

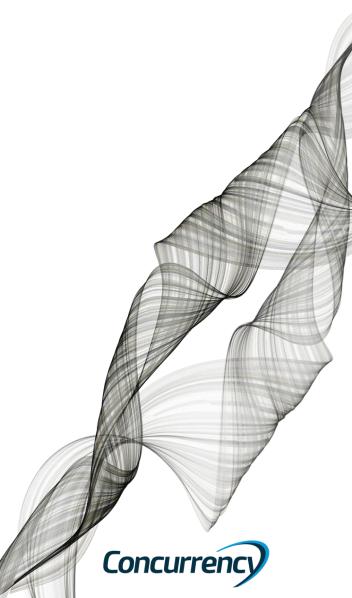
### Do you THINK you're ready for Copilot?

Friday, October 13, 2023 1:00 pm



Chris Blackburn

Explore the technologies driving CoPilot, delve into the essential Microsoft 365 business readiness configurations, and discuss the organizational changes required. Join us to discover how to activate and propel your journey into the future with Microsoft AI.





### Welcome to the MN M365 Fall Workshop Day 2023!

#### Please help us drive event awareness by tweeting and posting about your experience at the Workshop: @M365MN #M365WorkshopDay

#### Please join us following the sessions for Happy Hour... Admin Ales, Workshop Wine, and more!

Thank you for your participation!

Minnesota M365 Workshop Day Fall 2023



## **Thank You To The Sponsors!**

Stop by the Booths for "Vendor Bingo" to win prizes!



@M365MN

mn365.org

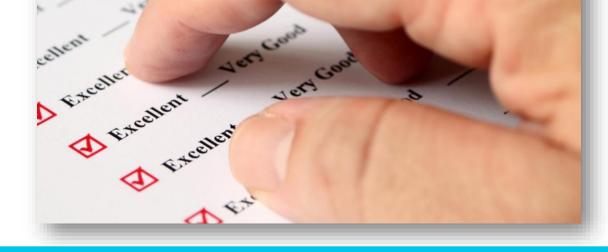


# Workshop Survey

#### MN365 Fall 2023 Workshop Day



### https://mn365.org/survey



@M365MN

mn365.org

## Agenda

#### • 10000 ft view

- What is Microsoft 365 Copilot?
- Privacy
- Data residency and storage
- Compliance
- Security
- Responsible
- Walk through of Microsoft 365 Copilot
- Q&A
- 1000 ft view
  - How Microsoft 365 Copilot works
  - Copilot for Everyone
  - Q/A
- Ground Level
  - How to prepare for Microsoft 365 Copilot
  - Walkthrough of E5 Security & Compliance

Concurrenc

• Q/A



## CoPilot 10000 ft View



### What is Microsoft 365 Copilot?



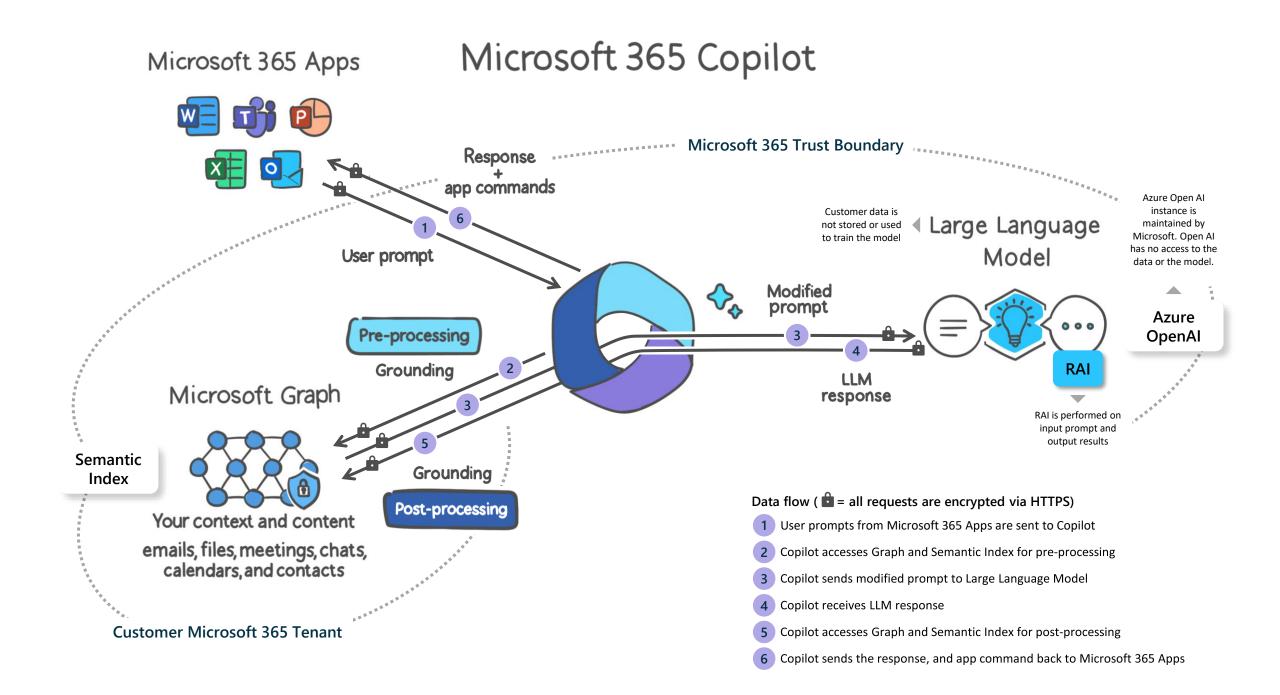
### Microsoft 365 Copilot



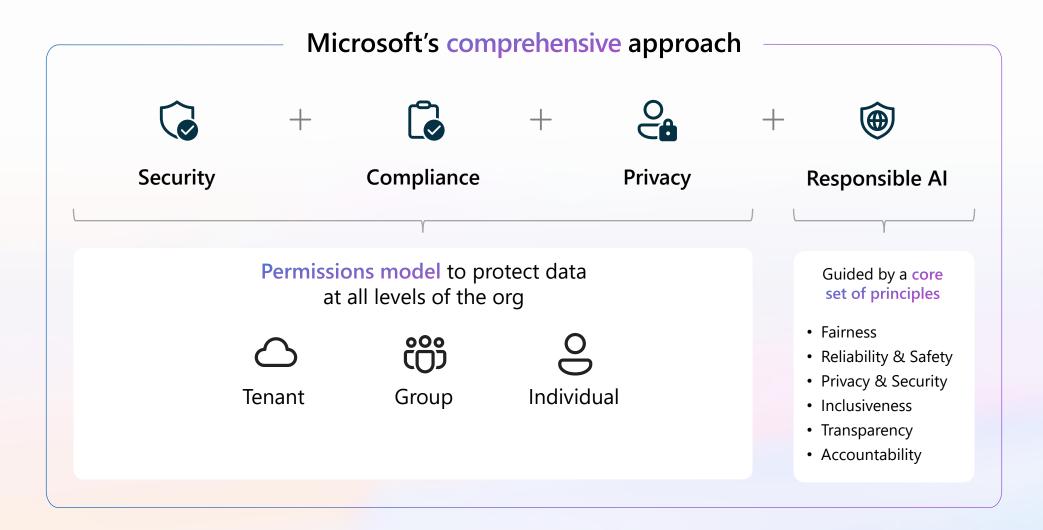
## Microsoft 365 Copilot

#### Designed for the needs of the enterprise

Grounded in your business data	Microsoft 365 Copilot has real-time access to both your <i>content and context</i> in the Microsoft Graph.
Comprehensive security, compliance, & privacy	Copilot inherits your security, compliance, and privacy policies set up in Microsoft 365.
Architected to protect data	Your data doesn't leave the compliance boundary and isn't used to train the foundation model.
Integrated into the apps you use every day	Word, Excel, PowerPoint, Outlook, Teams, and more.
Individual user & admin always in control	Users decide what to use, modify, or discard.
Designed to integrate new skills	As Copilot learns about processes, it can perform more sophisticated tasks and queries.



### Microsoft 365 Copilot foundational principles







Built on Microsoft's comprehensive approach to security, compliance, and privacy.

Copilot is integrated into Microsoft 365 apps and automatically inherits all your company's valuable security, compliance, and privacy policies and processes. Two-factor authentication, compliance boundaries, privacy protections, and more make Copilot the AI solution you can trust.





Microsoft 365 Copilot models ensure data is not exposed to other organizations.

**Copilot protects data in multiple ways:** 

- Logical isolation of customer content within each tenant with AAD authorization and role-based access control.
- Microsoft uses physical security, screening, and a multi-layered encryption strategy to protect customer content.
- Microsoft 365 encrypts customer content at rest and in transit.

Learn more about Microsoft 365 isolation controls



#### Data is protected with tenant controls & permissions models.

The permissions model within your Microsoft 365 tenant will ensure that data will not unintentionally leak between users and groups. **Copilot presents only data that each individual can access** using the same underlying controls for data access used in other Microsoft 365 services.

Review Microsoft's privacy policy and service documentation for more information.





Architected to protect tenant, group, and individual data.

Large Language Models (LLMs) are not further trained on, or learn from, your tenant data or your prompts. Copilot presents only data you can access using the same technology that we've been using for years to secure customer data.





Data protected with Purview or AIP labeling remains protected.

Data protected using Microsoft Purview Information Protection (MPIP or AIP) labeling will continue to be protected according to those policies.



## Compliance



#### **Copilot falls under standard Microsoft Product Terms.**

Learn more about our commitment to compliance through our <u>compliance website</u> and <u>Service Trust Portal</u>.

Understand compliance offering definitions.

Microsoft adheres to industry leading privacy, security, and compliance commitments.







Copilot inherits your Microsoft 365 policies and commitments.

Microsoft 365 Copilot automatically inherits your organization's security, compliance, and privacy policies for Microsoft 365. Data is managed in-line with our current commitments.

Review the following for more information:

Privacy at Microsoft

Microsoft Privacy Statement

Microsoft Trust Center for data protection and privacy

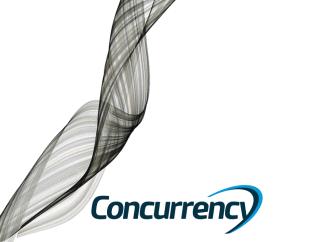




Microsoft 365 Copilot doesn't train with customer content.

