



AI in Teams Governance

Katleen Van Trier



**Digital Workplace
consultant**



Getting ready for Microsoft 365 Copilot

Copilot Readiness



**Microsoft 365
Governance**



**SharePoint
Governance**



Security



**Compliance
Implementation**



**All the stuff you
wanted to do
but never did**

Getting ready for Microsoft 365 Copilot



Security

Just in time access to content with DLP and Conditional Access Policies



User Review

Ensure that users have the correct access to Workspaces and Content



Permissions

Review permissions for users to ensure correct access



Oversharing

Limit oversharing of content through the organization



Content

Remove redundant, trivial or obsolete content to ensure accuracy

What are the risks of not being ready?



AI Hallucination

Generate an incorrect response based on incorrect content



Incorrect Access

Much easier to find content you didn't know you have access to with natural language



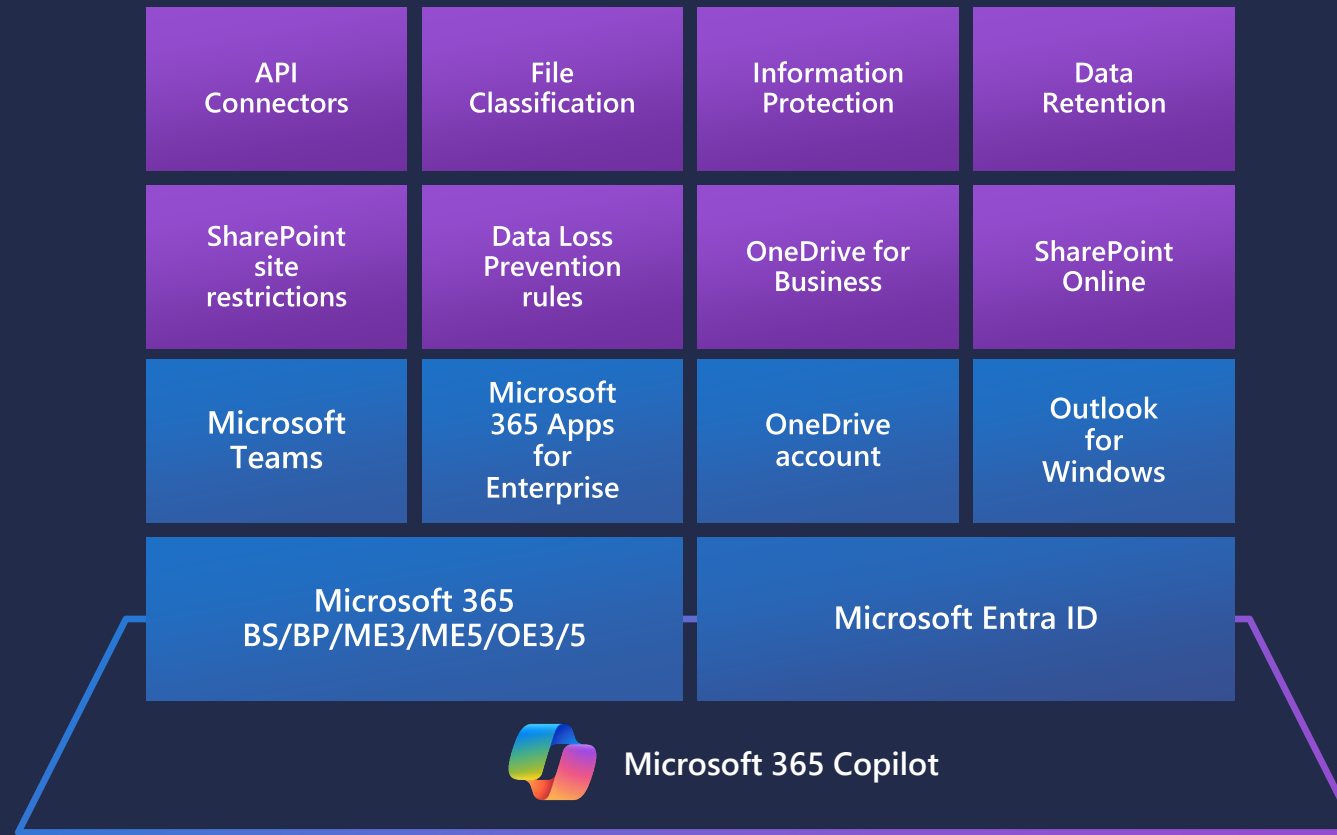
Lack of adoption

You only get one chance to make a first impression...

