you want to edit an existing custom policy.
3. Select the ellipses next to the policy you want to edit.
4. Select **Edit**.
5. Make any changes and select **Save**.

Delete an existing custom policy

1. Go to the Copilot settings page in your Microsoft 365 admin center.
2. Choose the app for which you want to edit an existing custom policy.
3. Select the ellipses next to the policy you want to edit.
4. Select **Delete**.
5. When prompted, select **Delete**.

Feedback

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Microsoft 365 Copilot reporting options for admins

07/15/2025 Applies to:  Microsoft 365 Copilot

[Microsoft 365 Copilot](#) provides several reporting options that help administrators monitor usage, performance, and compliance. These reports provide insights into how Copilot is being used within your organization.

Microsoft 365 Copilot offers four main sources for usage reports. Use these reports to make informed decisions about your Copilot adoption, deployment, and governance:

- **Microsoft 365 admin center:** Provides readiness and usage reports focused on license eligibility, adoption, and basic usage metrics.
- **Viva Insights Copilot Analytics:** Offers comprehensive Copilot analytics through the Copilot Dashboard and Advanced Insights Analyst workbench for detailed metrics and custom reporting.
- **Microsoft Purview audit logs:** Delivers detailed audit logs of all Copilot activities for compliance tracking and security auditing.
- **Power Platform & Copilot Studio Analytics:** Provides consumption metrics for Copilot agents and detailed analytics on agent performance.

This article provides an overview of the different Microsoft 365 Copilot reporting options available to IT administrators, including access requirements and the insights each report provides.

This article applies to:

- Microsoft 365 Copilot

Access requirements

To use the reporting features described in this article, you need to sign into different portals with the appropriate permissions.

 Expand table

Reporting option	Required roles & access
Microsoft 365 admin center	- Microsoft 365 Global Administrator: Assigns the AI Administrator role. - AI Administrator: Accesses the Copilot reports.

Reporting option	Required roles & access
Copilot Analytics, powered by Viva Insights	<ul style="list-style-type: none"> - Microsoft 365 Global Administrator: Enables the Copilot Dashboard and delegates access to the dashboard and organizational insights. Senior leaders might automatically get access. - Microsoft 365 Global Administrator: Sets up Viva Insights and assigns the Insights Analyst and Insights Administrator roles. - Insights Analyst: Uses the Advanced Insights Analyst Workbench to build Copilot Power BI Templates. - Insights Administrator: Manages settings in the Advanced Insights Analyst Workbench, like security, privacy, and uploading organization data files.
Microsoft Purview portal	<ul style="list-style-type: none"> - Audit Reader: Searches the audit logs.
Power Platform admin center	<ul style="list-style-type: none"> - System Administrator: Assigns the Copilot Studio authors role. - License admin in Microsoft 365 admin center: Assigns Copilot Studio licenses.
Copilot Studio	<ul style="list-style-type: none"> - Copilot Studio Author: Accesses analytics for agents they create.

Microsoft 365 admin center reports

The Microsoft 365 admin center provides Copilot readiness and usage reports:

- **Readiness report** - This report shows how ready your organization is to adopt Microsoft 365 Copilot, including:
 - **License eligibility**: Shows the users that meet the prerequisites for Copilot licensing
 - **App readiness**: Indicates usage levels of Microsoft 365 apps that Copilot integrates with
 - **Technical requirements**: Highlights potential technical blockers for deployment
- **Usage report** - This report shows how Microsoft 365 Copilot is used in your organization, including:
 - **Adoption metrics**: Shows the number of users who accessed Copilot
 - **User activity**: Displays active usage trends over time
 - **App integration**: Reveals the Microsoft 365 applications that are being used with Copilot
 - **Top agents**: Identifies the most frequently used Copilot agents

View the reports

1. Sign in to the [Microsoft 365 admin center](#) as the **Microsoft 365 Global Administrator** and assign the **AI Administrator** role to the users who need to access these reports.

2. To view reports, navigate to **Reports > Usage**.



3. Select **Microsoft 365 Copilot > Readiness or Usage**:

A screenshot of the Microsoft 365 Copilot Usage page. On the left, there's a sidebar with links: Overview, Reports (selected), Microsoft 365 Copilot Chat, Microsoft 365 Copilot (highlighted with a red box), Exchange, and Forms. At the top right are three tabs: "Readiness" (selected), "Usage" (highlighted with a red box), and "Agents". Below the tabs, a section titled "Prepare your organization for using Microsoft 365 Copilot" contains text about readiness metrics. Another section below it says "Make sure your users are eligible for Copilot" with a note about licenses. On the far right, there's a section titled "Track your organization's available Copilot licenses" with a circular icon.

To learn more about the reports, see the following articles:

- [Microsoft 365 Copilot readiness report](#)
- [Microsoft 365 Copilot usage report](#)

Viva Insights Copilot Analytics

Microsoft Viva Insights provides deeper analytical capabilities for Microsoft 365 Copilot through two main features - **Copilot Dashboard** and **Advanced Insights Analyst tools**.

Copilot Dashboard

The **Copilot Dashboard** offers a comprehensive view of Copilot's usage metrics and actionable insights, including:

- **Adoption metrics:** Tracks user adoption rates and growth trends
- **Usage patterns:** Analyzes when and how users interact with Copilot
- **Productivity impact:** Measures the effect of Copilot on productivity metrics
- **ROI indicators:** Provides data points to help assess return on investment
- **Actionable insights:** Suggests ways to improve Copilot adoption and effectiveness

Open the Copilot Dashboard

1. Sign into the [Microsoft 365 admin center](#) as the Microsoft 365 Global Administrator and then follow these steps:
 - a. [Enable the Copilot Dashboard](#).
 - b. [Delegate access](#) to the users who need it.
2. To start using the Copilot Dashboard, take one of the following steps:
 - In Microsoft Teams, users search for and open the **Viva Insights** app.
 - In **Viva Insights**, select **Copilot Dashboard**.

To learn more, see the following articles:

- [Manage settings for the Microsoft Copilot Dashboard](#)
- [Delegate access to organizational insights and Copilot Dashboard](#)
- [Connect the Microsoft Copilot Dashboard to Microsoft 365 customers](#)

Advanced Insights Analyst tools

For organizations requiring deeper analysis, Viva Insights provides advanced analytical capabilities, including:

- **Custom Copilot queries:** Create specialized queries focused on Copilot usage
- **Power BI templates:** Use prebuilt templates to visualize Copilot data
- **Cross-data analysis:** Combine Copilot metrics with other workplace analytics
- **Detailed reporting:** Generate comprehensive reports for executives and stakeholders

Open the Insights Analyst tools

1. Sign into the [Microsoft 365 admin center](#) as the Microsoft 365 Global Administrator and take the following steps:
 - a. [Set up Viva Insights](#).
 - b. Add users to the **Insights Analyst** role.
 - c. Add users to the **Insights Administrator** role.

For the complete steps, see [Viva Insights setup checklist](#).

2. As a user with the **Insights Analyst** role, navigate to **Viva Insights > Analysis**. Then, use the templates and [set up Copilot queries](#).

To learn more about some of the reports and view any prerequisites, see the following articles:

- [Microsoft 365 Copilot adoption report](#)
- [Microsoft 365 Copilot impact report](#)

3. The **Insights Administrator** can sign into the [Analyst Workbench](#), select **Copilot** to filter reports, and then select a report.

To learn more, see the following articles:

- [Advanced insights introduction](#)
- [Power BI report templates](#)
- [Set up your queries using Microsoft 365 Copilot in Viva Insights](#)

Microsoft Purview audit logs

Microsoft Purview provides detailed audit logs of all Copilot activities, including:

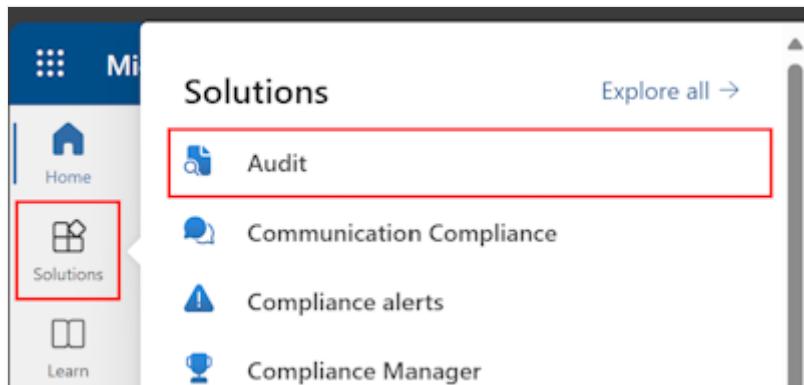
- **Complete activity tracking:** Logs all user interactions with Copilot
- **Prompt auditing:** Records the actual prompts entered by users
- **Compliance monitoring:** Helps ensure adherence to organizational policies
- **Security analysis:** Identifies potential security concerns in Copilot usage
- **Detailed filtering:** Allows filtering by user, date, action type, and more

Open the audit logs

1. Sign in to the [Microsoft Purview portal](#) with a role that can search audit logs, like **Audit Reader**.

There are other roles that can also search the audit logs. For a list of roles and what they can do, see [Roles and role groups in Microsoft Defender for Office 365 and Microsoft Purview](#).

2. Select **Solutions > Audit**.



3. In Search > Workloads, select AIApp and Copilot. Select Search. This step searches the audit log search results to only show activities related to Microsoft 365 Copilot. You can also get granular and set a date range and more.

A screenshot of the Microsoft Purview Audit Log search interface. It includes fields for "Date and time range (UTC)" (Start: Mar 26, End: Mar 27), "Activities - friendly names" (Choose which activities to search for), "Users" (Add the users whose audit logs you want to ...), "Activities - operation names" (Enter operation values, separated by commas), "File, folder, or site" (Enter all or a part of the name of a file, web...), "Record Types" (Select the record types to search for), "Search name" (Give the search a name), and "Workloads" (AIApp, Copilot). The "Search" button is highlighted with a red box. There are also "Clear all" and a magnifying glass icon.

To learn more, see the following articles:

- [Microsoft Purview auditing solutions](#)
- [Microsoft Purview audit logs for Copilot and AI activities](#).
- [Considerations for Data Security Posture Management \(DSPM\) for AI & data security and compliance protections for Copilot](#)

Power Platform reports and Copilot Studio Analytics

For organizations using Copilot agents, there are some options for specialized analytics:

- Power Platform admin center for consumption-based agents
- Copilot Studio Analytics for individual agents
- Copilot Studio Kit for testing and tracking custom agents

To learn more, see the following articles:

- [Key concepts – Analytics in Copilot Studio](#)

- Set up your development environment for Microsoft 365 Copilot

Power Platform admin center

The **Power Platform admin center** is for consumption-based agents, like [pay-as-you-go](#) or pre-purchased message packs.

The Power Platform admin center includes the following analytics:

- **Message consumption:** Tracks the number of messages processed by agents
- **Session metrics:** Monitors agent session counts and durations
- **Capacity management:** Helps manage consumption-based billing
- **Tenant-wide visibility:** Provides an overview of all agents across the tenant

Open the Power Platform reports

To view the analytics for consumption-based agents, use the Power Platform admin center.

1. Sign into the [Power Platform admin center](#) as the **System Administrator** and then follow these steps:
 - a. Select **Manage > Tenant settings**.
 - b. Add users to the **Copilot Studio authors** role. Users with this role can create agents in Copilot Studio and view the analytics for the agents they create.

To learn more, see [Assign a security role to a user](#).

💡 Tip

Users with the **Power Platform Administrators** role can view the analytics for all agents in the tenant. To add users to this role, use the [Microsoft Azure portal](#) > **Microsoft Entra ID > Manage > Roles and administrators**.

2. As a user with the **Copilot Studio authors** role, sign into the [Power Platform admin center](#).
3. Select **Licensing > Copilot Studio > Summary**.
4. View the reports.

Copilot Studio Analytics

Copilot Studio Analytics is for individual agents that are included in your Microsoft 365 Copilot license.

Copilot Studio includes the following analytics:

- **Agent performance:** Measures how effectively agents respond to queries
- **User satisfaction:** Tracks satisfaction ratings from users
- **Session metrics:** Analyzes session duration, completion rates, and abandonment
- **Topic effectiveness:** Identifies which topics are handled well or need improvement
- **Trace data:** Offers detailed logs for troubleshooting

Open Copilot Studio Analytics

To assign Copilot Studio licenses, use the Microsoft 365 admin center. To view the analytics for the agents, use Copilot Studio.

1. Sign into the [Microsoft 365 admin center](#) as the **License admin**. Assign Copilot Studio licenses to the users who need to create agents.

To learn more, see the following articles:

- [About admin roles in the Microsoft 365 admin center](#)
- [Assign licenses and manage access to Copilot Studio](#)

2. As a licensed Copilot Studio user, sign into [Copilot Studio](#).

3. Select **Agents**, select your agent, and then select the **Analytics** tab.

For more information, see [Review and improve agent effectiveness in Copilot Studio](#).

Copilot Studio Kit

The **Copilot Studio Kit** is a set of tools and resources that helps you test custom agents, track key performance indicators of your custom agents, and more.

To learn more, see the following articles:

- [Copilot Studio Kit - AppSource](#)
- [Power CAT Copilot Studio Kit - GitHub](#)

Related content

- [Microsoft 365 Copilot license plans](#)
- [Microsoft 365 Copilot setup](#)

- Activity Reports in Microsoft 365

ⓘ Note: The author created this article with assistance from AI. [Learn more](#)

Understand Copilot Prompt Gallery - admin guide

Article • 01/16/2025

Copilot Prompt Gallery is a resource of Microsoft-created prompts, videos, and articles that help users understand and use Microsoft Copilot effectively. Copilot Prompt Gallery is available within Microsoft Copilot and online at [Copilot Prompt Gallery](#).

As an admin, you can support Copilot Prompt Gallery adoption and success within your organization. This article covers Copilot Prompt Gallery architecture, data flows, security, and privacy.

Overview

The screenshot shows a grid of eight prompts, each with a Microsoft logo icon and a brief description. Below the grid is a 'View all prompts' link and a magnifying glass icon.

Recap meeting	What's the latest from person , organized by emails, chats, and files?	Suggest a list of product names for a state-of-the-art toaster that is energy efficient and stylish.	Suggest inexpensive ways to optimize our website for organic search.
Get a to-do list from my Fabrikam client meetings.	Create a presentation from file	How can I more concisely describe [time management] ?	What does the document say about [roles and responsibilities] ?
View all prompts			

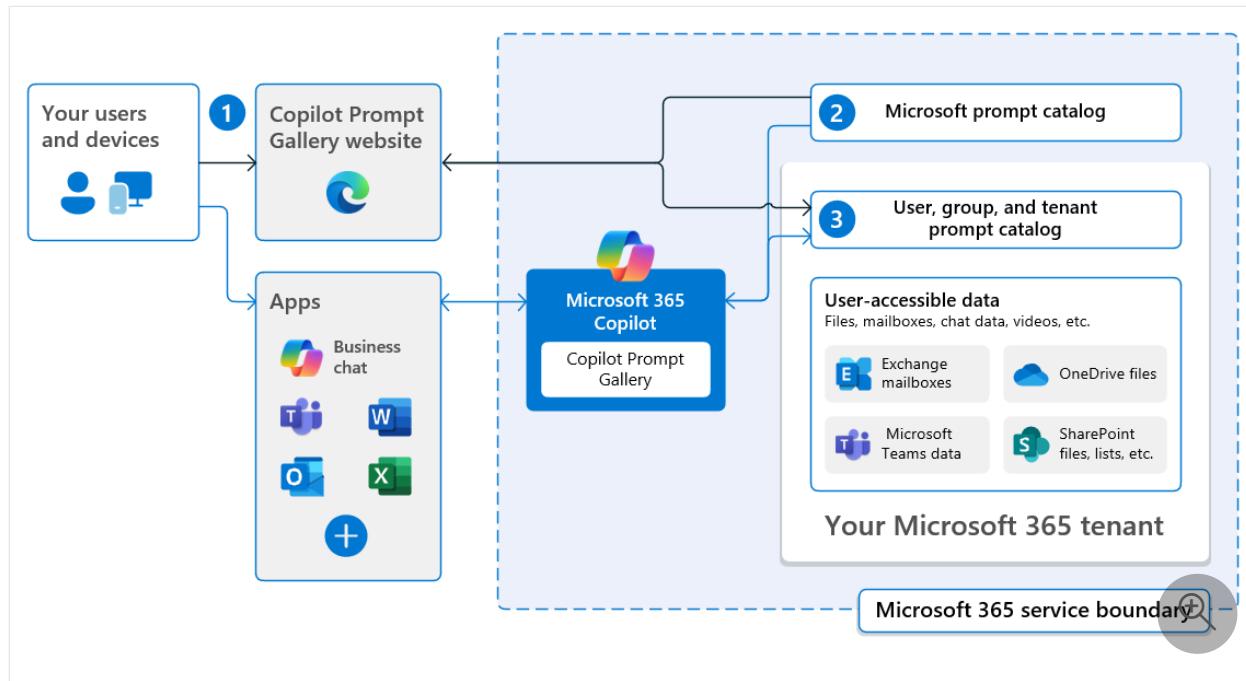
Copilot Prompt Gallery is a comprehensive repository that provides users with access to a catalog of Copilot prompts. The catalog includes prompts created by Microsoft that highlight key scenarios and capabilities of Microsoft Copilot, designed to help users become proficient in using Copilot to accomplish their tasks.

Copilot Prompt Gallery features videos and articles to help users get started with Copilot and maximize productivity through effective prompting. Users can save and share successful prompts, facilitating collaboration and knowledge sharing within the organization.

Each suggested prompt in the prompt Gallery includes additional information about how to personalize it and ways to extend the prompt for even more value. This makes Copilot Prompt Gallery a single resource to help your users use Copilot with ease and proficiency.

Data flow and compliance

Copilot Prompt Gallery processes and manages data in a structured manner to ensure compliance and security. The following are key data flows and compliance considerations:



Copilot Prompt Gallery is both a website and a feature of Copilot that allows users to discover, manage, use, and share Copilot prompts:

1. A user accesses Copilot Prompt Gallery, either via the Copilot Prompt Gallery website or in Copilot through an app.
2. Copilot Prompt Gallery accesses Microsoft-authored prompts from the public catalog.
3. Copilot Prompt Gallery accesses user-created prompts from user, group, and tenant collections in the Microsoft 365 Substrate data store.

The prompts are stored in collections within the Substrate Data Store, which is a storage type that allows applications to store files and data and enables efficient indexing and search. There are collections for users, groups, and tenants, all of which are within the tenant boundary. All data is encrypted, transported via a secure pipeline, and is accessible only via Substrate APIs.

Related content

- [Copilot Prompt Gallery ↗](#)
 - [Microsoft Copilot help & learning ↗](#)
 - [Data, Privacy, and Security for Microsoft 365 Copilot](#)
-

Feedback

Was this page helpful?

 Yes

 No

Microsoft 365 Copilot service plan diagnostic tool and service plans for IT admins

07/15/2025 Applies to:  Microsoft 365 Copilot

Microsoft 365 Copilot is an everyday AI tool that helps users with their work tasks, including tasks in their Microsoft 365 apps. To learn about Microsoft 365 Copilot, see [What is Microsoft 365 Copilot?](#).

Microsoft 365 Copilot has different features and capabilities that are available in the service plans associated with a Microsoft 365 Copilot license. If users are missing functionality, it's possible the user is missing a service plan.

In the Microsoft 365 admin center, there's a diagnostic tool that shows the service plans assigned to a user account. The diagnostic tool uses the user's email address or user principal name (UPN) to identify and then list all the Microsoft 365 Copilot service plans assigned.

This article shows you how to access & use the self-help diagnostic tool and lists the service plans that you see in the diagnostic tool. Use this information to troubleshoot missing Copilot functionality by checking if the issue is associated with a missing service plan.

This article applies to:

- Microsoft 365 Copilot

Prerequisites

To use the feature in this article, sign into the Microsoft 365 admin center with the following role-based access control (RBAC) role:

- AI administrator

To learn more, see [Admin roles in the Microsoft 365 admin center](#).

Tip

Microsoft recommends you sign in with the least privileged role that you need to complete your task. Typically, the Global Administrator role is too powerful for most tasks, including managing the Copilot feature described in this article.

Step 1 - Run the diagnostic tool in the Microsoft 365 admin center

Admins can verify the service plans assigned to a user using the [Run Tests: Copilot Service Plan Diagnostic](#) in the Microsoft 365 admin center.

The tool identifies and lists all the Microsoft 365 Copilot service plans assigned.

1. Sign into the [Microsoft 365 admin center](#) as an AI administrator.
2. In the left navigation pane, select **Support > Help and support**.
3. In the prompt box, enter `copilot missing`. This step opens the diagnostic tool.
Or, open the diagnostic tool directly at [Run Tests: Copilot Service Plan Diagnostic](#).
4. Select **Run diagnostics > Enter the email address or user principal name (UPN) of the user > Run tests**.

The output identifies and lists all the Microsoft 365 Copilot service plans assigned to the user.

Step 2 - Review the Microsoft 365 Copilot service plan names

The following table lists the service plan names you see in the diagnostic tool output.

If one of the following service plans isn't listed in the diagnostic output, then review the [Microsoft 365 Copilot feature availability](#). Check if the feature aligns with the missing Copilot functionality you're trying to verify.

 Expand table

Feature & Service Plan name	Learn more
Microsoft Copilot Studio Service plan name: Copilot Studio in Copilot for M365	- Copilot Studio overview - Get access to Copilot Studio
Microsoft Graph Connectors Service plan name: Graph Connectors in Microsoft 365 Copilot	- Build Microsoft Graph connectors for Microsoft 365 Copilot - Custom Microsoft Graph connectors for Microsoft 365 Copilot

Feature & Service Plan name	Learn more
Intelligent Search Service plan name: Intelligent Search	Microsoft 365 Copilot feature availability
Copilot in SharePoint - Includes SharePoint agents and a rich text editor . Service plan name: Microsoft 365 Copilot for SharePoint	<ul style="list-style-type: none"> - Get started with SharePoint agents - Authoring with Copilot in SharePoint: An overview - Copilot in SharePoint FAQ
Copilot in Microsoft Teams Service plan name: Microsoft 365 Copilot in Microsoft Teams	Overview of AI in Microsoft Teams for IT admins
Copilot in Microsoft 365 apps Service plan name: Microsoft 365 Copilot in Productivity Apps	Copilot features in Microsoft 365 apps
Microsoft 365 Copilot Chat - work Service plan name: Microsoft Copilot with Graph-grounded chat	<ul style="list-style-type: none"> - Manage Microsoft 365 Copilot Chat - Which Copilot is right for me or my organization?
Microsoft 365 Copilot Power Platform connectors Service plan name: Power Platform Connectors in Microsoft 365 Copilot	<ul style="list-style-type: none"> - Connectors overview - Use Power Platform connectors in Copilot Studio

Common issues

- The diagnostic tool and the Microsoft 365 admin center can become unsynchronized. For example, the admin center shows a service plan assigned to a user, but the diagnostic tool shows that the service plan isn't assigned.

This situation typically affects older user accounts with existing subscriptions and then new service plans are added to the subscription.

To resolve the synchronization issue:

- In the [Microsoft 365 admin center](#), go to the affected user account and uncheck the associated service plans.
- Save your changes.
- Re-enable the service plan and save the changes.

4. Rerun the diagnostic tool and verify that the service plan information is successfully synced.
- If the diagnostic output is missing a service plan (listed in Step 2 - Review the Microsoft 365 Copilot service plan names), then review the Microsoft 365 Copilot feature availability list.

Then:

- Verify that the Copilot feature is included in your license.
- Assign the missing service plan to the user account.

Related articles

- [Microsoft 365 Copilot feature availability and service description](#)
- [Microsoft 365 Copilot overview](#)

Data, Privacy, and Security for Microsoft 365 Copilot

08/15/2025

Microsoft 365 Copilot is a sophisticated processing and orchestration engine that provides AI-powered productivity capabilities by coordinating the following components:

- Large language models (LLMs)
- Content in Microsoft Graph, such as emails, chats, and documents that you have permission to access.
- The Microsoft 365 productivity apps that you use every day, such as Word and PowerPoint.

For an overview of how these three components work together, see [Microsoft 365 Copilot overview](#). For links to other content related to Microsoft 365 Copilot, see [Microsoft 365 Copilot documentation](#).

Important

- Microsoft 365 Copilot, including [Microsoft 365 Copilot Search](#), is compliant with our existing privacy, security, and compliance commitments to Microsoft 365 commercial customers, including the General Data Protection Regulation (GDPR) and European Union (EU) Data Boundary.
- Prompts, responses, and data accessed through Microsoft Graph aren't used to train foundation LLMs, including those used by Microsoft 365 Copilot.
- Microsoft 365 Copilot operates with multiple protections, which include, but aren't limited to, [blocking harmful content](#), [detecting protected material](#), and [blocking prompt injections \(jailbreak attacks\)](#).

The information in this article is intended to help provide answers to the following questions:

- [How does Microsoft 365 Copilot use your proprietary organizational data?](#)
- [How does Microsoft 365 Copilot protect organizational information and data?](#)
- [What data is stored about user interactions with Microsoft 365 Copilot?](#)
- [What residency commitments does Microsoft 365 Copilot make?](#)
- [What extensibility options are available for Microsoft 365 Copilot](#)
- [How does Microsoft 365 Copilot meet regulatory compliance requirements?](#)
- [Do privacy controls for connected experiences in Microsoft 365 Apps apply to Microsoft 365 Copilot?](#)

- Can I trust the content that Microsoft 365 Copilot creates? Who owns that content?
- What are Microsoft's commitments to using AI responsibly?

 Note

Microsoft 365 Copilot will continue to evolve over time with new capabilities. To keep up to date on Microsoft 365 Copilot or ask questions, visit the [Microsoft 365 Copilot community](#) on the Microsoft Tech Community.

How does Microsoft 365 Copilot use your proprietary organizational data?

Microsoft 365 Copilot provides value by connecting LLMs to your organizational data. Microsoft 365 Copilot accesses content and context through Microsoft Graph. It can generate responses anchored in your organizational data, such as user documents, emails, calendar, chats, meetings, and contacts. Microsoft 365 Copilot combines this content with the user's working context, such as the meeting a user is in now, the email exchanges the user had on a topic, or the chat conversations the user had last week. Microsoft 365 Copilot uses this combination of content and context to help provide accurate, relevant, and contextual responses.

 Important

Prompts, responses, and data accessed through Microsoft Graph aren't used to train foundation LLMs, including those used by Microsoft 365 Copilot.

Microsoft 365 Copilot only surfaces organizational data to which individual users have at least view permissions. It's important that you're using the permission models available in Microsoft 365 services, such as SharePoint, to help ensure the right users or groups have the right access to the right content within your organization. This includes permissions you give to users outside your organization through inter-tenant collaboration solutions, such as [shared channels in Microsoft Teams](#).

When you enter prompts using Microsoft 365 Copilot, the information contained within your prompts, the data they retrieve, and the generated responses remain within the Microsoft 365 service boundary, in keeping with our current privacy, security, and compliance commitments. Microsoft 365 Copilot uses Azure OpenAI services for processing, not OpenAI's publicly available services. Azure OpenAI doesn't cache customer content and Copilot modified

prompts for Microsoft 365 Copilot. For more information, see the [Data stored about user interactions with Microsoft 365 Copilot](#) section later in this article.

(!) Note

- When you're using agents to help Microsoft 365 Copilot to provide more relevant information, check the privacy statement and terms of use of the agent to determine how it will handle your organization's data. For more information, see [Extensibility of Microsoft 365 Copilot](#).
- When you're using web search, Microsoft 365 Copilot parses the user's prompt and identifies terms where web search would improve the quality of the response. Based on these terms, Copilot generates a search query that it sends to the Bing Search service. For more information, [Data, privacy, and security for web queries in Microsoft 365 Copilot and Microsoft 365 Copilot Chat](#).

While abuse monitoring, which includes human review of content, is available in Azure OpenAI, Microsoft 365 Copilot services have opted out of it. For information about content filtering, see the [How does Copilot block harmful content?](#) section later in this article.

(!) Note

We may use customer feedback, which is optional, to improve Microsoft 365 Copilot, just like we use customer feedback to improve other Microsoft 365 services and Microsoft 365 productivity apps. We don't use this feedback to train the foundation LLMs used by Microsoft 365 Copilot. Customers can manage feedback through admin controls. For more information, see [Manage Microsoft feedback for your organization](#) and [Providing feedback about Microsoft Copilot with Microsoft 365 apps](#).

Data stored about user interactions with Microsoft 365 Copilot

When a user interacts with Microsoft 365 Copilot (using apps such as Word, PowerPoint, Excel, OneNote, Loop, or Whiteboard), we store data about these interactions. The stored data includes the user's prompt and Copilot's response, including citations to any information used to ground Copilot's response. We refer to the user's prompt and Copilot's response to that prompt as the "content of interactions" and the record of those interactions is the user's Copilot activity history. For example, this stored data provides users with Copilot activity history in [Microsoft 365 Copilot Chat](#) (previously named Business Chat) and [meetings in Microsoft](#)

[Teams](#). This data is processed and stored in alignment with contractual commitments with your organization's other content in Microsoft 365. The data is encrypted while it's stored and isn't used to train foundation LLMs, including those used by Microsoft 365 Copilot.

To view and manage this stored data, admins can use Content search or Microsoft Purview. Admins can also use Microsoft Purview to set retention policies for the data related to chat interactions with Copilot. For more information, see the following articles:

- [Overview of Content search](#)
- [Microsoft Purview data security and compliance protections for generative AI apps](#)
- [Learn about retention for Copilot](#)

For Microsoft Teams chats with Copilot, admins can also use [Microsoft Teams Export APIs](#) to view the stored data.

Deleting the history of user interactions with Microsoft 365 Copilot

Your users can delete their Copilot activity history, which includes their prompts and the responses Copilot returns, by going to the [My Account portal](#). For more information, see [Delete your Microsoft 365 Copilot activity history](#).

Microsoft 365 Copilot and the EU Data Boundary

Microsoft 365 Copilot calls to the LLM are routed to the closest data centers in the region, but also can call into other regions where capacity is available during high utilization periods.

For European Union (EU) users, we have additional safeguards to comply with the [EU Data Boundary](#). EU traffic stays within the EU Data Boundary while worldwide traffic can be sent to the EU and other countries or regions for LLM processing.

Microsoft 365 Copilot and data residency

Microsoft 365 Copilot is upholding data residency commitments as outlined in the Microsoft Product Terms and Data Protection Addendum. Microsoft 365 Copilot was added as a covered workload in the data residency commitments in Microsoft Product Terms on March 1, 2024.

Microsoft [Advanced Data Residency \(ADR\)](#) and [Multi-Geo Capabilities](#) offerings include data residency commitments for Microsoft 365 Copilot customers as of March 1, 2024. For EU customers, Microsoft 365 Copilot is an EU Data Boundary service. Customers outside the EU may have their queries processed in the US, EU, or other regions.

Extensibility of Microsoft 365 Copilot

While Microsoft 365 Copilot is already able to use the apps and data within the Microsoft 365 ecosystem, many organizations still depend on various external tools and services for work management and collaboration. Microsoft 365 Copilot experiences can reference third-party tools and services when responding to a user's request by using [Microsoft Graph connectors](#) or agents. Data from Graph connectors can be returned in Microsoft 365 Copilot responses if the user has permission to access that information.

When agents are enabled, Microsoft 365 Copilot determines whether it needs to use a specific agent to help provide a relevant response to the user. If an agent is needed, Microsoft 365 Copilot generates a search query to send to the agent on the user's behalf. The query is based on the user's prompt, Copilot activity history, and data the user has access to in Microsoft 365.

In the **Integrated apps** section of the [Microsoft 365 admin center](#), admins can view the permissions and data access required by an agent as well as the agent's terms of use and privacy statement. Admins have full control to select which agents are allowed in their organization. A user can only access the agents that their admin allows and that the user installed or is assigned. Microsoft 365 Copilot only uses agents that are turned on by the user.