## We do not use customer data to train the large language models (LLMs) used to generate content.

Review Microsoft's privacy policy and service documentation





Data in different geographies are stored and processed in compliance with GDPR and other relevant Privacy Laws.

The new Microsoft 365 Copilot experiences do not change Microsoft's commitment and principles for data security and privacy. Microsoft 365 Copilot is integrated into Microsoft 365 which adheres to all existing privacy and compliance obligations.

Review Microsoft's privacy policy and service documentation for more information.



### Data residency & Storage

Microsoft commitments to its customers about the GDPR.

The General Data Protection Regulation (GDPR) introduces new rules for organizations that offer goods and services to people in the European Union (EU), or that collect and analyze data for EU residents no matter where you or your enterprise are located.

The GDPR requires controllers (such as organizations using Microsoft's enterprise online services) only use processors (such as Microsoft) that provide sufficient guarantees to meet key requirements of the GDPR. Microsoft has taken the proactive step of providing these commitments to all Volume Licensing customers as part of their agreements.

Learn more about Microsoft's commitment to GDPR from our <u>full summary</u>

<u>short summary</u>

### Data residency & Storage

Microsoft 365 Copilot data remains within the Microsoft cloud.

When you input prompts using our AI tools, the information contained within your prompts, the data they retrieve, as well as the generated responses remain within the Microsoft cloud.



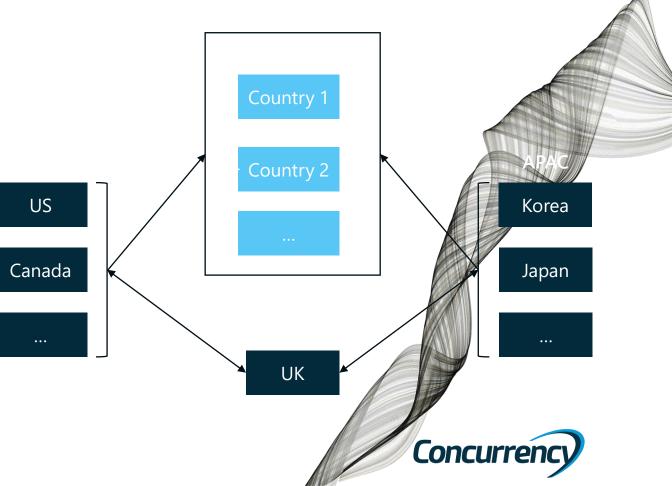
### Data residency

# Microsoft 365 Copilot is EU Data Boundary (EUDB) compliant

Your content data is written in home region datacenters.

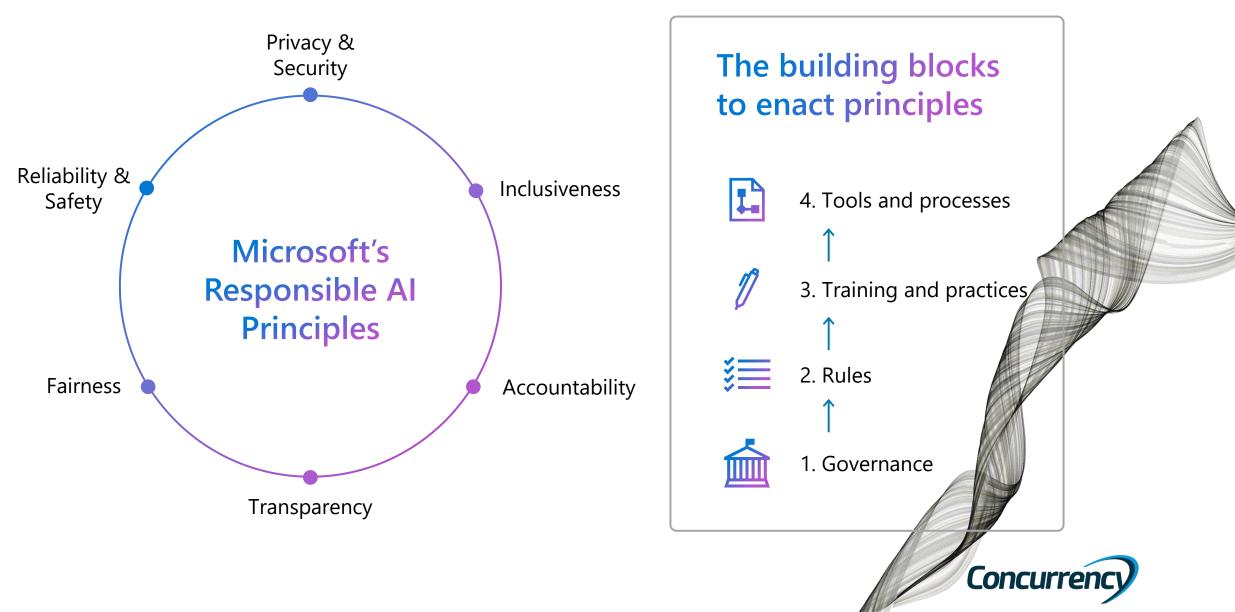
- LLM calls will be routed to the closest data centers in the regions.
- The LLM call will process customer data and return the response to the home region.
- NO customer content data is written in region outside the home region for the user.
- For EU users we have additional safeguards to comply with EUDB.

Data processing by geography

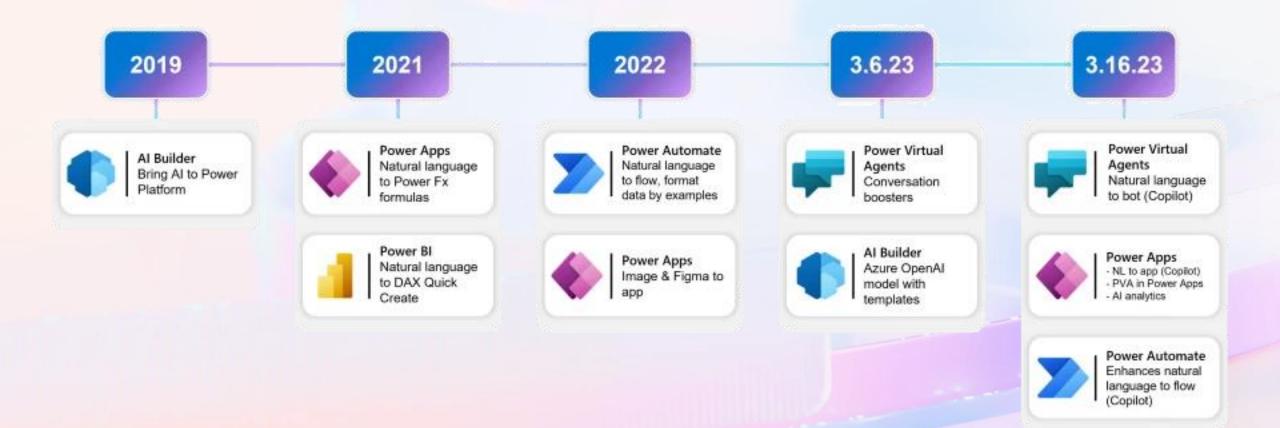


### **Responsible AI**

### The Responsible AI Principles



### Microsoft Al Journey





### Tools for a Responsible AI approach



#### Fairness

Assess fairness and mitigate fairness issues to build models for everyone.

#### Explainability

Understand model predictions by generating feature importance values for your mode.

### Counterfactuals

Observe feature perturbations and find the closest datapoints with different model predictions.



#### **Causal analysis**

Estimate the effect of a feature on real-world outcomes.

### 

#### **Error** analysis

Identify dataset cohorts with high error rates and visualize error distribution in your model.

#### Responsible AI sco

Get a PDF summary of your Responsible Al insights to share with your technical and non-technical stakeholders to aid in compliance reviews.



### Microsoft's Responsible AI Standard

Guidance for designing, developing, deploying, and using AI, which Microsoft's own engineering teams follow too

#### **Q** Identify

Identify and prioritize potential harms that could result from your AI system through iterative red-teaming, stress-testing, and analysis.

#### Measure

Measure the frequency and severity of those harms by establishing clear metrics, creating measurement test sets, and completing iterative, systematic testing (both manual and automated).

### Mitigate

Mitigate harms by implementing tools and strategies such as prompt engineering and using our content filters. Repeat measurement to test effectiveness after implementing mitigations.

#### Operate

Define and execute a deployment and operational readiness plan.

Conci

Review our <u>Responsible AI practices</u> to learn more

### Walkthough of Microsoft 365 Copilot



#### **How CoPilot Works**





### Large Language Model in Action



Large Language Model

Here's a short sentence describing Microsoft 365. It's a collection of powerful tools to help you work, connect, and create.

Ask me anything...



### Microsoft CoPilot in Everyday Life



#### Copilot in Whiteboard will

make Microsoft Teams meetings and brainstorms more creative and effective. Using natural language, you can ask Copilot to generate ideas, organize ideas into themes, create designs that bring ideas to life and summarize whiteboard content.



#### **Copilot in Outlook will**

offer coaching tips and suggestions on clarity, sentiment and tone to help users write more effective emails and communicate more confidently.



#### DALL-E, OpenAl's image

**generator**, inside of apps like PowerPoint allows you to ask Copilot to create custom images to support their content.

#### **Copilot in OneNote** will use prompts to draft plans, generate ideas, create lists and organize information to help customers find what they need easily.



#### Copilot in Loop helps your

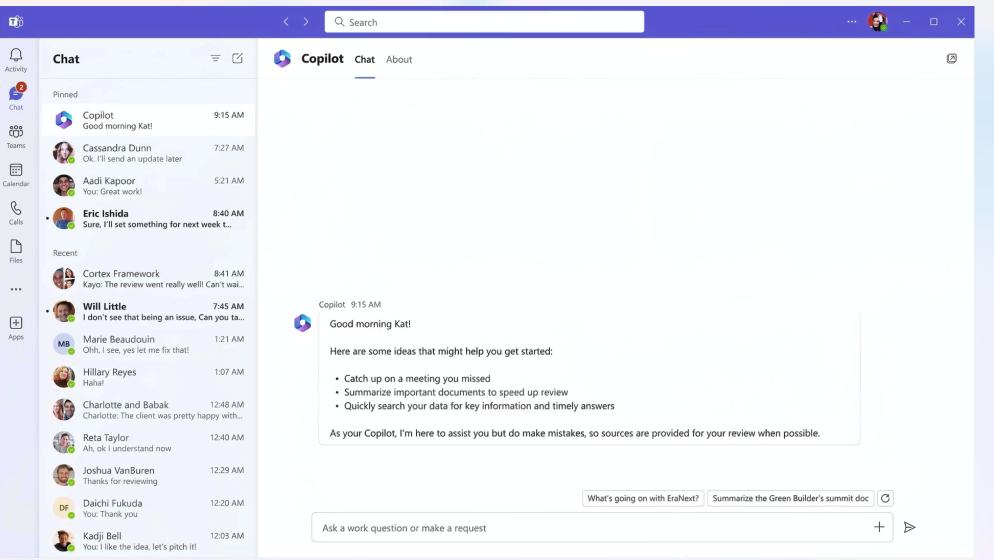
team stay in sync by quickly summarizing all the content on your Loop page to keep everyone aligned and able to collaborate effectively.