Some tips & tricks to help you get started with Microsoft 365 Copilot



Get Copilot ready - building blocks



Declutter your Microsoft 365 environment

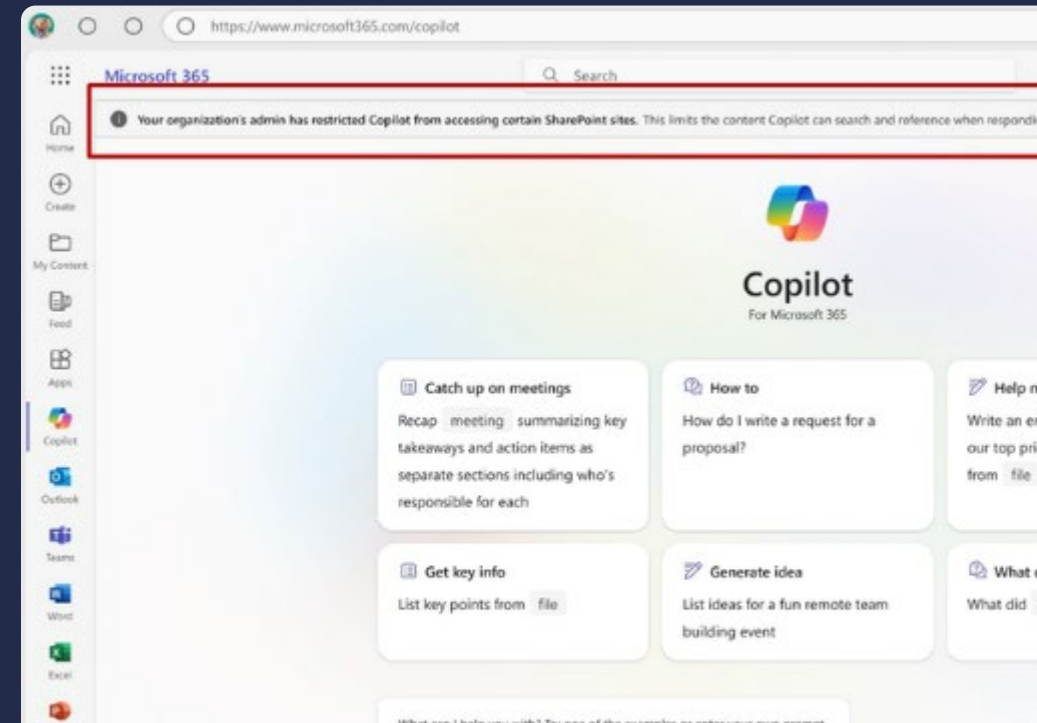
- Bring structure in your SharePoint sites and Teams
- Use logical naming for Sites, Teams and Files
- Delete outdated information
- Set-up lifecycle management for inactive workspaces
- Review user access on a regular basis



Restricted SharePoint Search

- Will be launched in April
- Disable organization-wide search
- Restrict Enterprise Search and Copilot experiences to a curated set of SharePoint sites of your choice
- Off by default. When enabled
 - An allowed list of curated SharePoint sites set up by admins (with up to 100 SharePoint sites), honoring sites' existing permissions.
 - Content from their frequently visited SharePoint sites.
 - Users' OneDrive files, chats, emails, calendars they have access to.
 - Files that were shared directly with the users.
 - Files that the users viewed, edited, or created.