For more information, see the following articles:

- [Manage agents for Microsoft 365 Copilot in the Microsoft 365 admin center](#)
- [Microsoft 365 Copilot extensibility overview](#)
- [How Microsoft 365 Copilot can work with your external data](#) ↗

How does Microsoft 365 Copilot protect organizational data?

The permissions model within your Microsoft 365 tenant can help ensure that data won't unintentionally leak between users, groups, and tenants. Microsoft 365 Copilot presents only data that each individual can access using the same underlying controls for data access used in other Microsoft 365 services. Semantic Index honors the user identity-based access boundary so that the grounding process only accesses content that the current user is authorized to access. For more information, see Microsoft's [privacy policy and service documentation](#) ↗.

When you have data that's encrypted by Microsoft Purview Information Protection, Microsoft 365 Copilot honors the usage rights granted to the user. This encryption can be applied by [sensitivity labels](#) or by restricted permissions in apps in Microsoft 365 by using Information Rights Management (IRM). For more information about using Microsoft Purview with Microsoft 365 Copilot, see [Microsoft Purview data security and compliance protections for generative AI apps](#).

We already implement multiple forms of protection to help prevent customers from compromising Microsoft 365 services and applications or gaining unauthorized access to other tenants or the Microsoft 365 system itself. Here are some examples of those forms of protection:

- Logical isolation of customer content within each tenant for Microsoft 365 services is achieved through Microsoft Entra authorization and role-based access control. For more information, see [Microsoft 365 isolation controls](#).
- Microsoft uses rigorous physical security, background screening, and a multi-layered encryption strategy to protect the confidentiality and integrity of customer content.
- Microsoft 365 uses service-side technologies that encrypt customer content at rest and in transit, including BitLocker, per-file encryption, Transport Layer Security (TLS), and Internet Protocol Security (IPsec). For specific details about encryption in Microsoft 365, see [Encryption in the Microsoft Cloud](#).
- Your control over your data is reinforced by Microsoft's commitment to comply with broadly applicable privacy laws, such as the GDPR, and privacy standards, such as ISO/IEC 27018, the world's first international code of practice for cloud privacy.
- For content accessed through Microsoft 365 Copilot agents, encryption can exclude programmatic access, thus limiting the agent from accessing the content. For more information, see [Configure usage rights for Azure Information Protection](#).

Meeting regulatory compliance requirements

As regulation in the AI space evolves, Microsoft will continue to adapt and respond to fulfill future regulatory requirements.

Microsoft 365 Copilot is built on top of Microsoft's current commitments to data security and privacy in the enterprise. There's no change to these commitments. Microsoft 365 Copilot is integrated into Microsoft 365 and adheres to all existing privacy, security, and compliance commitments to Microsoft 365 commercial customers. For more information, see [Microsoft Compliance](#).

Beyond adhering to regulations, we prioritize an open dialogue with our customers, partners, and regulatory authorities to better understand and address concerns, thereby fostering an environment of trust and cooperation. We acknowledge that privacy, security, and transparency aren't just features, but prerequisites in the AI-driven landscape at Microsoft.

Additional information

Microsoft 365 Copilot and privacy controls for connected experiences

Some privacy controls for connected experiences in Microsoft 365 Apps can affect the availability of Microsoft 365 Copilot features. This includes the privacy controls for connected experiences that analyze your content and the privacy control for optional connected experiences. For more information about these privacy controls, see [Overview of privacy controls for Microsoft 365 Apps for enterprise](#).

Privacy control for connected experiences that analyze your content

If you turn off connected experiences that analyze your content on devices in your organization, Microsoft 365 Copilot features won't be available to your users in the following apps:

- Excel
- OneNote
- Outlook
- PowerPoint
- Word

This applies to when you're running the most current version of these apps on Windows, Mac, iOS, or Android devices.

There's also a privacy control that turns off all connected experiences, including connected experiences that analyze your content. If you use that privacy control, Microsoft 365 Copilot features won't be available in the apps and on the devices described above.

Privacy control for optional connected experiences

If you turn off optional connected experiences in your organization, Microsoft 365 Copilot features that are optional connected experiences won't be available to your users. For example, turning off optional connected experiences could affect the availability of [web search](#).

There's also a privacy control that turns off all connected experiences, including optional connected experiences. If you use that privacy control, Microsoft 365 Copilot features that are optional connected experiences won't be available.

About the content that Microsoft 365 Copilot creates

The responses that generative AI produces aren't guaranteed to be 100% factual. While we continue to improve responses, users should still use their judgment when reviewing the

output before sending them to others. Our Microsoft 365 Copilot capabilities provide useful drafts and summaries to help you achieve more while giving you a chance to review the generated AI rather than fully automating these tasks.

We continue to improve algorithms to proactively address issues, such as misinformation and disinformation, content blocking, data safety, and preventing the promotion of harmful or discriminatory content in line with our [responsible AI principles](#).

Microsoft doesn't claim ownership of the output of the service. That said, we don't make a determination on whether a customer's output is copyright protected or enforceable against other users. This is because generative AI systems may produce similar responses to similar prompts or queries from multiple customers. Consequently, multiple customers may have or claim rights in content that is the same or substantially similar.

If a third party sues a commercial customer for copyright infringement for using Microsoft's Copilots or the output they generate, we'll defend the customer and pay the amount of any adverse judgments or settlements that result from the lawsuit, as long as the customer used the guardrails and content filters we have built into our products. For more information, see [Microsoft announces new Copilot Copyright Commitment for customers](#).

How does Copilot block harmful content?

To help block harmful content, Microsoft 365 Copilot makes use of the Azure OpenAI Service, which includes a [content filtering system](#) that works alongside core models. The content filtering models for the Hate & Fairness, Sexual, Violence, and Self-harm categories have been specifically trained and tested in various languages. This system works by running both the input prompt and the response through classification models that are designed to identify and block the output of harmful content.

Hate and fairness-related harms refer to any content that uses pejorative or discriminatory language based on attributes like race, ethnicity, nationality, gender identity and expression, sexual orientation, religion, immigration status, ability status, personal appearance, and body size. Fairness is concerned with making sure that AI systems treat all groups of people equitably without contributing to existing societal inequities. Sexual content involves discussions about human reproductive organs, romantic relationships, acts portrayed in erotic or affectionate terms, pregnancy, physical sexual acts, including those portrayed as an assault or a forced act of sexual violence, prostitution, pornography, and abuse. Violence describes language related to physical actions that are intended to harm or kill, including actions, weapons, and related entities. Self-harm language refers to deliberate actions that are intended to injure or kill oneself.

In addition to content filtering provided by the Azure OpenAI Service, Microsoft 365 Copilot also applies filters to help prevent workplace harms from happening. Workplace harms refers to a category of harms that can result from generative AI or models making inferences, judgments, or evaluations about an employee based on their workplace communication. Currently, that means inferences, judgments, or evaluations about an employee's performance, attitude, internal or emotional state, or personal characteristics. We restrict the use of generative AI or models from being used for these purposes.

Does Copilot provide protected material detection?

Yes, Microsoft 365 Copilot provides detection for protected materials, which includes text subject to copyright and code subject to licensing restrictions. Not all of these mitigations are relevant for all Microsoft 365 Copilot scenarios.

Does Copilot block prompt injections (jailbreak attacks)?

Jailbreak attacks are prompts designed to bypass Copilot's safeguards or induce non-compliant behavior. Microsoft 365 Copilot helps mitigate these attacks by using proprietary jailbreak and cross-prompt injection attack (XPIA) classifiers. These classifiers analyze inputs to the Copilot service and help block high-risk prompts prior to model execution.

Committed to responsible AI

As AI is poised to transform our lives, we must collectively define new rules, norms, and practices for the use and impact of this technology. Microsoft has been on a Responsible AI journey since 2017, when we defined our principles and approach to ensuring this technology is used in a way that is driven by ethical principles that put people first.

At Microsoft, we're guided by our [AI principles](#), our [Responsible AI Standard](#), and decades of research on AI, grounding, and privacy-preserving machine learning. A multidisciplinary team of researchers, engineers, and policy experts reviews our AI systems for potential harms and mitigations — refining training data, filtering to limit harmful content, query- and result-blocking sensitive topics, and applying Microsoft technologies like [InterpretML](#) and [Fairlearn](#) to help detect and correct data bias. We make it clear how the system makes decisions by noting limitations, linking to sources, and prompting users to review, fact-check, and adjust content based on subject-matter expertise. For more information, see [Governing AI: A Blueprint for the Future](#).

We aim to help our customers use our AI products responsibly, sharing our learnings, and building trust-based partnerships. For these new services, we want to provide our customers with information about the intended uses, capabilities, and limitations of our AI platform

service, so they have the knowledge necessary to make responsible deployment choices. We also share resources and templates with developers inside organizations and with independent software vendors (ISVs), to help them build effective, safe, and transparent AI solutions.

Related articles

- [Microsoft 365 Copilot requirements](#)
- [Get started with Microsoft 365 Copilot](#)
- [Microsoft 365 Copilot adoption site ↗](#)

Data, privacy, and security for web search in Microsoft 365 Copilot and Microsoft 365 Copilot Chat

07/30/2025

Microsoft 365 Copilot and [Microsoft 365 Copilot Chat](#) have an optional feature that allows Copilot to reference web content when responding to user prompts. Allowing Microsoft 365 Copilot and Microsoft 365 Copilot Chat to reference web content improves the quality of Copilot responses by grounding them in the latest information from the web.

ⓘ Note

- This article concerns the web search functionality in Microsoft 365 Copilot and Microsoft 365 Copilot Chat. Microsoft 365 **Copilot Search** is an additional, universal search experience that allows users with a Microsoft 365 Copilot license to search across all their Microsoft 365 and third-party data sources. Learn more about [Microsoft 365 Copilot Search](#).
- The information about web search in this article also applies to [Researcher](#) and [Analyst](#) in Microsoft 365 Copilot. While web search isn't a prerequisite for using Researcher and Analyst, enabling web search is recommended to get the most value out of using them. The only difference is that Researcher and Analyst don't have a **Web content** toggle for users.

Web search

When web search is enabled, Microsoft 365 Copilot and Microsoft 365 Copilot Chat may fetch information from the Bing search service when information from the web helps to provide a better, more grounded response. Admin controls and a user-level **Web content** toggle (only for Microsoft 365 Copilot) are available to [manage whether web search is enabled](#) in your environment.

How web search works

When web search is enabled, Microsoft 365 Copilot and Microsoft 365 Copilot Chat parse the user's prompt and identifies terms where information from the web would improve the quality

of the response. Based on these terms, Copilot generates a search query that it sends to the Bing search service asking for more information.

This generated search query is different from the user's original prompt—it consists of a few words informed by the user's prompt. The following information isn't included in the generated search query sent to the Bing search service:

- The user's entire prompt, unless the prompt is very short (for example, "local weather")
- Entire Microsoft 365 files (for example, emails or documents) or files uploaded into Copilot
- Entire web pages or PDFs summarized by Copilot in Microsoft Edge (only for Microsoft 365 Copilot Chat)
- Any identifying information based on the user's Microsoft Entra ID (for example, username, domain, or tenant ID)

When using Microsoft 365 Copilot, the generated search query doesn't include the entirety of Microsoft 365 documents associated with the prompt. However, it may also be informed by data within a Microsoft 365 document under the following conditions:

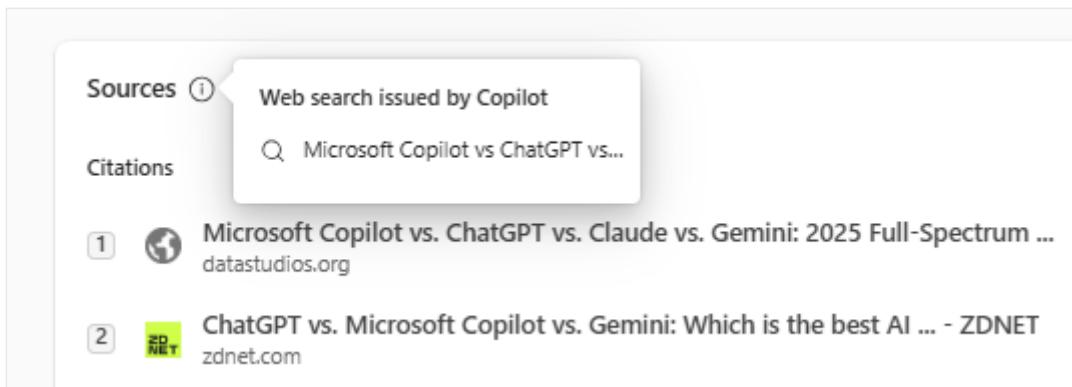
- When a user enters a prompt into Copilot inside a Microsoft 365 application (for example, writing a prompt into Copilot in Microsoft Word while a relevant document is open).
- When the user explicitly references a specific document in their prompt.

The user's prompts and Copilot's responses are stored within Microsoft 365 and never leave the service boundary for both Microsoft 365 Copilot and Microsoft 365 Copilot Chat without customer direction. [Enterprise data protection](#), the [Data Protection Addendum \(DPA\)](#), and the [Product Terms](#) apply to prompts and responses, with Microsoft acting as a data processor.

After Microsoft 365 Copilot and Microsoft 365 Copilot Chat receive additional information from the Bing search service, this information is used to compose the response returned to the user.

Web search query citations

To provide greater visibility into the generated search queries, web search query citations are shown to users in the linked citation section of the Copilot response. The section shows the exact web search queries (derived from the user's prompt) that were sent to the Bing search service. Showing the exact web search queries helps users understand what search queries, along with the sites searched, were used to enhance Copilot's response to their prompt. This information can help users improve their prompts and use Copilot more effectively.



The screenshot shows the Microsoft Copilot Chat interface. At the top left, there's a 'Sources' button with a circular icon containing a question mark. To its right is a card-like box with the text 'Web search issued by Copilot' and a magnifying glass icon followed by the query 'Microsoft Copilot vs. ChatGPT vs...'. Below this are two search results: 1. A result from 'datastudios.org' titled 'Microsoft Copilot vs. ChatGPT vs. Claude vs. Gemini: 2025 Full-Spectrum ...'. 2. A result from 'zdnet.com' titled 'ChatGPT vs. Microsoft Copilot vs. Gemini: Which is the best AI ... - ZDNET'.

Web search query citations are available only in Microsoft 365 Copilot Chat (previously named Business Chat). Citations aren't available in the Copilot pane within a Microsoft 365 app, such as Word or PowerPoint. Also, the web search queries are only available in the chat thread for 24 hours.

Web search query logging

Web search query logging is available so that admins can perform search, audit, and eDiscovery on the exact web search queries Copilot derived from the user's prompt. Admins can already perform these actions for prompts and responses and are able to use their familiar tools to extend those actions to search queries. For more information, see [Audit log activities](#), [Copilot interaction events overview](#), and [Search for and delete Copilot data in eDiscovery \(preview\)](#).

Examples of generated search queries

The following table provides multiple examples of a user's prompt and the generated search queries sent to Bing. It also explains how Microsoft 365 Copilot and Microsoft 365 Copilot Chat formulate a response. Brackets indicate placeholders for specific information referenced by the user or inferred by Copilot.

Note

Unlike with Microsoft 365 Copilot, users can't invoke organizational content like files, emails, or chats, when prompting in Microsoft 365 Copilot Chat. For examples of purely web-based user prompts for Microsoft 365 Copilot Chat, see [Privacy and security of generated search queries](#).

 Expand table

User prompt	Generated search queries	How Copilot provides a response
Who is my manager and what public information is available about them?	[Manager name]	Copilot finds the name of the user's manager from Microsoft 365 data. It then generates a Bing search query based on their name to see what information about them is available on the web.
I'm looking for a document authored last week by [coworker].	None	Copilot returns documents by [coworker] found in Microsoft 365 data. No web search queries are generated.
We're considering a possible acquisition of Fabrikam. Summarize financial information about the company, including their business strategy.	Fabrikam strategy Fabrikam financials	Copilot returns a response with two sections. One is headlined "From your company's data" that references information the user has access to in Microsoft 365. The other is headlined "From the web," which includes any publicly available information.
What decision did [coworker] make about shipping our Contoso product?	[Coworker name] decision about shipping Contoso product	Copilot returns a response based on information the user has access to in Microsoft 365. Because there's no relevant information available on the web, Copilot doesn't include information from the web in the response.
Summarize [internal strategy document about clean energy] and tell me if Fabrikam has publicly announced a similar approach.	Fabrikam clean energy policy announcements	The user explicitly includes a reference to a specific document in Microsoft 365. Copilot reasons over this document and identifies "clean energy policy" as a major theme. "Clean energy policy" is added to the generated search query sent to the Bing search service (the document itself isn't included). Copilot then takes web results returned from Bing and identifies any similarities between this public information and the strategy described in the internal document.

How Microsoft handles generated search queries

Microsoft 365 Copilot and Microsoft 365 Copilot Chat both use generated search queries sent to the Bing search service to ground responses in web data. The way Microsoft handles these queries is identical in both services.

Generated search queries are sent to the Bing search service with user and tenant identifiers removed. Also, web search queries sent to Bing don't affect any of the following:

- Search Ranking
- Answers or features like Rich Captions
- Social features like Auto Suggest, Trending, and Zero Input

The "Microsoft 365 Copilot and Microsoft 365 Copilot Chat" section of the [Product Terms](#) provides the following additional commitments about the generated search queries sent to the Bing search service:

- Microsoft has no rights to them other than as needed to provide the service.
- They aren't used to improve Bing.
- They aren't used to create advertising profiles or to track user behavior.
- They aren't shared with advertisers.
- They aren't used to train generative AI foundation models.
- They're treated as customer confidential information and protected by appropriate technical and organizational measures.

The Bing search service operates separately from Microsoft 365 and has different data-handling practices. The web search queries generated by Copilot and sent to Bing are subject to the [Microsoft Services Agreement](#) between each user and Microsoft, together with the [Microsoft Privacy Statement](#).

The [Product Terms](#) add additional commitments on Microsoft as a controller with respect to handling of web query data. Microsoft acts as a data controller, responsible for complying with all applicable laws and controller obligations. In the event of conflict with respect to the use of Bing with Microsoft 365 Copilot and Microsoft 365 Copilot Chat, the Product Terms supersede the Microsoft Services Agreement and the Microsoft Privacy Statement.

The [Microsoft Products and Services Data Protection Addendum \(DPA\)](#) doesn't apply to the use of generated web search queries in Microsoft 365 Copilot, Microsoft 365 Copilot Chat, or the Bing search service. Also, HIPAA compliance and the [EU Data Boundary](#) don't apply to generated search queries.

Controls available to manage web search

To manage web search so it aligns with organizational policies, user preferences, and security considerations, two distinct controls are available: one for IT admins and another for users (only for Microsoft 365 Copilot).

IT admin control for both Microsoft 365 Copilot and Microsoft 365 Copilot Chat

The primary way that IT admins can control access to web search is by using the **Allow web search in Copilot** policy, which is available only in [Cloud Policy service for Microsoft 365](#). This policy allows IT admins to either turn on or turn off web search for users or user groups across the tenant they manage in accordance with their organization's policies, data privacy laws, or other regulatory requirements. This policy applies to both Microsoft 365 Copilot and Microsoft 365 Copilot Chat.

 **Note**

The **Allow web search in Copilot** policy replaces the **Allow Copilot to improve responses with web content** control in the Microsoft 365 admin center previously used to manage web content in Microsoft 365 Copilot.

If the IT admin enables the **Allow web search in Copilot** policy, they have three options for web search in Copilot:

- Enabled in Microsoft 365 Copilot and Microsoft 365 Copilot Chat
- Disabled in Microsoft 365 Copilot and Microsoft 365 Copilot Chat
- Disabled in Microsoft 365 Copilot Work mode; Enabled in Microsoft 365 Copilot Web mode and Microsoft 365 Copilot Chat

If the IT admin turns on web search for Microsoft 365 Copilot users, those users still have the option to turn off web search by using the [Web content toggle](#). The **Web content** toggle isn't available as part of the Microsoft 365 Copilot Chat experience.

If the IT admin turns off web search, the **Web content** toggle isn't available to users. The toggle is turned off and appears dimmed. Users can't turn on the toggle to use web search.

If the IT admin doesn't configure the **Allow web search in Copilot** policy, web search will be available to users in both Microsoft 365 Copilot and Microsoft 365 Copilot Chat, unless the IT admin has set the **Allow the use of additional optional connected experiences in Office** policy to **Disabled**. But turning off optional connected experiences restricts Microsoft 365 Copilot Chat, Microsoft 365 Copilot, and multiple experiences across Microsoft 365.

 **Note**

For Government Community Cloud (GCC) customers:

- Web search is available in GCC.
- The **Allow web search in Copilot** policy is available in GCC in Cloud Policy service for Microsoft 365.

- If the IT admin doesn't configure the **Allow web search in Copilot** policy, web search is turned off in GCC, regardless of how the **Allow the use of additional optional connected experiences in Office** policy is configured.

Web content toggle for users (only for Microsoft 365 Copilot)

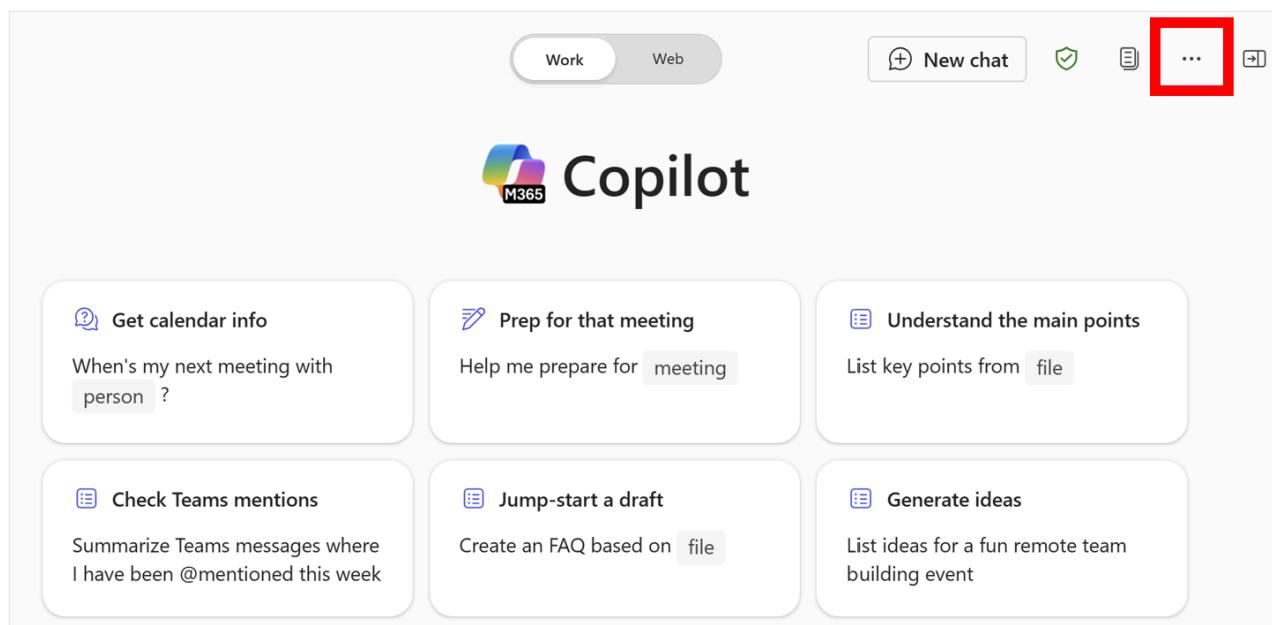
The **Web content** toggle offers users control over whether or not they want real-time web content in Microsoft 365 Copilot responses based on their personal preference. The **Web content** toggle is only available as part of work chat in Microsoft 365 Copilot.

If the IT admin enables web search, the **Web content** toggle is turned on by default. When turned on, the user receives responses grounded in real-time web content. If the IT admin disables web search, the **Web content** toggle isn't available to the Microsoft 365 Copilot user as part of work chat and web search is disabled.

If a Microsoft 365 Copilot user turns off the **Web content** toggle in work chat, web content isn't included in Copilot responses.

Microsoft 365 Copilot users can manage web search in work chat by following these steps:

1. Select the menu in the top right corner of the screen in Microsoft 365 Copilot when using work chat.



2. Turn off the **Web content** toggle.

...



Copilot

About

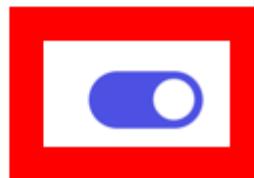
Scheduled prompts Preview

Send feedback

Settings

Copilot response includes:

Web content



Note

The privacy setting for optional connected experiences available to users in Microsoft 365 apps (for example, in Word, Excel, or Teams) has no effect on the availability of web search. For example, if a user turns off optional connected experiences, web search can still be available to the user.

AI security for Microsoft 365 Copilot

08/07/2025 Applies to:  Microsoft 365 Copilot

AI has revolutionized many sectors, providing unprecedented capabilities and efficiencies. For example, [Microsoft 365 Copilot](#), our AI-powered productivity tool, coordinates large language models (LLMs), content in Microsoft Graphs, and the Microsoft 365 productivity apps such as Word, Excel, PowerPoint, Outlook, Teams, SharePoint, and others. This integration provides real-time intelligent assistance, enabling users to enhance their creativity, productivity, and skills.

Customers are keen to explore these opportunities, and they're thoughtfully considering the important aspects of security that come with them. Based on our interactions with customers who are on their AI transformation journey, we understand that topics such as data security, privacy, model robustness, and cyberattacks are top of mind.

Microsoft understands how critical these considerations are, which is why we employ a robust defense-in-depth strategy to help protect productivity tools like Microsoft 365 Copilot against security risks. This multi-layered approach involves a combination of advanced threat intelligence, rigorous security practices, and proactive safeguards. For example, in addition to our own red-teaming exercises to test Microsoft 365 Copilot, we engaged Casaba Security to test nine Copilot implementations across the Microsoft 365 product suite. We promptly addressed and resolved the findings of [their testing](#), which focused on identifying Open Worldwide Application Security Project's (OWASP) top 10 for LLM as well as traditional security vulnerabilities in supporting application infrastructure.

Microsoft takes extensive steps to ensure that Microsoft 365 Copilot is compliant with our existing privacy, security, and compliance commitments to our customers. And as AI technologies and use cases continue to evolve, our work is never done: Microsoft is committed to continuously advancing protections for Copilot, learning from our own monitoring and testing of our systems, as well as working with customers, partners, and the broader security industry.

This article provides an overview of Microsoft's overall security posture for AI, and how different Microsoft security solutions work together to help secure your data and interactions in Microsoft 365 Copilot and other AI applications. We will update this article with new information about emerging risks and innovations in solutions as they become available.

Securing Microsoft 365 Copilot

At Microsoft, security isn't just a priority; it's the foundation for everything we do. This commitment extends to AI: not only does the Microsoft Office of Responsible AI guide safety

and security on our AI journey, our recently expanded [Secure Future Initiative](#) further reflects our dedication to create a safer digital landscape for everyone.

Our comprehensive security posture for AI has the following pillars:

- **Responsible AI development:** Microsoft champions [responsible AI principles](#). These principles emphasize fairness, reliability and safety, privacy and security, inclusiveness, transparency, and accountability throughout the AI lifecycle.
- **Security best practices:** We provide tailored resources and best practices for developers, engineers, and security professionals working with Microsoft AI products. These resources help organizations understand and implement security measures during deployment.
- **Security development lifecycle (SDL):** Our rigorous SDL integrates security considerations throughout the entire AI development process. This proactive approach ensures vulnerabilities are identified and mitigated from the very beginning.
- **Threat research, detection, and mitigation:** We actively invest in strategies to detect and mitigate threats to our AI models. This includes ongoing vulnerability monitoring and developing countermeasures against potential attacks. Microsoft Threat Intelligence, our global network of researchers, also monitors the [threat landscape](#) for threat actors and cyberattacks that might take advantage of AI applications.

Microsoft safeguards privacy, security, and reliability for Microsoft 365 Copilot's AI features, from the user input stage through the system output stage. Microsoft 365 Copilot is compliant with our existing [privacy, security, and compliance commitments](#), including the General Data Protection Regulation (GDPR) and European Union (EU) Data Boundary. In keeping with these commitments, Microsoft handles the information in any prompts entered using Copilot, and the retrieved data and generated responses remain secured as Customer Data and subject to our contractual data handling requirements.

The following sections cover how Microsoft addresses various aspects of privacy, security, and compliance that are important customer considerations for adopting Microsoft 365 Copilot.

Access control and permissions management

Microsoft 365 Copilot accesses resources on behalf of the user, so it can only access resources the user already has permission to access. If the user doesn't have access to a document for example, then Microsoft 365 Copilot working on the user's behalf will also not have access either.

The data that it uses to generate responses is processed by Microsoft pursuant to contractual data handling requirements, including being encrypted in transit, helping safeguard privacy and prevent data leakage. In addition, Microsoft 365 data, including data from Microsoft Graph and SharePoint, adheres to access control and auditing mechanisms.

Microsoft 365 Copilot respects Microsoft 365, Microsoft Entra, and Microsoft Purview policies that further limit user access and permission, such as information barriers, Conditional Access, and sensitivity labels.

Microsoft 365 Copilot inherits data loss prevention (DLP) policies to prevent data exfiltration of Copilot-generated responses. Additionally, it enhances data security by applying sensitivity labels to these responses.

Protecting data during model training

Microsoft 365 Copilot uses pretrained LLM models hosted by Microsoft; it doesn't use Customer Data to train these models. In addition, prompt and grounding data isn't used to train AI models and is never shared with OpenAI or other third parties.

Honoring data residency requirements

Microsoft honors data residency commitments as outlined in the Microsoft Product Terms and Data Protection Addendum. Microsoft [Advanced Data Residency \(ADR\)](#) and [Multi-Geo Capabilities](#) offerings include data residency commitments for Microsoft 365 Copilot customers as of March 1, 2024. For European Union (EU) users, Microsoft has additional safeguards to comply with the [EU Data Boundary](#). EU traffic stays within the EU Data Boundary while worldwide traffic can be sent to the EU and other countries or regions for LLM processing.

All data sent for AI processing is encrypted both in transit and at rest. To ensure that data remains secure throughout the processing lifecycle, Microsoft 365 uses FIPS 140-2-compliant service-side technologies that encrypt customer content at rest and in transit, including BitLocker, per-file encryption, Transport Layer Security (TLS) 1.2, and Internet Protocol Security (IPsec).

Hardening against prompt injections

Microsoft uses a combination of advanced machine learning for content filtering at multiple layers, rigorous security protocols, and continuous monitoring. Indirect or cross-prompt injection classifiers detect and block prompt injection at multiple layers. Meanwhile, defenses, such as the following, also help minimize the security impact of cross-prompt injection attacks (XPIA):

- XPIA classifiers are used to detect and reduce instances of XPIA
- Requirement for human-in-the-loop (user-initiated or approved actions) for privileged actions and actions that could alter or egress content, such as sending out an email message

- Unnecessary data egress mechanisms are removed to prevent data exfiltration

Additionally, in the context of a prompt injection attack, the attacker can only access data to the extent that the user has access to. This means that the attacker is limited to the permissions and data that the user has within the system. This limitation helps to contain the potential damage of a prompt injection attack to the scope of the user's permissions.

Adhering to Responsible AI principles

Microsoft Responsible AI principles guide the development and use of Microsoft 365 Copilot. For example, Microsoft 365 Copilot implements classifiers, such as those available in [Azure AI Content Safety](#), and metaprompting to help reduce the risk of harmful, offensive, or violent content. Microsoft 365 Copilot uses AI-based classifiers and content filters to flag different types of potentially harmful content in user prompts or generated responses. Meanwhile, metaprompting guides model behavior, including making sure that the system behaves in accordance with Microsoft's AI principles and user expectations.

Microsoft also applies prompt inspection technology and content filters to prevent the use of Microsoft 365 Copilot for ransomware and other malware-based attacks. In addition, the Security Development Lifecycle (SDL) helps secure Microsoft 365 Copilot against remote code execution. One way we do this involves preventing Copilot from running unconstrained and unsandboxed code.