#### Copilot in Viva Learning will

use a natural language chat interface to help users create a personalized learning journey including designing upskilling paths, discovering relevant learning resources and scheduling time for assigned trainings.

### **Microsoft CoPilot in Teams**





### **Microsoft CoPilot in Meeting Summaries**

Tĵi		< > Q Search	··· 🧶 – 🗆
L Ctivity	Feed = ···	Marie Beaudouin Chat Files +	
Chat	Unread only		Yeah, we haven't gotten lunch together in awhile either!
ເຕີວິ Teams	•	We should go back to	o that ramne place. I've been craving it the last few days ramen*
alendar Calls	• Sarah mentioned you in 3:45 pm 5 channels Hi all - I've attached the document that we discussed today.	Marie Beaudouin 11:25 AM Yes that would be wonderful. I'll make a reservation for next week.	
Files	Marie mentioned you 12:58 pm Thanks Samantha, I'll fix that! Chat with Marie	Sound good?	
	Will posted 11:39 am I've attached the file we discussed Northwind Traders > Marketing		11:28 AM I would love that!
Apps	Daichi mentioned Tailspin 8/20 Toys Tailspin Toys team, our meeting is Tailspin Toys > Accounting		
	Alvin posted an 3:45 am announcement We're going live with out latest pro Yammer Communities		AM c doc we reviewed with the engineers this mo in the document that there's a typo on the second page
	Sarah +2 reacted 7:15 am I prefer the blue one Chat with Reta, Miguel, +3	Marie Beaudouin 11:35 AM Thanks Samantha, I'll fix that!	
	Voicemail from Marie         8/23           Image: Marine mark         8/23	Type a new message	© + Þ
	Northwind Traders is 8/22		



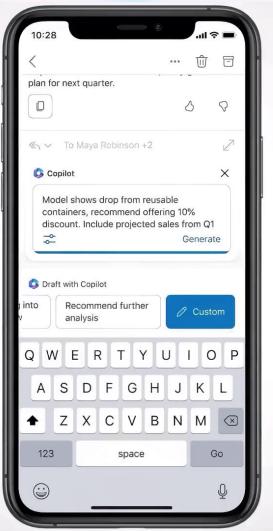
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### **Microsoft CoPilot to jumpstart Documents**

▼ Document1 · Saved ∨	,O Search		Q - 0 ×	
File Home Insert Draw Design Layout Referen	ces Mailings Review View Help	CS Comments / ~ Catch-up	C Editing V Share V	
∽ ☆ ✓ Aptos (Body) ∨ 11 ∨	$B  I  \underline{U} \sim \mathscr{A} \sim {\longrightarrow}   \\ \\ & \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\$	<ul> <li>Z Z Scopilot</li> </ul>	· · · · · · · · ·	
	<ul> <li>Create content with Copilot</li> <li>A job description for</li> <li>10 ideas for</li> <li>A press release for</li> <li>A project proposal about</li> </ul>	×		
	Describe what you'd like to create, and Copilot will generate a draft			
	* 0	$\triangleright$		
	2			
Page 1 of 1 0 words English (U.S.) Text Predictions: On	Page View — —	+ 100% ;	□ Fit Give Feedback to Microsoft	
Page 1 of 1 U Words English (U.S.) Text Predictions: Un		. 100.0	(	



### **Microsoft CoPilot on the Go**







### **Copilot with other platforms**





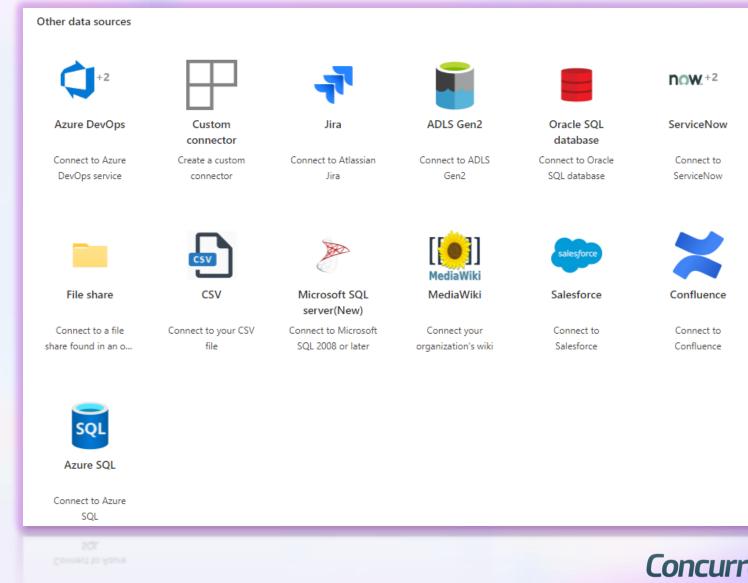
### Microsoft CoPilot and data, everywhere

Microsoft Graph connectors makes it easy to access disparate information—whether it's stored on-premises or in the cloud.

Find the information you need while working in your favorite productivity app or one of the many Microsoft 365 apps