More info: [Introducing Restricted SharePoint Search to help you get started with Copilot for Microsoft 365 - Microsoft Community Hub](#)



Sharing individual files

- Change your SharePoint sharing policy and disable anonymous sharing
- Only allow owners to share files

External sharing

Content can be shared with:

SharePoint OneDrive

Most permissive

Least permissive

Anyone
Users can share files and folders using links that don't require sign-in.

New and existing guests
Guests must sign in or provide a verification code.

Existing guests
Only guests already in your organization's directory.

Only people in your organization
No external sharing allowed.

Documents > General

Name	Modified	Modified By	+ Add column
DesignTeamOffsite.PNG	March 4	MOD Administrator	
PNWCoffeeHouseBrandBrief.p...		MOD Administrator	

Open Preview Share Copy link

Share the selected item with other people

Site sharing settings

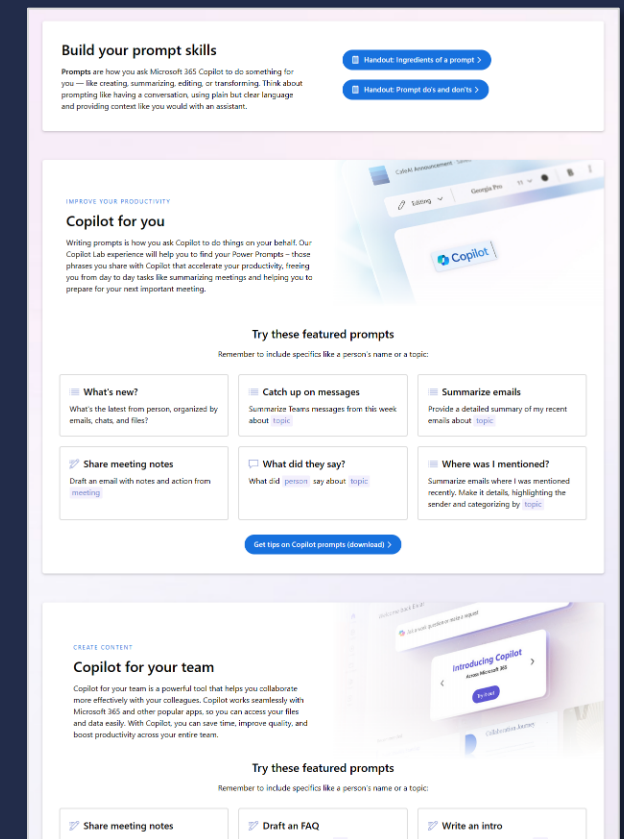
Control how things in this site can be shared and how request access works.

Sharing permissions

- Site owners and members can share files, folders, and the site. People with Edit permissions can share files and folders.
- Site owners and members, and people with Edit permissions can share files and folders, but only site owners can share the site.
- Only site owners can share files, folders, and the site.

Don't forget change management

- Let's enable Copilot and users will figure it out won't work!
- User expectations will be high
- Useful resources
 - Microsoft Adoption Site for Copilot
[Copilot for Microsoft 365](#)
 - Copilot Succes Kit
[Copilot Success Kit](#)
 - Scenario library
[Microsoft Copilot Scenario Library](#)
 - Copilot lab
[Copilot Lab](#)



Microsoft 365 Copilot:

The art and science of prompting

1. Tell Copilot what you need

There are many types of prompts you can use depending on what task you want done.

- ✓ **Learn about projects and concepts:**
"What is [Project X] and who are the key stakeholders working on it?"
- ✓ **Edit text:**
"Check this product launch rationale for inconsistencies."
- ✓ **Transform documents:**
"Transform this FAQ doc into a 10-slide onboarding guide."
- ✓ **Summarize information:**
"Write a session abstract of this [presentation]."
- ✓ **Create engaging content:**
"Create a value proposition for [Product X]."
- ✓ **Catch-up on missed items:**
"Provide a summary of the updates and action items on [Project X]."

