

My organization wants to use Microsoft 365 Copilot but where do I start to secure my M365 tenant?



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Microsoft 365 our Airbnb

Experts Live 2025 AI365ready.com





Some preparations are best made
before using Microsoft 365
Copilot....But why?

Airbnb: "Some trips are just better in an
Airbnb"

**Relevance:**

Not all information presented may be suitable.

**Solutions:**

There is no "One-Size-Fits-All", and NEVER forget adoption

**Level:**

Level 300

**Q&A Limitations:**

Consider waiting until the end



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Olijve



Modern Workplace
Consultant



Matthijs
Hilboezen

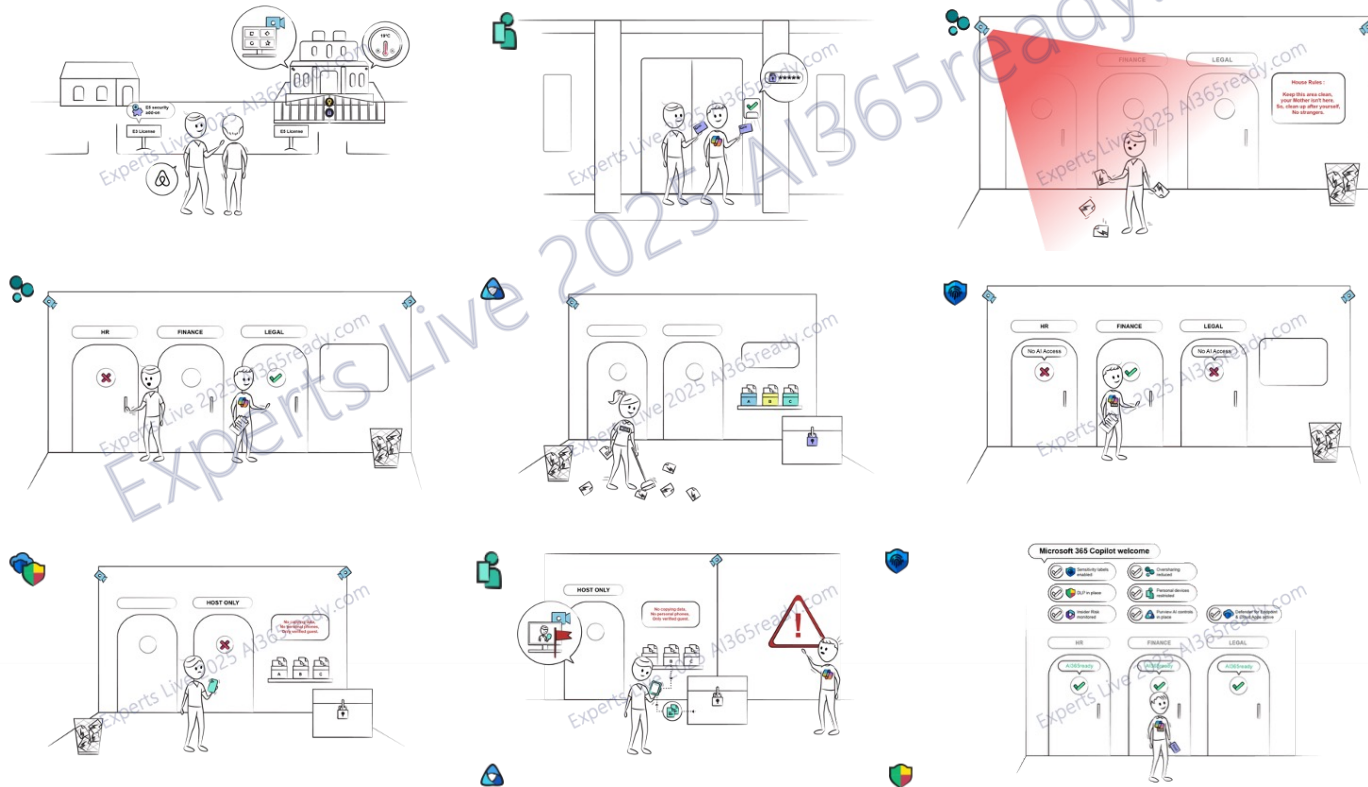
Waar
Bestemmingen zoeken

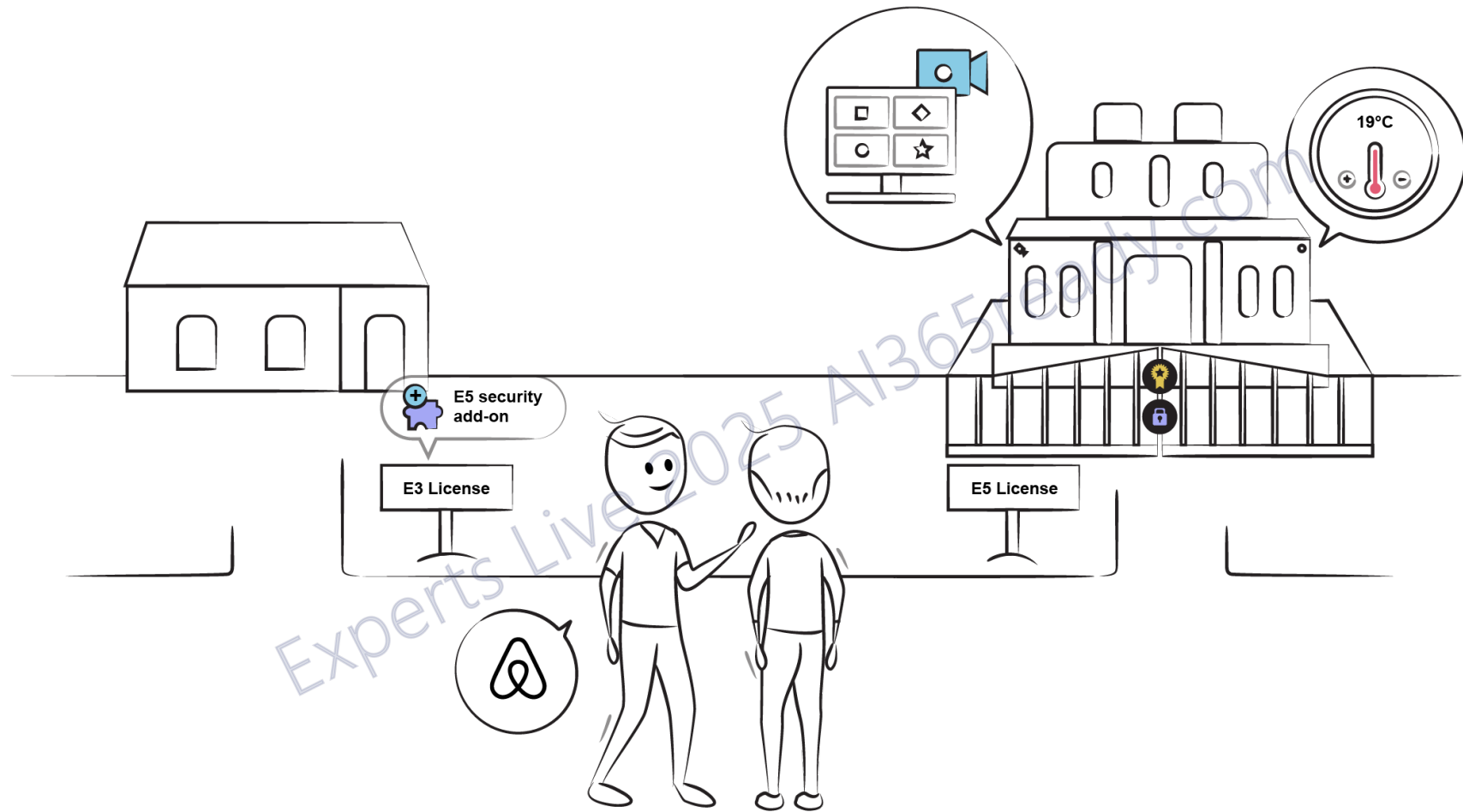
Datum
Datums toevoegen

Wie
Gasten toevoegen



Zoek verder naar woningen in Nieuwegein 3-4 jun >





Difference in base E3 and base E5 licensing

Feature	E3	E5
Manual sensitivity labeling	✓	✓
Auto-labeling and default labels	✗	✓
DLP for email, SharePoint, OneDrive	✓	✓
DLP for Teams chats and endpoints	✗	✓
Advanced audit, premium eDiscovery	✗	✓
Adaptive Protection & Insider Risk	✗	✓