#### More are available at

https://www.microsoft.com/microsoftsearch/connectors/?category=&query



MODELS 2

### **CoPilot leveraging other platforms**



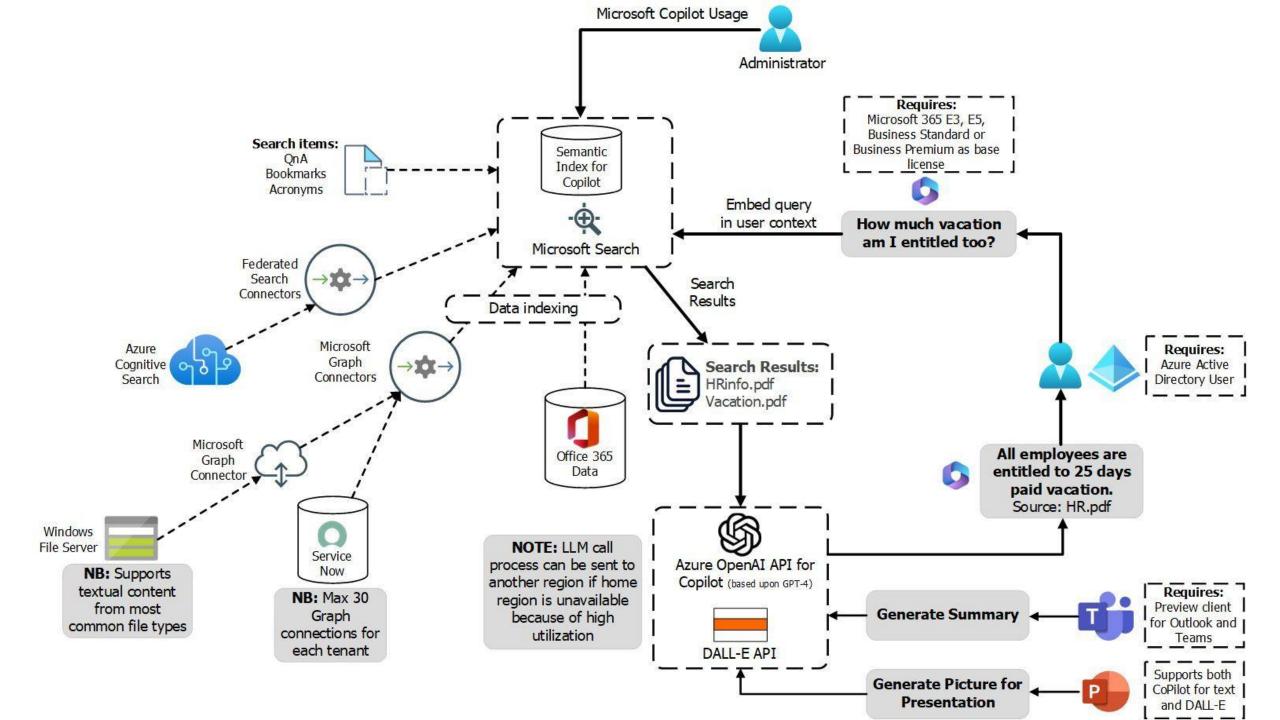




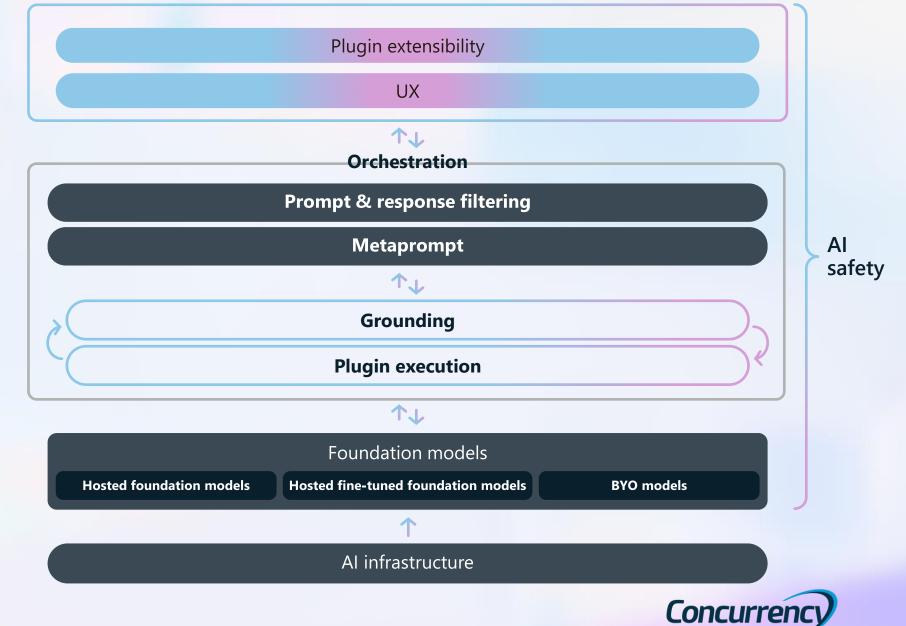
# CoPilot 1000 ft View



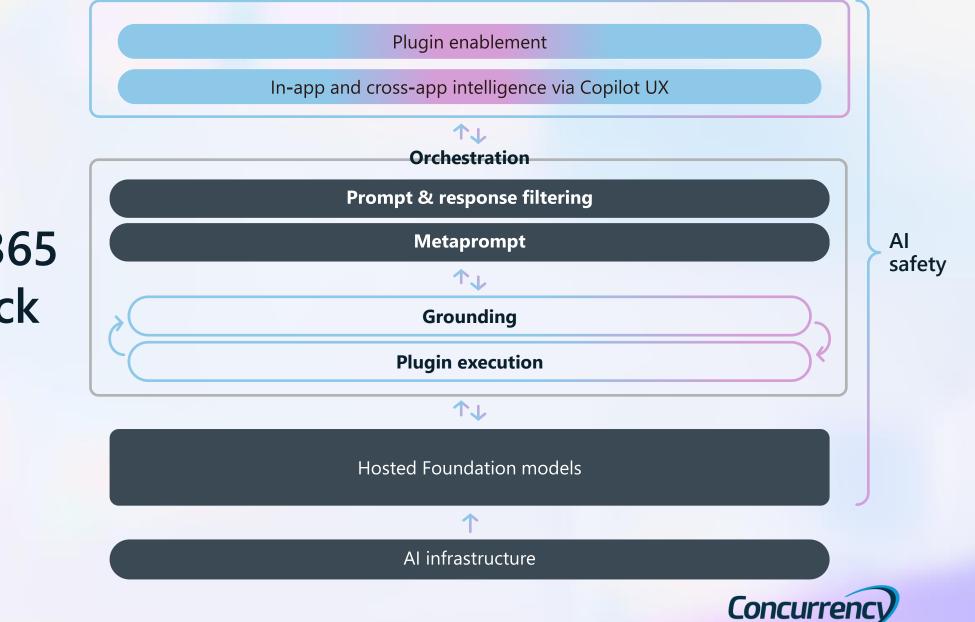
## How Microsoft 365 Copilot works



Copilot frontend



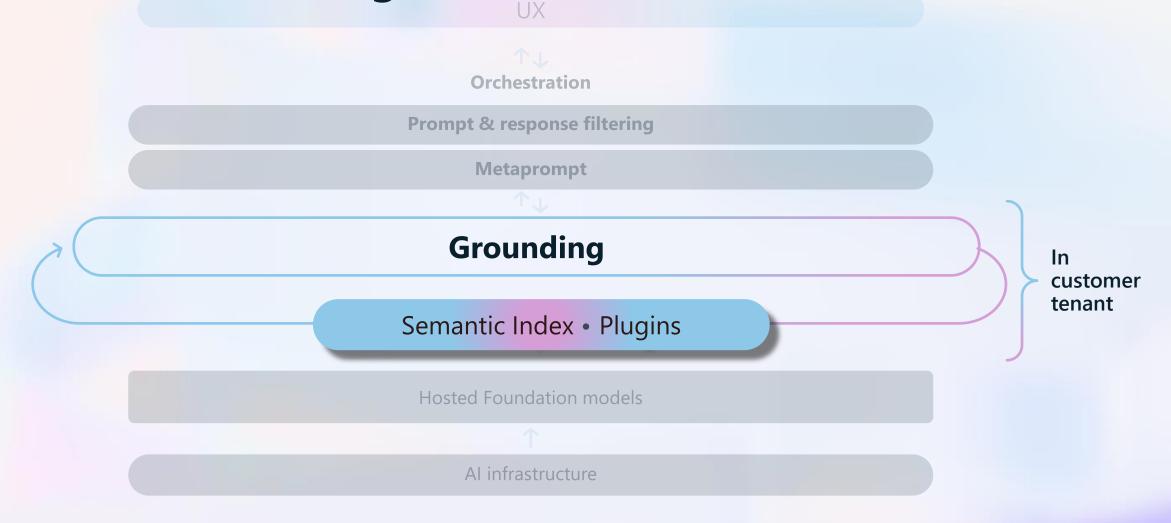
Microsoft 365 Copilot stack Microsoft 365 Apps, Microsoft Windows, Bing, Edge



Microsoft 365 Copilot stack

#### Microsoft 365 Copilot

## **Retrieval Augmented Generation (RAG)**

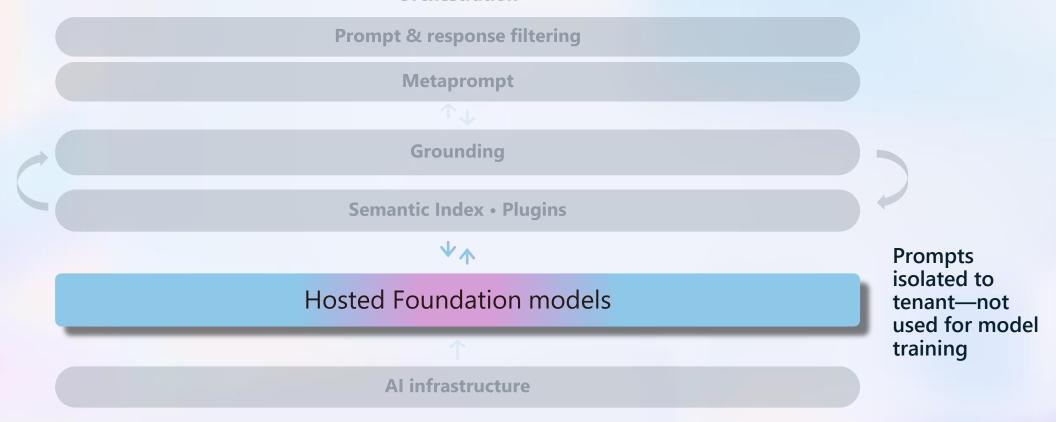




#### Microsoft 365 Copilot

## Natural language processing

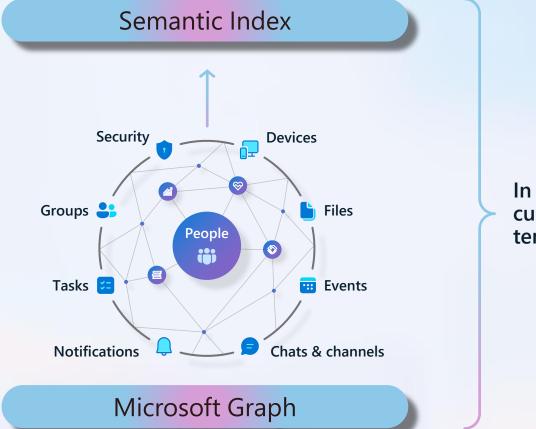
**Orchestration** 





# Microsoft 365 Copilot Semantic Index

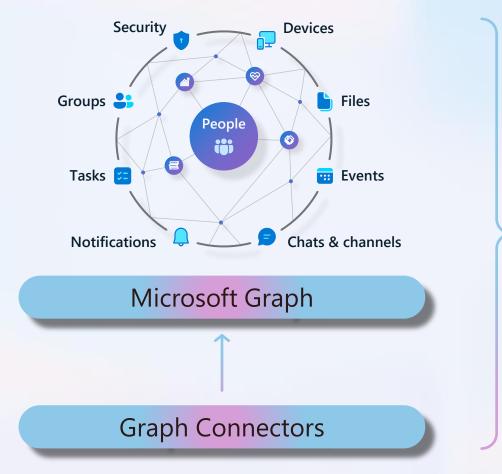
- Tenant-wide and userscoped vector indices
- User and tenant signals & relationships
- Semantics and similarities around content and users
- Ranking and relevance
- Security and permissions
- Across documents, chats, emails, people, projects, meetings, & more







### Microsoft 365 Copilot Microsoft Graph



In customer tenant



- Line-of-business and 3rd party data
- Security and permissions
- Search schema, filters and eDiscovery

## **Semantic Index for Microsoft 365 Copilot**

Microsoft 365 Copilot processing of customer data and prompts.

- Customer data sent to cloud model and results returned for user choice.
- Cloud model processes data without storing or retraining it.
- Customer data and prompts not stored by Microsoft.



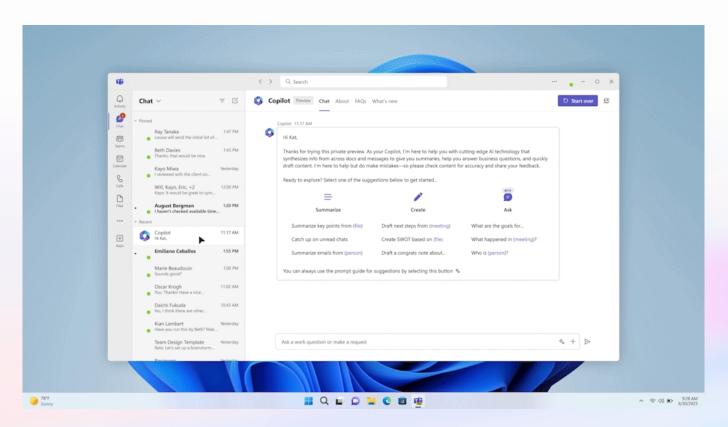
## Semantic Index for Copilot

Semantic Index for Copilot creates

## Semantic Index for Microsoft 365 Copilot

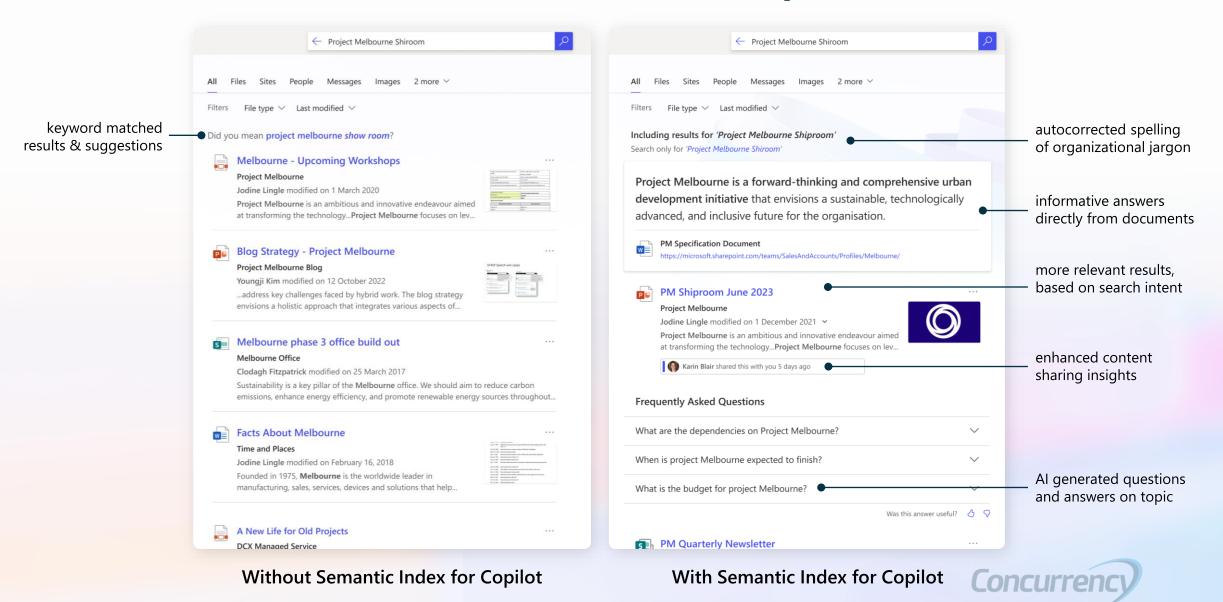
## To help every customer get Al-ready, we're rolling out Semantic Index for Copilot:

- The Semantic Index for Copilot creates a sophisticated map of your and your organizational data – identifying relationships and making important connections.
- It uses that conceptual understanding to determine your intent and help you find what you need
- The Semantic Index for Copilot enables Microsoft 365 Copilot to deliver relevant, actionable responses to prompts – and do so in a secure, compliant, privacy-preserving way.

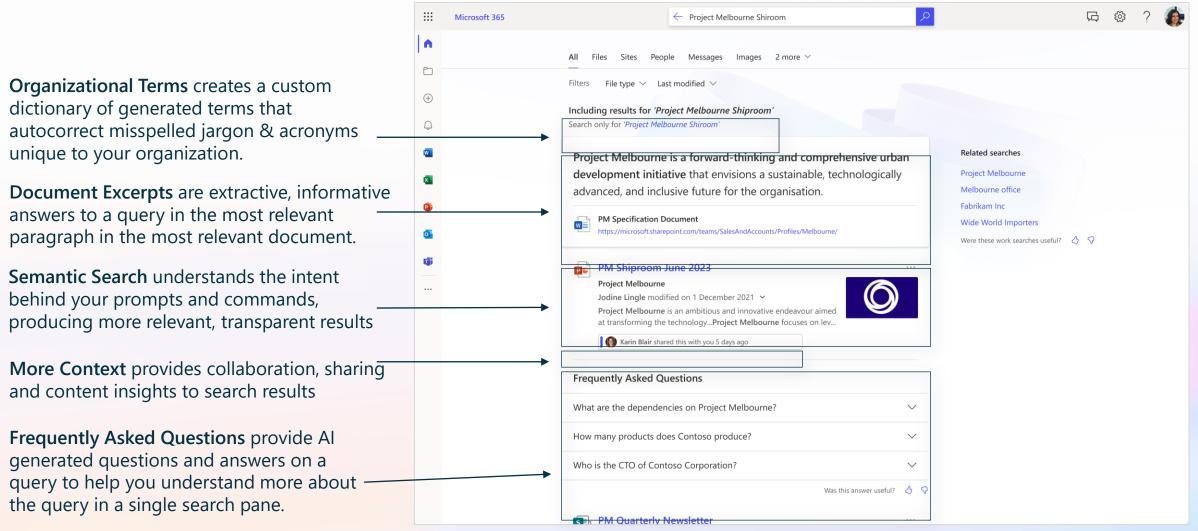




## **Semantic Index for Microsoft 365 Copilot**



## Semantic Index for Microsoft 365 Copilot features







#### **Microsoft Graph**

Ground Copilot in your data Enforce security & permissions at runtime

Customer's data - not used for training

Power Semantic Index for Copilot

## **Copilot for Everyone**

## **Bing Chat Enterprise**

Al-powered chat for work with <u>commercial data protection</u> What goes in — and comes out remains protected. Chat data is not saved, and Microsoft has no eyeson access – which means no one can view your data.

And best of all, your data is not used to train the large language models.

Enable @ <u>https://aka.ms/TurnOnBCE</u> Access @ <u>https://bing.com/chat</u>

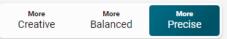
## Bing Chat Enterprise G

Al-powered copilot for the web 🕞

Bing is powered by AI, so surprises and mistakes are possible. can improve! Terms  $\mid$  Privacy

Ads are not targeted based on your workplace identity or chat I

Choose a conversation style



cblackburn@concurrency.com



#### ✓ Searching for: ROI of migration to Azure Cloud

Generating answers for you...

C Your personal and company data are protected in this chat

The ROI (Return on Investment) of migrating to Azure Cloud from a traditional datacenter can vary based on several factors, but here are some findings from studies:

- A Forrester study found that a composite organization using Azure PaaS can realize a three-year 228 percent return on investment (ROI), with a payback period of 15 months<sup>1</sup>.
- The same study also found a 50 percent increase in the speed of application development and a 40 percent reduction in app-dev related infrastructure costs<sup>1</sup>.
- Another study on Azure Arc demonstrated a 206 percent return on investment (ROI) over three years with payback in less than six months<sup>2</sup>.

However, it's important to note that although the ROI formula of return over costs appears relatively simple, it can be surprisingly complicated when applied to a cloud migration<sup>3</sup>. Comparing on-prem vs cloud ROI calculations can turn complex, and may not return the data you need to facilitate decision-making<sup>3</sup>.

Microsoft Azure provides a Total Cost of Ownership (TCO) Calculator to estimate the cost savings you can achieve by migrating your application workloads to Microsoft Azure <sup>4</sup>. This could be a useful tool for you to get a more accurate estimate based on your specific situation.

Remember, as you plan and design for an Azure migration, focusing on costs helps ensure your

#### G Your personal and company data are protected in this chat



Ask me anything...

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In GA Now

Included with Microsoft 365 E3, E5, Business Standard and Business Premium,

### **Teams Premium Features**

- Intelligent recap
  - automatically generate meeting notes, recommended tasks, and personalized highlights, & automatically generated meeting chapters based on the meeting transcript as well.

#### • New meeting options

 watermarking to deter leaks and limiting who can record, give you additional protections to keep the discussion private.

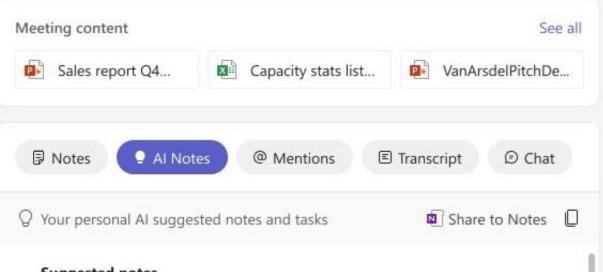
#### • Virtual Appointments

 allow external attendees to join virtual, branded lobby rooms through text messages or email on any device browser—without them having to download an app.

#### Improved Webinar experience

- Presenters can join a virtual green room so that preparation before the webinar is seamless.
- Presenters can more effectively manage what attendees see
- Registration experience is improved with registration waitlist and manual approval
- Customization of the registration start and end times
- External encoder support and RTMP-in, you'll be able to live stream a custom RTMP source.

#### NOTE: Recording and transcription must be on for meetings!!



#### Suggested notes

- Serena wants to look at the sales report before she and Beth spend 5:00 more budget on the campaign.
- Beth explains that they are on track for new product release in December. But they will need to keep an eye on advertisement budget. She will follow up on that.
- Beth explains that they are managing the capacity well. They could be a problem if they get more popular. Babak is going to double check on that.

#### Suggested tasks

- 🖗 Beth will follow up on advertisement budget.
- O Shammas will double check with Amanda regarding the ETA for the release of the new product.

### In GA Now, \$10 USD per user / mo, \$7 introductory

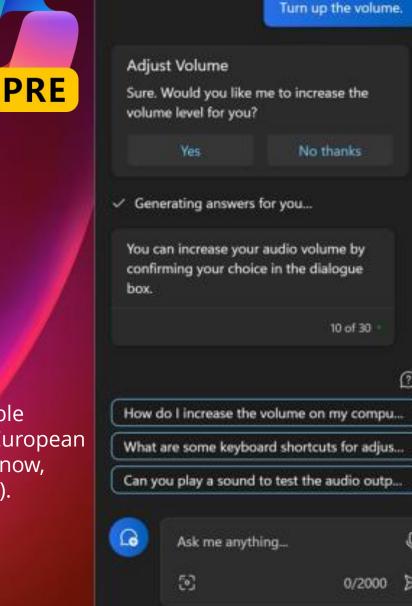
- 5:05

### Windows Copilot



Copilot adds Authentication Metadata Image Attribution (AMIA) credentials to images it creates, using the Content Authenticity Initiative (CAI) plug-in, as shown at the bottom left below.

A baseball player hitting a home run in city field



9/29/2023

Only available in Windows 11 23H2 See **<u>bit.ly/windows11copilot</u>** for steps on enabling **now!** 

While Copilot was expected to be available worldwide, <u>Microsoft</u> has excluded the European Union (EU) from the roll out, at least for now, because of the Digital Markets Act (DMA).

Q Search

### Windows 11 AI Enhancements



**Copilot in Windows** (in preview) empowers you to create faster, complete tasks with ease and lessens your cognitive load – making once complicated tasks, simple.

We've made accessing the power of Copilot seamless as it's always right there for you on the taskbar or with the Win+C keyboard shortcut providing assistance alongside all your apps, on all screen sizes at work, school or at home.



**Snipping Tool** now offers more ways to capture content on your screen – with this update you can now extract specific text content from an image to paste in another application or, you can easily protect your sensitive information with text redaction by using text actions on the post capture screen. Plus add sound capturing using audio and mic support, creating compelling videos and content from your screen.





**Photos** has also been enhanced with AI including new features to make editing your photos a breeze. With Background Blur you can make the subject of your photo stand out quickly and easily.

The Photos app automatically finds the background in the photo, and with a single click, instantly highlights your subject and blurs out the background.