Prompts are how you ask Microsoft 365 Copilot to do something for you — like creating, summarizing, editing, or transforming. Think about prompting like having a conversation, using plain but clear language and providing context like you would with an assistant.

2. Include the right prompt ingredients

To get the best response, it's important to focus on some of the key elements below when phrasing your Copilot prompts.

Goal

What response do you want from Copilot?

Context

Why do you need it and who is involved?

Generate 3-5 bullet points to prepare me for a meeting with Client X to discuss their "Phase 3+" brand campaign. Focus on email and Teams chats since June. Please use simple language so I can get up to speed quickly.

Which information sources or samples should Copilot use?

Source

How should Copilot respond to best meet your expectations?

Expectations

Microsoft 365 Copilot:

The art and science of prompting

3. Keep the conversation going

Following up on your prompts help you collaborate with Copilot to gain more useful, tailored responses.



Generating content ideas

Lead with broader requests, then give specific details about the content.



Gaining insights

Ask for a summary of a specific file, then ask relevant questions to gain deeper insights.



Enabling insightful meetings

Request a meeting recap, then ask for more information about what you should know.



Translating languages

Ask Copilot to translate a sentence to one of the supported languages, then ask for more context or a regional dialect.



Storytelling assistance

Ask Copilot to write a story, then guide it by giving more specific, relevant details.



Solving technical problems

Present a technical problem, then narrow it down, or ask for step-by-step guidance.

Helpful hints to keep in mind

Know Copilot's limitations

Copilot is limited to your current conversation, so give lots of details.

Communicate clearly

Pay attention to punctuation, grammar, and capitalization.

Use quotation marks

This helps Copilot know what to write, modify, or replace for you.

Start fresh

Avoid interrupting and type "new topic" when switching tasks.