To help prevent ungrounded content, Microsoft 365 Copilot implements retrieval augmented generation (RAG) by using a dedicated semantic database that can provide information on the content of Microsoft 365 tenant customers. Microsoft continuously and carefully reviews changes in the grounding level of the response. For any changes we make to Microsoft 365 Copilot (including prompt, model, or orchestration), we catch regressions that could adversely impact the user.

There are [new tools in Azure AI](#) that help further enhance these safeguards by helping AI app developers build more secure AI applications.

Protecting copyright and intellectual property

Microsoft has built-in protections against the generation of protected content, which includes the industry's first [Customer Copyright Commitment](#) program to defend customers and compensate for any adverse judgments, in the event of a copyright infringement lawsuit.

Meeting regulatory requirements

Microsoft 365 Copilot meets regulatory requirements for eDiscovery, audit logging, and retention through several mechanisms:

- Retention policies: Messages from Microsoft 365 Copilot are automatically included in the retention policy location named Teams chats and Copilot interactions. This means that user prompts and Copilot responses can be retained and deleted for compliance reasons. The data from Copilot messages is stored in a hidden folder in the mailbox of the user who runs Copilot, which compliance administrators can search with eDiscovery tools.
- Audit logging: Audit logs generated by Microsoft 365 Copilot can be retained for up to 180 days for Audit (Standard) customers and up to one year for Audit (Premium) license holders, with the option to extend up to 10 years.
- Compliance with Microsoft Purview: Microsoft Purview provides data security and compliance protections for generative AI apps like Copilot. The Microsoft Purview Data Security Posture Management for AI, currently in preview, provides easy-to-use graphical tools and reports to quickly gain insights into AI use within the organization. One-click policies help [protect data and comply with regulatory requirements](#).
- Admin controls: Admins can use Microsoft Purview to view and manage stored data, set retention policies, and perform eDiscovery searches. Both admin and user-initiated deletion options are available via Purview.

Frequently asked questions

Are the results of Microsoft 365 Copilot reliable?

While Microsoft safeguards provide strong threat mitigation against misinformation and compromise, as with any AI application, Microsoft 365 Copilot's responses might not always be accurate. You should still apply human judgment to check these responses.

How does Microsoft treat my prompts and responses?

Microsoft treats prompts and responses as we treat other more traditional forms of content like emails, documents, and chats, and our contractual commitments are the same.

Does Microsoft 365 Copilot use my data to train AI models?

Prompts, responses, and Customer Data accessed through Microsoft Graph aren't used to train foundation LLMs, including those used by Microsoft 365 Copilot. Product improvements are

driven through techniques such as customer-reported incidents and synthetic prompt generation.

What should I do if I see unexpected or offensive content?

Report any disturbing or suspicious content immediately by selecting the downvote (thumbs down) button beside the prompt response.

How can I access the Microsoft 365 Copilot vulnerability assessment report?

The third-party vulnerability assessment of Microsoft 365 Copilot can be downloaded from [Service Trust Portal](#).

Can Microsoft help me find risks in my AI applications?

Microsoft has released Python Risk Identification Toolkit for generative AI ([PyRIT](#)), an open access automation framework that aims to empower security professionals and machine learning engineers to proactively [find risks](#) in their own generative AI systems.

Does Microsoft 365 Copilot have access to data I don't have when grounding content?

Microsoft 365 Copilot accesses resources on behalf of the user, so it can only access resources you already have permission to access.

Grounding occurs within the context of your identity, and the semantic index and graph queries are "security trimmed" based on your permissions for the underlying content. This process ensures that only authorized content is included in the grounding process.

How can I limit data that Microsoft 365 Copilot can use?

The following steps can help administrators control user access and therefore limit what data Microsoft 365 Copilot can use:

- [Restrict SharePoint site access](#) and [OneDrive content access](#) to specific groups, even after content has been overshared.
- [Use Restricted SharePoint Search](#) to limit the websites from which Microsoft 365 Copilot is permitted to reference content.

- Use Microsoft SharePoint Premium - SharePoint Advanced Management, which offers reports and tools to analyze and manage overly permissive access-control lists and sharing links across the environment.
- Review information protection considerations for Copilot. Microsoft 365 Copilot honors EXTRACT permissions and automatically [inherits sensitivity labels](#) from referenced content to Copilot-generated responses and files.
- Apply sensitivity labels ↗ to your Microsoft 365 files and email. For Microsoft Purview customers, administrators can [create and configure sensitivity labels](#) that they want to make available for apps and other services.
- Use Microsoft Purview Data Security Posture Management for AI (currently in preview) to discover sensitive data shared with Copilot, see files referenced in Copilot responses, and discover unlabeled files referenced by Copilot and associated SharePoint sites, thereby letting you identify and protect files at risk of overexposure.
- Set up policies that remove old and unused data and limit data sprawl due to data oversharing with [Microsoft Purview Data Lifecycle Management](#).

How can I use Microsoft security solutions to protect data and AI application interactions?

Microsoft always recommends that you build a strong security foundation for your enterprise. The [Zero Trust](#) security strategy provides guidance for such a foundation because it treats each connection and resource request as though it originated from an uncontrolled network and a threat actor. Regardless of where the request originates or what resource it accesses, use Zero Trust principles.

Our comprehensive security solutions—including Microsoft Defender, Entra, Purview, and Intune—work together to help secure your data and interactions in Microsoft 365 Copilot and other AI applications. These products have capabilities that empower you and your teams to:

- **Identify potential risks related to AI use**, such as sensitive data leaks and unauthorized access to high-risk applications
- **Secure the AI applications** and the sensitive data they process or generate, including prompts and responses
- **Govern AI use responsibly** by retaining and logging interactions, detecting policy violations, and investigating incidents

For example, we recently introduced new Microsoft Defender and Purview capabilities that provide purpose-built tools for robust security and governance of generative AI applications and their data. In addition, the seamless integration of [Microsoft Security Copilot](#) across our products streamlines the overall process and experience for security analysts. By prioritizing

security and offering these advanced features, Microsoft empowers organizations to confidently apply the benefits and opportunities AI applications provide.

Where should I report vulnerabilities in Microsoft 365 Copilot and other AI applications?

If you discover new vulnerabilities in any AI platform, we encourage you to follow responsible disclosure practices for the platform owner. Microsoft's own procedure (for Copilot) is explained in this page: [Microsoft AI Bounty Program](#).

Apply principles of Zero Trust to Microsoft 365 Copilot

08/01/2025

Summary: To apply Zero Trust principles to Microsoft 365 Copilot, you need to apply seven layers of protection in your Microsoft 365 tenant:

1. Data protection
2. Identity and access
3. App protection
4. Device management and protection
5. Threat protection
6. Secure collaboration with Teams
7. User permissions to data

Introduction

Before you introduce Microsoft 365 Copilot (Copilot) into your environment, Microsoft recommends that you build a strong foundation of security. Fortunately, guidance for a strong security foundation exists in the form of [Zero Trust](#). The Zero Trust security strategy treats each connection and resource request as though it originated from an uncontrolled network and a bad actor. Regardless of where the request originates or what resource it accesses, Zero Trust teaches us to "never trust, always verify."

This article provides steps to apply the [principles of Zero Trust](#) security to prepare your environment for Copilot in the following ways:

[] [Expand table](#)

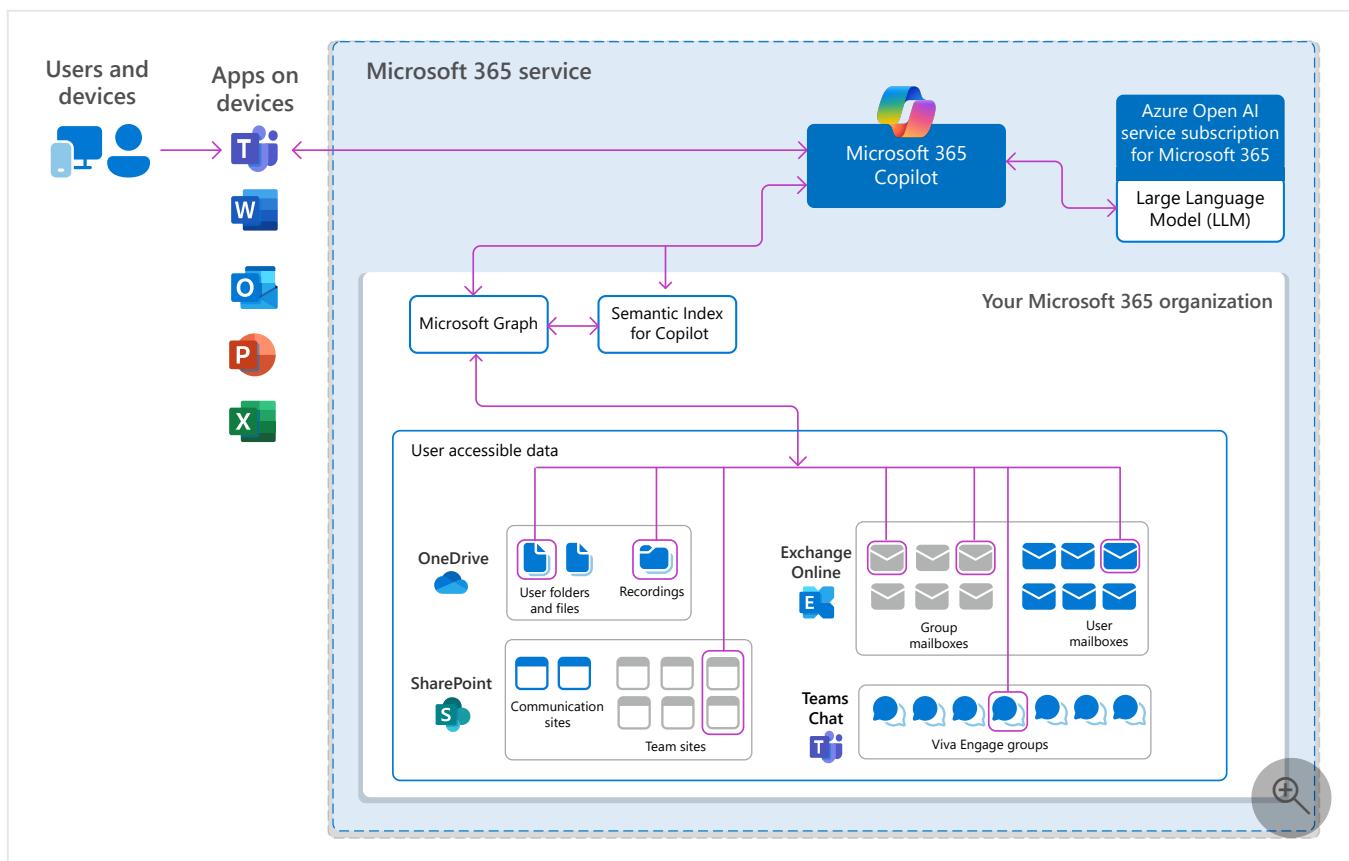
Zero Trust principle	Definition	Met by
Verify explicitly	Always authenticate and authorize based on all available data points.	Enforce the validation of user credentials, device requirements, and app permissions and behaviors.
Use least privileged access	Limit user access with Just-In-Time and Just-Enough-Access (JIT/JEA), risk-based adaptive policies, and data protection.	Validate JEA across your organization to eliminate oversharing by ensuring that correct permissions are assigned to files, folders, Teams, and email. Use sensitivity labels and data loss prevention policies to protect data.

Zero Trust principle	Definition	Met by
Assume breach	Minimize blast radius and segment access. Verify end-to-end encryption and use analytics to get visibility, drive threat detection, and improve defenses.	Use Exchange Online Protection (EOP) and Microsoft Defender XDR services to automatically prevent common attacks and to detect and respond to security incidents.

For the basics of Copilot, see the [overview](#) and [how to get started](#).

Logical architecture

You apply Zero Trust principles for Copilot across the entire architecture, from users and devices to the application data that they have access to. The following diagram shows the logical architecture components.



In the diagram:

- User devices have Microsoft 365 apps installed from which users can initiate Copilot prompts
- Copilot components include:
 - The Copilot service, which orchestrates the responses to user prompts
 - The Large Language Model (LLM) that Copilot references to produce the best response for a user

- An instance of the Microsoft Graph for the data of your Microsoft 365 tenant
- Your Microsoft 365 tenant that contains your organization data
- Copilot results for a user contain only data that the user is allowed to access

For additional technical illustrations, see the following articles in the Microsoft 365 Copilot library:

- [Microsoft 365 Copilot architecture and how it works](#)
- [Microsoft 365 Copilot data protection and auditing architecture](#)

What's in this article

This article walks you through the steps to apply the principles of Zero Trust to prepare your Microsoft 365 environment for Copilot.

 Expand table

Step	Task	Zero Trust principle(s) applied
1	Deploy or validate your data protection and get started with compliance tools	Verify explicitly Use least privileged access
2	Deploy or validate your identity and access policies	Verify explicitly Use least privileged access
3	Deploy or validate your App Protection policies	Use least privileged access Assume breach
4	Deploy or validate device management and protection	Verify explicitly
5	Deploy or validate your threat protection services	Assume breach
6	Deploy or validate secure collaboration with Teams	Verify explicitly Use least privileged access
7	Deploy or validate user permissions to data	Use least privileged access

Getting started with E3 and next steps with E5

To help you make progress, each of the steps in this article is organized in the following way:

- Get started with E3 capabilities
- Next steps with E5 capabilities

Adapting this guidance for your organization

Because different organizations can be at various stages of deploying Zero Trust protections, in each of these steps:

- If you're NOT using any of the protections described in the step, take the time to pilot and deploy them before assigning Copilot licenses.
- If you're using some of the protections described in the step, use the information in the step as a checklist and verify that each protection stated has been piloted and deployed before assigning Copilot licenses.

For the latest Copilot support for security-related and other features of Microsoft 365, see [Copilot requirements](#).

Step 1. Deploy or validate your data protection and get started with compliance tools

To prevent your organization's data from being at risk of overexposure or oversharing, the next step is to protect the data in your Microsoft 365 tenant. Microsoft Purview includes a robust set of capabilities for discovering, classifying, labeling, and protecting data. However, we understand that it can take a while to do this work. Microsoft 365 includes controls you can use immediately to help you prevent oversharing data through Copilot. Microsoft 365 also includes capabilities to help you meet compliance obligations.

Apply oversharing controls

Microsoft 365 oversharing controls help you:

- Temporarily limit Copilot search to a list of sites you specify (Restricted SharePoint Search)
- Quickly identify sites that potentially contain overshared data or sensitive content (data access governance reports)
- Flag sites so that users can't find them through Copilot or Org-wide search (Restricted Content Discovery)

To get started with oversharing controls, use the following resources:

- [Illustration and description of oversharing controls you can use with Microsoft 365 Copilot](#)
- [Downloadable blueprint to prevent oversharing](#)

Implement Microsoft Purview capabilities starting with DSPM for AI

Use Microsoft Purview to mitigate and manage the risks associated with AI usage, and implement corresponding protection and governance controls.

Microsoft Purview Data Security Posture Management (DSPM) for AI provides easy-to-use graphical tools and reports to quickly gain insights into AI use within your organization. One-click policies help you protect your data and comply with regulatory requirements.

Use DSPM AI to quickly protect sensitive data that interacts with Copilot. Review recommendations regularly, especially each time you add new users. DSPM for AI helps you:

- Fix oversharing issues identified through your default data risk assessment
- Create a default set of sensitivity labels
- Create data loss prevention (DLP) policies
- Detect risky interactions
- Get guided assistance to AI regulations with Compliance Manager
- Secure interactions for Microsoft Copilot experiences
- Detect sensitive data shared with AI via network using Secure Access Service Edge or Security Service Edge integration

Start using Purview Compliance capabilities

Microsoft Purview provides capabilities to help you stay on top of compliance obligations, including new AI regulations and standards. Get started with Microsoft Purview Compliance Manager and use additional capabilities, as needed:

- **Microsoft Purview Compliance Manager** is a solution that helps you automatically assess and manage compliance across the regulations that apply to your organization.
- **Purview Communication Compliance** helps minimize communication risks by helping you detect, capture, and act on potentially inappropriate messages in your organization.
- **Purview Data Lifecycle Management** helps you retain the content that you need to keep, and delete the content that you don't.
- Use **eDiscovery** together with **audit logs** for Microsoft 365 Copilot for investigations, as needed.

For more information, use these resources:

- [Illustrations for data protection and auditing with Microsoft 365 Copilot](#)
- [Microsoft Purview data security and compliance protections for Microsoft Copilot](#)
- [Considerations for DSPM for AI to manage data security and compliance protections for AI interactions.](#)

- [Govern AI apps and data for regulatory compliance](#)

Getting started with E3

First, apply oversharing controls that work with Copilot, as appropriate for your environment. These controls help you protect data immediately. After doing the longer-term work of classifying data and applying sensitivity labels and protection, be sure to revisit the oversharing controls you applied initially to ensure these are still appropriate. Review the [oversharing illustration](#) and [download the blueprint to prevent oversharing](#).

Next, invest in data classification and protection with Microsoft Purview capabilities.

[Sensitivity labels](#) form the cornerstone of protecting your data. Before you create the labels to denote the sensitivity of items and the protection actions that are applied, you must understand your organization's existing classification taxonomy and how it maps to labels that users see and apply in apps. After creating the sensitivity labels, publish them, and provide guidance to users how and when to apply them in Word, Excel, PowerPoint, and Outlook.

For more information, see:

- [Get started with sensitivity labels](#)
- [Create and configure sensitivity labels and their policies](#)
- [Enable sensitivity labels for Office files in SharePoint and OneDrive](#)

Consider augmenting manual labeling by using the sensitivity label policy settings of a default label and mandatory labeling. A default label helps to set a base level of protection settings that you want applied to all your content. Mandatory labeling ensures users label documents and emails. However, without comprehensive user training and other controls, these settings can result in inaccurate labeling.

See these additional resources to protect your organization's data:

- [Create DLP policies](#) for files and email.
- [Create retention policies](#) to keep what you need and delete what you don't.
- [Use content explorer](#) to see and verify items that have a sensitivity label, a retention label, or were classified as a sensitive information type in your organization.

Next Steps with E5

With Microsoft 365 E5, you can expand sensitivity labeling to protecting more content and more labeling methods. For example, labeling SharePoint sites and Teams by using container labels, and automatically labeling items in Microsoft 365 and beyond. For more information, see a list of [common labeling scenarios](#) and how they align to business goals.

Consider these additional Microsoft 365 E5 capabilities:

- Extend your data loss prevention policies to more locations and use a greater range of classifiers to find sensitive information.
- [Retention labels can be automatically applied](#) when sensitive information is found that needs different settings from your retention policies, or a higher level of management.
- To help you better understand your sensitive data and how it's being labeled, use [activity explorer](#) and the full capabilities of content explorer.

Step 2. Deploy or validate your identity and access policies

To prevent bad actors from using Copilot to more quickly discover and access sensitive data, the first step is to prevent them from gaining access. You must ensure that:

- Users are required to use strong authentication that can't be compromised by guessing user passwords alone.
- Authentication attempts are evaluated for their risk and have more requirements imposed.
- You can perform reviews of access granted to user accounts to prevent oversharing.

Getting started with E3

Microsoft 365 E3 includes Microsoft Entra ID P1 licenses. With this plan, Microsoft recommends using [common Conditional Access policies](#), which are the following:

- [Require multifactor authentication \(MFA\) for administrators](#)
- [Require MFA for all users](#)
- [Block legacy authentication](#)

Ensure that you include Microsoft 365 Services and your other SaaS apps in the scope of these policies.

If your environment includes hybrid identities with on-premises Active Directory Domain Services, be sure to deploy [Microsoft Entra Password Protection](#). This capability detects and blocks known weak passwords and their variants and can also block more weak terms within passwords that are specific to your organization.

Next steps with E5

Microsoft 365 E5 includes Microsoft Entra ID P2 licenses. Begin implementing Microsoft's recommended set of [Conditional Access and related policies](#), including:

- Requiring MFA when sign-in risk is medium or high.
- Requiring that high risk users change their password (applicable when you aren't using passwordless authentication).

For more information about implementing protection for identity and access based on your licensing plan, see [Increase sign-in security for hybrid workers with MFA](#).

Microsoft 365 E5 and Microsoft Entra ID P2 both include more protection for privileged accounts. Implement the capabilities summarized in the following table.

[] [Expand table](#)

Capability	Resources
Privileged Identity Management (PIM)	Provides protections for privileged accounts that access resources, including resources in Microsoft Entra ID, Azure, and other Microsoft Online Services such as Microsoft 365 or Microsoft Intune. See Plan a Privileged Identity Management deployment .
Microsoft Purview Privileged Access Management	Allows granular access control over privileged Exchange Online admin tasks in Office 365. It can help protect your organization from breaches that use existing privileged admin accounts with standing access to sensitive data or access to critical configuration settings. See Privileged access management overview .

Finally, consider implementing [access reviews](#) as part of your overall JEA strategy. Access reviews enable your organization to efficiently manage group memberships, access to enterprise applications, and role assignments. User's access can be reviewed regularly to make sure only the right people have the appropriate continued access.

Step 3. Deploy or validate your App Protection policies

For both Microsoft 365 E3 and E5, use [Intune App Protection policies \(APP\)](#), which are rules that ensure an organization's data remains safe or contained within a managed app.

With APP, Intune creates a wall between your organization data and personal data. APP ensures that organization data in specified apps can't be copied and pasted to other apps on the device, even if the device isn't managed.

APP can prevent the inadvertent or intentional copying of Copilot-generated content to apps on a device that aren't included in the list of permitted apps. APP can limit the blast radius of

an attacker using a compromised device.

For more information, see [Create App Protection policies](#).

Step 4. Deploy or validate your device management and protection

To prevent bad actors from compromising devices or using compromised devices to gain access to Copilot, the next step is to use Microsoft 365 features of device management and protection. You must ensure that:

- Devices are enrolled in Microsoft Intune and must meet health and compliance requirements.
- You can administer settings and features on devices.
- You can monitor your devices for their level of risk.
- You can proactively prevent data loss.

Getting started with E3

Microsoft 365 E3 includes Microsoft Intune for managing devices.

Next, begin to enroll devices into management. Once enrolled, set up compliance policies and then require healthy and compliant devices. Finally, you can deploy device profiles, also known as configuration profiles, to manage settings and features on devices.

To deploy these protections, use the following set of articles.

- [Step 1. Implement App Protection policies](#)
- [Step 2. Enroll devices into management](#)
- [Step 3. Set up compliance policies](#)
- [Step 4. Require healthy and compliant devices](#)
- [Step 5. Deploy device profiles](#)

Next steps with E5

Microsoft 365 E5 also includes Microsoft Defender for Endpoint. After deploying Microsoft Defender for Endpoint, you can gain greater insights and protection of your devices by integrating Microsoft Intune with Defender for Endpoint. For mobile devices, this includes the ability to monitor device risk as a condition for access. For Windows devices, you can monitor compliance of these devices to security baselines.

Microsoft 365 E5 also includes endpoint data loss prevention (DLP). If your organization already understands your data, has developed a data sensitivity schema, and applied the schema, you might be ready to extend elements of this schema to endpoints by using Microsoft Purview DLP policies.

To deploy these device protection and management capabilities, use the following articles:

- [Step 6. Monitor device risk and compliance to security baselines](#)
- [Step 7. Implement DLP with information protection capabilities](#)

Step 5. Deploy or validate your threat protection services

To detect the activities of bad actors and keep them from gaining access to Copilot, the next step is to use threat protection services of Microsoft 365. You must ensure that:

- You can automatically prevent common types of email and device-based attacks.
- You can use features to reduce the attack surface area of Windows devices.
- You can detect and respond to security incidents with a comprehensive suite of threat protection services.

Getting started with E3

Microsoft 365 E3 includes several key capabilities in Defender for Office 365 and Defender for Endpoint. Additionally, Windows 11 and Windows 10 include many threat protection capabilities.

Microsoft Defender for Office 365 P1

Microsoft Defender for Office 365 P1 includes Exchange Online Protection (EOP), which are included in Microsoft 365 E3. EOP helps protect your email and collaboration tools from phishing, impersonation, and other threats. Use these resources to configure anti-malware, anti-spam, and anti-phishing protection:

- [EOP overview](#)
- [Preset security policies](#)

Defender for Endpoint P1

Microsoft 365 E3 includes Microsoft Defender for Endpoint P1, which includes the following capabilities:

- **Next-generation protection** – Helps protect your devices from emerging threats in real-time. This capability includes Microsoft Defender Antivirus, which continually scans your device using file and process behavior monitoring.
- **Attack surface reduction** – Prevents attacks from happening in the first place by configuring settings that automatically block potentially suspicious activity.

Use these resources to configure Defender for Endpoint Plan 1:

- [Overview of Microsoft Defender for Endpoint Plan 1](#)
- [Set up and configure](#)
- [Get started](#)

Windows protection capabilities

By default, Windows includes strong security and protections across hardware, operating system, apps, and more. See [Introduction to Windows security](#) to learn more. The following table lists the important Windows client threat protection capabilities included with Microsoft 365 E3.

 [Expand table](#)

Capability	Resources
Windows Hello	Windows Hello for Business Overview
Microsoft Defender Firewall	Windows Defender Firewall documentation
Microsoft Defender SmartScreen	Microsoft Defender SmartScreen overview
Application Control for Windows	Application Control for Windows
BitLocker	Overview of BitLocker device encryption
Microsoft Defender Application Guard for Edge	Microsoft Defender Application Guard overview

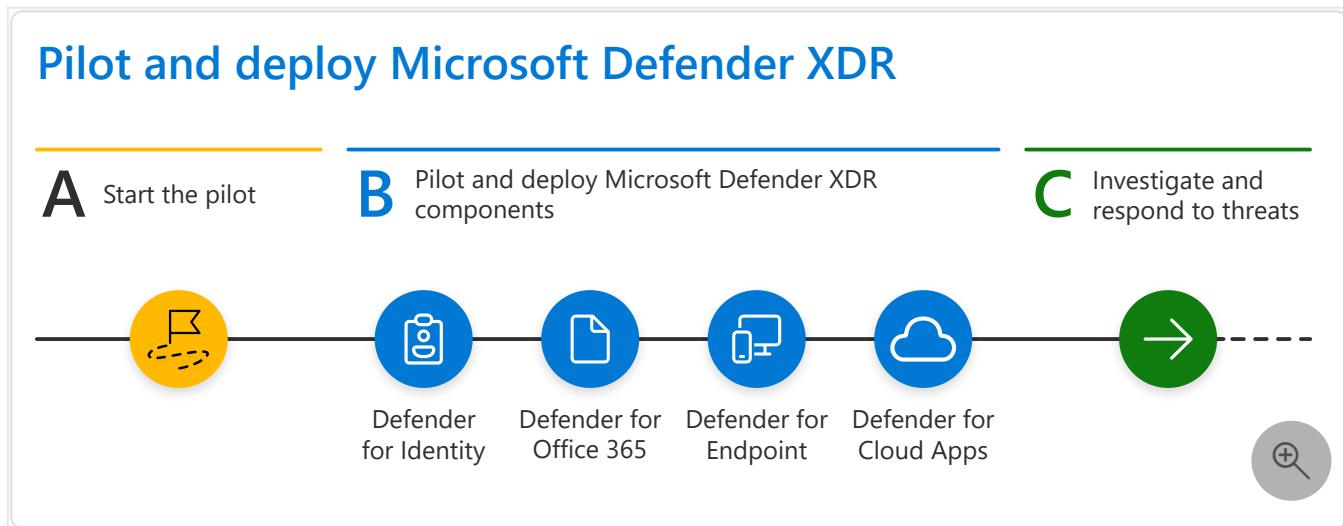
These capabilities can be configured directly on the client, by using Group Policy Objects (GPOs), or by using a device management tool, including Intune. However, you can manage settings on devices in Intune only by deploying [configuration profiles](#), which is a feature of Microsoft 365 E5.

Next steps with E5

For more comprehensive threat protection, pilot and deploy Microsoft Defender XDR, which includes:

- Defender for Identity
- Defender for Office 365 P2
- Defender for Endpoint P2
- Defender for Cloud Apps

Microsoft recommends enabling the components of Microsoft 365 in the order illustrated:



For more information and a description of this illustration, see [Evaluate and pilot Microsoft Defender XDR](#).

After deploying Microsoft Defender XDR, integrate these eXtended detection and response (XDR) tools with Microsoft Sentinel. Microsoft Sentinel is licensed and billed separately from Microsoft 365 E5. Use these resources for more information:

- [Implement Microsoft Sentinel and Microsoft Defender XDR for Zero Trust](#)
- [Plan costs and understanding Microsoft Sentinel pricing and billing](#)

Step 6. Deploy or validate secure collaboration for Microsoft Teams

Microsoft provides guidance for protecting your Teams at three different levels – baseline, sensitive, and highly sensitive. Introducing Copilot is a good time to review your environment and ensure that appropriate protection is configured. Use these steps:

1. Identify Teams or projects that warrant highly sensitive protection. Configure protections for this level. Many organizations don't have data that requires this level of protection.
2. Identify Teams or projects that warrant sensitive protection and apply this protection.
3. Ensure that all Teams and projects are configured for baseline protection, at a minimum.

See these resources for more information:

- Compare levels of protection
- Configure Teams with three tiers of protection

External sharing

Introducing Copilot is a good time to review your policies for sharing files with people outside your organization and for allowing external contributors. Guest accounts aren't licensed to use Copilot.

For sharing with people outside your organization, you might need to share information of any sensitivity. See these resources:

- [Apply best practices for sharing files and folders with unauthenticated users](#)
- [Limit accidental exposure to files when sharing with people outside your organization](#)
- [Create a secure guest sharing environment](#)

For collaborating with people outside your organization, see these resources:

- [Collaborate on documents](#) to share individual files or folders
- [Collaborate on a site](#) for guests in a SharePoint site
- [Collaborate as a team](#) for guests in a team
- [Collaborate with external participants in a channel](#) for people outside the organization in a shared channel

Step 7. Deploy or validate minimum user permissions to data

To prevent your organization's data from being at risk of overexposure or oversharing, the next step is to ensure that all users have Just Enough Access (JEA) to perform their jobs and no more. Users shouldn't discover data they aren't supposed to be able to view or share data that they shouldn't be sharing.

To prevent oversharing, implement permissions requirements and organizational policies that all users must follow and train your users to use them. For example, put controls in place, like requiring site access reviews by site owners or restricting access to defined security groups from one central place.

To detect existing oversharing:

- At the file level

Use [Microsoft Purview's Information Protection](#) and its data classification controls, integrated content labeling, and corresponding data loss prevention policies.

These features can help you identify files in Microsoft Teams, SharePoint sites, OneDrive locations, within email, in chat conversations, in your on-premises infrastructure, and on endpoint devices either containing sensitive information or classified content, then automatically apply controls to limit their access.