Microsoft 365 Copilot

Core Requirements



Licensing



Cloud
Storage



Identity &
Access



Data
Governance



Admin
Readiness

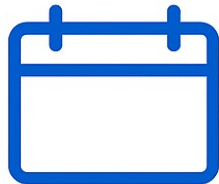




Microsoft 365 Apps Update Rings



Current
Channel



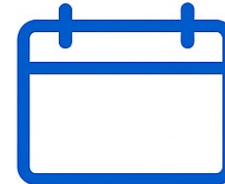
Current
Channel
(Preview)



Monthly
Enterprise



Semi-Annual
Enterprise
Channel



Semi-Annual
Enterprise
Channel
(Preview)



Microsoft 365 Apps for Windows 10 and later | Properties

Client Apps

Search

Overview

Manage

Properties

Monitor

Device install status

User install status

Category

Productivity

Show this as a featured app in the Company Portal

No

Information URL

<https://products.office.com/explore-office-for-home>

Privacy URL

<https://privacy.microsoft.com/privacystatement>

Developer

Microsoft

Owner

Microsoft

Notes

No Notes

Logo



App suite configuration [Edit](#)

Apps to be installed as part of the suite

Access, Excel, OneNote, Outlook, PowerPoint, Publisher, Teams, Word

Architecture

64-bit

Update channel

Monthly Enterprise Channel

Remove other versions

Yes

Version to install

Latest

Use shared computer activation

No

Accept the Microsoft Software License Terms on behalf of users

Yes

Install background service for Microsoft Search in Bing

Yes

Apps to be installed as part of the suite

No languages selected

Default file format

Office Open XML Format

Assignments [Edit](#)