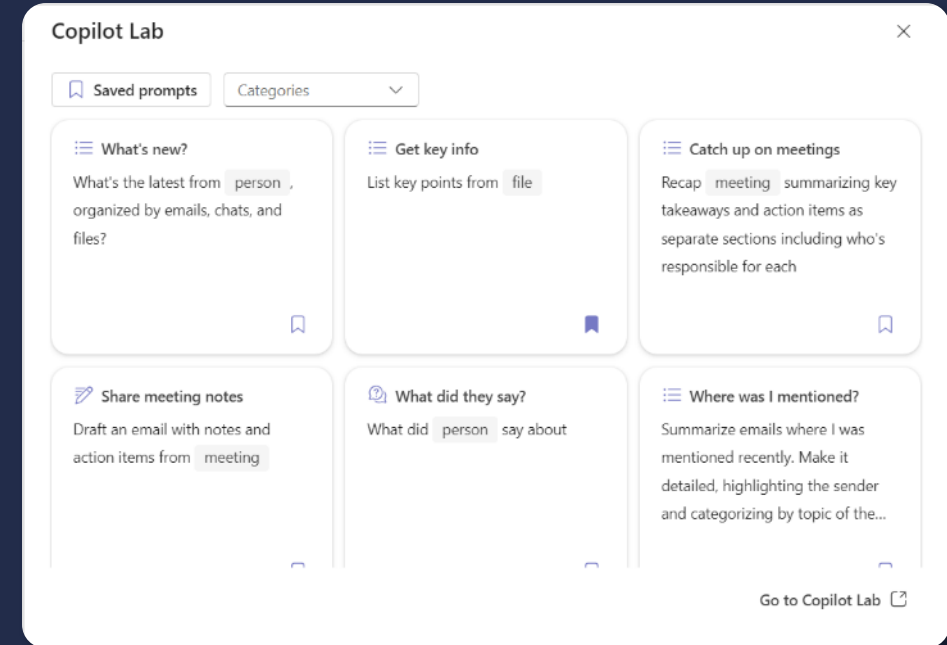
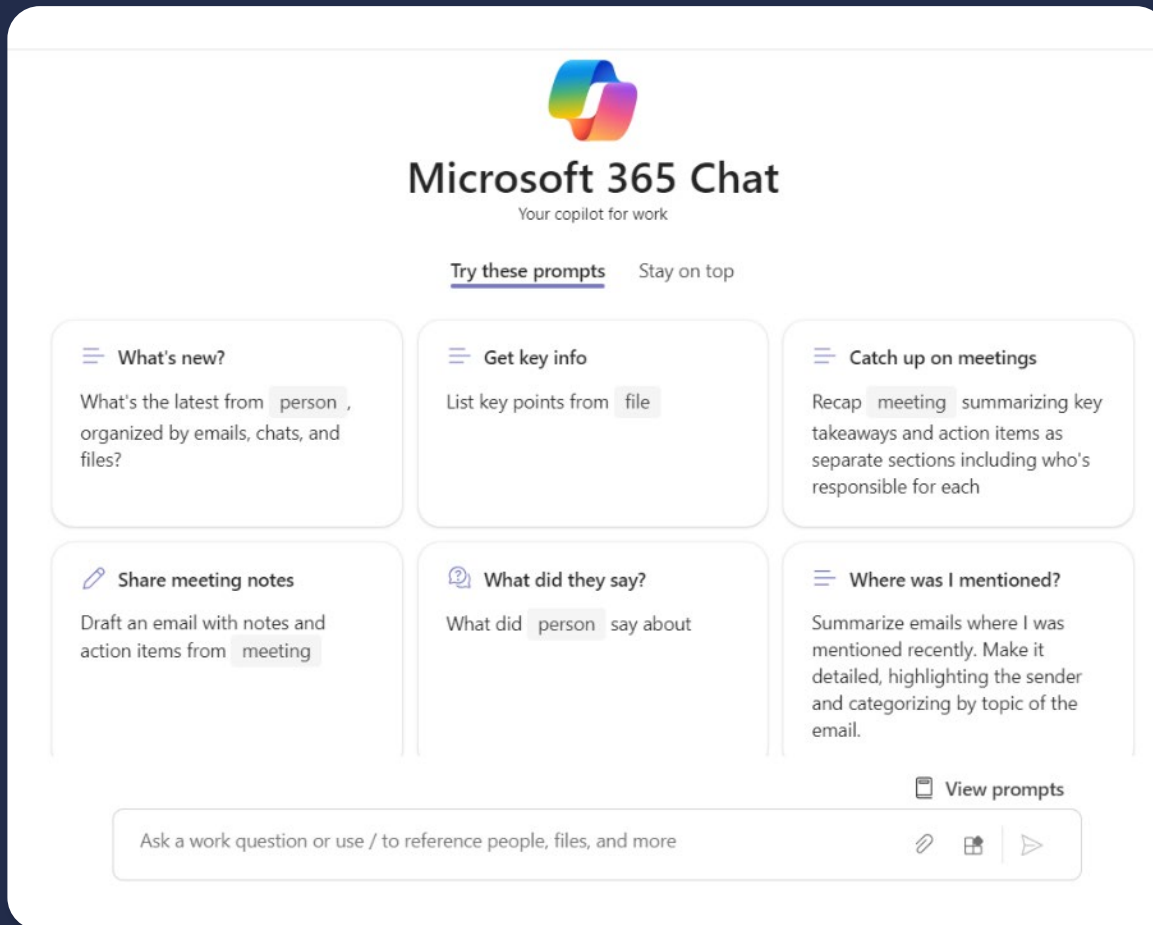
Be professional

Using polite language improves Copilot's response.



Learn more on our [Microsoft Copilot help & learning page.](#)

Copilot Lab – Your guide to building Copilot skills



<https://aka.ms/CopilotLab>

Provides prompt suggestions directly in product

Stay on top – Personalized recommendations for Copilot prompts

View prompts – Catalog of other prompts by category

Discover – Know your data and understand the risks

Uncover the potential data and security risks Microsoft 365 Copilot could introduce into your organization.