Photos stored in OneDrive (home or personal) accounts, you can now quickly find the photo you're looking for based on the content of the photo. You can also now find photos based on the location where they were taken.

**Paint** has been enhanced with AI for drawing and digital creation with the addition of background removal and layers as well as a preview of Cocreator that brings the power of generative AI to the Paint app.



### Windows 11 AI Enhancements



**Clipchamp**, now with auto compose, helps you with scenes suggestions, edits and narratives based on your images and footage automatically so you can create and edit videos to share with family, friends, and social media like a pro.



Notepad will start automatically saving your session state allowing you to close Notepad without any interrupting dialogs and then pick up where you left off when you return. Notepad will automatically restore previously open tabs as well as unsaved content and edits across those open tabs.



Outlook for Windows, you can connect and coordinate your various accounts (including Gmail, Yahoo, iCloud, and more) in one app. Intelligent tools help you write clear, concise emails and seamlessly attach important documents and photos from OneDrive.



New text authoring experiences to voice access and new natural voices in Narrator, continuing our ongoing commitment to making Windows 11 the most accessible version of Windows yet.



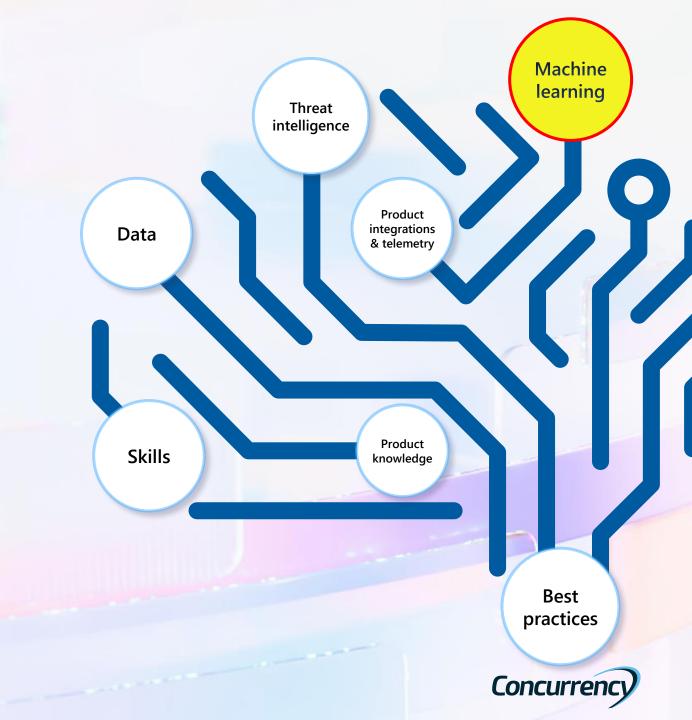
Modernized File Explorer, we are introducing a modernized File Explorer home, address bar and search box all designed to help you more easily access important and relevant content, stay up to date with file activity and collaborate without even opening a file. Also coming to File Explorer is a new Gallery feature designed to make it easy to access your photo collection.



Windows Backup makes moving to a new Windows 11 PC easier than ever. With Windows Backup, transitioning most files, apps and settings from one PC to another, is seamless so everything is right where you left it, exactly how you like it.

### **Security Copilot**

The first generative AI security product to help defend organizations at machine speed and scale



## Microsoft Security Copilot

### **Defending** at machine speed

Security Copilot builds upon the OpenAI models, using security-specific models development by Microsoft, incorporates security specific skills, and is informed by global threat intelligence signals.

*"It takes us three minutes to do a task that used to take at least a few hours"* 

- Private preview customer

Enable response in minutes, not hours



Simplify the complex with natural language prompts and easy reporting



Catch what others miss with deeper understanding of your enterprise



Upskill your security talent with cyber-trained generative AI





### Modernize your security operations



#### Security posture management

Discover whether your organization is susceptible to known vulnerabilities and exploits. Prioritize risks and address vulnerabilities with guided recommendations.

#### Incident response

Surface an ongoing incident, assess its scale, and get instructions to begin remediation based on proven tactics from real-world security incidents



××

#### Security reporting

Summarize any event, incident, or threat in seconds and prepare the information in a ready-to-share, customizable report for your desired audience



### **Security Copilot**

#### Timing

- Early access program (EAP) to launch early October 2023.
- Nominations opened July 18 through account teams

#### Pricing

> \$100K one-time fee for a one-year license

#### **Prerequisites**

- Must be an Enterprise License customer.
   No Retail or CSP customers at this time
- > Must work with Microsoft Account team to meet eligibility criteria, agree to cost, and be nominated
- > Microsoft Defender for Endpoint P2 license

#### Value

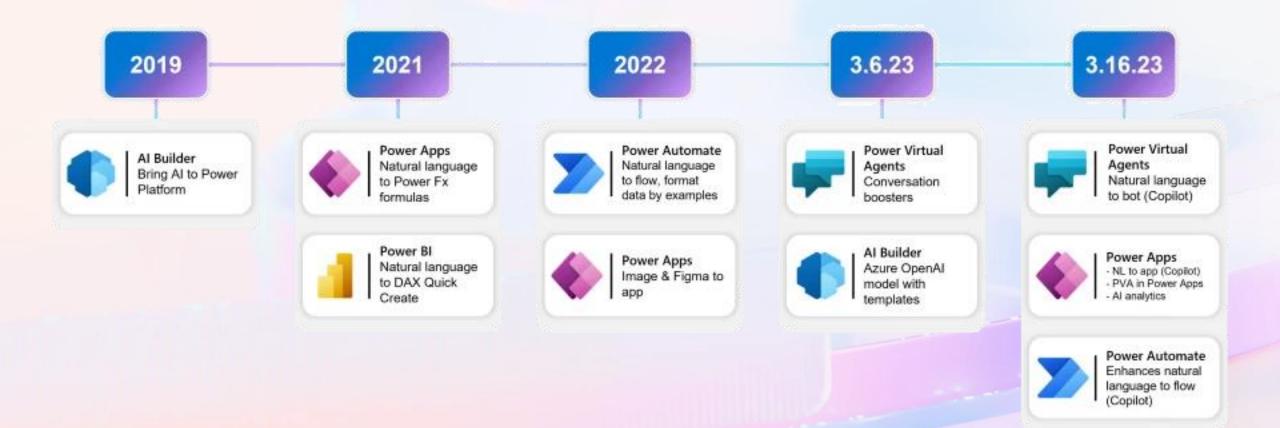
- > Enhanced speed and scale for SOC analysts
- > Incident response
- > Security posture management
- > Security reporting
- > Additional use cases and integrations to be supported over time, including management, identity, and compliance



## Copilot to Accelerate Development



### Microsoft Al Journey



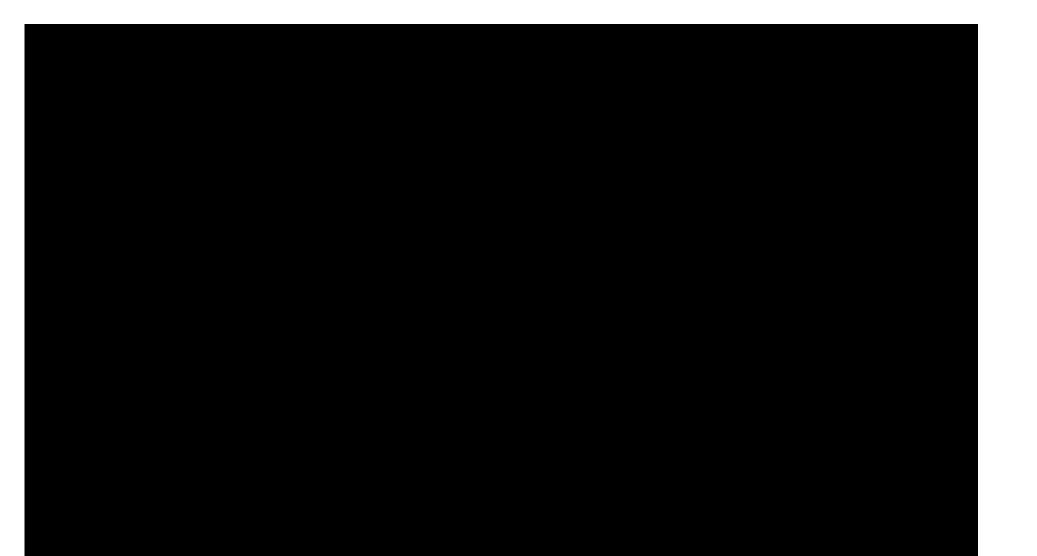


# The No Coding Era Is Here

- 1. Democratization of App Development: Power Platform Copilot allows users with no technical background to create custom applications.
- 2. Speed and Agility: Power Platform Copilot enables rapid application development, resulting in faster time-to-market and increased agility in response to changing business needs.
- 3. Cost-Effectiveness: Power Platform Copilot eliminates the need for expensive development resources, reducing the overall cost of building and maintaining custom applications.
- 4. Integration and Extensibility: Power Platform Copilot seamlessly integrates with other Microsoft products, allowing users to easily connect and extend their applications, creating end-to-end solutions that drive business value.
- 5. Scalability and Security: Built on Microsoft Azure, ensuring that applications can grow with the needs of the organization and adhere to Microsoft's frameworks and security standards, protecting sensitive data and applications from potential threats.



# Use Copilot to build Workflows





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# GitHub Copilot X



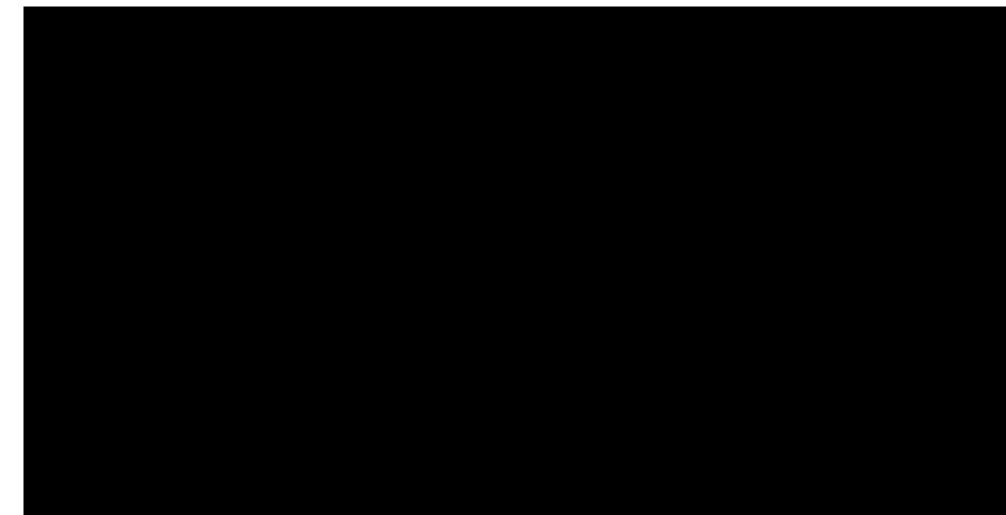
### CoPilot X will revolutionize the way developers write code:

- 1. Copilot X will be able to suggest lines of code based on the context of the code they are writing, which will save developers time and effort.
- 2. Copilot X will be able to suggest more accurate and helpful suggestions than current code completion tools.
- 3. Copilot X will be able to understand and respond to natural language commands, which will make it easier for developers to communicate with each other about code.