Group mode

Group

Filter mode

Filter

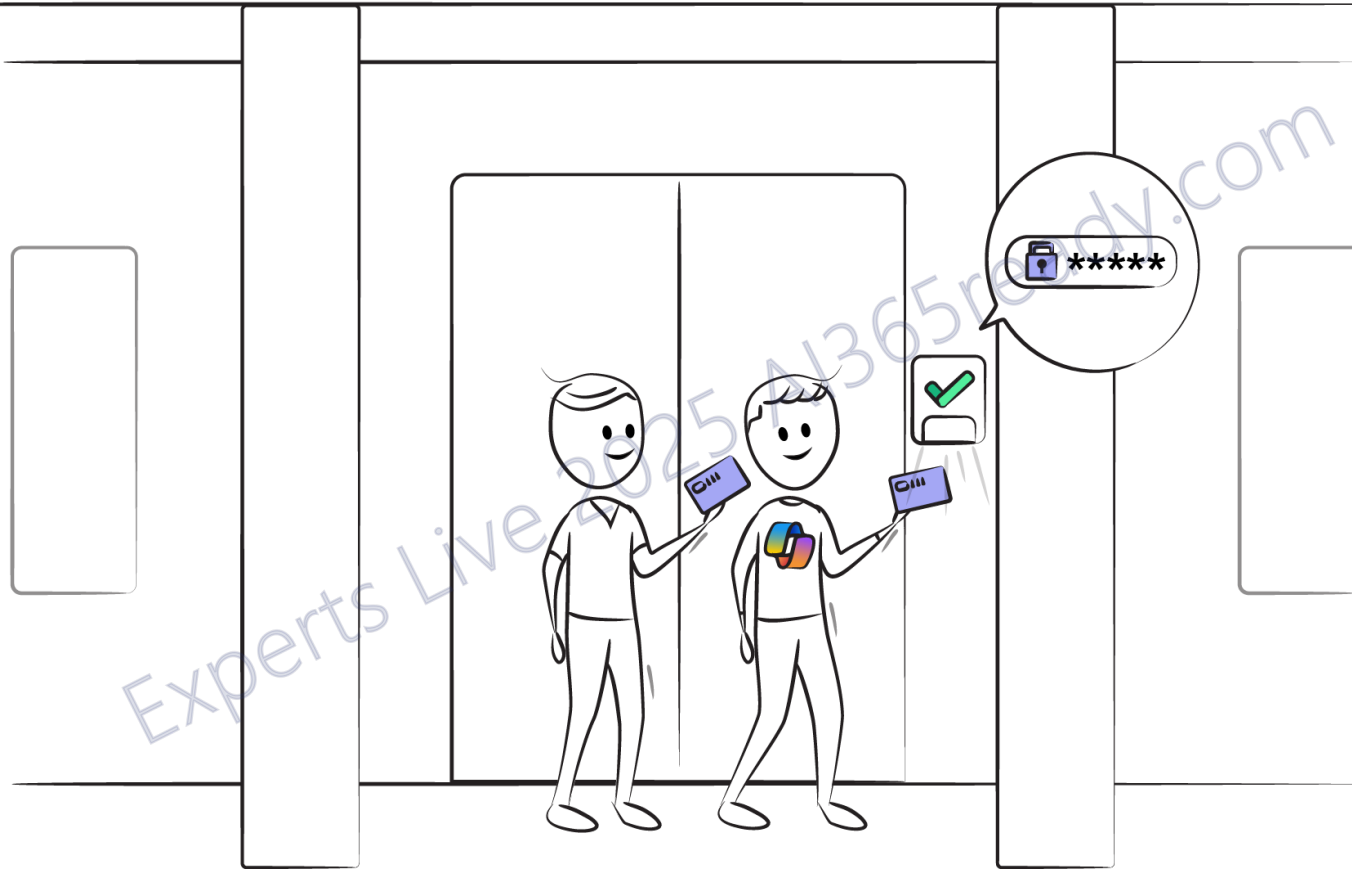
Required

Included

AI - Microsoft Copilot - License

None

None



```
PS /Users/mhilboezen> connect-MgGraph -Scopes "Application.ReadWrite.All"
Welcome to Microsoft Graph!
```

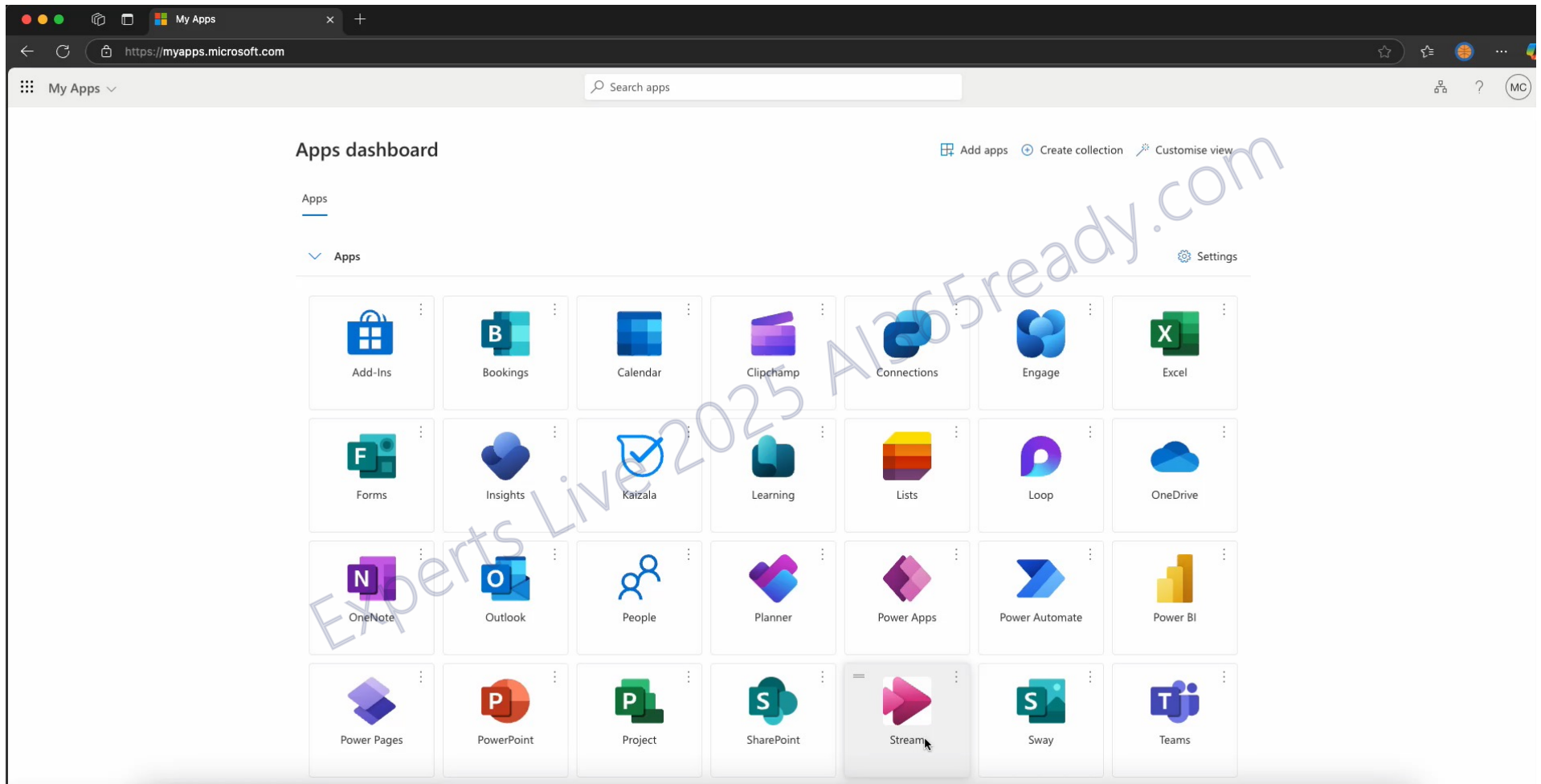
```
Connected via delegated access using 14d82eec-204b-4c2f-b7e8-296a70dab67e
Readme: https://aka.ms/graph/sdk/powershell
SDK Docs: https://aka.ms/graph/sdk/powershell/docs
API Docs: https://aka.ms/graph/docs
```