What is sensitive? Where does data live? Who has access? How is it used? What is the risk?

- Define what is sensitive to the organization
- Generic & customer specific
 - Company secrets
 - Highly confidential
 - Personal Identifiable Information

- Created inventory of all data repositories
- Considered as copilot source
 - Microsoft 365
 - 3rd party sources
 - Structured and unstructured

- What content can employee access
- Internal & external to the organization
- Access control and access management
- Oversharing

- Sensitive data overexposure
- Unprotected data
- Is the use of sensitive data managed

- What if data is exposed
- Which data could harm the organization
- What would be the impact & cost
- Are we at risk
- Are we compliant

Protect

Implement controls to mitigate and reduce risk

Data Lifecycle controls

- Minimize obsolete data
- Retention policies and automatic deletion
- Records management for business, legal or regulatory record keeping requirements

Data Protection controls

- Protect sensitive information
 - Data encryption
 - Watermarking
- Prevent Data loss
- Protect against Oversharing and external sharing

Data access controls

- Optimize access permissions, remove, block
- Correct oversharing
- Exclude data sources

Data labeling

- Train users to use standard Team, SharePoint site, and file naming conventions

Data classification

- Select and define sensitive info types
 - Generic, out of the box
 - Customer specific, custom defined to specification

Elevate Productivity



Organizational risk tolerance define next steps.