Feature	<b>GitHub</b> Copilot	CoPilot X
Code completion	Yes	Yes
Chat and voice interfaces	No	Yes
Support for pull requests	No	Yes
Answering questions on docs	No	Yes
Adoption of OpenAI's GPT-4 model	No	Yes



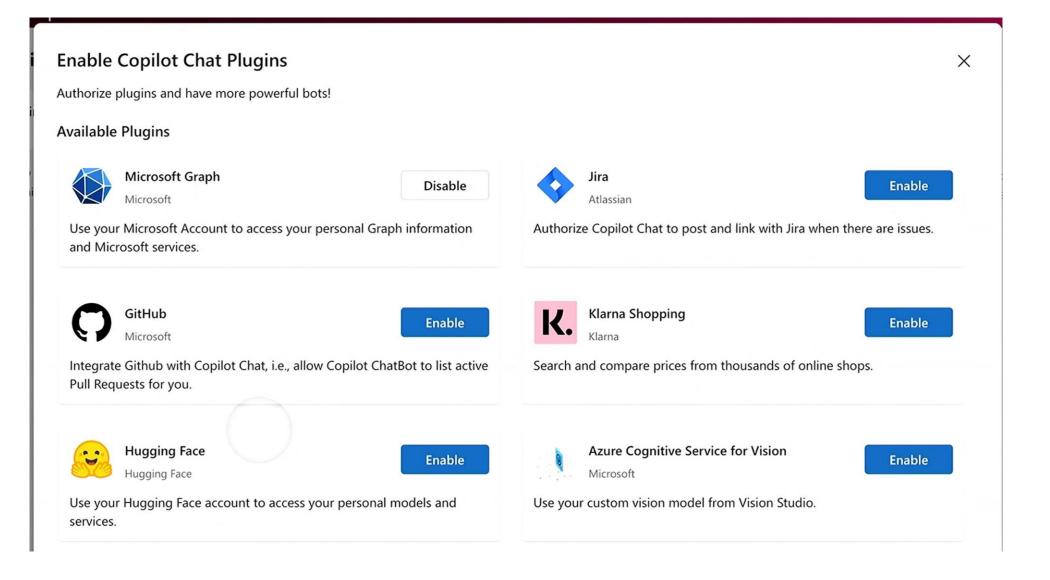
## GitHub Copilot X



Concurrency 76

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### Chat Plugins for CoPilot (outside of Microsoft 365)



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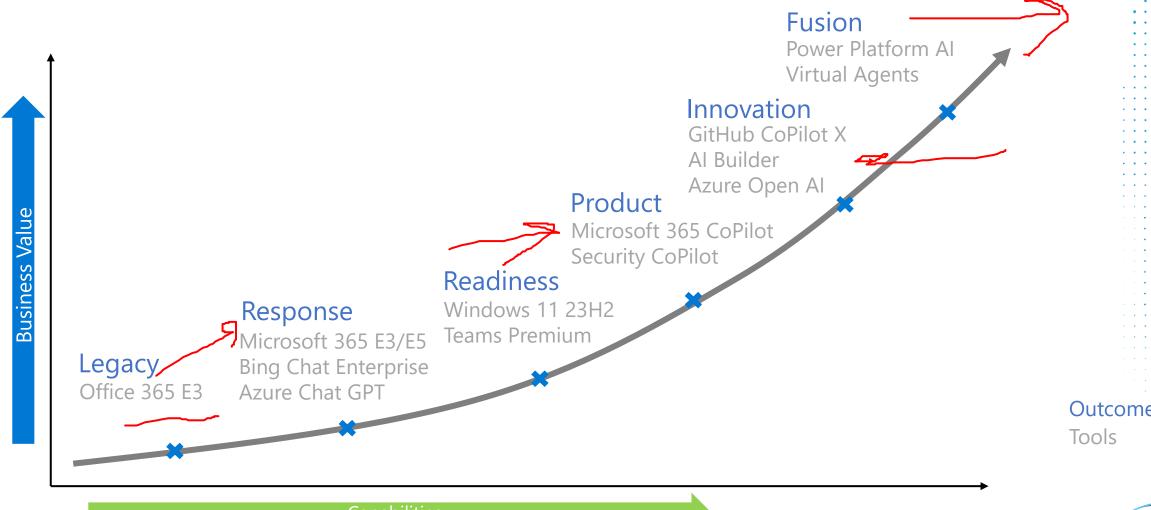


# **CoPilot Ground View**



## How to prepare for Microsoft 365 Copilot

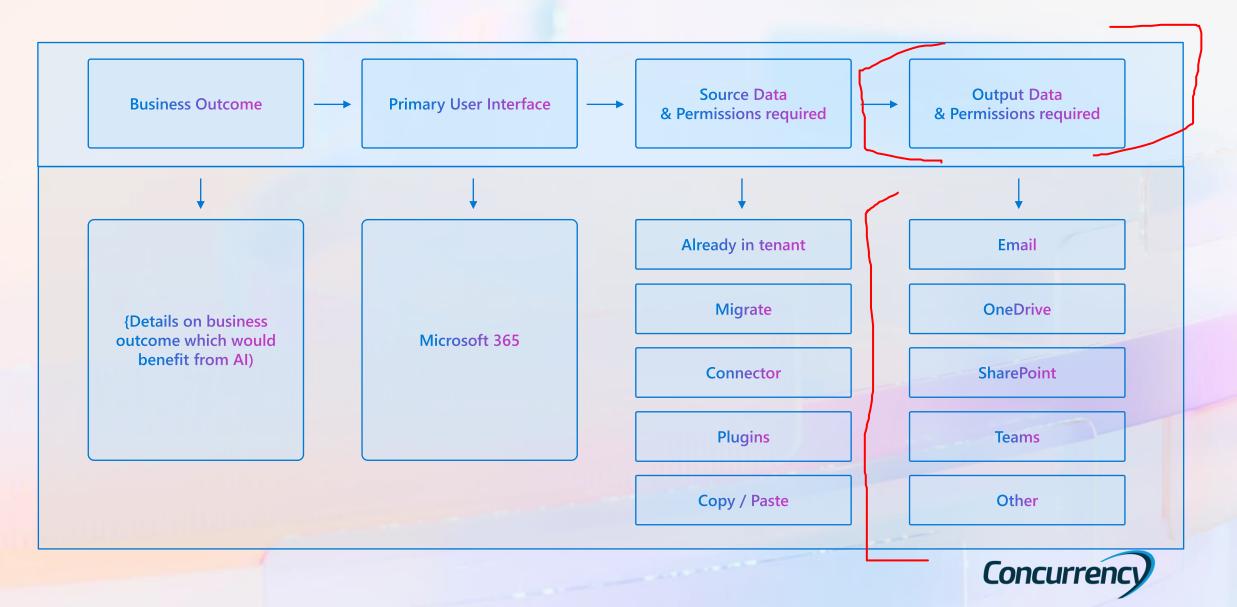
# Aligning AI to your Technology Maturity



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Capabilities

## Microsoft 365 Copilot finding the Al opportunity



## **G** How Do I Prepare My Tenant

- Microsoft 365 E3 or E5 are licensing prerequisites.
- $\checkmark$  An Azure Active Directory account for each user in your org<sup>1</sup>
- A provisioned OneDrive account for each user in your org.
- Tenants with the richest data in Microsoft 365 (Exchange, OneDrive, SharePoint, Teams) will get the best results in CoPilot. The richness of the cross-app experience will depend on the data sources indexed by Microsoft 365.
- For Outlook: Users need to be using the **new Outlook for Windows** (currently in Preview). Users can load the new Outlook by toggling or Outlook Mobile. <u>Getting started with the new Outlook for Windows Microsoft Support</u>.
- For Teams: Users need to be using Teams desktop client or the web app. **Both current and the new versions of Teams supported**.
- ) For Loop: Tenants must have Loop enabled. Learn more how to enable Loop. (only required if customer want to use Copilot in Loop)
- () User devices must be on either the Current Channel or Monthly Enterprise channel
- ) Meeting the Requirements for the **Tenant Review Council (TRC)**



### How Do I Prepare For the Tenant Readiness Council (TRC)

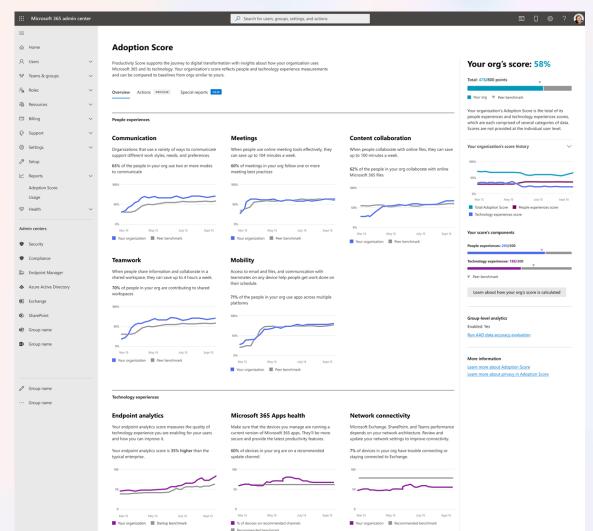
- CoPilot licenses can be purchased starting on November 1, 2023
- Microsoft 365 E3 or E5 are licensing prerequisites.
- $\checkmark$ ) If not, you must purchase sufficient ME3/ME5 seats in same transaction as Copilot to address the gap
- Microsoft 365 Copilot can only be purchased as if you have an EA or EAS. Retail or CSP customers cannot purchase at this time
- Your local Microsoft Commercial Executive must start the transaction process
- The purchase is for **300 or more seats** at the cost of \$30 per user, per month
- ) You as reviewed the data residency and data processing standards for Microsoft 365
- You have reviewed ME3 and/or ME5 usage health and have developed a plan to drive healthy Microsoft 365 Copilot adoption.