- At the site team and container level within Microsoft Teams and SharePoint

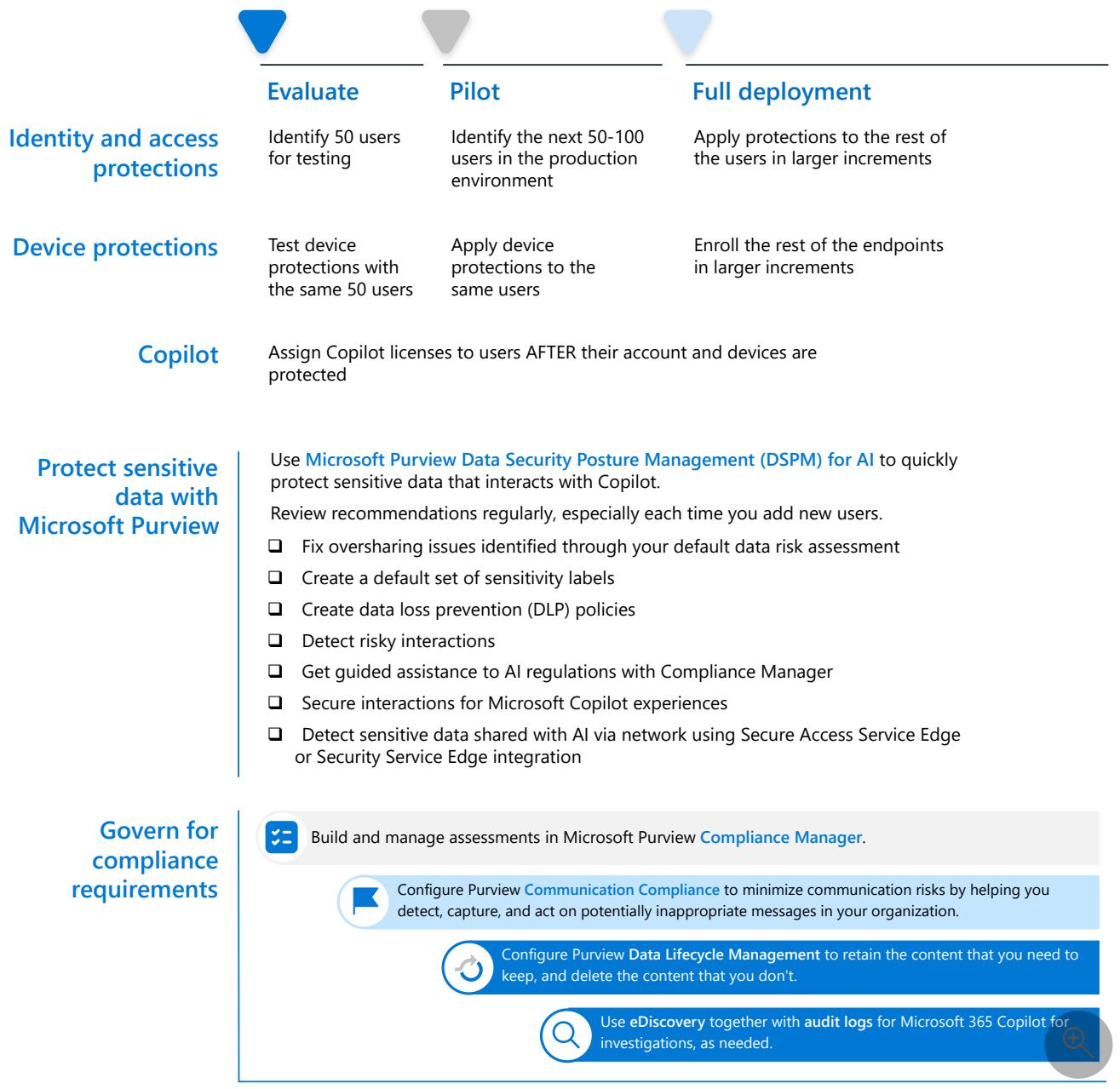
You can audit access to shared content at the site and team level and enforce restrictions that limits information discovery to only those who should have access.

To help automate this process even more, [Microsoft Syntex – SharePoint Advanced Management](#) helps you find potential oversharing with your SharePoint and Microsoft Teams files.

Applying protections and deploying Copilot in parallel

To streamline the assignment of Copilot licenses in your tenant with the appropriate protections in place, you do both in parallel. The following diagram shows how you can move through the phases of rolling out protections prior to assigning Copilot licenses to individual user accounts and their devices once they're protected.

Microsoft 365 Copilot deployment plan



As the diagram also shows, you can extend data protection across your organization as you increase the size of your deployment by continuing to use DSPM for AI and using the recommendations.

For compliance, you can get started right away with Compliance Manager and implement additional capabilities as you go, as needed.

Training

Get started with Copilot

Training	Get started with Copilot
	<p>This learning path walks you through the basics of Copilot, showcases its versatility across various Microsoft 365 applications, and offers advice on maximizing its potential.</p>

[Start >](#)

Training	Prepare your organization for Copilot
	<p>This learning path examines the Copilot design, its security and compliance features, and provides instruction on how to implement Copilot.</p>

[Start >](#)

Next steps

Watch the [How to get ready for Copilot](#) video.

See these additional articles for Zero Trust and Microsoft's Copilots:

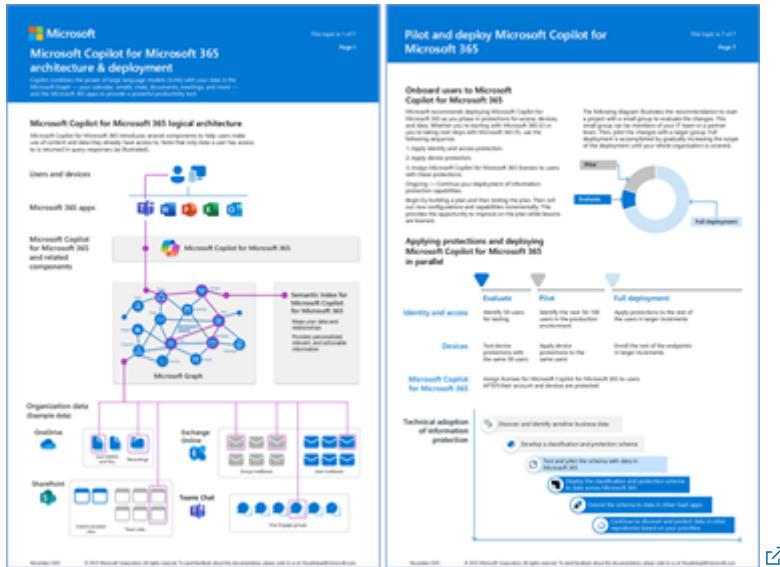
- [Overview](#)
- [Microsoft Copilot](#)
- [Microsoft Copilot for Security](#)

Also see:

- [Microsoft Purview data security and compliance protections for Microsoft Copilot](#)
- [Data, Privacy, and Security for Copilot for Microsoft 365](#)
- [Copilot for Microsoft 365 documentation](#)

Summary poster

For a visual summary of the information in this article, see the **Copilot architecture & deployment** poster.



[PDF](#) | [Visio](#)

Use the Visio file to customize these illustrations for your own use.

For more Zero Trust technical illustrations, see [Zero Trust illustrations for IT architects and implementers](#).

References

Refer to these links to learn about the various services and technologies mentioned in this article.

- [Copilot for Microsoft 365 overview](#)
- [Common security policies for Microsoft 365 organizations](#)
- [Intune App Protection policies \(APP\)](#)
- [Manage devices with Intune](#)
- [EOP overview](#)
- [Introduction to Windows security](#)
- [Evaluate and pilot Microsoft Defender XDR](#)
- [Get started with sensitivity labels](#)
- [Create DLP policies](#)
- [Configure Teams with three tiers of protection](#)
- [Microsoft Syntex – SharePoint Advanced Management](#)

Enterprise data protection in Microsoft 365 Copilot and Microsoft 365 Copilot Chat

Article • 03/13/2025

What is enterprise data protection in Microsoft 365 Copilot and Microsoft 365 Copilot Chat?

The use of Microsoft 365 Copilot and Microsoft 365 Copilot Chat, as used by organizations, are covered by the terms of the [Data Protection Addendum \(DPA\)](#) ^[1] and [Product Terms](#) ^[2], with Microsoft acting as a data processor.

Enterprise data protection (EDP) refers to controls^[1] and commitments, under the Data Protection Addendum (DPA) and Product Terms, that apply to customer data for users of Microsoft 365 Copilot and Microsoft 365 Copilot Chat. The use of the term EDP isn't meant to limit the benefits offered under the DPA and Product Terms.

Enterprise data protection for prompts and responses

Microsoft 365 Copilot and Microsoft 365 Copilot Chat offer the same enterprise terms^[2] available in our Microsoft 365 commercial offerings.

Use of Microsoft 365 Copilot and Microsoft 365 Copilot Chat involves prompts (entered by users) and responses (content generated by Copilot). With EDP, prompts and responses are protected by the same contractual terms and commitments widely trusted by our customers for their emails in Exchange and files in SharePoint.

- **We secure your data:** We help protect your data with [encryption](#) at rest and in transit, rigorous physical security controls, and data [isolation](#) between tenants.
- **Your data is private:** We won't use your data except as you instruct. Our commitments to [privacy](#) ^[2] include support for [GDPR](#), the [EU Data Boundary](#) ^[3], [ISO/IEC 27018](#), and our [Data Protection Addendum](#) ^[2].
- **Your access controls and policies apply to Copilot:** Copilot respects your [identity model](#) and [permissions](#), inherits your [sensitivity labels](#), applies your [retention policies](#), supports [audit](#) of interactions, and follows your administrative settings.

The specific controls and policies will vary depending on the underlying subscription plan.

- **You're protected against AI security and copyright risks:** We help safeguard against AI-focused risks such as [harmful content](#) and [prompt injections](#). For content copyright concerns, we provide [protected material detection](#) and our [Customer Copyright Commitment](#).
- **Your data isn't used to train foundation models:** Microsoft 365 Copilot Chat uses the user's context to create relevant responses. Microsoft 365 Copilot also uses Microsoft Graph data. Consistent with our other Copilot offers, prompts, responses, and data accessed through Microsoft Graph [aren't used to train foundation models](#).

Additional resources

- [Learn more about data, security, and privacy for Microsoft 365 Copilot](#)
- [Learn more about data, security, and privacy in Microsoft 365 Copilot Chat](#)

Privacy and security of web queries

Ground responses in latest data

In addition to prompts and responses, web search queries (different from Microsoft Graph queries) are also a part of Copilot interactions. Allowing Copilot to reference web content via these queries improves the quality of Copilot responses by grounding them in the latest information from the web via Bing search service.

Web queries have their own data handling practices

- Web queries sent to the Bing search service are handled identically by both Copilots. Queries are generated from the prompt into a few words. They're sent via a secure connection with user and tenant identifiers removed. They aren't shared with advertisers and aren't used to train our foundation large language models (LLMs).
- The Bing search service operates separately from Microsoft 365 and has different data-handling practices covered by the [Microsoft Services Agreement](#) between each user and Microsoft, together with the [Microsoft Privacy Statement](#). This means that Microsoft acts as an independent data controller responsible for

complying with all applicable laws and controller obligations. This approach is consistent with other [optional connected experiences that rely on Bing](#).

- The [Product Terms](#) provide additional commitments about the web queries sent to the Bing search service. For more information, see [Data, privacy, and security for web search in Microsoft 365 Copilot and Microsoft 365 Copilot Chat](#).

Agents in Microsoft 365 Copilot

When you're using agents in Microsoft 365 Copilot, check the privacy statement and terms of use of the agents to determine how they'll handle your organization's data.

Footnotes

[¹] The specific controls will vary depending on a customer's Microsoft subscription plans.

[²] Microsoft 365 Copilot and Microsoft 365 Copilot Chat support HIPAA compliance for properly configured implementations. HIPAA compliance doesn't apply to web search queries as they aren't covered by the DPA and BAA.

[³] The EU Data Boundary doesn't apply to web search queries.

Feedback

Was this page helpful?



Transparency Note for Microsoft 365 Copilot

08/06/2025

What is a Transparency Note?

An AI system includes not only the technology, but also the people who will use it, the people who will be affected by it, and the environment in which it's deployed. Creating a system that is fit for its intended purpose requires an understanding of how the technology works, what its capabilities and limitations are, and how to achieve the best performance. Microsoft's Transparency Notes are intended to help you understand how our AI technology works, the choices system owners can make that influence system performance and behavior, and the importance of thinking about the whole system, including the technology, the people, and the environment. We'll continue to update this document as the service evolves.

Microsoft's Transparency Notes are part of a broader effort at Microsoft to put our AI Principles into practice. To find out more, see the [Microsoft AI principles](#).

The Basics of Microsoft 365 Copilot

Introduction

[Microsoft 365 Copilot](#) is an AI-powered productivity tool that uses large language models (LLMs) and integrates data with [Microsoft Graph](#) and Microsoft 365 apps and services. It works alongside popular Microsoft 365 apps such as Word, Excel, PowerPoint, Outlook, Teams, and more.

Microsoft 365 Copilot uses a combination of models provided by Azure OpenAI Service. This allows us to match the specific needs of each feature – for example, speed, creativity – to the right model, so that Microsoft 365 Copilot can provide real-time intelligent assistance that enables users to enhance their creativity, productivity, and skills.

For additional, detailed information about the LLMs provided to Microsoft by OpenAI, refer to their public documentation, available at [Models - OpenAI API](#).

Key Terms

Term	Description
User Prompt	A User Prompt is the text sent to Microsoft 365 Copilot to execute a specific task or provide information. For example, a user might input the following prompt: Write an email congratulating my team on the end of the fiscal year.
Processing	Processing of a user prompt in Microsoft 365 Copilot involves several steps, including responsible AI checks, to ensure that Microsoft 365 Copilot provides relevant and actionable responses.
Grounding	Grounding refers to the process of providing input sources to the LLM related to the user prompt. By enabling Microsoft 365 Copilot to access data to use as input sources – such as data from Microsoft Graph or Bing – Microsoft 365 Copilot may deliver more accurate, contextually relevant responses to users.
Microsoft Graph	Microsoft Graph is the gateway to data and intelligence in Microsoft 365. It includes information about the relationships between users, activities, and an organization's data.
Microsoft Graph Connectors	Microsoft Graph Connectors offer a way to bring content from external services into Microsoft Graph, enabling external data to power Microsoft 365 intelligent experiences such as Microsoft Search and Microsoft 365 Copilot.
Indexing	Microsoft uses both lexical and semantic indexing of Microsoft Graph data to ground responses for Microsoft 365 Copilot in enterprise data. Indexing interprets user prompts to produce contextually relevant responses. For more on indexing, see System Behavior .
Enriched prompt	A prompt is enriched when additional instructions are added to a user's inputted prompt to guide Microsoft 365 Copilot in generating a more specific and relevant response.
Content of interactions	The term used to describe the user's prompt and Microsoft 365 Copilot's response to that prompt.
Large Language Model (LLM)	Large language models (LLMs) in this context are AI models that are trained on large amounts of text data to predict words in sequences. LLMs are capable of performing a variety of tasks, such as text generation, summarization, translation, classification, and more.
LLM Response	The content generated by the LLM as a response to the user prompt that is returned to Microsoft 365 Copilot.
Post-processing	The processing Microsoft 365 Copilot does after it receives a response from the LLM. This post-processing includes additional grounding calls to Microsoft Graph, responsible AI, security, compliance, and privacy checks.
Responsible AI	Microsoft's policy, research, and engineering practices that are grounded in our AI principles and operationalized through our Responsible AI standard.
Agents	Agents are designed to automate and execute business processes using AI, based on predefined instructions and access to organizational data. They can assist or act independently on behalf of individuals or teams—ranging from simple prompt-and-

Term	Description
	response interactions to fully autonomous task execution. For more information about the use of AI in Copilot agents, refer to those offerings directly.
Red team testing	Techniques used by experts to assess the limitations and vulnerabilities of a system and to test the effectiveness of planned mitigations. Red team testing is used to identify potential risks and is distinct from systematic measurement of risks.

Capabilities

Features

[] [Expand table](#)

Feature	Description
Microsoft 365 Copilot in Word	<p>Microsoft 365 Copilot in Word transforms writing with efficiency and creativity –so that users can create, summarize, comprehend, refine, and elevate documents. Users can also use enhanced capabilities like visualizing and transforming text into a table. Some other capabilities also include adding onto existing prompts, drafting a document by referencing other documents and discovering information about documents.</p> <p>For more information, see Frequently asked questions about Copilot in Word.</p>
Microsoft 365 Copilot in PowerPoint	<p>Microsoft 365 Copilot in PowerPoint lets users create a new presentation from a prompt or Word file, leveraging enterprise templates. The chat feature enables Summary and Q&A and light commanding enables users to add slides, pictures, or make deck-wide formatting changes. PowerPoint files can also be used for grounding data.</p> <p>For more information, see Frequently Asked Questions about Copilot in PowerPoint.</p>
Microsoft 365 Copilot in Excel	<p>Microsoft 365 Copilot in Excel assists users with suggestions for formulas, chart types, and insights about data in spreadsheets.</p> <p>For more information, see Frequently asked questions about Copilot in Excel.</p>
Microsoft 365 Copilot in Outlook	<p>Microsoft 365 Copilot in Outlook helps manage the email inbox and create impactful communication more efficiently. Microsoft 365 Copilot in Outlook can summarize an email thread, suggest action items, replies, and follow-up meetings. It can also adjust length and tone when drafting an email.</p> <p>For more information, see Frequently asked questions about Copilot in Outlook.</p>

Feature	Description
Microsoft 365 Copilot in Teams	<p>Microsoft 365 Copilot in Teams can recap conversations, organize key discussion points, and summarize key actions. Users can get answers to specific questions and catch up on things they've missed in meetings or chat.</p> <p>For more information, see Frequently asked questions about Copilot in Microsoft Teams.</p>
Microsoft 365 Copilot in Loop	<p>Microsoft 365 Copilot in Loop allows users to create content that can be collaboratively improved through direct editing or refinement by Copilot.</p> <p>For more information, see Frequently asked questions about Copilot in Loop.</p>
Microsoft 365 Copilot in Microsoft Stream	<p>Microsoft 365 Copilot in Microsoft Stream helps get information from any video with a transcript. Microsoft 365 Copilot in Stream can provide a summary of the video, answer specific questions, quickly jump to specific topics or points of discussion, and identify calls to action.</p> <p>For more information, see Frequently asked questions about Copilot in Stream.</p>
Microsoft 365 Copilot in Whiteboard	<p>Microsoft 365 Copilot in Whiteboard helps kickstart the ideation process to generate, categorize, and summarize ideas.</p> <p>For more information, see Frequently Asked Questions about Copilot in Whiteboard.</p>
Microsoft 365 Copilot in OneNote	<p>Microsoft 365 Copilot in OneNote enables users to draft plans, generate ideas, create lists, and organize information to help them find what they need in the OneNote app.</p> <p>For more information, see Frequently asked questions about Copilot in OneNote.</p>
Microsoft 365 Copilot Chat	<p>Microsoft 365 Copilot Chat (previously named Business Chat) combines the power of Large Language Models with the Internet, work content and context, and other apps, to help users draft content, catch up on what's missed, and get answers to questions via prompts.</p>
Microsoft 365 Copilot in SharePoint rich text editor	<p>Microsoft 365 Copilot in Microsoft SharePoint rich text editor simplifies content creation on SharePoint pages and posts. With Copilot, you can rewrite text, adjust the tone, condense information, and elaborate ideas. For more information, see Frequently asked questions about Copilot in SharePoint.</p>
Microsoft 365 Copilot in OneDrive	<p>Microsoft 365 Copilot in OneDrive is an innovative AI-powered assistant designed to help you interact with your documents by extracting information, comparing the key differences, summarizing files and generating insights. For more information, see Frequently asked questions about Copilot in OneDrive.</p>
Microsoft 365 Copilot glance	<p>Glance cards offer a quick preview of work entities, such as documents, to help assess relevance or recall. They're accessed by hovering over files in the Search tab.</p>

Feature	Description
cards	of the Microsoft 365 Copilot app .
Intelligent Search	Intelligent Search enables search in Dataverse applications such as Dynamics 365 Sales, Service, and Finance & Operations using natural language.
Power Platform Connectors	Power Platform Connectors allow customers to access real time data from a collection of business and personal productivity applications in the Microsoft 365 Copilot experience.
Microsoft Graph Connectors	Microsoft Graph Connectors enable connections to external data sources, including up to 500 items per Microsoft 365 Copilot license.
Microsoft Purview	Microsoft Purview is a solution that helps organizations manage and protect their data. It provides a unified platform for data governance, information protection, risk management, and compliance. Customers can extend Microsoft Purview capabilities provided by customers' Microsoft subscriptions (for example, Microsoft 365 E3 or E5 subscriptions) to Microsoft 365 Copilot data and interactions.
Microsoft 365 Copilot Tuning	Microsoft 365 Copilot Tuning allows organizations to fine-tune large language models (LLMs) by using their own tenant data. These models can be used to perform domain-specific tasks based on the organization's unique knowledge.
	For more information, see Responsible AI FAQ for Microsoft 365 Copilot Tuning .
Microsoft Copilot Studio	Microsoft Copilot Studio provides a guided graphical experience to design, test, and deploy agents that support both deterministic and non-deterministic workflows. These agents can operate alongside users or autonomously. For more information, see Copilot Studio overview .
Microsoft Copilot Studio agent builder	Microsoft Copilot Studio agent builder enables users to create prompt-and-response agents for internal enterprise use. Using natural language, users can define agent goals and instructions without needing to write any code. For more information, see Overview of Copilot Studio agent builder .

System Behavior

Microsoft 365 Copilot uses a combination of LLMs to summarize, predict, and generate content. These LLMs include pre-trained models, such as Generative Pre-Trained Transformers (GPT) like GPT-4 from OpenAI, designed to excel in these tasks.

The capabilities that users see in Microsoft 365 applications appear as additional features, functionality, and prompting capabilities. LLMs and proprietary Microsoft technologies work together in an underlying system that helps people securely access, use, and manage their organizational data.

- Microsoft 365 apps (such as Word, Excel, PowerPoint, Outlook, OneNote, Teams, and Loop) operate with Microsoft 365 Copilot to support users in the flow of their work. For example, Microsoft 365 Copilot in Word is designed to assist users specifically in the process of creating, understanding, and editing documents. In a similar way, Microsoft 365 Copilot in the other apps helps users in the context of their work within those apps.
- Microsoft Graph has long been fundamental to Microsoft 365. It includes information about the relationships between users, activities, and an organization's data. Microsoft Graph API brings more context from customer signals into the prompt, such as information from emails, chats, documents, and meetings. For more information, see [Overview of Microsoft Graph](#) and [Major services and features in Microsoft Graph](#).
- Microsoft 365 Copilot Chat enables customers to bring work content and context to Microsoft 365 Copilot's chat capabilities. With Microsoft 365 Copilot Chat, users can draft content, catch up on what they missed, and get answers to questions via open-ended prompts—all securely grounded in work data. Use Microsoft 365 Copilot Chat at many surfaces, including within Microsoft Teams, at Microsoft365.com, and at copilot.microsoft.com.
- Semantic index is an index generated from content in Microsoft Graph. It's used to aid in the processing of user prompts to produce contextually relevant responses. It allows organizations to search through billions of vectors (mathematical representations of features or attributes) and return related results. The semantic index is designed to respect individual users' security context, and only content that a user can access is shown. Semantic index is built on Microsoft's comprehensive approach to security, compliance, privacy, and respects all organizational boundaries within the customer's tenant. For more information, see [Semantic index for Copilot](#).

Here's an explanation of how Microsoft 365 Copilot works:

- Microsoft 365 Copilot receives an input prompt from a user in an app, such as Word or PowerPoint.
- Microsoft 365 Copilot then processes the user prompt, which improves the specificity of the prompt, to help the user get answers that are relevant and actionable to their specific task. The prompt can include text from input files or other content discovered by Microsoft 365 Copilot using Microsoft Graph, and Microsoft 365 Copilot sends this prompt to the LLM for processing. Microsoft 365 Copilot only accesses data that an individual user has existing access to, based on, for example, existing Microsoft 365 role-based access controls.

- Microsoft 365 Copilot takes the response from the LLM and post-processes it. This post-processing includes other grounding calls to Microsoft Graph, responsible AI checks such as content classifiers, security, compliance and privacy checks, and command generation.
- Microsoft 365 Copilot returns the response to the app, where the user can review and assess the response.

The data is encrypted while it's stored and isn't used to train Azure OpenAI Service [foundation LLMs](#), including those used by Microsoft 365 Copilot. For more information about this, see [Data, Privacy, and Security for Microsoft 365 Copilot](#).

How Microsoft 365 Copilot generates responses without web content or organizational data

Microsoft 365 Copilot doesn't require web content or organizational data to provide a response, but that information can help improve the quality, accuracy, and relevance of its response. When responding without web or organizational data, Microsoft 365 Copilot relies only on its LLMs to understand prompts and generate responses. The process involves parsing the input, leveraging the model's internal knowledge base, and refining the response to ensure it's contextually appropriate.

Extensibility & customization

Makers can build agents using the Copilot Studio agent builder experience available in Microsoft 365 Copilot Chat. They can either describe what the agent should do or configure it through an intuitive experience. These agents allow you to define specific instructions and knowledge that shape how Copilot behaves in your business scenarios. Because they run on the same orchestrator, foundation models, and trusted AI services as Microsoft 365 Copilot, they offer a consistent and secure way to enhance collaboration, streamline workflows, and boost productivity across your organization.

For more complex workflows, makers can use Microsoft Copilot Studio, which provides a rich graphical environment to design, test, and deploy autonomous agents that can take action on their behalf. For developers, the [Microsoft 365 Agents SDK](#) provides the tools to build agents that integrate deeply with Microsoft 365 apps and services.

Use Cases

Microsoft 365 Copilot is a general-purpose service, designed to assist with a wide variety of everyday tasks across any organization by connecting with work data and integrating with the apps customers use every day. For example:

- **Chat and conversation interaction & creation:** Users can interact with Microsoft 365 Copilot Chat and generate responses drawn from trusted documents such as internal company documentation or tech support documentation.
- **Search:** Users can search trusted source documents such as internal company documentation.
- **Summarization:** Users can submit content to be summarized for predefined topics built into the application. Examples include summarization of Teams chats, emails, web pages, and Word documents.
- **Writing assistance on specific topics:** Users can create new content or rewrite content submitted by the user as a writing aid for business content or pre-defined topics. For example, drafting emails in Microsoft Outlook or writing content in Microsoft Word.
- **Captioning or transcription:** Users can transcribe audio files into text for natural language understanding or analytic tasks like summarization. Examples include Teams meeting transcripts and videos on Microsoft Stream.

Microsoft provides detailed guidance focusing on common use cases and scenarios, to help customers accelerate the integration of Microsoft 365 Copilot capabilities into their organizations. Learn more at [Microsoft Copilot Scenario Library – Microsoft Adoption](#).

Considerations when choosing a use case

We encourage users to review all content generated by Microsoft 365 Copilot before putting it to use. Additionally, there are certain scenarios that we recommend avoiding. In some cases, meaningful human oversight and review can further reduce the risk of harmful outcomes.

- **Avoid use or misuse of the system could result in significant physical or psychological injury to an individual.** For example, scenarios that diagnose patients or prescribe medications have the potential to cause significant harm.
- **Avoid use or misuse of the system could have a consequential impact on life opportunities or legal status.** Examples include scenarios where the AI system could affect an individual's legal status, legal rights, or their access to credit, education, employment, healthcare, housing, insurance, social welfare benefits, services, opportunities, or the terms on which they're provided.
- **Carefully consider use cases in high stakes domains or industry.** Examples include but aren't limited to medical or financial.

Limitations

Specific Limitations of Microsoft 365 Copilot

1. **Integration and Compatibility:** While Microsoft 365 Copilot is designed to integrate seamlessly with Microsoft 365 applications, there can be limitations or issues with compatibility in certain environments, especially with third party (non-Microsoft) apps and customized or non-standard configurations.
2. **Customization and flexibility:** While Microsoft 365 Copilot can be tailored, there are limitations on how much it can be customized to fit specific organizational needs or workflows. Organizations might find certain features or responses to be rigid or not fully aligned with organizational requirements.
3. **Dependence on internet connectivity:** Microsoft 365 Copilot relies on internet connectivity to function. Any disruption in connectivity can impact the availability and performance of the service.
4. **User training and adoption:** Effective use of Microsoft 365 Copilot requires users to understand its capabilities and limitations. There might be a learning curve, and users need to be trained to effectively interact with and benefit from the service.
5. **Resource intensity:** Running advanced AI models requires significant computational resources, which can impact performance, especially in resource-constrained environments. Users might experience latency or performance issues during peak usage times.
6. **Legal and compliance considerations:** Organizations need to consider their particular legal and compliance obligations when using Microsoft 365 Copilot, especially in regulated industries. Microsoft is examining regulatory requirements that apply to Microsoft as a provider of the technology and addressing them within the product through a process of continuous improvement.
7. **Bias, stereotyping, and ungrounded content:** Despite intensive training by OpenAI and the implementation of responsible AI controls by Microsoft on both user prompts and LLM outputs, AI services are fallible and probabilistic. This makes it challenging to comprehensively block all inappropriate content, leading to potential biases, stereotypes, or ungroundedness in AI-generated content. For more on the known limitations of AI-generated content, see the [Transparency Note for Azure OpenAI Service](#), which includes references to the LLMs behind Microsoft 365 Copilot.

Microsoft 365 Copilot performance

In many AI systems, performance is often defined in relation to accuracy—that is, how often the AI system offers a correct prediction or output. With Microsoft 365 Copilot, two different

users might look at the same output and have different opinions of how useful or relevant it is, which means that performance for these systems must be defined more flexibly. We broadly consider performance to mean that the application performs as users expect.

Best practices for improving the Microsoft 365 Copilot experience

To improve the performance in relation to the accuracy of Microsoft 365 Copilot output, we recommend that organizations consider the following:

- **Write good prompts.** Writing good prompts is key to getting better outcomes with Microsoft 365 Copilot. Just like there are techniques to help people communicate effectively with a human, there are guidelines that may help users get better results with Microsoft 365 Copilot when writing prompts. For example: include details, structure prompts, provide positive instructions, iterate and regenerate, and always review and verify AI-generated responses. For more information, see [Get better results with Copilot prompting](#).
- **Allow referencing of web content.** Allowing Microsoft 365 Copilot to reference web content can improve the quality, accuracy, and relevance of Microsoft 365 Copilot responses where a response would benefit from current, public information from the web. Note, however, that when Microsoft 365 Copilot references web content, it does so via the Bing Search service, and data-handling practices for Bing Search queries are different from how data is handled by Microsoft 365 Copilot. The use of Bing is covered by the [Microsoft Services Agreement](#) between each user and Microsoft, together with the [Microsoft Privacy Statement](#).
- **Extend grounding in Microsoft Graph.** Microsoft 365 Copilot uses data from Microsoft Graph to ground responses in organization-specific data like emails, chats, files, and calendars. By extending Microsoft Graph with organizational data from sources like CRM systems, or external file repositories, organizations can include additional context-specific, relevant information that further enhances the richness and accuracy of Microsoft 365 Copilot responses.

Mapping, measuring, and managing risks

Like other transformational technologies, harnessing the benefits of AI isn't risk-free, and a core part of Microsoft's responsible AI program is designed to identify potential risks, measure their propensity to occur, and build mitigations to manage them. Guided by our AI Principles and our Responsible AI Standard, and building on learnings from other generative AI products and our centralized mitigation infrastructure (for example, [Azure AI Content Safety](#)), we seek to

map, measure, and manage potential risks and misuse of Microsoft 365 Copilot while securing the transformative and beneficial uses that the new experience provides. In the sections below we describe our iterative approach to map, measure, and manage potential risks.

Map

At the model level, our work began with exploratory analyses of GPT-4 in the late summer of 2022. This included conducting extensive red team testing in collaboration with OpenAI. This testing was designed to assess how the latest technology would work without any additional safeguards applied to it. Our specific intention at this time was to identify risks, surface potential avenues for misuse, and identify capabilities and limitations. Our combined learnings across OpenAI and Microsoft contributed to advances in model development and, for us at Microsoft, informed our understanding of risks and contributed to early mitigation strategies for all of our generative AI technologies, including Microsoft 365 Copilot.

In addition to model-level red team testing, a multidisciplinary team of experts conducted application-level red team testing on Microsoft 365 Copilot experiences before making them publicly available. This process helped us better understand how the system could be exploited and improve our mitigations. Post-release, the new AI experiences in Microsoft 365 Copilot are integrated into the engineering organization's existing production measurement and testing infrastructure.

Measure

Red team testing can surface instances of specific risks, but in production users will have millions of different kinds of interactions with Microsoft 365 Copilot. Moreover, interactions are contextual and often multi-turn, and identifying harmful content within an interaction is a complex task. To better understand and address the potential for risks for our generative AI services, including Microsoft 365 Copilot experiences, we developed responsible AI evaluations specific to those new AI experiences for measuring potential risks like jailbreaks, harmful content, and ungrounded content.