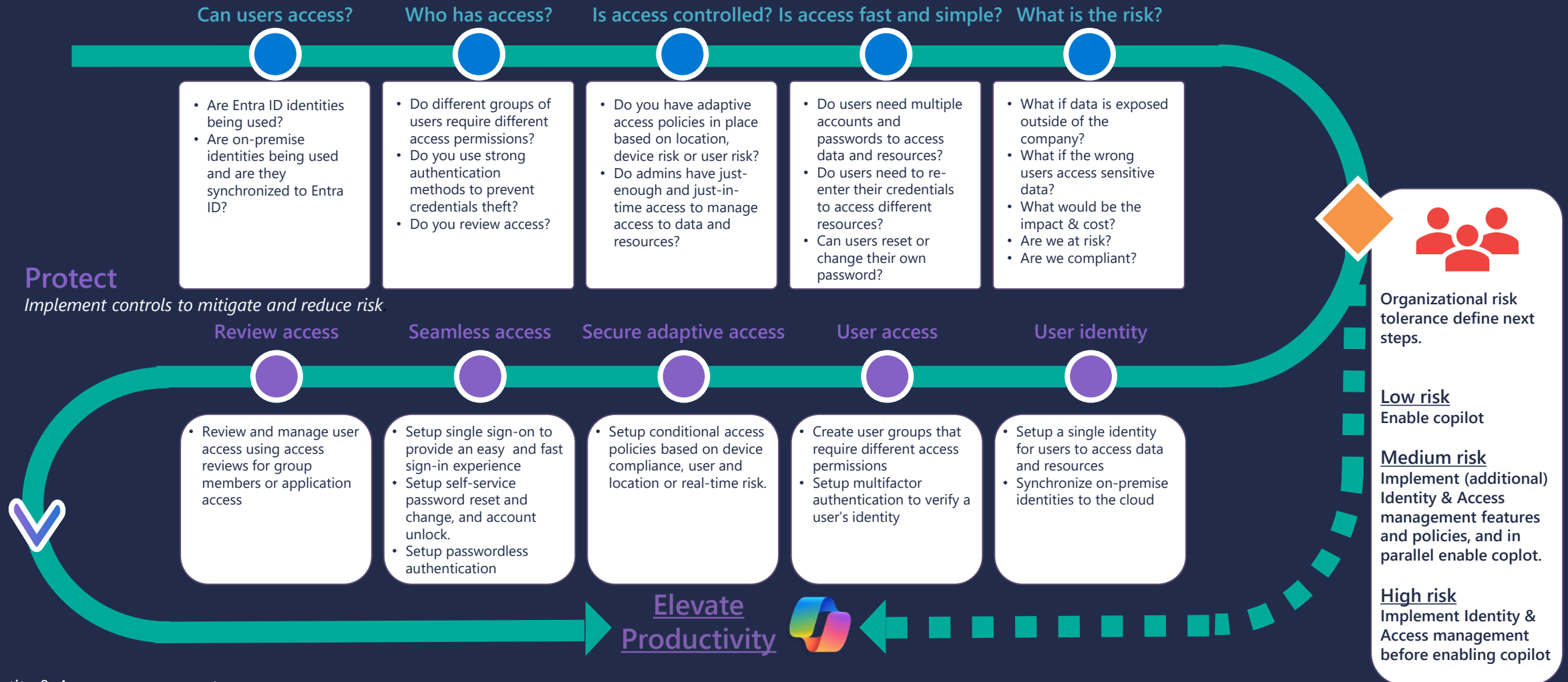
Low risk
Enable copilot

Medium risk
Implement (additional) data security and in parallel enable copilot.

High risk
Implement data security before enabling copilot

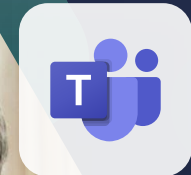
Discover – Protect user access to Microsoft Copilot for Microsoft 365

Use strong authentication and real-time, risk-based adaptive access policies without compromising user experience



How can Orchestry help you get ready?

How Orchestry can be your
wingman in the era of Copilot
readiness



What is Orchestry

Orchestry

 **Rich Workspace Templates**

 **Informative Workspace Directory**

 **Intuitive Self-Service Provisioning**

 **Advanced Empowering Governance**

 **Intelligent Actionable Insights**

 **Comprehensive Lifecycle Management**

 **Intelligent Recommendations**

 **More Features Coming Soon**

INTRODUCING

Orchestry Recommendations for Copilot readiness



Orchestry <<

- Home
- Signals >
- Recommendations
- Health Checks

- + Provision
- Template >
- Workspaces
- Channels
- Documents
- Features
- Approved Workflow
- Metadata
- Analyze >

Signals


Recommendations

Open 5
Resolved 4
Snoozed 2

Filters

Total Workspaces Scanned: **1,345**

Priority



- 🔥 Urgent 1
- 🔥 Important 3
- ⭐ Best Practice 1

📄 Resolved

8

Last 30 Days ↑ 23%

✦ New

12

Last 30 Days

Top Categories

🛡️ Security 25	🏗️ Architecture 22
👤 Adoption 17	💰 Cost Saving 14
👤 Guests 6	🗨️ Communications -

Recommendation	Priority ⌵
<p>Large Audience for Shared Links in OneDrive</p> <p>You have 107 OneDrive files with an unusually large audience who can access it via Shared Links.</p> <div style="display: flex; gap: 5px; margin-top: 5px;"> Copilot Readiness Oversharing 📁 ☁️ </div>	🔥 Important ⌵
<p>Workspaces Without Guest Review Policies ✦ New</p> <p>You have 25 Workspaces with Guests that currently have no Review policy applied.</p>	🔥 Urgent ⌵

Powerful Insights to prepare your tenant for Copilot

 Urgent

Workspaces with Sensitivity Label Changes

You have **39 workspaces** whose Sensitivity Label has been changed in the last 7 days

 Security  Governance 

 Best Practice

Workspaces with High Version History Storage Footprint

You have **412 workspaces** containing over 500 MB of Version History

 Cost Savings  Storage  

 Important

Workspaces with High Trending Storage

You have **27 workspaces** whose storage footprint has grown by more than 50% in the last 7 days

 Cost Savings  Storage  

 Important

Inactive Users with Premium Licenses

You have **281 users** with Microsoft 365 Premium licenses who have been inactive for over 60 days

 Cost Savings  Licensing  

 Important

Large Audience for Shared Links in OneDrive

You have **107 OneDrive files** with an unusually large audience who can access it via Shared Links