Some Copilot experiences require a websocket connection from the device where the Microsoft 365 app is running to a Microsoft service.



### How Do I Ensure a Healthy Microsoft 365 Tenant?

### https://admin.microsoft.com/#/adoptionscore



Adoption Score provides insights for your organization in two areas: people experiences and technology experiences. All insights are calculated using data at the organizational level, not the individual level. Ensure insights are calculated across all users, and then use the Adoption Score report to validate score (the highest score is 800 points, making 100%)

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#### Adoption Score

Adoption Score provides insights for your organization in two areas: people experiences and technology experiences. All insights are calculated using data at the organizational level, not the individual level.

#### Learn about privacy settings in Adoption Score

Insight calculations and display Organizational messages

Select users and groups for calculating insights

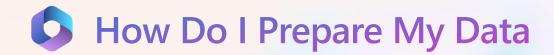
Choose the users and groups whose data will be used to determine your org's people experiences insights.

Include all users (recommended)

Exclude specific users via group

O Don't calculate for any users

https://admin.microsoft.com/#/Settings/ Services/:/Settings/L1/AdoptionScore



### 1 Understand file permissions:

- Overview of sharing and permissions available in SharePoint in Microsoft 365
- <u>Sensitivity labels</u> from Microsoft Purview
- 2 Implement data loss prevention policies:
  - Learn about data loss prevention
  - Watch: <u>automatically classifying and protecting documents and data</u> and <u>data loss prevention in Microsoft Purview</u>
- 3 Use reporting to stay updated:
  - <u>Usage reports</u> in the Microsoft 365 admin center
  - Data access governance reports in SharePoint admin center

Review this blog post on getting tenant ready for Microsoft 365 Copilot or watch this Microsoft Mechanics video.



### **G** How Do I Prepare My Data

Understand File Permissions		Implement Data Loss Prevention Policies		Use Reporting to Stay Updated
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- Overview of sharing and permissions available in SharePoint in Microsoft 365
- <u>Sensitivity labels</u> from Microsoft Purview

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	нî,	X-rays	ß	Choose the type of link that's selected by default when users share files and folders in SharePoint and OneDrive.
•	٦	Advertising Ideas.docx 년 :	→ This item is popular with your c	Specific people (only the people the user specifies)     Only people in your organization
	٦	Agenda.docx	3 Viewers · 13 Views	Anyone with the link
	~	AlliePhoto.png	Mirlam Graham viewed this Just now	Choose the permission that's selected by default for sharing links.
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### **G** How Do I Prepare My Data

Understand File Permissions Implement Data Loss Prevention Policies Use Reporting to Stay Updated

### Learn about <u>data loss prevention</u>

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1 Financial highlights	Location		D	E	F	G		
2 Year end 3 Revenue 4 Gross margin	Reports Sales and Marketing	ar 2 0.00 0.00	Year 1 93,580.00 60,543.00					
5 Operating income 6 Net income	Sensitivity Confidential\All Employees	2.00 3.00	18,161.00 12,193.00					
7 Diluted earnings per s 8 Cash dividends declare 9 Cash, cash equivalents	rsimone@vanarsdelltd.com	2.1 1.44 0.00	1.48 1.24 96,526.00					
10 Total assets 11 Long-term obligations	<ul> <li>Personal</li> <li>Public</li> </ul>	9.00 9.00 4.00	174,303.00 44,574.00					
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### **G** How Do I Prepare My Data



- <u>Usage reports</u> in the Microsoft 365 admin center
- Data access governance reports in SharePoint admin center

Discover sites with specific sensitivity labelled files Know your site admins						Govern these sites for right policy settings		
Site ID Site URL	Primary Admin	Primary Admin Email	Labelled documents	Site S	Sensitivi	Site Sensitivity	Site Unmanaged Device Policy	Site External Sharing
f7dab2e5-eQ/sites/InvestmentBanking	Michelle Harris	michelle.harris@contoso.onmicrosoft.com					None	TRUE
00bb177f-22/sites/ContosoLife	Caleb Foster	caleb.foster@contoso.oncalrosoft.com	933	162fi	bb5e-1f	General	Limited, web-only access	FALSE
bde6e6c9-9e/sites/LeadershipTeam	Avery Howard	avery.howard@contoso.onaverosoft.com	911	162fi	bb5e-1f		Block access	FALSE
3aefb921-e9/sites/USSales	Riley Ramirez	riley.ramirez@contoso.onrilrosoft.com	908	222a	35d4-8a	Confidential	Block access	FALSE
6d75c83f-3e/sites/Operations	Amber Rodrigue	amber.rodriguez@contoso.onambrosoft.com	908	162fi	bb5e-1f	General	Limited, web-only access	TRUE
3c6e4459-8a/sites/DroneWorkshop	Maria Sullivan	maria.sullivan@contoso.onmarrosoft.com	868	162fi	bb5e-1f	General	None	TRUE
160f9cc7-8e;/sites/FlySafeConference	Grace Taylor	grace.taylor@contoso.ongrarosoft.com	839	162fi	bb5e-1f	General	Limited, web-only access	FALSE
eb95ec98-9f/sites/LeadershipConnection	Sam Centrell	sam.centrell@contoso.onsamrosoft.com	634	222a	35d4-8a	Confidential	Block access	FALSE
aee6640b-30 / sites / MarkProjectTeam	Vance DeLeon	vance.deleon@contoso.onvanrosoft.com	588	162fi	bb5e-1f	Confidential	Block access	FALSE
d2bdc732-9e/sites/Give	Cameron Baker	cameron.baker@contoso.oncamrosoft.com	558	162fi	bb5e-1f	General	Limited, web-only access	TRUE
46d12cf3-76/sites/NewEmployeeOnboarc	n Oscar Ward	oscar.ward@contoso.onoscrosoft.com	501	162fi	bb5e-1f	General	None	TRUE
50f07137-47/sites/ParentsofContoso	Eugenia Lopez	eugenia.lopez@contoso.oneugrosoft.com	479	222a	35d4-8a	General	Limited, web-only access	FALSE
7ba4e7e9-3a/sites/ContosoBrand	Casey Jensen	casey.jensen@contoso.oncasrosoft.com	446	162fi	bb5e-1f	Confidential	Block access	FALSE
d84d7015-71/sites/ProductSupport	Brandon Stuart	brandon.stuart@contoso.onbrarosoft.com	360	162fi	bb5e-1f	Confidential	Block access	FALSE
8836bd59-35/sites/RetailOperations	Devon Torres	devon.torres@contoso.ondevrosoft.com	341	162fi	bb5e-1f	General	Limited, web-only access	TRUE
08f03943-20/sites/SalesandMarketing	Michael Peltier	michael.peltier@contoso.onmicrosoft.com	218	222a	35d4-8a	General	None	TRUE
50f748af-4b/sites/SalesBestPractices	Kayla Lewis	kayla.lewis@contoso.onkayrosoft.com					Limited, web-only access	FALSE
51763230-74/sites/USSales	Isabel Gracia	isabel.gracia@contoso.onisarosoft.com					Block access	FALSE
3a0abc9c-61/sites/AllCompany	Kerry Allen	kerry.allen@contoso.onkerrosoft.com	150	162fi	bb5e-1f		Block access	FALSE
32b81ef7-26/sites/Benefits	Parker McLean	parker.mclean@contoso.onparrosoft.com	130	222a	35d4-8a	General	Limited, web-only access	TRUE





SharePoint			Salaudeen Rajack <del>+</del>	₡?	
			Q si	HARE [D]	
Demo Sales Marketing Blo Site Settings S Indexing Site Content Specify whether this site should be visible in search results. If a site is not visible to search, then content from that site and all of its subsites will not appear in search results.	3			y .	•
Indexing ASPX Page Content The text of the items displayed on ASPX pages is often included in search results. If individual items on the pages on this site are secured by using permissions that are more restrictive than the page itself, unauthorized users might see this restricted information in search results.	This site does not contain page indexing behavior: O Do not index Web Pa Always index all Web Never index any Web	arts if this site conta Parts on this site			E
Offline Client Availability Specify whether this site should be available for offline clients.	Allow items from this site	to be downloaded t © No			

Reindex site

#### Reindex site

Marking this site for reindexing will enable this site to be picked up during the next scheduled search crawl.

Cancel

OK

Setting the "Indexing Site Content" to "No" will prevent the site from being indexed in the Semantic Index for Copilot (as well as the Keyword index).



## **File Version History**

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Version History			
<ul> <li>Yesterday, 8:20 PM</li> <li>Current Version</li> <li>Robert Gates</li> </ul>			
<ul> <li>Thursday, 10:47 AM</li> <li>Robert Gates</li> </ul>			
<ul> <li>Wednesday, 2:12 PM</li> <li>Robert Gates</li> </ul>			
<ul><li>Tuesday, 2:48 PM</li><li>Robert Gates</li></ul>			
<ul> <li>Monday, 9:09 PM</li> <li>Robert Gates</li> </ul>			
<ul> <li>September 15, 6:40 PM</li> <li>Robert Gates</li> </ul>			
<ul> <li>September 1, 12:37 PM</li> <li>Robert Gates</li> </ul>			
<ul> <li>August 31, 3:41 PM</li> <li>Robert Gates</li> </ul>			
<ul><li>August 30, 8:27 PM</li><li>Robert Gates</li></ul>			

Maintain a single file, all historical information is saved within the file. Only the "Current Version" is returned in Copilot results.





# Questions?



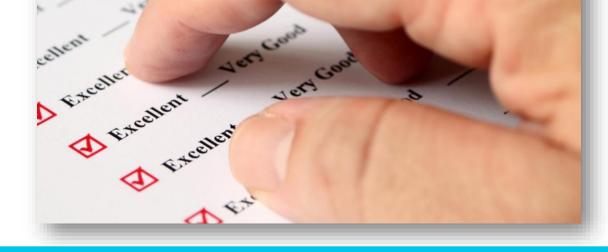


# Workshop Survey

### MN365 Fall 2023 Workshop Day



## https://mn365.org/survey



@M365MN

mn365.org