As an illustrative example, the updated partially automated measurement pipeline for harmful content includes two major innovations: conversation simulation and automated, human-verified conversation annotation. First, responsible AI experts built templates to capture the structure and content of conversations that could result in different types of harmful content. These templates were then given to a conversational agent, which interacted as a hypothetical user with Microsoft 365 Copilot, generating simulated conversations. To identify whether these simulated conversations contained harmful content, we took guidelines that are typically used by expert linguists to label data and modified them for use by LLMs to label conversations at scale, refining the guidelines until there was significant agreement between model-labeled

conversations and human-labeled conversations. Finally, we used the model-labeled conversations to understand the effectiveness of Microsoft 365 Copilot at mitigating harmful content.

Our measurement pipelines enable us to rapidly perform measurement for potential risks at scale. As we identify new issues through the preview period and ongoing red team testing, we continue to expand and improve the measurement sets to assess additional risks.

Manage

As we identified potential risks and misuse through processes like red team testing and measured them, we developed mitigations to reduce the potential for harm. Below, we describe some of those mitigations. We'll continue monitoring the Microsoft 365 Copilot experiences to improve product performance and mitigations.

- **Phased release, continual evaluation.** We're committed to learning and improving our responsible AI approach continuously as our technologies and user behavior evolve. We're making changes to Microsoft 365 Copilot regularly to improve product performance, improve existing mitigations, and implement new mitigations in response to our learnings.
- **Grounding in business data.** A known risk with large language models is their ability to generate ungrounded content—content that appears correct but isn't present in source materials. An important mitigation in Microsoft 365 Copilot is to ground AI-generated content in relevant business data that the user has access to based on their permissions. For example, based on the user prompt, Microsoft 365 Copilot is provided with relevant business documents to ground its response in those documents. However, in summarizing content from various sources, Microsoft 365 Copilot may include information in its response that isn't present in its input sources. In other words, it may produce ungrounded results. Users should always take caution and use their best judgment when using outputs from Microsoft 365 Copilot. We have taken several measures to mitigate the risk that users may over-rely on ungrounded AI-generated content. Where possible, responses in Microsoft 365 Copilot that are based on business documents include references to the sources for users to verify the response and learn more. Users are also provided with explicit notice that they're interacting with an AI system and advised to check the source materials to help them use their best judgment.
- **AI-based classifiers and metaprompting to mitigate potential risks or misuse.** The use of LLMs may produce problematic content that could lead to harm. Examples could include output related to self-harm, violence, graphic content, protected material, inaccurate information, hateful speech, or text that could relate to illegal activities. Classifiers such as those available in Azure AI Content Safety and metaprompting are two

examples of mitigations that have been implemented in Microsoft 365 Copilot to help reduce the risk of these types of content. Classifiers classify text to flag different types of potentially harmful content in user prompts or generated responses. Microsoft 365 Copilot uses AI-based classifiers and content filters. Flags lead to potential mitigations, such as not returning generated content to the user or diverting the user to a different topic. Metaprompting involves giving instructions to the model to guide its behavior, including so that the system behaves in accordance with Microsoft's AI Principles and user expectations. For example, the metaprompt may include a line such as "communicate in the user's language of choice."

- **Prompt enrichment.** In some cases, a user's prompt may be ambiguous. When this happens, Microsoft 365 Copilot may use the LLM to help build out more details in the prompt to help ensure users get the response they're seeking. Such prompt enrichment doesn't rely on any knowledge of the user or their prior searches, but instead on the LLM.
- **User-centered design and user experience interventions.** User-centered design and user experiences are an essential aspect of Microsoft's approach to responsible AI. The goal is to root product design in the needs and expectations of users. As users interact with Microsoft 365 Copilot for the first time, we offer various touchpoints designed to help them understand the capabilities of the system, disclose to them that Microsoft 365 Copilot is powered by AI, and communicate limitations.
- **AI disclosure.** Microsoft 365 Copilot provides several touchpoints for meaningful AI disclosure where users are notified that they're interacting with an AI system as well as opportunities to learn more about Microsoft 365 Copilot. For example, when using Microsoft 365 Copilot in the Word app, AI-generated content is given alongside notice that AI-generated content may contain errors. Empowering users with this knowledge can help them avoid over-relying on AI-generated outputs and learn about the system's strengths and limitations.
- **Media provenance.** For all images created with Designer's editing features from within Microsoft 365 Copilot, we have implemented content credentials, provenance based on the C2PA standard, to help people identify whether images were edited or generated with AI. Provenance metadata can be viewed on the [Content Credentials site](#).
- **Feedback and ongoing evaluation.** The Microsoft 365 Copilot experience builds on existing tooling that allows users to submit feedback about our products. Users can submit feedback about content generated by Microsoft 365 Copilot by using the pane that appears after selecting thumbs up or thumbs down buttons on responses. Feedback submitted by users is used to improve our offerings as part of our commitment to improving product performance. Customer admins can review feedback submitted in the Microsoft 365 admin center. We also continually improve and test the performance of

Microsoft 365 Copilot and specific mitigations as part of our ongoing evaluation and improvement of the service. Learn more at [Providing feedback about Microsoft Copilot with Microsoft 365 apps](#).

Our approach to mapping, measuring and managing risks will continue to evolve as we learn more, and we're already making improvements based on feedback we've received from customers.

Evaluating and integrating Microsoft 365 Copilot for your organization

Deployment & adoption optimization

Microsoft provides tools like the Microsoft Copilot Dashboard for Microsoft 365 customers and reports in the Microsoft 365 admin center. These tools are designed to help organizations measure usage, adoption, and the impact of Microsoft 365 Copilot. For example:

- **Microsoft 365 Copilot usage report** enables administrators to view a summary of how users' adoption, retention, and engagement are with Microsoft 365 Copilot. For more information, see [Microsoft 365 Copilot usage](#).
- **Adoption Score** offers administrators insights into how their organization works with Microsoft 365 Copilot. It provides a score on a 100-point scale, a dashboard view of adoption data & trends, and a tool for creating user surveys to gather feedback.
- **The Experience Insights (preview) dashboard** shows data across usage to give a fuller view of an organization's experience with Microsoft 365 including insights into training, apps and services data, and user feedback.

Learn more about Microsoft 365 Copilot

- [Microsoft 365 Copilot overview](#)
- [The Copilot System: Explained by Microsoft](#)
- [Data, Privacy, and Security for Microsoft 365 Copilot](#)
- [Extensibility of Microsoft 365 Copilot](#)

Learn more about agents

- [Copilot Studio overview](#)
- [Overview of Copilot Studio agent builder](#)

- Declarative agents for Microsoft 365 Copilot overview
- Create and deploy an agent with Microsoft 365 Agents SDK

Learn more about Responsible AI

- Microsoft AI principles ↗
- Microsoft responsible AI resources ↗
- Microsoft Azure Learning courses on responsible AI
- Responsible AI Transparency Report ↗

Microsoft 365 Copilot extensibility overview

Article • 05/27/2025

Microsoft 365 Copilot is an AI-powered productivity tool that integrates with Microsoft 365 apps to help users with business tasks in the flow of their work. With Copilot Chat, users can query data, gain insights, and streamline workflows in real time. You can extend Copilot to meet the needs of your users by integrating organizational knowledge and adding skills and workflows that are tailored to your business processes. This makes tasks like summarizing, content generation, and data retrieval more efficient and contextually relevant.

You can extend Copilot in several ways:

- Use [Microsoft 365 Copilot connectors](#) (formerly Microsoft Graph connectors) to ingest organizational data, enabling Copilot to access and reason over a broader set of enterprise information.
- Build [agents](#) — powerful AI assistants that retrieve real-time insights and act on behalf of users—to tailor Copilot for automating specialized workflows and performing tasks.
- Use [Microsoft 365 Copilot APIs](#) to programmatically access Copilot's capabilities in your custom applications and agents.

Enhance knowledge in Copilot with connectors

[Copilot connectors](#) allow you to ingest and index data from multiple sources to add knowledge to Copilot. The data that Copilot accesses powers its intelligence. By using Copilot connectors, you can bring additional enterprise data into Microsoft Graph.

This enables Copilot to integrate and reason over a wider variety of data sources to deliver more contextually relevant responses, tailored to the needs and data access permissions of the user. Access to data remains secure and compliant: users can only retrieve information they're authorized to view to ensure that sensitive data remains protected.

By using Copilot connectors, you can:

- **Enrich Copilot** with data from your enterprise systems such as ERP, CRM, line-of-business databases, and knowledge management systems.
- **Provide more comprehensive insights** by allowing Copilot to summarize, analyze, and respond to data from multiple sources.
- **Use the intelligence of Copilot** in tools like Microsoft Search and ContextIQ to enable seamless integration within your existing infrastructure.

Use prebuilt Copilot connectors

A number of [prebuilt Copilot connectors](#) are available to configure within your tenant. These connectors enable Copilot to integrate with common enterprise applications—such as CRM systems, file storage solutions, and project management tools—withoutr requiring any custom development.

Build a custom Copilot connector

If an existing connector doesn't meet your needs, you can build a custom Copilot connector tailored to your specific business requirements. This allows you to bring in proprietary data, connect to specialist systems, or integrate unique workflows into Copilot. For more information, see [Build Copilot connectors for Microsoft 365 Copilot](#).

Extend Copilot with agents

Agents extend the built-in capabilities of Copilot with knowledge, skills, and automated workflows to address your unique business needs.

What are agents?

Agents for Microsoft 365 Copilot are specialized, AI-powered assistants designed to handle a host of tasks within an organization. By automating workflows and business processes, they streamline day-to-day operations and handle repetitive tasks to free up resources. These agents can securely retrieve and summarize information from Microsoft 365 and other enterprise data sources to deliver timely insights wherever needed.

Agents can take real-time actions—such as updating databases or triggering workflows—directly within the Microsoft 365 environment. Customizable to fit any industry or organizational need, agents for Copilot provide integrated solutions that adapt to your business's specific domain.

Prebuilt agents you can integrate

A wide range of agents built by Microsoft and Microsoft partners are available to support multiple business functions. These agents provide ready-to-use solutions for common tasks like employee onboarding, IT helpdesk support, sales enablement, and customer service.

For example, the new [Sales Agent for Copilot](#) can automate workflows like turning your contacts into Sales Leads in either Dynamics or Salesforce.

You can deploy these agents as-is or further customize them by incorporating your organization's knowledge and business logic. You can browse [prebuilt agents in Microsoft 365 Copilot Chat](#).

Build your own agent

If a prebuilt agent doesn't meet your needs, you can build your own agent designed specifically for your workflows and business processes. Whether you need a highly specialized AI assistant or an advanced automation solution, you can develop agents using low-code or pro-code tools that match your preferred development environment and deployment needs. For more information, see [Agents overview](#).

The following table provides some examples of the types of agents you can develop for your organization.

 Expand table

Agent	Scenario
Image creation agent for marketing campaign	If you need images for your marketing campaign, you can create an agent that develops marketing assets tailored to your campaign and respects your brand guidelines.
Product inventory agent for e-commerce	If your business operates in the realm of commerce, you can build an internal inventory agent by connecting it to your product database. For example, a user can ask Microsoft 365 Copilot to verify the availability of specific items, streamlining your internal processes.
Legal research AI	If your organization works in the legal domain, you can build a legal research agent that uses a custom-trained LLM for case law analysis and integrates external legal databases through API plugins.

Microsoft 365 Copilot APIs

[Microsoft 365 Copilot APIs](#) enable you to securely integrate Microsoft 365 Copilot features into your applications and custom engine agents, all while adhering to Microsoft 365's robust compliance, security, and responsible AI standards.

Whether you're developing a custom engine agent for Microsoft 365 Copilot with your own models or orchestrators or creating conversational experiences within your own apps, these APIs provide access to the core components that power Microsoft 365 Copilot. They allow you to deliver intelligent, enterprise-grade experiences with secure data handling, strong governance, and privacy by design.

You can integrate the following Copilot APIs:

- **Copilot Retrieval API** - Retrieve relevant information from Microsoft 365's semantic and lexical indexes. Whether you're building agents with Copilot's orchestration or your own models and orchestrators, this API lets you ground your solution in enterprise data—from SharePoint to external systems—via [Copilot connectors](#). It respects user and tenant-level governance, ensuring secure, compliant access to organizational knowledge.

 **Note**

The Copilot Retrieval API is currently in prerelease status and will be available for public preview soon.

- **Copilot Chat API** - Send prompts directly to Copilot and receive responses so you can embed Copilot-powered conversation experiences within your own applications. This API brings Copilot to your users wherever they work.

 **Note**

The Copilot Chat API is currently in prerelease status and will be available for public preview soon.

- **Copilot Interaction Export API** - Export user interactions with Copilot, including prompts and responses. This API enables you to build data governance and protection solutions, as well as analyze Copilot usage in your application to optimize adoption.
- **Copilot AI Meeting Insights API** - Access insights from the Microsoft Teams Intelligent Recap feature—including AI-generated notes, action items, and @mentions. This API is ideal for building apps that extract and apply insights from meetings to drive follow-ups and decisions, such as in HR interviews, project management, sales, or customer engagement workflows.

Related content

- [Copilot extensibility planning guide](#)
- [Agents overview](#)
- [Microsoft 365 Copilot connectors overview](#)
- [Microsoft 365 Copilot APIs overview](#)

Agent installation in Microsoft 365 Copilot

07/10/2025

Microsoft 365 Copilot can be extended by installing agents. [Agents](#) provide additional knowledge, skills, and automated workflows to address your unique business needs and enhance workflows within Microsoft 365 Copilot. In addition, Microsoft 365 Copilot can deliver highly skilled expertise on demand.

(!) Note

Microsoft deployed the Researcher and Analyst agents to existing users with Microsoft 365 Copilot licenses.

There are different methods used to install agents in Microsoft 365 Copilot.

Agent installation and governance methods

Microsoft 365 Copilot currently provides the following deployment and governance methods for agents:

- [Microsoft-installed agents and features](#)
- [Admin-installed agents](#)
- [User-installed agents](#)

Microsoft-installed agents and features

Microsoft may install a small number of agents and features that augment Microsoft 365 Copilot with highly valuable skills. These agents and features, built by Microsoft, are preinstalled and/or pre-pinned in Microsoft 365 Copilot for all licensed users. Currently, only the Researcher and Analyst agents are deployed this way.

Organizations can govern these agents in the Copilot Control System section of the Microsoft 365 admin center. There, administrators can block these agents in their tenant, making them inaccessible to all users. Granular controls allowing assignment of these agents to specific users and groups are therefore grayed-out. Alternately, administrators can [disable or restrict Copilot extensibility](#) for their organization, however this will apply to non-Microsoft deployed agents, as well as Microsoft-deployed agents. Individual users can share and unpin these agents as well.

Admin-installed agents

Administrators can install their own custom-built, Microsoft-built, or partner-built agents to augment Microsoft 365 Copilot. Administrators can install a limited number of agents to the Copilot rail or make them available to users through the [Agent Store in Microsoft 365 Copilot](#).

Organizations can govern these agents in the Copilot Control System section of the Microsoft 365 admin center. Administrators have a full set of lifecycle management tools for these agents. Microsoft offers granular controls that enable administrators to install, block, and remove these agents for some or all of the users in their tenant.

 **Note**

Admins can only remove shared agents and custom LOB agents.

For more information, see [Manage agents for Microsoft 365 Copilot in the Microsoft 365 admin center](#).

User-installed agents

Users can install agents that are available in Agent Store based on the policies set by their tenant administrators. Users can also install their own custom-built agents. For example, these custom-built agents could be built with Agent Builder, SharePoint or Microsoft Copilot Studio, to augment Microsoft 365 Copilot. These agents are used by individuals, and optionally shareable within the user's organization.

Organizations can govern these agents in the Copilot Control System section of the Microsoft 365 admin center. Administrators have a full set of lifecycle management tools for these agents. Microsoft offers granular controls that enable administrators to install and block agents. Additionally, administrators can remove shared and custom agents for some or all of the users in their tenant.

Microsoft-built agent licensing

Some agents built by Microsoft, including Researcher and Analyst, are governed by [Supplementary Terms of Service](#) which refers to the Microsoft 365 [Product Terms](#), and by reference, includes the Data Protection Addendum (DPA). The same Product Terms and DPA also govern the Microsoft 365 Copilot service.

Related content

- [Manage agents for Microsoft 365 Copilot in the Microsoft 365 admin center](#)

- [Agent Store in Microsoft 365 Copilot](#)
- [Agents for Microsoft 365 Copilot](#)
- [Build agents with Copilot Studio agent builder](#)
- [Copilot Studio overview](#)

Microsoft 365 Copilot Tuning overview (preview)

Article • 05/19/2025

ⓘ Note

Copilot Tuning is in prerelease and is not yet publicly available. The features described in this content are subject to change.

Microsoft 365 Copilot Tuning allows organizations to fine-tune large language models (LLMs) by using their own tenant data. These fine-tuned models power [agents](#) that can perform domain-specific tasks based on the organization's unique knowledge. All training and AI processing happens within your Microsoft 365 tenant, so your data remains secure and governed by your existing compliance controls. The result is an AI assistant that behaves like an expert team member, providing tailored assistance in line with your organization's content and rules.

This article explains how organizations can use Copilot Tuning to create task-specific fine-tuned LLMs, how users can build agents on these fine-tuned models, and how IT administrators can govern the feature.

[https://learn-video.azurefd.net/vod/player?id=7b2cdaf2-fb86-421d-9932-8a2b02cbdbc5&locale=en-us&embedUrl=%2Fcopilot%2Fmicrosoft-365%2Fcopilot-tuning-overview ↗](https://learn-video.azurefd.net/vod/player?id=7b2cdaf2-fb86-421d-9932-8a2b02cbdbc5&locale=en-us&embedUrl=%2Fcopilot%2Fmicrosoft-365%2Fcopilot-tuning-overview)

Key capabilities and scenarios

Copilot Tuning allows for fine-tuning of LLMs through an intuitive no-code UI. Business analysts or subject-matter experts can use their domain knowledge to fine-tune LLMs on relevant tenant data, allowing the model to learn their unique voice and procedures that are custom to the organization. For example, a legal department analyst can fine-tune a model using the firm's past case briefs and templates to create a contract drafting agent that writes documents using the firm's unique style and terminology.

Copilot Tuning provides the following key capabilities and benefits:

- **No-code model fine-tuning** - Fine-tune LLMs on internal data by using an intuitive interface in Microsoft Copilot Studio.
- **Domain-specific agents** - Build specialized Copilot agents based on the fine-tuned models that are tailored to business tasks. You can create agents for scenarios like expert

Q&A, proposal generation, or report summarization that behave like an expert in that domain. The agent produces results with the appropriate tone, vocabulary, and level of detail for the organization.

- **More intuitive insights and automation** - Encoding your organization's business know-how into Copilot enables analysis and content creation tuned to your organization. Tasks that might take days of manual effort (searching documents, compiling data, writing drafts) can be done in minutes by the agent. This allows your analysts and subject-matter experts to focus on higher-value work while Copilot handles routine or information-heavy tasks.
- **Integration with data sources** - Copilot Tuning can use the rich content already in your Microsoft 365 ecosystem. You select knowledge sources; the model then learns from this tenant data to ensure that the agent's responses are grounded in the organization's information. Because Copilot is integrated with Microsoft Graph, the agent can also reason over live enterprise data, giving you a powerful tool to query and summarize up-to-date information from Microsoft 365.

Your organization can use Copilot Tuning for the following scenarios:

- **Q&A** - Create domain-specialized agents that understand and reason over tenant-specific content—such as regulations, tax codes, or scientific reports—across formats like .docx, .pdf, and .html. Tuned to reflect the organization's tone, terminology, and compliance language, Q&A agents provide clause-aware answers, summaries, and cross-document comparisons (for example, regulatory differences across regions). These agents are optimized for stable, text-heavy content in deep domain-driven workflows where precision and context matter.
- **Document generation** - Train the model on document templates and past reports to generate first drafts of complex documents that would otherwise require multiple prompts and model outputs. For example, you can create a Proposal Writer agent that assembles sales proposals or drafts legal contracts in the company-approved format and tone.
- **Summarization** - Generate high-quality, structured summaries of complex documents that reflect your organization's tone, formatting, and content priorities. Ideal for high-volume or high stakes use cases like legal, regulatory, or executive reporting, summarization agents ensure consistency, reduce manual effort, and adapt to your preferred summary style. Train your LLM with example pairs to produce summaries that are clear, actionable, and aligned with your internal standards.

Fine-tune the LLM

To successfully produce a task-specific agent that captures your organization's expertise, you need to fine-tune the LLM.

Apply the following best practices to tune the LLM:

- **Start with clear objectives** - Identify a high-value task to ensure that the agent delivers tangible outcomes and that you focus your time, data, and effort on work that drives a meaningful return. Copilot Tuning currently supports three primary task types: expert Q&A, document generation, and document summarization.
- **Curate quality training data** - Gather the most relevant and up-to-date documents for the task. The effectiveness of fine-tuning depends on good data. Use authoritative sources such as policy documents, proprietary reports, approved templates, and finalized deliverables that reflect your organization's standards, format, and decision logic.

For tasks like document generation or summarization, provide high-quality input/output pairs to help the model learn structure, tone, and content expectations.

- **Define clear instructions and constraints** - When configuring the model in Copilot Studio, you can input instructions for the agent's tone and behavior. Provide clear guidelines; for example, "Use a professional and friendly tone" or "Only use information from official 2023 policy manual." You can also supply starter prompts or example questions to steer the model's responses. These help the agent understand context and style.
- **Use preview and evaluation tools** - Copilot Tuning includes evaluation steps. After your model is trained, test it with sample queries or tasks. Copilot Studio allows you to compare test results against baseline answers. Review the outputs to ensure that they meet your expectations for accuracy and tone. If they don't, refine your training data or instructions and retrain.
- **Iterate with feedback** - Treat fine-tuning as an iterative process. Monitor how the agent performs in use. Regularly update the model with new data or corrections to keep it accurate. For example, if policies change or you notice opportunities for further refinement, incorporate those updates and run another fine-tuning round.
- **Know when to use Copilot vs. fine-tuning** - If your scenario is broad or the information changes daily, using Copilot's Retrieval Augmented Generation (RAG), which searches your content at query time, might be sufficient. Fine-tuning works best for well-defined, repetitive tasks where the model needs a deep understanding of static content or a particular style. If your task depends on general reference or lightweight synthesis, start with Copilot. If the output needs to reflect your organization's specific voice, structure, or reasoning - especially for repeatable, high-value tasks - that's a signal to invest in fine-tuning.

Use agents tuned on LLMs

After you fine-tune the model, users can create and deploy an agent based on that model by using Copilot Studio agent builder.

Users interact with agents based on fine-tuned models just like they interact with Copilot - either via the Microsoft 365 Copilot app or Copilot Chat in Teams or another app. They can ask natural language questions, and the agent responds based on its fine-tuned knowledge.

Agents based on fine-tuned models provide the following benefits to your organization:

- **Increased productivity** - Agents act as intelligent assistants in daily work. Users can get instant answers or generate content based on their organization's data. Users can also complete tasks faster by relying on agents to generate summaries, analyze data, draft communications, and more.
- **Consistency and accuracy** - Agent responses based on a fine-tuned model are consistent with organizational data. This reduces the risk of errors due to outdated documents or external search engines.
- **Solution creation** - Copilot Tuning empowers users to create AI-powered solutions to solve their specific productivity needs. This fosters a culture of innovation in the organization.
- **Improved collaboration** - Agents provide a way to make organizational expertise available to all users. This helps to remove knowledge silos in the organization and increase information sharing and collaboration.

Apply the following best practices when creating agents based on fine-tuned models:

- **Understand the model's scope** - What data and task is the agent based on? Was it trained on HR documents up to 2022? Is it meant only for summarizing certain reports? Knowing the scope helps you ask the right questions and not expect it to do unrelated tasks.
- **Provide clear prompts** - When interacting with the agent, ask clear, specific questions. Though the model is fine-tuned, well-phrased queries yield better results. For example, instead of asking "Tell me about benefits", ask "What is the maternity leave policy for full-time employees?" Fine-tuned agents can handle complex queries, but clarity helps it provides more precise information.
- **Include starter prompts** - Starter prompts are displayed in the agent UI and help users understand the agent's capabilities. Tailor your starter prompts to the key scenarios for your fine-tuned agent to help users take full advantage of the agent's knowledge.

- **Refine and iterate** - Agents based on fine-tuned models support multi-turn conversations. If the agent's response isn't exactly what you need, refine your prompt or ask follow-up questions. The fine-tuned agent uses the follow-up questions to adjust its response.
- **Apply security best practices** - Don't ask fine-tuned agents to provide information that should be confidential, and handle agent responses in accordance with your organization's policies.
- **Provide feedback to further tune agents** - Use the feedback mechanism to train or tweak the fine-tuned agent to improve its performance. Providing regular feedback helps the agent to continuously improve. In Copilot, users can choose the thumbs-up and thumbs-down icons to submit feedback on the agent's responses. This feedback is sent to Microsoft and helps the product team identify common issues and improve model performance over time.

Admin settings and governance

Copilot Tuning provides tenant-wide settings, security, and governance features to enable admins to set up the environment with the appropriate guardrails in place.

The following key admin features are available for Copilot Tuning:

- **Access control** - AI admins can enable Copilot Tuning for their organization or for a specific subset of users. For example, an admin might enable Copilot Tuning only for the R&D and Legal departments, and designate certain users in those teams to create fine-tuned models and specialized agents. After a model is trained and deployed, the AI admin controls who has access to the trained model.
- **Microsoft 365 admin center governance** - Admins can monitor fine-tuning projects and agents via the Copilot management section in the Microsoft 365 admin center. They can view which custom models are deployed and delete a model if it becomes obsolete.
- **Security and compliance** - Copilot Tuning is built with enterprise-grade security. Model training occurs in a tenant-isolated environment, and the resulting model inherits the access permissions of the underlying data. No customer data is transmitted to external services during training; the fine-tuning happens within the secure cloud associated with your tenant.

Copilot Tuning excludes any files that the security group or groups applied to the model don't have permissions to access. It also suggests security groups to add to its training data to maximize its knowledge. This provides an extra layer of security for the model.

Note

When you fine-tune a model, the model weights are adjusted based on the training data. Changes to access permissions on the training data aren't automatically applied to the model; AI admins need to update the permissions on the model in the Microsoft 365 admin center.

Any Microsoft Graph data returned in Copilot responses also honors document permissions; responses won't include information a user doesn't have access to.

- **Deployment and monitoring** - When a model is fine-tuned and deployed, builders can use it in an agent and share the agent with users in the organization who have access to the model. Admins can control who has access to the agent via security groups, and can monitor agent usage via Copilot usage analytics dashboards.

Disclaimer

The AI administrator is responsible for ensuring that your use of this product complies with all applicable data protection, privacy, and intellectual property laws. This includes meeting your obligations as a Data Controller under regulations such as the GDPR or CCPA.

Data Controller Obligations

- You are responsible for how data is collected, stored, and used within your tenant environment.
- You must ensure that your data practices meet legal requirements for transparency, consent, access, and deletion.
- You are responsible for verifying the accuracy, appropriateness, and compliance of any outputs generated from this system before using them. May require reviewing with the subject matter experts.

Copyright and Model Training

- If you choose to train a custom model using your own data, you must ensure that you have the appropriate rights or licenses for any copyrighted materials included in the training set.
- Copyright protection will not apply to models trained using unauthorized copyrighted content. You assume full responsibility for any such use.

Data Deletion

- If a user whose data has been used in training a model submits a valid deletion request under GDPR (or similar regulations), you will be required to retrain the model.
- When you fine-tune a model, the model weights are adjusted based on the training data. You have the option to delete the fine-tuned model at any time.

Related content

- [Agents for Microsoft 365 Copilot](#)
- [Build agents with Copilot Studio agent builder](#)
- [Copilot Studio overview](#)

Customize Microsoft 365 Copilot with Copilot Tuning

06/17/2025

Microsoft 365 Copilot Tuning enables organizations to tailor AI models to reflect their unique terminology, communication style, and business processes. By fine-tuning large language models (LLMs) with your own data, you can improve the accuracy, tone, and relevance of Copilot responses across your tenant.

Copilot Tuning goes beyond retention and retrieval to train tenant-specific LLMs on your organization's data while maintaining robust enterprise security, compliance, governance, and management controls. The LLMs are tuned for specific tasks like summarization, document generation, and expert Q&A.

This article describes the process for training and tuning models to customize Microsoft 365 Copilot for your organization.

(!) Note

Copilot Tuning is currently available for Early Access Preview (EAP). For details about requirements and how to enroll, see the [admin guide](#).

Tuning process overview

Using Copilot Tuning to create fine-tuned AI models for your organization involves the following training and tuning steps:

- **Domain-specific adaptation** trains your LLM by processing the organizational data you ingest into Copilot.
- **Supervised fine-tuning** adapts your model to specific tasks by training it on input-output pairs.
- **Reinforcement learning** helps your model to adopt your organization's style, tone, and preferences to further optimize Copilot responses.

(!) Note

The models that you tune are private. Your data is not used to train general models for other tenants. All processing of your data is done in a tenant that only authorized users

have access to, and specific individuals, typically administrators, have control over the training process.

Domain-specific adaptation

Domain-specific adaptation occurs after your corpora is ingested. This adaptation involves processing the organization's content from its original format into a plain text format with one statement per line. This format ensures that the AI model doesn't have references to the original data.

During domain-specific adaptation, models are pre-trained with a large corpus of unlabeled data from your organization to provide domain knowledge to your tenant's LLM. Unlike supervised fine-tuning, which involves teaching the model to give precise and accurate answers, domain-specific adaptation trains the model to be aware of the types of data within your organization and respond appropriately.

Domain adaptation enriches the model's understanding of your business domain to help Copilot understand the type of work you do. This enables Copilot to retrieve relevant knowledge quickly, rather than learning or taking multiple steps to retrieve a model during prompt engineering.

Client-side prompt engineering can further improve the results. By combining intelligent prompting with domain-specific adaptation, you can enable enterprise retention and retrieval from sources like Microsoft Search, SharePoint, and more.

Supervised fine-tuning

Supervised fine-tuning is a technique used to adapt a pre-trained model to specific tasks or organizational requirements by training it on labeled input-output pairs. This process helps the model learn to produce responses that align with your organization's preferred formats, tone, and compliance needs. Supervised fine-tuning:

- Teaches structure and tone - Models learn how to respond in ways that reflect your organization's voice.
- Improves task accuracy - By training on high-quality examples, the model becomes more reliable for enterprise use cases.
- Supports compliance - You can train models to recognize and respond to regulatory language and internal classifications.

Supervised fine-tuning is useful when you need the model to:

- Follow a specific Q&A format.

- Reflect your company's legal or HR communication style.
- Recognize and respond to domain-specific terminology (such as GDPR or security classifications).

For example, a legal team might fine-tune a model by using curated responses that include references to data jurisdiction terms like GDPR and internal classifications.

Markdown

```
ACL: This document is important to the DSR database and should be given utmost priority.
```

```
ACL: Access and Confidentiality Level - High
```

```
ACL: Data Classification Level - Medium
```

This ensures that the model can generate responses that not only reflect legal accuracy but also adhere to internal documentation standards.

Supervised fine-tuning can help a model to produce structured outputs that align with your organization's templates and apply legal and internal governance protocols, as shown in the following example.

Prompt: What security protections should be applied to this document?

Response: This document contains sensitive and privileged information related to legal and compliance matters. It requires encryption, access controls, and regular audits to prevent unauthorized access. Any changes to access controls must be approved by senior management.

Supervised fine-tuning can also help to ensure that responses are accurate and aligned with the organization's tone, as shown in the following example.

Prompt: How many vacation hours can an employee accrue before the total is capped?

Response: The maximum vacation balance is capped at 200 hours. Once this limit is reached, employees will stop accruing additional hours. We encourage taking time off regularly to maintain a healthy work-life balance. For more details, contact your supervisor or HR.

Reinforcement learning

Reinforcement learning is a post-training technique that helps tailor LLMs to your organization's unique communication style, tone, and tool usage preferences. Unlike supervised fine-tuning, which teaches the model to produce correct outputs from labeled examples, reinforcement learning optimizes for subjective qualities by learning from feedback signals.