 Copilot Readiness  Oversharing  

INTRODUCING

Orchestry Insights for Copilot readiness



Never Used Workspaces 101 workspace(s)
Workspaces that appear to have never been used

Search for a workspace

Filters Days Inactive Show Archived Export

Workspace Name	Assigned Lifecycle Policies	Assigned Guest Policies	Owners	Members	Guests	Workspace Space Usage	Created Date	Last Activity Date	Days Inactive
Project Workspace Dev Provisioning /sites/ProjectWorkspaceDevProvisioning Inactive 682 682 682	---	---	1	0	0	23.95 MB	Mar 18th, 2022	Mar 18th, 2022	682
PRJ-EUR-LGL-Project MVP 2 /sites/prj-eur-lgl-project-mvp1 Inactive 635 635 635	---	---	3	4	0	45.59 MB	May 4th, 2022	May 4th, 2022	635
PRJ-AUS-FIN-Post Deployment T4 /sites/prj-aus-fin-post-deployment-t4 Inactive 634 634 634	---	---	3	1	0	58.04 MB	May 5th, 2022	May 5th, 2022	634
PRJ-NA-MAN-Project INV1 /sites/prj-na-man-project-inv1 Inactive 627 627 627	---	---	3	2	0	45.61 MB	May 12th, 2022	May 12th, 2022	627
Tall Knowledge 915 /sites/TallKnowledge915 Inactive 663 626 626	---	---	2	17	0	1.39 MB	May 13th, 2022	May 13th, 2022	626

Insight Reports


Instantly see the status of your tenant with powerful Insight reports not available out of the box.

Understand usage, storage, membership, permissions and more.


Easily resolve sharing and other issues to help you get ready for Copilot.

Overview Lifecycle **Users** Last Crawled: Jan 29, 2024


Owners 6 Email All Chat All




David Francoeur
Wall Inspector



Alex Wilber
Marketing Assistant
Marketing



Allan Deyoung
IT Admin
IT



Adele Vance
Retail Manager
Retail






Status
Inactive

- 622 days without Team activity
- 797 days without Group activity
- 139 days without SharePoint activity

LAST ACTIVITY September 12, 2023

Workspace Content 273 workspace(s)
Workspace content including pages, list items and documents

Filters Document Count Visibility

Workspace Name	Document Count	Pages	List Items	Group Conversations	Workspace Space Usage
 Orchestry /sites/orchestry Active 0	110,727	2	330	0	6.01 GB
 PRJ-AUS-MAN-Project CAPGEM 2 /sites/prj-aus-man-project-capgem2 Inactive 537 537 134	27,854	8	0	1	247.22 GB
 Project Archive /sites/ProjectArchive Active 686 61	20,026	63	0	1	32.95 GB
 Team Site Archive /sites/TeamSiteArchive Active 859 83	13,207	46	14	1	4.85 GB
 Orchestry Project Archive /sites/Orchestry_Project_Archive Inactive 313 95	796	1	0	1	567.53 MB



28-day Fully Functional Trial

- ✓ Free help with the installation and getting started
- ✓ Understand your environment
- ✓ Clean up inactive Workspaces
- ✓ Set yourself up for the future

✉ dwp@Inetum-Realdolmen.world

10% discount on Orchestra licenses for event participants (Orders before end of June 2024)



Export

inetum.
realdolmen
Positive digital flow

The screenshot shows the Orchestra Guest Management Dashboard. The left sidebar contains navigation options: Guests, Dashboard, Insights, Policies, and Settings. The main content area is titled 'Guest Management | Dashboard' and features a 'Guest Overview' section with a line chart showing guest trends. Below the chart are three summary cards: '642 Active Guests', '57 Inactive Guests', and '12 Not Redeemed'. A floating 'Insights' button is visible at the bottom of the dashboard.

Category	Count
Active Guests	642
Inactive Guests	57
Not Redeemed	12





Q&A