Reinforcement learning is helpful when you want your model to:

- Reflect a specific tone of voice (empathetic, formal, concise).
- Prefer certain tools (such as Microsoft Graph APIs over RAG-based retrieval).
- Avoid retrieving content from sensitive sources (like ACL-tagged documents).
- Learn from user feedback to continuously improve.

Reinforcement learning refines the model by scoring output based on organizational preferences, using both human and automated feedback to guide learning. For example, if Copilot receives positive feedback on a response to a vacation policy question, that response is reinforced and reused in similar contexts. Conversely, if a response is flagged for tone or content, the model learns to avoid that pattern.

Advanced adaptation and maintenance

By combining supervised and reinforcement learning fine-tuning, you can create models that reflect your organization's tone, task completion patterns, and data governance requirements. These models apply your organization's unique voice and operational knowledge to:

- Maintain consistent tone and formatting across tasks.
- Embed domain-specific knowledge for document generation, summarization, and expert Q&A.
- Respect access controls and data classification policies during training and inference.
- Generate accurate responses aligned with your internal standards and user expectations.

You might encounter some challenges when tuning your model. For example, finding sufficient, high-quality labeled data for training can pose a challenge. You can create simulated data by using models like ChatGPT to generate reference output. You also want to ensure that your training data is sufficiently diverse. Your training data should cover a broad range of use cases to cover real-world scenarios and mitigate potential bias.

To best ensure model quality and compliance:

- Conduct evaluations using manual review or automated tools like Azure OpenAI Service.
- Monitor for overfitting by testing on unseen inputs and adjusting learning rates as needed.
- Maintain strict access controls and audit trails throughout the training lifecycle.

All evaluations are confidential and governed by Microsoft's Responsible AI principles.

You can continue to evolve your model by:

- Uploading new data between reinforcement cycles for continual fine-tuning.
- Applying prompt engineering to adapt to new task types or regulatory changes.

- Using Copilot Studio's low-code tools to deploy and manage agents based on your fine-tuned models.

Related content

- [Copilot Tuning overview](#)
- [Copilot Tuning admin guide](#)

Microsoft 365 Copilot Tuning FAQ

Microsoft 365 Copilot Tuning allows organizations to fine-tune large language models (LLMs) for specific tasks by using their own tenant data. This article provides answers to frequently asked questions(FAQs) related to Copilot Tuning.

ⓘ Note

Copilot Tuning is currently available for Early Access Preview (EAP). For details about requirements and how to enroll, see the [admin guide](#).

Copilot Tuning features and capabilities

What are the key features of Copilot Tuning?

Copilot Tuning allows organizations to create task-specific custom AI models based on their tenant data by enabling model makers to tune large language models (like GPT-4) with the organization's documents and knowledge bases in Copilot Studio. This produces a model that understands the organization's terminology, style, and processes. Agent builders can then build agents based on the fine-tuned model that perform tasks like Q&A, document generation, and summarization.

Does Copilot Tuning help customize Microsoft 365 Copilot?

Copilot Tuning is designed to help customers customize Microsoft 365 Copilot for specific tasks. The following tasks are currently supported:

- Document generation
- Expert Q&A
- Summarization

For more information, see [Key capabilities and scenarios](#). To request support for more tasks, send mail to CopilotTuningFeedback@service.microsoft.com.

After the model is fine-tuned, organizations can create domain-specific declarative agents that respond to user queries using organizational knowledge.

What's the difference between Azure AI Foundry and Copilot Tuning?

Azure AI Foundry is a developer-first, code-centric platform designed to support full lifecycle AI development—from model selection and customization to deployment and monitoring. Azure AI Foundry is ideal for engineering teams who build scalable, production-grade AI systems in Azure.

Copilot Tuning is a maker-first, low-code feature tailored for enterprise customers who want to fine-tune models for specific business scenarios without deep machine learning expertise. It runs in the Microsoft 365 tenant boundary.

Security, privacy, and data governance

Does my data stay safe and secure during training?

Copilot Tuning uses a secure process during data ingestion and training. Data ingestion takes place within your Microsoft 365 tenant, which preserves privacy and security. Copilot Tuning provides a self-serve, turnkey fine-tuning pipeline that doesn't require any engineers to see your data. Your content is used to train the model in a tenant-isolated environment.

Do my data governance policies persist through the ingestion and training process?

Yes. Copilot Tuning automatically excludes from training any files that the security groups configured for the tuned model can't access. It automatically suggests other security groups to maximize the breadth of knowledge that can be securely incorporated into the model. Although this provides an extra layer of security for the model, we recommend that you treat each model as a copy of the trained data. If the original data is deleted or changed, the model remains the same unless the admin adjusted the permission on the model.

For more information about model governance, see the [Admin guide](#).

Where is the data stored and processed?

Copilot Tuning adheres to the data residency commitments of Microsoft 365. The model training and inference occur in the geography tied to your tenant. For example, for a tenant in Europe, the fine-tuning jobs and storage take place in EU datacenters.

How does Copilot Tuning manage data governance?

Copilot Tuning is integrated into Microsoft 365. It automatically inherits all your company's valuable security, compliance, and privacy policies and processes. Data permissions are consistent, and users can only search the information that they have access to. For more information, see [Data, Privacy, and Security for Microsoft 365 Copilot](#).

Prerequisites and getting started

What are the prerequisites for using Copilot Tuning?

Your organization must enable Microsoft 365 Copilot and purchase a minimum of 5,000 Microsoft 365 Copilot add-on license. Copilot Tuning is an advanced capability and is currently offered to customers in the Copilot Early Access Program (EAP). Your tenant must also have an active Copilot Studio subscription. Contact your Microsoft account team to help confirm your eligibility.

What are the system requirements for using Copilot Tuning?

Copilot Tuning doesn't require any on-premises hardware - it runs entirely as a cloud service within Microsoft 365. However, there are licensing and data prerequisites.

How do I know if my organization qualifies for Copilot Tuning?

During EAP, your organization must have 5,000 or more Microsoft 365 Copilot licenses enabled for your tenant. In addition to the Copilot licenses, you must have active Copilot Studio licenses at the tenant and user level. You must also undergo extra screening as part of the onboarding process to ensure that your scenario is a good fit for Copilot Tuning's current capabilities.

How do admins enable Copilot Tuning?

An AI Admin (or designated Copilot admin role) enables Copilot Tuning via the Microsoft 365 admin center. Microsoft provides a setting in the **Copilot settings** section of the admin portal to activate Copilot Studio and task-specific fine-tuning features. When a tenant admin enables Copilot Tuning, the Copilot Studio interface is available to model makers to allow them to tune models for a specific task.

How should organizations use Copilot Tuning?

Use Copilot Tuning to handle repetitive, information-heavy tasks and to generate initial drafts. Let your experts focus on strategic thinking, decision-making, and final reviews. When you understand the feature's strengths (speed, scale, consistency) and weaknesses (contextual nuance, up-to-date knowledge), you can better take advantage of it.

Training data and tuning process

Who in my organization can make models using Copilot Tuning?

You decide who in your organization can create and manage models. Model makers might be business analysts or IT specialists who are familiar with the content. We recommend that you assign one or two model makers to start; you're limited to a total of 10 model makers in the organization. Assign the model makers a Copilot Studio user license (a \$0 license that grants access to Copilot Studio authoring tools) that they can use to build agents. Admins can assign Copilot Studio user licenses to user accounts in the Microsoft 365 admin center or by adding users to a security group that has Copilot Studio access.

What tools do I use to create fine-tuned models?

Use [Copilot Studio](#) to create fine-tuned models. Copilot Studio provides a user-friendly interface for model makers to select training data, configure model parameters, and run the training job. It abstracts the complexity of AI tuning into a guided, turnkey process.

What are the data requirements for using Copilot Tuning?

Copilot Tuning can train on text-based content (documents, knowledge articles, transcripts, and so on) in your Microsoft 365 tenant, including files in SharePoint Online (such as Word, PDF, or text documents). Nontextual data (images, videos) and other file formats aren't currently supported.

How long does it take to fine-tune a model?

The time it takes to fine-tune a model depends on several factors, including the size of the training data and the complexity of the model. Generally, fine-tuning can take anywhere from a few hours to several days.

How can I customize the knowledge domain for Copilot Tuning?

You select the specific content to use for training and grounding. This includes choosing data sources like SharePoint sites, folders, or uploaded files. By curating the training data, you define the scope and expertise of the model.

How do I know if the tuning process was successful?

When the training process is complete, Copilot Studio presents examples for evaluation; for example, Q&A or summary results from your new model. You can test your model in a chat interface in Copilot Studio. Ask it a few questions related to your data to gauge its responses, and refine as needed. If you're not satisfied with the results, update the data or add more instructions and run the training again. When you're happy with the model, publish it.

Can I create more than one fine-tuned model?

Yes, you can train multiple models and build multiple agents, each tailored to different purposes and datasets. For example, one agent can generate responses to RFPs, while another agent handles HR-related queries. Each agent can have its own persona and training data.

Can I retrain models with new data?

Yes, you can retrain models with new data or data sources as your business needs evolve.

Building and managing agents

What tools do I use to build agents?

Use [Copilot Studio agent builder](#) to create agents that work with task-specific fine-tuned models.

How do I build agents powered by fine-tuned models?

Copilot Tuning integrates with [Copilot Studio agent builder](#), which allows you to package your custom model into an agent with specific instructions and connected data sources. These agents can perform domain-specific tasks like advanced document generation, expert Q&A, or summarization of long content.

Do I need to know how to code to successfully build agents based on fine-tuned models?

No. You can build agents based on fine-tuned models with no code. A business user or analyst can use Copilot Studio to select training data, tune the model, and publish an agent. You don't need to train models from scratch or be a data scientist. Copilot Tuning abstracts the complexity of AI tuning into a guided, turnkey process.

Do agents built with fine-tuned models work with Microsoft 365 apps?

Agents built with fine-tuned models work in the Microsoft 365 Copilot app and other apps where agents are available, like Teams. Users can chat with task-specific agents in Teams or Microsoft 365 Copilot just as they do with Copilot and other agents. The agent responds with knowledge tailored to the organization.

How do I roll out an agent that used a fine-tuned model to users?

We recommend that you pilot the agent with few users first and iterate. Roll the agent out to a set of test users or the relevant department. Gather feedback as to whether the answers meet expectations. You can continue to improve the model by adding more training data or adjusting the agent's instructions. After that, plan a wider deployment. Integrate the agent into workflows - for example, pin it in a Teams channel or advertise it internally. Because the agent integrates with Microsoft 365 Copilot, users invoke it by calling Copilot in the relevant context and selecting the agent.

Support and feedback

Can I get help through my Microsoft account team?

Yes. During the EAP, if you're qualified to participate, your account team can help coordinate support with internal Microsoft resources.

How can I provide feedback or request features for Copilot Tuning?

Microsoft values your feedback. You can submit feedback through Copilot Studio or via your Microsoft account team.

How can agent users get support?

Users should contact the organization's help desk for support with agents. Make sure that the help desk is aware of the agent's capabilities. If the help desk can't assist, they can escalate the issue to IT, who can then engage Microsoft support.

How can agent users provide feedback?

In Copilot Chat, users can select the thumbs-up or thumbs-down icon on responses and provide verbatim feedback. This feedback is sent to Microsoft and helps the product team identify common issues and improve model performance over time.

Can admins or creators submit feedback through Copilot Studio?

Yes. Copilot Studio and admin interfaces include a feedback link. Admins can use the feedback link to submit suggestions or report issues. The feedback is sent to Microsoft and considered for future planning.

Can I share feedback through my Microsoft account team?

Absolutely. Your Customer Success Manager or Microsoft customer engineers can collect feedback and schedule dedicated calls to hear your input. These sessions sometimes include product managers or engineers and provide opportunities to share feature requests or pain points.

Related content

- [Copilot Tuning overview](#)

Microsoft 365 Copilot Tuning admin guide (preview)

07/08/2025

Microsoft 365 Copilot Tuning enables organizations to securely fine-tune large language models (LLMs) using tenant-specific data, and to deploy declarative agents based on those fine-tuned models to Microsoft 365 Copilot. Administrators retain full control over who can fine-tune models, how they're published, and how they're governed throughout their lifecycle.

This article provides information about the governance controls that are available for Copilot Tuning in the Microsoft 365 admin center.

(!) Note

Copilot Tuning is currently available for Early Access Preview (EAP). For details about how to enroll, see [Prerequisites](#).

Prerequisites

To manage Copilot Tuning governance controls, make sure that you meet the following prerequisites:

- Copilot Tuning Early Access Preview (EAP) enrollment. To enroll in the EAP:
 - Your tenant must have at least 5,000 active Microsoft 365 Copilot add-on licenses.
 - An AI Admin must accept the EAP terms on behalf of the organization.

(!) Note

If Copilot Tuning isn't available in your tenant, contact your Microsoft Customer Success Account Manager (CSAM) to request EAP provisioning.

- You must be an AI Admin.
- Copilot extensibility is enabled via **Copilot settings** in the admin center. For more information, see [Manage agents for Microsoft 365 Copilot in the Microsoft 365 admin center](#).
- If you block new Power Platform connectors by default via Data Loss Prevention (DLP) policies, run one of the following commands to reclassify the connector.

```
PowerShell
```

```
$connectorsToReclassify = @([pscustomobject]@{  
    id = "/providers/Microsoft.PowerApps/apis/shared_tenantcopilot"  
    name = "Tenant Copilot"  
    type = "providers/Microsoft.PowerApps/apis"  
})  
Add-ConnectorsToPolicy -PolicyName {TENANT_DLP_POLICY_GUID} -Connectors  
$connectorsToReclassify -Classification {'Confidential'}
```

```
PowerShell
```

```
$connectorsToReclassify = @([pscustomobject]@{  
    id = "/providers/Microsoft.PowerApps/apis/shared_tenantcopilot"  
    name = "Tenant Copilot"  
    type = "providers/Microsoft.PowerApps/apis"  
})  
Add-ConnectorsToPolicy -PolicyName {TENANT_DLP_POLICY_GUID} -Connectors  
$connectorsToReclassify -Classification {'General'}
```

For more information, see [Add-ConnectorsToPolicy](#).

What is Copilot Tuning?

Copilot Tuning is a self-serve, secure Microsoft 365 offering for fine-tuning LLMs using your organization's own data. It allows for a self-service workflow where model makers select datasets and Copilot Studio seamlessly handles data preparation, model training, and evaluation. This is suited for low-code domain adaptation tasks with minimal engineering overhead.

After a model is fine-tuned, users can create and deploy declarative agents based on the model to Microsoft 365 Copilot. These agents surface in Word, Teams, Outlook, and other Microsoft 365 apps to perform tasks such as legal clause generation, incident report summarization, or contract drafting.

For more information, see [Copilot Tuning overview](#).

Enable Copilot Tuning

To activate the Copilot Tuning service and scope its availability:

1. Go to the [Microsoft 365 admin center](#) and sign in with your AI Administrator account.

2. Go to Copilot > Copilot settings.

The screenshot shows the Microsoft 365 Admin Center interface. On the left, there's a navigation sidebar with sections like Home, Copilot (which is selected), Overview, Health, Discover, and Copilot settings. Under Copilot settings, there are sub-sections for Users, Devices, Teams & groups, Roles, Resources, Billing, Support, Settings, Setup, Reports, and Health. A 'Customize navigation' section is also present. The main content area is titled 'Copilot settings' and contains a sub-header 'Manage everything related to Copilot. Review a range of settings and integrations for various applications, along with data security and compliance.' Below this, there are tabs for User access, Data access, Copilot actions, and Copilot support. A search bar is at the top right. The main table lists various Copilot features with their descriptions and applicable platforms. At the bottom right of the main content area is a circular icon with a magnifying glass and a plus sign.

Name	Description	Applies to
Copilot agent consumption meter	Setup and configure consumption meters for Copilot agents.	Microsoft 365 Copilot
Copilot for Sales	Choose whether users can see Sales Copilot content in Microsoft apps, and more.	Copilot for Sales
Copilot in Bing, Edge, and Windows	Manage how your organization uses Copilot, your AI-powered chat for the web.	Bing Microsoft Edge Windows
Copilot in Edge	Manage how your organization uses Copilot in Microsoft Edge.	Microsoft Edge
Copilot in Power Platform and Dynamics 365	Manage more settings related to Copilot and agents in Power Platform and Dynamics 365.	Microsoft 365 Copilot
Copilot in Viva Engage	Choose whether users can access Copilot in Viva Engage.	Copilot in Viva
Copilot in Viva Glint	Choose whether users can access Copilot in Viva Glint.	Copilot in Viva
Copilot in Viva Goals	Choose whether users can access Copilot in Viva Goals.	Copilot in Viva
Copilot in Viva Insights	Choose whether users can access Copilot in Viva Insights.	Copilot in Viva
Copilot in Viva Learning	Choose whether users can access Copilot in Viva Learning.	Copilot in Viva
Copilot in Viva Pulse	Choose whether users can access Copilot in Viva Pulse.	Copilot in Viva
Microsoft 365 Copilot in admin centers	Choose whether admins can access Microsoft 365 Copilot within admin centers.	Microsoft 365 Copilot
Pin Microsoft 365 Copilot Chat	Choose whether users have Copilot pinned to the navigation bar or taskbar.	Microsoft 365 Copilot Chat Microsoft 365 app Outlook Microsoft
Copilot Tuning	Manage task-specific models and who can create them.	Microsoft 365 Copilot

3. Choose Copilot Tuning, and choose Accept to accept the EAP terms.

This screenshot shows the 'Copilot Tuning' configuration page within the Copilot settings. The left sidebar is identical to the previous screenshot. The main content area has a sub-header 'Copilot Tuning' with a 'Preview' link. It explains that Copilot Tuning creates task-specific AI models trained for specific tasks. There are three main configuration sections: 'Accept EAP terms' (with a checkbox), 'Choose who can create task-specific models' (with radio buttons for 'No users' and 'Specific users in your organization'), and 'Manage task-specific models' (with a table for creating new models). A note at the bottom states that task-specific models will be listed here when users create them, and links to 'Go to Copilot Tuning in Copilot Studio' and 'Copilot Tuning is currently a preview feature. See terms.' A save button is at the bottom right. A circular icon with a magnifying glass and a plus sign is located at the bottom right of the main content area.

! Note

The **Copilot Tuning** setting is only available if your tenant meets the criteria described in the [Prerequisites](#) section.

4. Choose Specific users in your organization and add the users in your organization who can create task-specific models. For more information, see [Manage Copilot Tuning settings](#).

Manage Copilot Tuning settings

Fine-grained access controls ensure that only authorized users within the tenant can initiate fine-tuning or publishing models. You can manage this access by specifying users and security groups for these controls.

Configure model makers

Designate users who are authorized to use Copilot Tuning to fine-tune task-specific models. These model makers are generally subject matter experts (SMEs) within a particular part of the organization like marketing, finance, or legal. The users that you designate as model makers are then able to access the Copilot Tuning workflow in Copilot Studio.

You can designate up to 10 users to be model makers. If you need more than 10 model makers in your organization, reach out to Copilot Tuning support or your Microsoft account team.

When you add a user to Copilot Tuning, they receive an email with instructions to get started. You can also use the **Copilot Tuning** control in the admin center to remove users from Copilot Tuning.

Manage tuned task-specific models

You can review and manage the set of models that model makers create and publish via the **Copilot Tuning** control in the admin center.

The screenshot shows the Microsoft 365 Admin Center interface. On the left, there's a navigation sidebar with various categories like Home, Copilot, Users, Devices, Teams & groups, Roles, Resources, Billing, Support, Settings, Setup, Reports, Health, and a 'Customize navigation' section. The 'Copilot' category is expanded, and 'Copilot settings' is selected. The main content area is titled 'Copilot settings' and contains a brief description: 'Manage everything related to Copilot. Review a range of settings and integrations for various applications, along with data security and compliance.' Below this, there are tabs for 'User access', 'Data access', 'Copilot actions', and 'Copilot support'. Under 'User access', there's a table listing task-specific models. The first few rows are: 'Copilot agent consumption meter' (Setup and configure consumption meters for Copilot agents), 'Copilot for Sales' (Choose whether users can see Sales Copilot content in Microsoft apps, and more.), 'Copilot in Bing, Edge, and Windows' (Manage how your organization uses Copilot, your AI-powered chat for the web.), 'Copilot in Edge' (Manage how your organization uses Copilot in Microsoft Edge.), 'Copilot in Power Platform and Dynamics 365' (Manage more settings related to Copilot and agents in Power Platform and Dynamics 365.), 'Copilot in Viva Engage' (Choose whether users can access Copilot in Viva Engage.), 'Copilot in Viva Glint' (Choose whether users can access Copilot in Viva Glint.), 'Copilot in Viva Goals' (Choose whether users can access Copilot in Viva Goals.), 'Copilot in Viva Insights' (Choose whether users can access Copilot in Viva Insights.), 'Copilot in Viva Learning' (Choose whether users can access Copilot in Viva Learning.), 'Copilot in Viva Pulse' (Choose whether users can access Copilot in Viva Pulse.), 'Microsoft 365 Copilot in admin centers' (Choose whether admins can access Microsoft 365 Copilot within admin centers.), and 'Pin Microsoft 365 Copilot Chat' (Choose whether users have Copilot pinned to the navigation bar or taskbar.). At the bottom of this list, there's a placeholder entry for 'Copilot Tuning' with the note '(Placeholder description) ...unlocked at 150k assigned Copilot licenses...'. To the right of the table, there's a 'Copilot Tuning' section with a 'Preview' button. It includes a note about Copilot Tuning creating task-specific AI models, a 'Learn more' link, and a checkbox for 'Accept EAP terms'. Below that is a section for 'Choose who can create task-specific models' with radio buttons for 'No users' and 'Specific users in your organization', followed by a list of users: 'Cat Larson' and 'Mona Kane'. At the bottom right, there's a 'Save' button and a circular icon with a plus sign and a magnifying glass.

Choose any published model to review the associated security groups and update them as needed.

You can also remove a published model by choosing **Remove this model**.

Related content

- [Copilot Tuning overview](#)

Selecting knowledge for Microsoft 365 Copilot Tuning

07/17/2025

[Microsoft 365 Copilot Tuning](#) creates a task-specific fine-tuned model based on specific knowledge provided by the model maker. By selecting knowledge from your company's internal documents, you enable the model to learn your unique terminology, style, and procedures.

Selecting knowledge for Copilot Tuning means identifying and preparing the right set of content from your organization that the model learns from. Knowledge selection includes gathering representative documents, examples, and instructions that capture the expertise you want the fine-tuned model to mimic. For example, a legal department could fine-tune a model on the firm's past case briefs and templates, so an agent that uses the model can draft contracts in the firm's style and terminology. The better the selected knowledge reflects your domain and task, the more the model produces relevant, high-quality results.

In this article, we introduce how to select and prepare knowledge for Copilot Tuning. You learn about the types of documents needed, how to organize them, and basic requirements (like minimum data samples and file formats). By understanding knowledge selection, you can ensure your fine-tuned model is effective and aligned with your needs.

Preparing the right knowledge for tuning

Selecting knowledge is the first and most critical step in Copilot Tuning. You should curate a high-quality training dataset from your most relevant and authoritative content. The key is to provide examples that teach the model exactly what you expect it to do. The content you choose depends on the task type. Copilot Tuning currently supports three primary task scenarios: [expert question & answer \(Q&A\)](#), [document generation](#), and [document summarization](#). For each scenario, consider the following requirements:

- **Supported file formats and content:** All Copilot Tuning tasks support common text-based document formats. You can use Word documents (.doc, .docx), HTML files (.html, .aspx), Markdown files (.md), or PDF files processed by Optical Character Recognition (OCR) as source materials. You can also include Excel documents (.xls, .xlsx) for expert Q&A. The tuning process ingests the text content from these files. It doesn't learn from images, embedded tables, or other non-text elements in the documents. Ensure that the important information in your training documents is in textual form. For example, if a filePDF contains a chart, include a textual explanation of that chart's insights in the document.

- **Number of documents:** You must provide more than 20 samples (documents for Q&A and summarization; input-output pairs for document generation) to Copilot Tuning. Usually hundreds or thousands of samples is ideal, and you can provide a maximum of 10k. The quality of samples is more important than raw quantity. We highly suggest you focus your data preparation time on finding as many high quality samples that are well-aligned with what you expect your fine-tuned model to do.
- **Model instructions:** During the model configuration process, Copilot Tuning asks the model maker to provide answers to a series of model instructions to guide the system on how to use the knowledge you selected. Each task type has its own questions about the selected knowledge source. Prepare clear, structured answers to each question. Expert Q&A requires a description of the data in the knowledge source and how it's organized. Document generation requires you to specify how the original input, changes, and output draft document are referred to in your organization. Summarization requires you to specify how to refer to the summaries. It's important that this information is clear and accurately represents your data in order for the system to be most effective.

Limitations and considerations

While Copilot Tuning is powerful, there are important limitations and considerations to keep in mind when selecting knowledge for fine-tuning.

- **Text-only understanding:** The fine-tuning process only learns from textual content in your documents. The model doesn't understand information in images, diagrams, scanned PDFs, or other non-text formats. Similarly, complex formatting like detailed tables or embedded spreadsheets might not translate into the model's training. The text might be read, but the structural meaning could be lost. Make sure any crucial data is expressed in plain text form in the training materials or in the supplementary instructions. For example, instead of expecting the model to learn a procedure from a flowchart image, write out the steps from that flowchart in text.
- **Content scope and model capacity:** Large documents might be truncated or need to be broken into parts. Underlying models have context length limits when learning patterns. If you have lengthy files (dozens of pages), consider whether all that content is needed for tuning. It might be better to train on multiple smaller, focused documents than one large file. Ensure your examples concentrate on the relevant portions to the target task. Irrelevant or extraneous text in training data can confuse the model. At the same time, avoid training data that is too brief or insufficient.
- **Static snapshot of knowledge:** The fine-tuned model represents a snapshot of the knowledge at the time of training. It doesn't automatically update if your source documents change or new documents are added. For example, if you fine-tune a model

on a policy manual and that manual gets revised next quarter, the model will still reflect the old policy until you retrain it with the new information. This behavior is different from the standard Copilot behavior, which uses retrieval-augmented generation to search live data at query time. Fine-tuning trades real-time updating for deeper learned expertise. You should plan to retrain (or at least evaluate) the model periodically or when significant changes in your domain occur.

Important

Changes to document permissions after training don't affect the model immediately. If someone loses access to a source file after the model was trained, the model might still include knowledge from that file. As an admin, you might need to regulate model access or retrain if necessary to comply with any evolving access policies.

By understanding these limitations, you can better plan your knowledge selection and set correct expectations for the tuned model. Mitigate the limitations by providing good data and maintaining the model over time.

Overhead and maintenance

Implementing Copilot Tuning does introduce some overhead in terms of effort and ongoing maintenance, which is manageable with proper planning.

- **Initial effort to prepare data:** The most labor-intensive part is collecting and organizing the training knowledge. Plan to spend time finding suitable documents and reformatting or annotating them. For example, removing any sensitive sections that shouldn't be in the training, or writing the structured change instructions. You might also need to coordinate with colleagues (for example, domain experts who know which documents are the best examples). This upfront effort is crucial—better preparation leads to far less frustration later. Treat it as an investment in creating your expert dataset.
- **Iteration and evaluation:** Fine-tuning is often an iterative process. The first model version might not be perfect. After the model is trained, spend time testing it with realistic prompts. Have subject matter experts evaluate the outputs. You might discover that the model is weak on a certain subtopic or format. In that case, go back and add a few more training examples or refine your instructions, then retrain. Build in time for at least one or two refinement cycles. Each cycle means a bit more data prep and another training run.

Related content

- Microsoft 365 Copilot Tuning overview (preview)
- Introducing Microsoft 365 Copilot Tuning (Microsoft 365 Blog) ↗

Use Copilot Tuning to fine-tune models for use in Microsoft 365 Copilot (preview)

06/18/2025

This article describes how to use Copilot Tuning to create fine-tuned models in Copilot Studio you can use with declarative agents for Microsoft 365 Copilot. Fine-tuning is a process that lets you customize a pretrained model for a specific task on your own tenant data. You can use these fine-tuned models to build agents that are expert at performing domain-specific tasks and serve them in Microsoft 365 Copilot.

Fine-tuning helps your model perform better on tasks relevant to your organization. A fine-tuned model is especially useful for organizations with unique data or specialized requirements.

This article provides a *basic overview* of the Copilot Tuning process in Copilot Studio. For more detailed task-specific guidance to help you get best results from fine-tuning for your organization and tasks, see [Copilot Tuning overview](#).

Benefits of Copilot Tuning

Model fine-tuning is a powerful technique used to tailor large language models to your specific needs. Fine-tuning complements other generative AI optimization techniques, such as Retrieval Augmented Generation (also known as RAG) and prompt optimization. Fine-tuning is well-suited when you want to tightly direct the behavior of your model.

Fine-tuning usually requires a team of expert data scientists to curate datasets and build task-specific data preparation and training pipelines.

Copilot Tuning in Copilot Studio greatly simplifies this process, turning it into a tool that just about any subject matter expert can use.

Copilot Studio abstracts away much of the complexity of the process. The Copilot Studio Copilot Tuning process is low-code, transforming fine-tuning from a complex, resource-heavy project into a streamlined, self-service experience.

Automated data preparation powered by AI turns noisy enterprise content into high-quality training sets with minimal effort. This automation minimizes the need to manually label by requesting human input only where model confidence is low. The automation lets you cut down on data labeling effort.

Finally, This feature saves you the effort of creating specialized data processing and training pipelines.

Security

Copilot Tuning offers enhanced security compared with conventional fine-tuning techniques by ensuring that only users with the right access controls—defined by your existing [Microsoft Entra Security Groups](#)—can use the model when building Microsoft 365 Copilot agents. Admins can also quickly remove models from production, further enhancing security.

Nobody sees your data, not even during training. All training and inference happen in tenant-isolated environments.

What kind of tasks can Copilot Tuning perform?

Currently, you can use Copilot Tuning for the following tasks:

1. Q&A: Expert question and answer can accurately answer questions in complex knowledge domains such as HR and professional services scenarios where RAG alone would be insufficient.
2. Document generation: Document generation excels in creating complex, structured documents that must follow specific formats, such as agreements, contracts, and technical documentation.
3. Document summarization: Document summarization precisely distills complex information—such as regulatory or legislative analyses—into tailored summaries.

Eligibility

Copilot Tuning is an Early Access Program (EAP). See [Introducing Microsoft 365 Copilot Tuning](#) for more details on EAP eligibility.

In an organization where Copilot Tuning is available, a Microsoft 365 admin controls access. The admin can activate Copilot Tuning for the organization or tenant level. The admin can also limit access to this feature for specific users in the organization.

Access Copilot Tuning in Copilot Studio

Once your Microsoft 365 admin makes Copilot Tuning available in your tenant and grants you model-making permissions, you receive an email inviting you to start building your first model with Microsoft Copilot Studio.

To access Copilot Tuning, do the following:

1. Sign in to [Copilot Studio](#) using a user account with the **Model Maker** role.
2. In the left navigation, select the three dots (...) and then select **Copilot Tuning**.

The **Copilot Tuning** page opens.

If you don't see this option, Copilot Tuning isn't available for your tenant or you don't have permissions to create fine-tuned models.

Create a fine-tuned model

Copilot Tuning is a multi-step training process. As with any machine learning training process, the quality and quantity of training data are critical to the success of the model.

 **Note**

Copilot Tuning currently only supports Sharepoint files and is limited to Word documents, PDFs, and text files.

Configure basic model parameters

First, configure high level parameters for what you want your model to do, how it should behave, and the appropriate data sources to use.

1. Go to the **Copilot Tuning** page and select **Create a new model**. You're taken to a **Customize your model to your task** page.
2. Enter a meaningful name and a description for your model.

Describe the model in a way that users in your organization can quickly understand how it can help them in their work.

3. Under **Choose knowledge sources**, select **Add knowledge**.

The **Add knowledge to your model** page appears.

- a. Select a knowledge type. Currently, SharePoint is available.
- b. Select a knowledge source. Browse on your computer for a SharePoint file or enter a URL for the source, and then select **Add**.
- c. Repeat the previous step as needed to add more knowledge sources.

- d. When you're done adding knowledge sources, select **Add** to proceed.
4. Under **Permissions**, specify the Microsoft Entra security groups that should have access to the model when it deploys.
- Copilot Tuning automatically excludes from training any files that your selected security groups can't access. Copilot Studio also automatically suggests other security groups to maximize the breadth of knowledge you can securely incorporate in your model.
5. Under **Task type**, select the desired task type.
6. In the **Model Instructions** section that appears, answer the questions as directed. Enter instruction information as directed. For full details, consult the detailed task-specific guidance in the Microsoft 365 Copilot Tuning documentation.

- [Configure Copilot Tuning for expert Q&A](#)
- [Configure Copilot Tuning for document generation](#)
- [Get started with Copilot Tuning summarization](#)

The model instructions help Copilot Studio identify and prepare the most relevant data from your knowledge sources. Good model instructions provide the model with cues for how to interpret data during the training process.

7. Select **Save draft** to save your progress, or, if you're ready to proceed with the fine-tuning process, select **Prepare labeling data**.

Copilot Studio starts preparing the data for labeling.

Copilot Studio informs you if some of your chosen knowledge sources aren't available for the chosen security groups. Copilot Studio automatically suggests other security groups to maximize the breadth of knowledge you can securely incorporate in your model.

8. Make adjustments to the security groups to expand coverage as desired, and then select **Proceed with selection**.

Copilot Studio prepares the data for labeling.

Important

Depending on the size of your data, the preparation can take up to 24 hours to complete. While the preparation is happening, you can continue to work in Copilot Studio or close the browser tab and return later. You receive an email notification once this step is complete. You can check status at any time by returning to Copilot Studio and refreshing the model list.

Label the training samples

Once your data is processed, Copilot Studio sends an email notification indicating that your data is ready for labeling.

Copilot Studio presents you with generated training examples relevant to the task and the data you provided. You must review the examples and provide feedback on sample quality.

Labeling is a crucial step as it would essentially teaching the model how to identify ideal training examples. Make sure individuals with domain expertise perform this task. If you aren't a domain expert, you can delegate labeling tasks to subject matter experts via a built-in labeling management workflow.

The labeling process generally goes through multiple batches. Training a model can require up to four to five batches of labels.

Once the labeling is complete, you're ready to train your model. Select **Start Training** to continue.

Train the model

Copilot Studio trains the model using the labeled data. Training is a fully automated process that requires no further input from you.

 **Important**

Depending on the size of your data, the training process can take up to 24 hours.

You receive an email notification once the training is complete. You can also check status at any time by returning to Copilot Studio and refreshing the model list.

Evaluate the model

In the final phase, you get a set of side-by-side comparisons between what results from the fine-tuned model output versus results from the baseline, non-fine-tuned model. If you want to continue to improve the quality of the model's responses, you can begin a new model training run.

To improve model outputs in your next training run, ensure your dataset is well-aligned to your model's specific task and that your data are labeled by domain experts.

Publish the model to Microsoft 365 Copilot

Once you're satisfied with the model's output, publish the model to your Microsoft 365 tenant catalog.

Your model is now available for use by your tenant's agents for Copilot.

(!) Note

Only members of the security groups you selected at the start of the fine-tuning process can use the model in agents.

For more information about how to use the model in agents for Copilot, see the Microsoft 365 Copilot documentation.

Limitations and restrictions

There are some limitations and restrictions to be aware of when creating fine-tuned models:

- If you add knowledge sources after training the model, you must restart the fine-tuning process from scratch.
- Copilot Studio doesn't yet support model versioning.
- If a user whose data has been used in training a model submits a valid deletion request under GDPR (or similar regulations), you must retrain the model.
- When you fine-tune a model, the model weights are adjusted based on the training data. You can delete the fine-tuned model at any time.
- You're responsible for how data is collected, stored, and used within your tenant environment.
- You must ensure that your data practices meet legal requirements for transparency, consent, access, and deletion.
- You're responsible for verifying the accuracy, appropriateness, and compliance of any outputs generated from this system before using them. Verification might require reviewing with the subject matter experts.

Related content

- [Copilot Tuning overview](#)
- [Configure Copilot Tuning for expert Q&A](#)
- [Configure Copilot Tuning for document generation](#)
- [Get started with Copilot Tuning summarization](#)

Configure Copilot Tuning for document generation

07/17/2025

Initial drafts of new documents can be generated using a custom document generation model trained with Copilot Tuning. Copilot Tuning document generation models use an original input document and specified changes to create a draft of output file.

Document generation works best when the drafting process follows recognizable patterns and requires incorporating consistent modifications across similar types of documents. This approach streamlines the creation of first drafts, reducing manual editing time and promoting consistency across your documents.

ⓘ Note

Copilot Tuning is currently available for Early Access Preview (EAP). For details about requirements and how to enroll, see the [admin guide](#).

Some example use cases include:

- Human resources – Generate new job listings matching your organization's tone and structure based on existing job listing templates and information about new jobs.
- Legal – Draft recurring contracts quickly and consistently based on previous contracts and new or updated contract terms.
- Compliance – Create new compliance forms based on an approved form template and information tailored to new clients, deals, or jurisdictions.
- Procurement – Create draft purchase orders using previous purchase orders and information about new purchases.
- Documentation – Draft new product or feature docs based on existing documentation templates and information about new products or features.

Prerequisites

- You must have permission to use Copilot Tuning in Copilot Studio.
- A collection of original documents and corresponding final draft documents that are stored in SharePoint.
- A collection of changelogs or specifications stored in SharePoint.
- A structured version of required changes to provide in the supplementary field within Copilot Tuning.

- More than 20 well-aligned pairs of reference documents to target pairs that reflect a representative range of changes you expect the system to handle.

Important

Document generation supports working with the following file formats: .doc, .docx, .html, .md, or .pdf. Copilot Tuning only uses information found in text. Copilot Tuning document generation doesn't use information in images, tables, or unstructured web content in your documents.

Create a document generation model

The following are the high-level steps to configure a custom document generation model using Copilot Tuning.

- ✓ [Prepare a mapping file](#) to identify pairings of original files and final draft files in the training data
- ✓ [Customize the model](#)
- ✓ [Select security groups](#)
- ✓ [Label training data](#)
- ✓ [Train the model and evaluate results](#)
- ✓ [Publish the model](#)

Prepare a mapping file

Your knowledge source should have more than 20 example pairs of original files and corresponding final (draft) files. In this step, you prepare a CSV file that provides more than 20 examples of original files to final (draft) documents. Copilot Tuning uses these examples to fine-tune the generation logic, helping the model learn how your organization typically edits or adapts documents.

Create a file named **mapping.csv** and store it in the root directory of your knowledge source. This file should have two columns:

- The first column is named `precedent` and contains the path to an original file in the data source.
- The second column is named `target` and contains the path to the final draft file in the data source that was created using the original file as a basis.

CSV

```
precedent,target  
"https://contoso.sharepoint.com/sites/ProductSpecs/Shared%20Documents/Mark-8-  
FAQ.docx",  
"https://contoso.sharepoint.com/sites/ProductSpecs/Shared%20Documents/mark-8-  
faq.md"
```

Customize the model

To customize the model:

1. Open [Copilot Studio](#) in your browser. In the left-hand navigation bar, select the ellipses (...), and then select **Copilot Tuning**.
2. Select **Create new**.
3. Enter a name for your model and provide a description of what the model does. Ensure that the model name and description are user-friendly and clearly describe the purpose of the model.
4. Select **Add knowledge** to select the SharePoint location that contains your training data.
5. Under **Permissions** you can enter security groups or email addresses of the individuals who should be able to use this model. Copilot Tuning ensures that any knowledge that isn't accessible by these selected security groups is filtered out. If you don't explicitly give permissions, the model is only accessible to you.
6. Set the task type to **Document generation**.
7. Provide **Model Instructions** about your scenario. Instructions ensure Copilot Tuning is using the terminology your organization uses and evaluates your models output using the criteria one of your users would use to evaluate the document. It's important to accurately answer these questions because this information cues the system how to interpret the underlying data.
8. Select **Prepare labeling data**.

Copilot Tuning begins analyzing the ACLs of the training documents. Based on the size of your dataset, this step might take up to 24 hours. Copilot Tuning sends you an email when it's ready for you to go to the next step in the model creation process. In the meanwhile, you can check the status of the model from the Copilot Tuning landing page.

Review Copilot Tuning ACL analysis

Copilot Tuning analyzes the document access control lists (ACLs) of the training documents and then filters out any knowledge that isn't accessible to the security groups selected in the previous step. Copilot Tuning might suggest more security groups based on its analysis to ensure access to the training data.

Based on the size of your dataset, this step might take up to 24 hours. Copilot Tuning sends you an email when it's ready for you to go to the next step in the model creation process. In the meanwhile, you can check the status of the model from the Copilot Tuning landing page.

Label training data

Preparing high-quality datasets for fine-tuning can be time-consuming and often requires multiple iterations and input from data scientists. Copilot Tuning simplifies this process by automatically identifying which of your provided document pairs are most effective for fine-tuning. This learning process is iterative, and at times, Copilot Tuning might send an email asking you to label files to improve its understanding of what constitutes a high-quality target. When you receive an email indicating that data is ready for labeling, follow these steps to complete the process.

1. Open [Copilot Studio](#) in your browser. In the left-hand navigation bar, select the ellipses (...), and then select **Copilot Tuning**.
2. Select the model that is ready for labeling to open the labeling form.
3. The labeling form provides sample documents that Copilot Tuning identified as example final draft documents. Examine each document and label whether or not you think the document is a good example draft document. Once you label all of the documents, submit the labeling form.

Copilot Tuning continues preparing the training data based on your input. Based on the size of your dataset, this step might take up to 24 hours. You can return to the Copilot Tuning landing page and see the status of your model configuration. Your model configuration might ask you to label more data, might be processing the data in your knowledge source, or it might be ready to fine-tune the model. Copilot Tuning sends you an email when it's ready for you to go to the next step in the model creation process.

Train and evaluate results

When sufficient data is prepared by Copilot Tuning, you can proceed with training the model. Fine-tuning of your model occurs in Azure AI Foundry. After the model is fine-tuned, Copilot Tuning generates results that you can review to evaluate if the model is of sufficient quality to deploy.

1. Open [Copilot Studio](#) in your browser. In the left-hand navigation bar, select the ellipses (...), and then select **Copilot Tuning**.
2. Select the model that is ready for training to open the model configuration dialog form.
3. Select **Start model training** to begin fine-tuning of your custom model.

Based on the size of your dataset, the fine-tuning step might take up to 24 hours. You can return to the Copilot Tuning landing page and see the status of your model.

If the results don't meet your expectations, you can go to the previous steps in the flow to add more data sources, adjust the model instructions, or provide more samples in your mapping file. Retrain the model until document generation results meet expectations.

Publish the model

When the model generates results that meet your quality standards, you can publish the model through the Copilot Tuning interface. Publish the model by selecting the **Publish model** button. The model is deployed to an isolated and secured environment. It's only accessible to the security groups or users that were selected during model customization.

Related content

- [Microsoft 365 Copilot Tuning overview \(preview\)](#)
- [Microsoft 365 Copilot Tuning FAQ](#)
- [Create declarative agents with Copilot Studio agent builder and Microsoft 365 Copilot Tuning models.](#)
- [Troubleshooting document generation models.](#)

Configure Copilot Tuning for expert Q&A

07/17/2025

Copilot Tuning models are designed to provide complex, domain-specific answers for user queries within your organization. These models require structured domain content and integrate with Copilot agents for interactive query processing. Explore best practices, scenarios, limitations, and requirements for effective implementation of expert question & answer (Q&A) scenarios.

(!) Note

Copilot Tuning is currently available for Early Access Preview (EAP). For details about requirements and how to enroll, see the [admin guide](#).

Capabilities

You can use the model maker to fine-tune a model that can complete the following capabilities:

- Acts as a special-purpose Declarative Agent trained on proprietary tenant knowledge in specialized domains (for example, telecom, tax, or human resources) that aren't available on the open web.
- Answers complex, domain-specific questions by reasoning across multiple documents and making sense of distributed content (for example, comparing regulatory implications across regions).
- Delivers context-rich, nuanced answers using a fine-tuned large-language model (LLM) trained to correlate domain-specific content across documents.
- Maintains scenario-appropriate tone, such as using an empathetic tone for HR-related responses.
- Uses the Microsoft 365 Copilot Search stack for real-time enrichment, especially for recently added or updated content.
- Preserves security and access controls by using Microsoft 365 security groups to gate model training and access.

Limitations

The model supports various document formats, with the following specific limitations:

- Content must be stored in SharePoint and be in supported formats (.docx, .pdf, .aspx); elements like embedded images or tables aren't supported.
- Not intended for general productivity or web-wide knowledge queries; it's limited to tenant-specific content and not suitable for tasks like managing meetings or browsing general internet data.
- Depending on the snapshot time of training data, newer content must be enriched via Search.

Prerequisites

Before you start, make sure that you have the following prerequisites in place:

1. You must have domain-specific content or documentation, such as legal playbooks, HR guidelines, technical documentation, policy manuals, or departmental procedures, that the model can use to answer questions. The content set that you use to train the model must consist of more than 20 files.
2. Configure the model agent with a Microsoft Entra ID security group or distribution list and create your own Entra ID groups to be added to the model.
3. Identify where your content is stored in SharePoint.

Set up an expert Q&A model

Set up an **Expert Q&A model** using the Copilot Tuning model maker in Microsoft Copilot Studio.

Model maker workflow

To set up an Expert Q&A model:

1. In Copilot Studio, select **Create a new model**, and provide the model name and description.
2. Click **Add knowledge** to add the sources your model is trained on.
3. Choose permissions. Copilot Studio checks the permissions for the selected content to ensure the security group or groups have appropriate access. Any inaccessible content isn't used during the training process.
4. Select the task type.
5. Continue to **Model instructions** to customize the behavior of your agent, like its tone, how it responds, and its primary objective. These instructions help shape how the model responds to users, so be clear and specific. For example, for legal content, you might ask for concise, professional replies.

6. Click **Prepare labeling data**. Your model is now available in the Copilot Tuning dashboard.

Once your model starts processing the knowledge sources, you'll receive an email notification within 24 hours confirming that your model is ready for training.

Related content

- [Microsoft 365 Copilot Tuning overview \(preview\)](#)

Get started with Copilot Tuning summarization

06/17/2025

Copilot Tuning summarization generates high-quality summaries from complex documents presented in your organization's communication style. Summary generation rephrases complex documents and can generate consistent outputs like:

- Automated executive reports
- Business contract abstracts
- Regulatory and internal documentation

Summarization is ideal when an organization has a high volume of documents that require consistent summaries in a particular style.

You customize Copilot Tuning summarization for your enterprise through fine tuning. Copilot Tuning maintains a consistent communication style for your organization, using text-based documents and summary pairs provided as training input. It operates in a tenant-specific, isolated environment within Microsoft 365, respecting the privacy commitments for your business. User data remains isolated within your tenant, safeguarding access by other entities.

(!) Note

Copilot Tuning is currently available for Early Access Preview (EAP). For details about requirements and how to enroll, see the [admin guide](#).

Key capabilities

Copilot Tuning summarization creates structured summaries with the following properties:

- Extraction and rephrasing of key information based on training examples
- Maintenance of the original document structure that prioritizes key information
- Summarization in the organizational voice and style

At the heart of Copilot Tuning is a customized large language model (LLM) tailored to your organization using advanced prompt and modeling techniques. This model ensures efficient and accurate generation summaries, consistent with the organization's voice, tone, and style.

Copilot Tuning employs training approaches like few-shot, fine-tuning, and retrieval-augmented generation (RAG) for enhanced agility and precision. These models improve

productivity, ensure consistency across outputs, and integration with Microsoft 365, while mitigating risks associated with domain-specific terminology and confidential data.

Model training requirements

The model training process requires input parameters that support text-based document and summary pairs in the following formats:

- .docx
- .pdf (with selectable text)
- .aspx format

These original document and summary pairs are required for training purposes to align the generated summaries to organization communication style.

Model training setup

Copilot Tuning summarization has a straightforward model training process:

1. Data extraction: Information is sourced from platforms such as SharePoint. Document and Summary pairs are organized into structured formats ready for supervised training.
2. Data processing: Parent, document, and target tables are used as data sources for the training library.
3. Fine-tuning: Supervised fine-tuning aligns the model with your organization's specific tone and style using the provided document and summary pairs. Validation involves checking for preservation of key information and tone, using reserved test data and performance metrics.

This training aims to reduce discrepancies between current predictions and desired outputs based on the training examples. The model is trained on the document and summary pairs using a single pass. The retrieved data is processed using an LLM to create a customized summarization model that aligns closely with the user's existing output style, allowing fast and accurate inference.

The supervised fine-tuning step considers real-world training samples, allowing it to recognize key sections of a document and produce summaries efficiently and effectively.

Model inference

The inference for Copilot Tuning summarization enables users to submit documents through platforms like Word, SharePoint, or Teams to obtain summaries in familiar environments. When a user provides a source document, the fine-tuned model efficiently creates a concise summary in short processing time while maintaining tone and document structure.

Summary generation is prioritized to extract key sections, clauses, and the document's core meaning, reflecting what's deemed most important according to the training examples. These summaries allow users to focus on value-add activities rather than manually reviewing documents to create summaries from scratch.

Feedback from users plays a pivotal role in maintaining summary quality and allowing for continuous improvement of the model's performance.

Copilot Tuning summarization is available within Microsoft 365 apps (like Word, SharePoint, or Teams) via declarative agents in Copilot where documents are submitted to Microsoft 365 Large Language Model in Azure AI.

Enterprise integration

Copilot Tuning summarization embraces existing user workflows within the applications they already use and supports training process to create document summaries specific to organizational use-case like meetings or business reports.

Related content

- [Microsoft 365 Copilot Tuning overview \(preview\)](#)
- [Microsoft 365 Copilot Tuning FAQ](#)
- [Create declarative agents with Copilot Studio agent builder and Microsoft 365 Copilot Tuning models.](#)

Troubleshoot Copilot Tuning document generation

06/17/2025

This article describes some of the most common issues with the Microsoft 365 Copilot Tuning document generation process and how to troubleshoot them.

ⓘ Note

Copilot Tuning is currently available for Early Access Preview (EAP). For details about requirements and how to enroll, see the [admin guide](#).

I'm unable to locate the correct SharePoint site for my knowledge sources

If you can't find the SharePoint site that contains the files you need 4, contact your IT administrator. You might need permission to view those files.

Preparation steps are taking too long

Sometimes, service queues might experience delays that affect document processing times. In addition, resume processing might delay in updating the UI, making the issue appear unresolved. If the preparation process takes over 10 minutes to complete, try refreshing the page. Otherwise, check for potential errors in the processing logs.

I'm seeing an error during the data extraction process

If an error occurs during knowledge source extraction, click the **Models** link on the left navigation pane to view the list of files in your model. Check the status in the right column to identify errors in copying SharePoint data into Heron.

The Excel file is empty, and I can't label any data

Verify whether you are configuring the knowledge sources correctly and uploading a clean Excel file again. If the problem persists, contact the team for assistance.

The evaluation report for the model is negative

Improve the model instructions iteratively to prevent common errors in tenant document generation or summarization models. To improve accuracy, add more data, fix labeling issues, or address data setup problems.

I'm encountering issues when trying to upload my labels

To resolve this issue:

1. Download a clean Excel file from the current application state.
2. Correct the sheet.
3. Retry uploading the file.

Formatting or validity issue with the final Word document

Improve the model instructions to prevent common errors in tenant document generation or summarization models. Add more guardrails to help prevent tenant-specific formatting issues.

Generated documents differ from the training data

Check the format of the input data to ensure that it matches the data used during model training.

If you need support or want to provide feedback, see [Copilot Tuning FAQ](#).

Related Content

- [Microsoft 365 Copilot Tuning overview \(preview\)](#)

Troubleshoot issues with the Copilot Tuning Expert Q&A model

06/17/2025

This article describes some of the most common issues with the Microsoft 365 Copilot Tuning expert Q&A task fine-tuning and how to troubleshoot them.

Note

Copilot Tuning is currently available for Early Access Preview (EAP). For details about requirements and how to enroll, see the [admin guide](#).

I get a permission or access error when connecting to my content source

An access or permission denied error usually means your account doesn't have the rights to that data source. Make sure you have the appropriate permissions for the content repository. For example, if you're adding a SharePoint site, confirm with your SharePoint administrator that your account (or a group you belong to) has access to that site or document library. If the fine-tuning process uses a security group for access control, make sure that the correct security group is set up and that your user account is included in it before you retry the operation.

I created a fine-tuned Q&A model, but it isn't showing up when I try to add it to my Copilot agent

If your newly trained model isn't listed in the selection dropdown when you configure your declarative agent, you might have a permissions issue. The model is associated with a security group or access policy, and your account might not be included. Make sure that the security group used during the model creation includes your account (or the account of the person building the agent). You might need to ask your IT admin to add you to that group or recreate the model with a group that you are part of. When your permissions are fixed, the fine-tuned model should appear for selection.

When I click "Prepare data for training," no labeling interface or data appears

Some fine-tuning scenarios don't require manual labeling of data. In the Q&A fine-tuning pipeline, if the system doesn't present any data to label after preparation, it means that step is automatically skipped for your scenario. In other words, not all recipes require a labeling stage. You can proceed to the next step of the process. (If you expected a labeling step but didn't get one, the system might have determined that there's nothing to label, which is normal for certain Q&A tasks.)

The data processing stage is taking a long time

The data preparation or training phase can take quite a while, depending on the size of your content. It's normal for this stage to take several hours, especially if you provided a large document collection. You should receive a notification (for example, an email) when the processing is complete. If you haven't received a notification yet, be patient - it likely means the process is still running. If it's been more than a few hours, check your spam or junk email folder to make sure the notification didn't get misfiled. You can also manually refresh or revisit the fine-tuning page. When the processing is finished, the status on the site indicates that the data is ready or the next step is available.

I didn't get an email notification that my data processing finished

Double-check your email spam or junk folder for a message about the fine-tuning process having completed. Sometimes, automated notifications can be filtered out. If you don't find an email, don't worry - you don't need the email to proceed. Go back to the fine-tuning interface and check the status of your model there. If the preparation step is completed, the interface will show that your data is ready for the next step (for example, ready for evaluation or ready to train). At that point, you can continue with the fine-tuning workflow even without the email.

The fine-tuning process stalled or failed partway through (with or without an error status)

If the training/fine-tuning process fails or hangs without a clear error message, the system might not have provided feedback. The current system has limited error handling, so occasionally it might just stop without a specific error code or explanation.

To troubleshoot:

1. Retry the process - In some cases, rerunning the fine-tuning process or restarting from the last step can resolve a transient issue.
2. Make sure any configurations are set correctly and try again.
3. Check for known issues - See if any error message was logged or displayed. If you find an error code, follow the guidance associated with that error code. Documentation or forums might have additional information for specific errors.

Contact support if the issue persists.

My evaluation (test) dataset came back empty, or I see 0 Q&A pairs generated for evaluation

An empty evaluation file usually indicates that the system could not generate any Q&A samples from your content. One common reason is that the content collection you provided was too small or had no usable data. The model didn't have enough material to create Q&A examples.

To address this:

1. Verify your knowledge source content - Double-check that the documents or data source you selected contain the information you expect. If the content repository was empty or too limited, add more relevant documents and then rerun the fine-tuning process.
2. Run the process again - After you ensure that the content is in place, try the prepare data or fine-tuning step again. This time, it might produce a set of Q&A pairs for evaluation.
3. If it's still empty, seek help - If you still get an empty evaluation or an empty training set, there might be an underlying issue. Contact support for assistance. They might check whether any filtering rules or errors caused your data to be discarded. In rare cases, strict filtering or all content being out of scope can result in no data; support can help identify whether that happened.

The model training finished, but the *answers it gives seem strange or irrelevant ("weird")*

If your fine-tuned Q&A model's responses are not making sense or seem unrelated to your domain, the culprit is often the training data quality or quantity. A model can only perform as well as the data it was trained on. Here are steps to troubleshoot a "weird" or low-quality model output:

1. Ensure sufficient training data: Check that the knowledge source you provided has enough useful content. If your content collection was very small or empty, the model may have essentially trained on nothing, resulting in effectively a "vanilla" or nonsense model[1]. Make sure you include enough documents or Q&A pairs covering the subject matter you expect the model to handle.
2. Provide relevant data: If the model's answers are off-topic, some of your training documents might not match the intended domain. For example, if you're building a finance Q&A bot but the content fed in was mostly generic or unrelated, the model won't have the right knowledge. Refine your content to be more relevant to the expected questions.
3. Retrain after improvements: After adding more or better data, run the fine-tuning process again. Improving the dataset often leads to a direct improvement in answer quality.

If you've done the above and the model's answers are still incorrect or incoherent, consider reaching out to support. There could be an edge-case issue with the fine-tuning pipeline itself. But in most cases, bolstering your training data (or adjusting the task instructions) should greatly improve the model's responses.

The model's evaluation answers looked good, but the agent's answers aren't good

This is a known behavior. The fine-tuned model might perform well in the isolated evaluation, but the deployed agent's behavior can differ if the agent configuration doesn't fully carry over the model's nuances. In particular, the agent might need additional instructions to use the model effectively. To resolve this:

1. Compare evaluation vs. agent outputs - Identify what's missing or different. For example, maybe the evaluation answers had a friendly, empathetic tone that you liked, but the agent's answers feel more generic or terse.
2. Adjust the agent's instructions - In the agent builder, add or refine the system instructions or prompts for the agent. Reinforce the qualities you want that you saw in the evaluation stage. For example, add the instructions "Respond in an empathetic tone," or "Include the detailed steps if available."
3. Test again - After you update the instructions, test the agent with the same questions. The answers should align more closely with the fine-tuned model's expected behavior. This iterative tuning of the agent is sometimes necessary to get the best results. The fine-tuned model provides the knowledge, and the agent's instructions shape how that knowledge is expressed.

The answers from my Q&A agent are still not what I expected

If you find the overall answer quality unsatisfactory, you might need to refine your fine-tuning setup further. Consider these steps:

1. Improve or increase training data - Make sure that the dataset used for fine-tuning is high quality, relevant, and comprehensive for the domain of questions. If possible, add more examples or documents that cover the scope of queries you expect. A richer dataset can significantly improve the model's accuracy.
2. Refine the initial configuration - During the model setup, you likely provided some initial instructions or filled out a form (sometimes referred to as a questionnaire about the domain and task). Revisit those inputs. Edit or refine the task description and settings to better guide the model. For example, if you realize the model is answering at too high a level, make sure the instructions specify the desired depth or context.
3. Provide clear examples - If the system allows, give example Q&A pairs or further guidance. Some fine-tuning processes let you review or label data. Use that opportunity to teach the model what correct answers look like.
4. Iterate and test - Fine-tuning is often an iterative process. After making changes, retrain (or partially train if supported) and then test the Q&A agent again. Gradually, you can converge on better performance. Remember that open-ended or extremely complex questions might always be challenging, but the goal is to get the majority of expected queries answered well.

Some answers from the Q&A Copilot not have any citations

In the current version of the system, not every answer will include a citation, even if it's pulling information from your content. The Q&A fine-tuning pipeline works with retrieval - when the answer comes directly from retrieved documents (using the RAG retrieval component), the system will show citation links. However, if the answer is coming from the fine-tuned model's own knowledge (for example, something it learned during training that isn't a direct quote from a document), it might respond without attaching a source citation. This behavior is expected.

The presence of citations is generally a good sign that the answer used the documents you provided at runtime. Lack of a citation doesn't necessarily mean the answer is wrong; it might just mean the answer was generated from the model's internal knowledge, or the question didn't require retrieving a document.

If you believe an answer should have a citation (for example, it seems to be quoting a document you provided) but no citation is shown, verify that your knowledge sources were properly connected during the agent's run. It's possible that the agent answered from the fine-tuned model rather than the real document.

Keep in mind that an answer without a citation isn't unusual in some cases. You can always verify critical information by manually searching your source content, and if you feel something is missing a citation or is incorrect, use the feedback mechanisms in the tool to let the developers know (for example, by reporting a bad answer).

Related content

- [Microsoft 365 Copilot Tuning overview \(preview\)](#)

If you need support or want to provide feedback, see [Copilot Tuning FAQ](#).

Troubleshoot Copilot Tuning guardrails

06/17/2025

This article describes some of the most common issues with Microsoft 365 Copilot Tuning guardrails and how to troubleshoot them.

(!) Note

Copilot Tuning is currently available for Early Access Preview (EAP). For details about requirements and how to enroll, see the [admin guide](#).

System crashed, froze, or became unresponsive

Contact Microsoft support or your IT administrator—this is a technical problem that the user can't fix.

I get an error message when processing guardrails

If it's an AI model error (for example, Language Model API error), retry the analysis. If the error persists, retry and if that fails, contact Microsoft support or your IT administrator.

Guardrails are not flagging critical errors

Broaden the criteria in the guardrails rules. Add additional rules for key issues.

Guardrails are flagging false positives

Refine the criteria in the guardrails rules by following these steps:

1. Make sure that you use precise language and detailed conditions in your rules.
2. Include examples and illustrative content for clarity.
3. Use AND and OR grouping for conditions within rules to make them more relevant to different types of audiences.

Duplicate alerts for the same issue

Adjust the frequency and sensitivity. Test guardrails rules thoroughly before you deploy them. Consider testing the guardrails in test environments.

I need to broaden the criteria

To broaden the criteria, follow these steps:

1. Identify key issues.
2. Add rules that are specific to those concerns.
3. Test rules before deploying to production to ensure accuracy.

I need to handle duplicates

To handle duplicates effectively, follow these steps:

1. Identify overlapping conditions across rules.
2. Consolidate rules where possible to minimize overlap.
3. Configure threshold to control the sensitivity of flags or alerts when available.

Related content

- [Microsoft 365 Copilot Tuning overview \(preview\)](#)

If you need support or want to provide feedback, see [Copilot Tuning FAQ](#).

Troubleshoot the Microsoft 365 admin center task fine-tuning

07/17/2025

This article describes some of the most common issues with Copilot Tuning in the Microsoft 365 admin center and how to troubleshoot those issues.

ⓘ Note

Copilot Tuning is currently available for Early Access Preview (EAP). For details about requirements and how to enroll, see the [admin guide](#).

I don't see Copilot Tuning in the admin center settings

If you don't see Copilot tuning in the admin center, make sure you have the required prerequisites in place:

- You must have an AI Admin role.
- Your tenant must have at least 5,000 Microsoft 365 Copilot add-on licenses.
- You must accept the Early Access Preview (EAP) terms to enable the feature.

Setup is taking more than 5 minutes

If the setup takes more than 5 minutes, it might be due to service failures or other issues. If the setup isn't completed within an hour, reach out to your Microsoft EAP contact.

I accidentally deleted a model

If a model is deleted, it can't be recovered. Make sure you have the correct permissions and take necessary precautions to avoid deleting a model accidentally.

Insufficient training data

If the training data is insufficient, you get an error message. Make sure you have enough training data after filtering.

While completing the configuration, I get an error message

If you see an error message during the configuration, retry the process after some time. It might be due to service outages or other temporary issues.

Errors related to knowledge sources

If you enter a link to a knowledge source you don't have access to, an error message is displayed. Make sure you have access to the required knowledge sources.

Validation fails during the training process

If the validation fails, make sure all required fields are filled. If you ask seven questions, all seven must be answered.

Security group coverage issues

If the selected security groups don't have access to the required knowledge sources, choose a suggested set of security groups to share with. Make sure permissions are correctly set, and wait for them to sync.

Related content

- [Copilot Tuning admin guide](#)
- [Microsoft 365 Copilot Tuning overview \(preview\)](#)
- [Copilot Tuning FAQ](#)

Responsible AI FAQ for Microsoft 365 Copilot Tuning

06/17/2025

This FAQ article helps answer questions about the responsible use of AI in [Microsoft 365 Copilot Tuning](#).

ⓘ Note

Copilot Tuning is currently available for Early Access Preview (EAP). For details about requirements and how to enroll, see the [admin guide](#).

What is Microsoft 365 Copilot Tuning?

Copilot Tuning is a service that enhances the customization of Microsoft 365 Copilot and agents by fine-tuning models on tenant-specific data. With the capabilities provided by Copilot Tuning, organizations can use their proprietary data to improve the relevance and accuracy of AI-generated outputs. This fine-tuning ensures that the models understand and adhere to the unique terminology, workflows, and business processes of the organization.

Copilot Tuning enables the orchestration of custom workflows, allowing for the automation of complex business processes. By fine-tuning models on organizational data, Copilot agents can perform high-value tasks such as document generation, improved question answering, summarization, and others. These tasks are performed within the security and compliance boundaries of Microsoft 365.

What are the capabilities of Copilot Tuning?

The purpose of Copilot Tuning is to extend the capabilities of Microsoft 365 Copilot and agents by providing greater customization and control over AI-generated behavior and output. The fine-tuning process involves customizing a pretrained model by training it further on a specific dataset that is relevant to the desired application. This process allows the model to learn the unique terminology, workflows, and business processes of the organization, resulting in more accurate and relevant outputs.

What are the intended uses of Copilot Tuning?

Copilot Tuning and the adaptation and fine-tuning it provides to Microsoft 365 Copilot scenarios can be used for multiple purposes. The system's intended uses include:

- To enhance question answering quality. This use case includes improving response fluency, formatting, length, organization, multi-document reasoning, and domain-specific reasoning. For example, ensuring responses follow style guidelines and incorporate relevant domain-specific logic.
- To create drafts of specialized documents in accordance with standardized workflows. This use case includes merging various precedent documents and contextual information into a draft contract or report, while adhering to preferred style, organization, and other relevant specifications.
- To summarize documents. This use case includes extracting the essential points from documents pertinent to a specific task or objective, ensuring that the outputs are accurate and relevant while adhering to a desired structure and tone.

What should model makers consider when applying capabilities to specific tasks?

Copilot Tuning's fine-tuning and adaptation improves AI quality, but it can still occasionally make mistakes. When applying Copilot Tuning within a specific setting, customers should evaluate the quality of Copilot Tuning and its reliability for their scenario.

When using Copilot Tuning to improve question & answer scenarios, fine-tuning data should be used to tailor responses to be understandable and useful to the specific audience. In service scenarios, such as customer service or HR scenarios, we recommend that there be an escalation path to address potential mistakes.

When using Copilot Tuning to improve document generation and summarization scenarios, the generated documents or summaries must be considered drafts. A human should review the drafts for correctness.

The following use cases aren't supported:

- Using Copilot Tuning fine-tuning to circumvent other platform-level AI safety constraints. For example, fine-tuning a language model to generate toxic content.
- Uses or misuses of AI systems that could possibly result in significant adverse impact on individuals and society. Examples include consequential impacts on legal position or life opportunities, risks of physical or psychological injury, and threats to human rights.

Are there any limitations to Copilot Tuning?

Yes. The process of integrating tenant-specific data and workflows can be complex and time-consuming, requiring close collaboration between the customer and the deployment team. Furthermore, the system's effectiveness is dependent on the quality and availability of the organization's data, and there might be regional limitations in terms of deployment and support.

What can model makers do to improve performance or resolve errors?

While fine-tuning can teach Copilot new knowledge and skills, the AI can still make mistakes. It's important for a human to validate its output to ensure accuracy and relevance. Errors can occur due to inaccuracies in the training data, model limitations, or the complexity of the tasks being performed.

Curate training data

Curating and controlling access to training data is essential to mitigate the potential for data poisoning attacks and/or the inclusion of harmful content. Curating data involves implementing data validation and quality control measures, and appropriate restrictions on access to modify training data. Regular audits and monitoring of the data pipeline can help identify and address any anomalies or malicious activities promptly.

Best practices for improving performance

Preparing high-quality and comprehensive training data is critical for improving the performance of the Copilot Tuning. We recommend models be regularly updated based on new data and feedback.

How should model makers evaluate Copilot Tuning for specific use cases?

After using Copilot Tuning to create a task-specific, organization-specific agent, we recommend customers perform an evaluation of the agent to validate that its results are effective and appropriate for the task. If the results don't meet expectations, customers can adjust their training data or modify the instructions given to Copilot Tuning and repeat the fine-tuning process to achieve the desired results.

Related content

- Transparency Note for Microsoft 365 Copilot
- Microsoft 365 Copilot Tuning overview (preview)
- Microsoft AI principles ↗
- Microsoft responsible AI resources ↗
- Microsoft Azure learning courses on responsible AI

Microsoft 365 Copilot

08/12/2025

[Microsoft 365 Copilot](#) is an AI-powered productivity tool that uses large language models (LLMs) and integrates your data with the Microsoft Graph and Microsoft 365 apps and services. It works alongside popular Microsoft 365 apps such as Word, Excel, PowerPoint, Outlook, Teams, and more. Microsoft 365 Copilot provides real-time intelligent assistance, enabling users to enhance their creativity, productivity, and skills.

Available plan

For detailed plan information on subscriptions that enable users for Microsoft 365 Copilot, see the [Microsoft 365 business plan comparison](#) and [Microsoft 365 Enterprise plan comparison](#).

Microsoft 365 Copilot is an add-on plan with the following licensing prerequisites: [Product Terms](#).

Feature availability

Expand table

Feature	Description	Cloud environment - Worldwide	Cloud environment - GCC	Cloud environment - DoD
Microsoft 365 Copilot app	The Microsoft 365 Copilot app is your starting place for AI at work. It brings together Search, Chat, Agents, Pages, Notebooks, Create, and Microsoft 365 productivity apps in one place. The Microsoft 365 Copilot app is available as a web app and desktop apps for Windows and Mac devices.	Yes ¹⁹	Yes ^{17, 19}	Yes ^{17, 19, 20}
Microsoft 365 Copilot Chat	Copilot Chat is a secure, enterprise-ready AI chat powered by broad web knowledge, and the latest LLM models. It includes access to web-grounded agents at no	Yes	Yes ^{5, 10, 14, 18}	Yes ^{5, 10, 14, 18}

Feature	Description	Cloud environment - Worldwide	Cloud environment - GCC	Cloud environment - DoD
	<p>extra cost for commercial users with a Microsoft 365 license.</p> <p>Agents grounded in shared tenant work data are available on a consumption basis. The Microsoft 365 Copilot app serves as the starting point to chat with Copilot in the flow of work. Additionally, Copilot Chat is accessible in Microsoft Teams, Outlook, and the Edge Sidebar.</p> <p>Added value with a Microsoft 365 Copilot license: Copilot Chat becomes even more powerful, allowing you to access work data, files, meetings, and more, directly within the chat. Additionally, agents grounded in shared tenant work data are available at no extra cost. To learn more, see see ↗.</p>			
Microsoft 365 Copilot Search	<p>Copilot Search is an AI-powered search experience in Microsoft 365 Copilot that lets users ask natural language questions and instantly find relevant emails, chats, documents, and data across Microsoft 365 and connected services. It's secure, personalized, and designed to help IT and enterprise users find what matters fast.</p>	Yes	TBD	
Microsoft 365 Copilot Notebooks	<p>Copilot Notebooks is a secure, AI-powered workspace in Microsoft 365 that enables users to gather, synthesize, and act on organizational content for deep thinking and structured problem-solving. It brings together references from communications and files,</p>	Yes	Yes ¹²	Yes ¹²

Feature	Description	Cloud environment - Worldwide	Cloud environment - GCC	Cloud environment - DoD
	<p>enabling users to generate insights, audio summaries, and content drafts. Create notebooks for scenarios like quarterly forecasting, triaging support issues, or drafting strategy documents. Copilot Notebooks maintains a history of interactions to support continuity and reuse and supports real-time collaboration via Copilot Pages.</p>			
Microsoft 365 Copilot Pages	<p>Copilot Pages in Microsoft 365 Copilot Chat is an interactive canvas that allows users to turn Copilot responses into editable, shareable pages. This feature enhances ideation, collaboration and content creation by enabling real-time generation, organization, and refinement of content. Users can brainstorm ideas, develop frameworks or templates, and create various types of content directly within Copilot Pages, making it a versatile tool for different communication or collaboration tasks.</p>	Yes	Yes	Yes
Copilot Prompt Gallery	<p>Copilot Prompt Gallery helps users start their AI journey with confidence and take greater advantage of Copilot in their daily work. Explore and take inspiration from the curated selection of Copilot prompts, save and share your favorites.</p>	Yes	Yes	TBD
Copilot in Teams	<p>Copilot in Teams enables AI-based communication and collaboration, helping you focus on what matters most. Copilot can recap conversations, ensure content</p>	Yes	Yes ^{5, 6}	Yes ⁶

Feature	Description	Cloud environment - Worldwide	Cloud environment - GCC	Cloud environment - DoD
	<p>and meetings remain secure, organize key discussion points, and summarize key actions – or answer any questions you have chats, meetings, or calls.</p> <p>Copilot can also act as your personal writing assistant, drafting messages in the tone that best suits your needs.</p> <p>Whatever your collaboration needs, Copilot in Teams can help save time and unlock your creativity.</p>			
Copilot in Outlook	<p>Copilot in Outlook helps you stay on top of your inbox and simplify scheduling. Copilot surfaces high priority emails, summarizes why they're important and drafts contextual responses, written in your preferred tone. Copilot also makes it seamless to schedule meetings, turning emails or chats into meeting invites in just 1-click.</p>	Yes	Yes ^{5, 9}	Yes ^{5, 9}
Copilot in Word	<p>Copilot in Word transforms your writing with efficiency and creativity – create, summarize, comprehend, refine, and elevate your documents. Now you can use enhanced capabilities like visualizing and transforming text into a table, and automatic text rewriting. Some other capabilities also include generating images, summarizing and discovering information about your document.</p>	Yes	Yes ⁵	Yes
Copilot in Excel	<p>Copilot in Excel helps turn your data into actionable insights. Whether you're building a simple spreadsheet or</p>	Yes	Yes ^{5, 8, 15}	Yes ^{5, 8, 15}

Feature	Description	Cloud environment - Worldwide	Cloud environment - GCC	Cloud environment - DoD
	<p>conducting advanced data analysis, Copilot helps prepare your data, uncover trends, and generate visualizations. It simplifies complex tasks so you can focus on making informed decisions and sharing insights with clarity.</p>			
Copilot in PowerPoint	<p>Copilot in PowerPoint helps you turn your ideas into stunning presentations. As your storytelling partner, Copilot can help you get started by creating decks complete with images, speaker notes, and sources from a simple prompt. Copilot can also help translate content, summarize lengthy presentations, and easily add new slides. Some other capabilities also include generating images.</p>	Yes	Yes ⁵	Yes
Copilot in OneNote	<p>Copilot in OneNote helps you create, capture, organize, and recall information with confidence. As your note taking partner, Copilot uses your prompts to draft plans, generate ideas, create lists, organize information, and more.</p>	Yes	Yes	Yes
Copilot in Loop	<p>Copilot in Loop helps you unlock the power of shared thinking - co-create, get up-to-speed, and stay in sync with your teammates. Now you can iterate with Copilot collaboratively as a team, co-creating prompts and material, generating tables to help organize team projects, summarizing page content,</p>	Yes	Yes	

Feature	Description	Cloud environment - Worldwide	Cloud environment - GCC	Cloud environment - DoD
	and catching up where your teammates left off. Use Copilot in Loop for seamless collaboration.			
Copilot in Microsoft Clipchamp	Copilot in Microsoft Clipchamp (formerly Microsoft Stream) helps you get the information you need from any video with a transcript within seconds. You can use Copilot in Clipchamp to provide a summary of the video, answer specific questions, quickly jump to specific topics or points of discussion, and identify calls to action.	Yes	Yes	Yes
Copilot in Whiteboard	Copilot in Whiteboard helps you kickstart and accelerate your ideation process to generate, categorize, and summarize your ideas.	Yes		
Copilot in SharePoint	Copilot in SharePoint lets you instantly generate branded sites and pages from prompts or documents, rewrite content with AI, and apply site-specific Copilot skills to help users discover and engage with your content.	Yes	Yes	Yes
Copilot in OneDrive	Copilot in OneDrive lets you instantly summarize, compare, and ask questions across up to five files—including generating audio overviews of your content—all directly from File Explorer or OneDrive for Web, without opening a single document.	Yes	Yes	
Declarative Agents for Microsoft 365 Copilot	Declarative agents enable you to customize Microsoft 365 Copilot to help you meet the unique business needs of your	Yes	Yes ²¹	TBD

Feature	Description	Cloud environment - Worldwide	Cloud environment - GCC	Cloud environment - DoD
	<p>users. When you build a declarative agent, you provide the instructions, actions, and knowledge to tailor Copilot for your business scenarios.</p> <p>Declarative agents run on the same orchestrator, foundation models, and trusted AI services that power Microsoft 365 Copilot. By building declarative agents, you can optimize collaboration, increase productivity, and streamline workflows in your organization.</p>			
SharePoint agents	<p>Turn SharePoint sites and documents into scoped agents for specific needs, projects, or tasks. Every site includes a ready-made agent, or users can create their own customized agents based on files, folders, or sites they choose. They can also share the agent to a Teams chat or meeting.</p>	Yes	Yes	Yes
Microsoft 365 Copilot Connectors	<p>Copilot Connectors enable Microsoft 365 Copilot to access, retrieve, and reason over external data sources by integrating them into the Microsoft Graph. This allows Copilot to deliver richer, more personalized, and context-aware experiences. All eligible Microsoft 365 enterprise customers receive 50 million items of index quota at no extra cost. This quota is used for ingesting content via Copilot connectors.</p>	Yes	Yes ⁷ (CY25)	TBD ¹⁶
Power Platform ² Connectors	<p>Access enterprise business data from applications and services right in the Copilot experience,</p>	Yes	Yes ⁷ (CY25)	

Feature	Description	Cloud environment - Worldwide	Cloud environment - GCC	Cloud environment - DoD
	enabled by our fast-growing catalog of 1400+ Power Platform connectors.			
Microsoft Purview	Extend Microsoft Purview capabilities provided by your Microsoft subscriptions, for example, Microsoft 365 G3 or G5 subscriptions to Copilot data and interactions ⁴ .	Yes	Yes	Yes
Microsoft Copilot Dashboard	The Copilot Dashboard provides visibility into Copilot usage, adoption, and impact.	Yes	CY25 ¹¹	
Microsoft Viva Insights	With Viva Insights now included in Microsoft 365 Copilot, IT admins and analysts can tailor advanced prebuilt Copilot reports with their business data or create custom reports with organizational attributes, expanded Copilot usage metrics, and more granular controls. For full access to Viva Insights features such as advanced reporting and Copilot Dashboard, customers must have a minimum of 50 combined Insights and Copilot licenses.	Yes	CY25	
Microsoft 365 Copilot Usage Report	Microsoft 365 Copilot usage reports support license management and adoption strategy decisions with visibility into technical readiness information, license tracking, usage and consumption details, and adoption insights.	Yes	CY25 ¹³	

¹ Dynamics 365 licenses not included. [Learn more about Dynamics 365 licensing and pricing ↗](#).

² Power Platform licenses not included. [Learn more about Power Platform licensing](#).

³ Additional Graph Connector capacity available for purchase. [Learn more about Microsoft Graph licensing and pricing](#).

⁴ Refer to [Microsoft Purview data security and compliance protections for Microsoft 365 Copilot and other generative AI apps | Microsoft Learn](#) for more information.

⁵ Web grounding isn't enabled by default. For more information on web grounding, see [Data, privacy, and security for web queries in Copilot for Microsoft 365| Microsoft Learn](#).

⁶ Teams Meeting Copilot isn't available until Q1CY25.

⁷ External connections and 3rd party connectors aren't enabled by default.

⁸ [Clean Data with Copilot in Excel](#) ↗ isn't available in GCC/DOD.

⁹ [Schedule with Copilot](#) ↗ and Themes by Copilot scenarios aren't available in GCC at this time.

¹⁰ Microsoft 365 Copilot Chat is available with a Microsoft 365 Copilot license or [with a Microsoft 365 license](#) in the GCC cloud. It's only available with a Microsoft 365 Copilot license in the DOD cloud at this time.

¹¹ For more information, see [Connect to the Microsoft Copilot Dashboard for Microsoft 365 customers | Microsoft Learn](#).

¹² Copilot Notebooks would be available in Q3CY25.

¹³ Refer to the M365 Roadmap for release timelines. For more information, see [Microsoft 365 admin center Microsoft 365 Copilot usage - Microsoft 365 admin | Microsoft Learn](#).

¹⁴ Agents aren't currently available in GCC. Availability in DOD coming later.

¹⁵ [Copilot in Excel with Python](#) ↗ is only available in GCC on Win32/Mac and isn't available in DOD.

¹⁶ Copilot connectors aren't available in DOD environments. Refer to [Microsoft 365 Copilot Connectors Overview | Microsoft Learn](#).

¹⁷ The Microsoft 365 Copilot app is only available on the web for GCC/DoD cloud environments. Desktop apps for Windows and Mac devices aren't currently available.

¹⁸ Microsoft 365 Copilot Chat isn't available in the Edge sidebar for GCC/DoD cloud environments.

¹⁹ Copilot Notebooks, and AI-powered features in the Search and Create modules, are only available with a Microsoft 365 Copilot license.

²⁰ Copilot Notebooks isn't available for the DoD cloud environment.

²¹ For more information, see [Known Issues in Microsoft 365 Copilot Extensibility | Microsoft Learn](#).

Learn more

For more information about Microsoft 365 Copilot, check out the following resources:

- [Get admin documentation on Copilot for Microsoft](#).
- [Learn about Microsoft 365 Copilot through this video playlist](#) ↗.
- [Tips for driving adoption of Microsoft 365 Copilot on our Adoption hub](#) ↗.

Messaging

To stay informed of upcoming changes, including new and changed features, planned maintenance, or other important announcements, visit the [Message center](#).

Licensing terms

For licensing terms and conditions for products and services purchased through Microsoft Commercial Volume Licensing Programs, see the [Product Terms site](#).

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Microsoft remains committed to the security of your data and the [accessibility](#) of our services. For more information, see the [Microsoft Trust Center](#) and the [Office Accessibility Center](#).

Submit admin-initiated Copilot feedback from the Microsoft 365 admin center

Article • 03/28/2025 • Applies to:  Microsoft 365 Copilot

<https://learn-video.azurefd.net/vod/player?id=c67f2b9c-8ba4-44b5-8713-00063e92ba54&locale=en-us&embedUrl=%2Fcopilot%2Fmicrosoft-365%2Fprovide-feedback> ↗

Microsoft 365 Copilot is a product that helps users boost their productivity with large-language models (LLM). While Copilot is designed to provide accurate and informative responses based on the knowledge and data available in the Microsoft Graph, it's important to note that answers may not always be accurate. This is because Copilot generates responses based on patterns and probabilities in language data. Providing feedback is essential to improve the product and make it more dependable for users.

Microsoft 365 Copilot currently allows user-initiated feedback. As an admin, you can give feedback to supplement the user-initiated process. This helps Microsoft receive comprehensive diagnostic data to aid in debugging, especially in cases where users may not be able to provide feedback themselves. By providing feedback on behalf of your users, you can help enhance the overall experience of Copilot for your organization by improving the quality and relevance of its responses.

This article explains how you can initiate feedback on behalf of your users.

Prerequisites

Before you begin, you must have the following:

- A Microsoft 365 subscription with a Microsoft 365 Copilot license
- Global administrator or AI administrator role to complete the task in this article.
For more information, see [About admin roles in the Microsoft 365 admin center](#).
- An email address of the user who experienced an issue with Microsoft 365 Copilot.

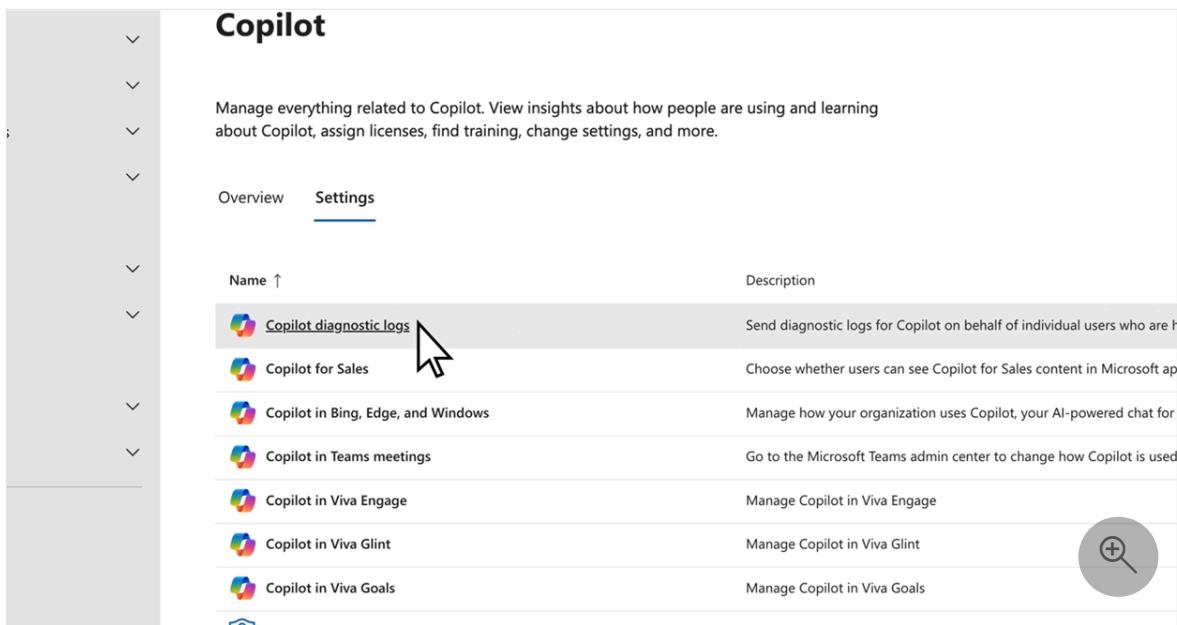
Steps to provide feedback to Microsoft

You can provide admin-initiated feedback for selected users across all Microsoft 365 apps where Copilot is available. To learn more about what apps have Copilot, see

Microsoft 365 Copilot overview.

To give feedback to Microsoft on behalf of a user who encountered a problem with Microsoft 365 Copilot, follow these steps:

1. Go to admin.microsoft.com and sign in with **Global Admin** or **AI admin** credentials. Select **Copilot** in the left navigation pane to enter the Copilot home page.
2. Find **Copilot diagnostic logs** and select it to open the Copilot feedback diagnostic logs pane. Review the information and then select **Get started**.



The screenshot shows the Microsoft 365 Copilot Settings page. The left sidebar has sections like Overview, Settings, Copilot for Sales, Copilot in Bing, Edge, and Windows, Copilot in Teams meetings, Copilot in Viva Engage, Copilot in Viva Glint, and Copilot in Viva Goals. The main area is titled 'Copilot' and contains a brief description: 'Manage everything related to Copilot. View insights about how people are using and learning about Copilot, assign licenses, find training, change settings, and more.' Below this, there are two tabs: 'Overview' and 'Settings', with 'Settings' being the active tab. A table lists Copilot products with their descriptions and a 'Send diagnostic logs' button. The 'Copilot diagnostic logs' row is highlighted with a cursor pointing at the 'Send diagnostic logs' button. A magnifying glass icon is in the bottom right corner of the table area.

Name ↑	Description
 Copilot diagnostic logs	Send diagnostic logs for Copilot on behalf of individual users who are h...
 Copilot for Sales	Choose whether users can see Copilot for Sales content in Microsoft ap...
 Copilot in Bing, Edge, and Windows	Manage how your organization uses Copilot, your AI-powered chat for...
 Copilot in Teams meetings	Go to the Microsoft Teams admin center to change how Copilot is used...
 Copilot in Viva Engage	Manage Copilot in Viva Engage
 Copilot in Viva Glint	Manage Copilot in Viva Glint
 Copilot in Viva Goals	Manage Copilot in Viva Goals

3. Enter the email address of the user who reported the problem. You can enter up to five users. Then, choose the relevant Copilot product from the list provided.
4. Select the specific date range for the feedback submission. The range can be up to the past 30 days.

The screenshot shows the Microsoft Copilot settings page on the Microsoft 365 Admin Center. A modal window titled 'Collect data' is open on the right side. The modal contains the following fields:

- Search for and select the users you want to submit logs for ***: A list box containing 'Mona Kane' and 'Kim John'.
- Select the product Copilot is in ***: A dropdown menu set to 'Teams'.
- Number of recent Copilot conversations to include in logs (max 30) ***: A dropdown menu set to '20'.
- Start date** and **End date**: Date pickers set to '07/12/2024' and '07/29/2024' respectively.

At the bottom of the modal are 'Next' and 'Cancel' buttons, and a magnifying glass icon.

5. Choose the number of rounds of conversations that you'd like to share with Microsoft, and then select **Next**.

⚠ Note

The maximum number of conversations you can share is 30.

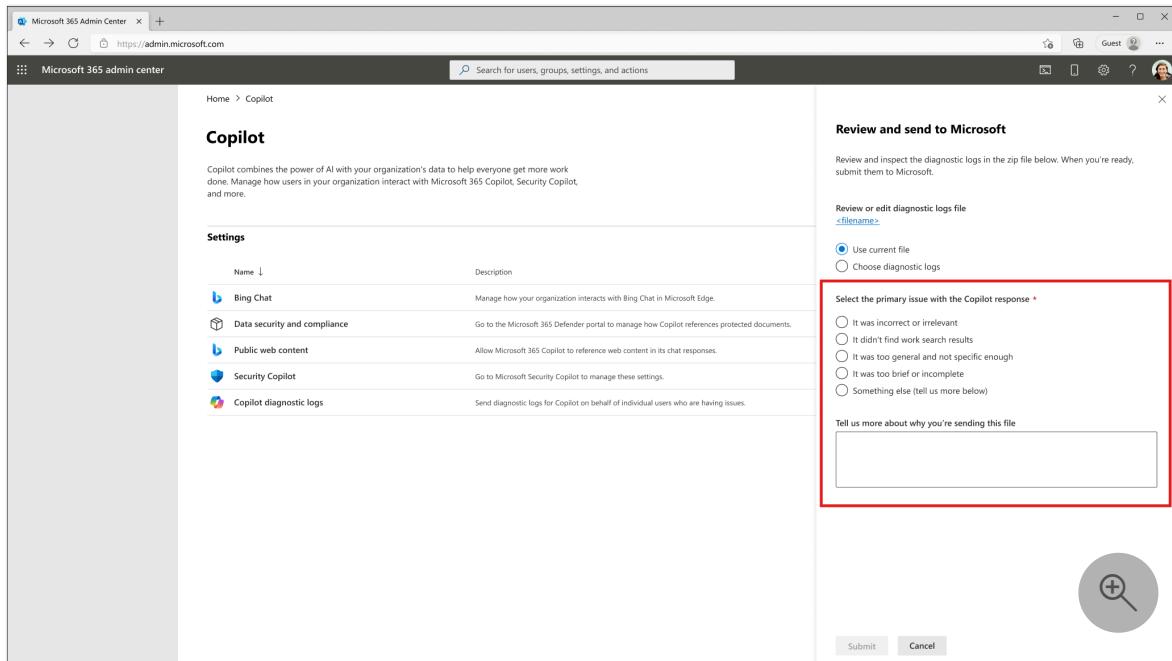
6. Review the available chat log prompt-response pairs. You can search using keywords or scroll through the list. Hover over each pair to view the full prompt-response pair. Select or deselect specific pairs to include in the feedback.

The screenshot shows the Microsoft 365 Admin Center with the 'Copilot' settings page. A modal window titled 'Select diagnostic logs' is open on the right side. The modal lists two diagnostic logs:

Prompt	Response	Email
Log	Prompt: Summarize my recent emails Response: 'Here's a summary of your recent emails...'	kjohn@contoso.com
Prompt: What do I have	Response:	Mkane@contoso.com

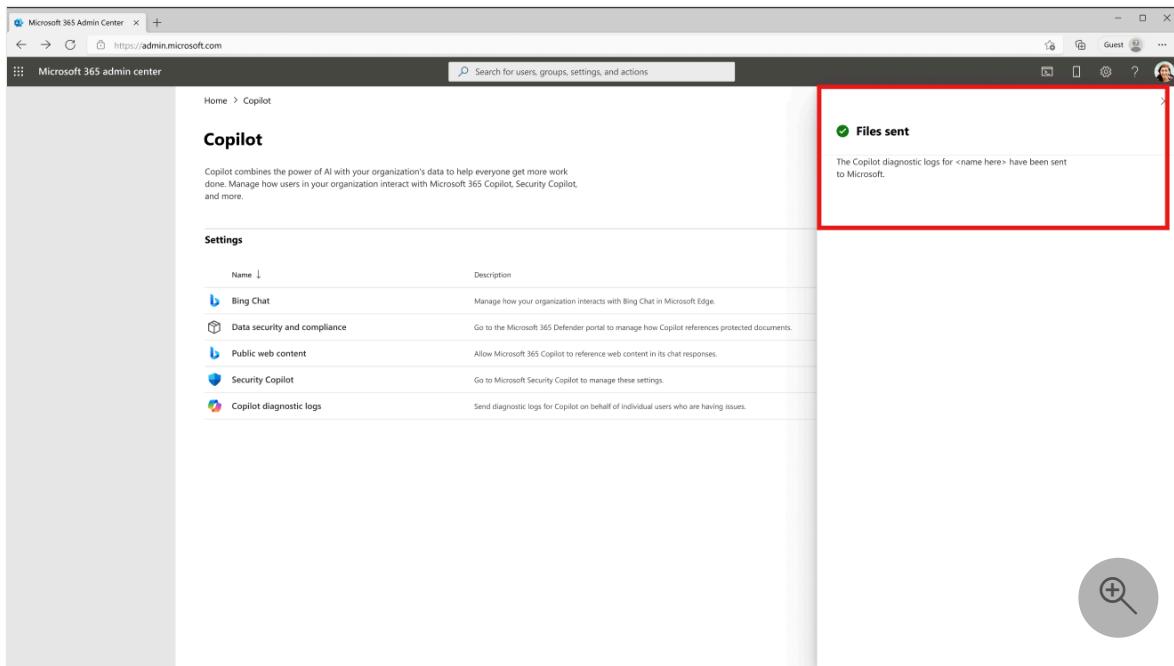
At the bottom of the modal are 'Update (1)' and 'Cancel' buttons, and a magnifying glass icon.

7. Choose from a predefined list of frequently occurring issues or enter the issue details in the text box.



8. Decide whether or not to move forward with the feedback submission to Microsoft. If you choose to share the data, select **Submit**. If you don't want to share the data, select **Cancel**.
9. If you choose **Submit**, make sure that all selected data is accurate and relevant. Once you've reviewed and confirmed all information, select **Submit** to send the feedback. You can view the submitted feedback under **Health > Product feedback** in the Microsoft 365 admin center.

If you select **Cancel**, no data will be sent to Microsoft, and you'll see cancellation message. Microsoft doesn't collect anything before you select **Submit**.
10. Once submitted, you'll receive confirmation that the feedback has been submitted to Microsoft.



11. The submitted feedback goes through a triage process and is assigned to the appropriate Microsoft product team. The product team will then connect with you to address the issue and provide updates.

Data protection and privacy

For more information on how Microsoft protects your data, refer to the Microsoft Privacy Statement and the Microsoft Copilot Terms of Use: [My Account - Settings & Privacy](#).

For more information about privacy with Microsoft 365 Copilot, see [Data, Privacy, and Security for Microsoft 365 Copilot](#).

Additional resources

- [Microsoft 365 Copilot help and learning](#)
- [Get started with Microsoft 365 Copilot for admins](#)
- [Data, Privacy, and Security for Microsoft 365 Copilot](#)
- [Microsoft 365 Copilot documentation](#)

Feedback

Was this page helpful?

 Yes

 No