NOTE: You can use the `-NoWelcome` parameter to suppress this message.

```
PS /Users/mhilboezen> # Create service principal for the service Enterprise Copilot Platform (Microsoft 365 Copilot)
PS /Users/mhilboezen> New-MgServicePrincipal -AppId fb8d773d-7ef8-4ec0-a117-179f88add510
```

DisplayName	Id	AppId	SignInAudience	ServicePrincipalType
Enterprise Copilot Platform	dffe2740-6293-4770-bbf4-092be0a53815	fb8d773d-7ef8-4ec0-a117-179f88add510		Application

Policy name	Created by	State
AI18 - Copilot Readiness - Block AI services when insider risk is elevated - All Users	USER	On
AI19 - Copilot Readiness - AI services must access from a compliant device when insider risk is moderate - All Users	USER	On
AI20 - Copilot Readiness - Require phishing-resistant MFA for AI services - All Users	USER	Report-only





Microsoft Defender

Settings > Endpoints

Cloud apps

Cloud discovery

Cloud app catalog

OAuth apps

Activity log

Governance log

Policies

Endpoints

General

Advanced features

Licenses

Email notifications

Auto remediation

On

Share endpoint alerts with Microsoft Compliance Center

Forwards endpoint security alerts and their triage status to Microsoft Compliance Center, allowing you to enhance [insider risk management](#) policies with alerts and remediate internal risks before they cause harm. Forwarded data is processed and stored in the same location as your Office 365 data.



←

↺

https://purview.microsoft.com/settings/application-settings/insiderriskmgmt?tid=44f12cb3-9905-4d15-9364-bd097c8d6753

🔍 A ☆ ⌵ 👤 ⋮

Microsoft Purview

🔍 Search

Copilot 🔔 1 ⚙️ ? MH

🏠 Home

📁 Solutions

📖 Learn

⚙️ Settings

📁 Data Loss Prevention

👤 Insider Risk Management

🔍 eDiscovery

📁 Data Lifecycle Management

⚙️ Settings

👤 Account

👤 Roles and scopes

🔌 Data connectors

👤 Device onboarding

📄 Optical character recognition (OCR)

Solution settings

🗨️ Communication Compliance

🛡️ Compliance Manager

📁 Unified Catalog

📁 Data Lifecycle Management

📁 Data Loss Prevention

Analytics

Data sharing

Detection groups

Global exclusions

Inline alert customization

Intelligent detections

Microsoft Teams

Notifications

Policy indicators

Policy timeframes

Analytics

When turned on, we'll scan sources in your org (such as the Microsoft 365 audit log) to detect the same activities used by insider risk policies. Scans run daily and provide real-time insights that can help you set up and refine policies to ensure you're detecting the most relevant activities. [Learn more about analytics](#)

🔔 We understand how important privacy is to you and your users. You can choose to show analytics reports at a tenant level or individual user level.

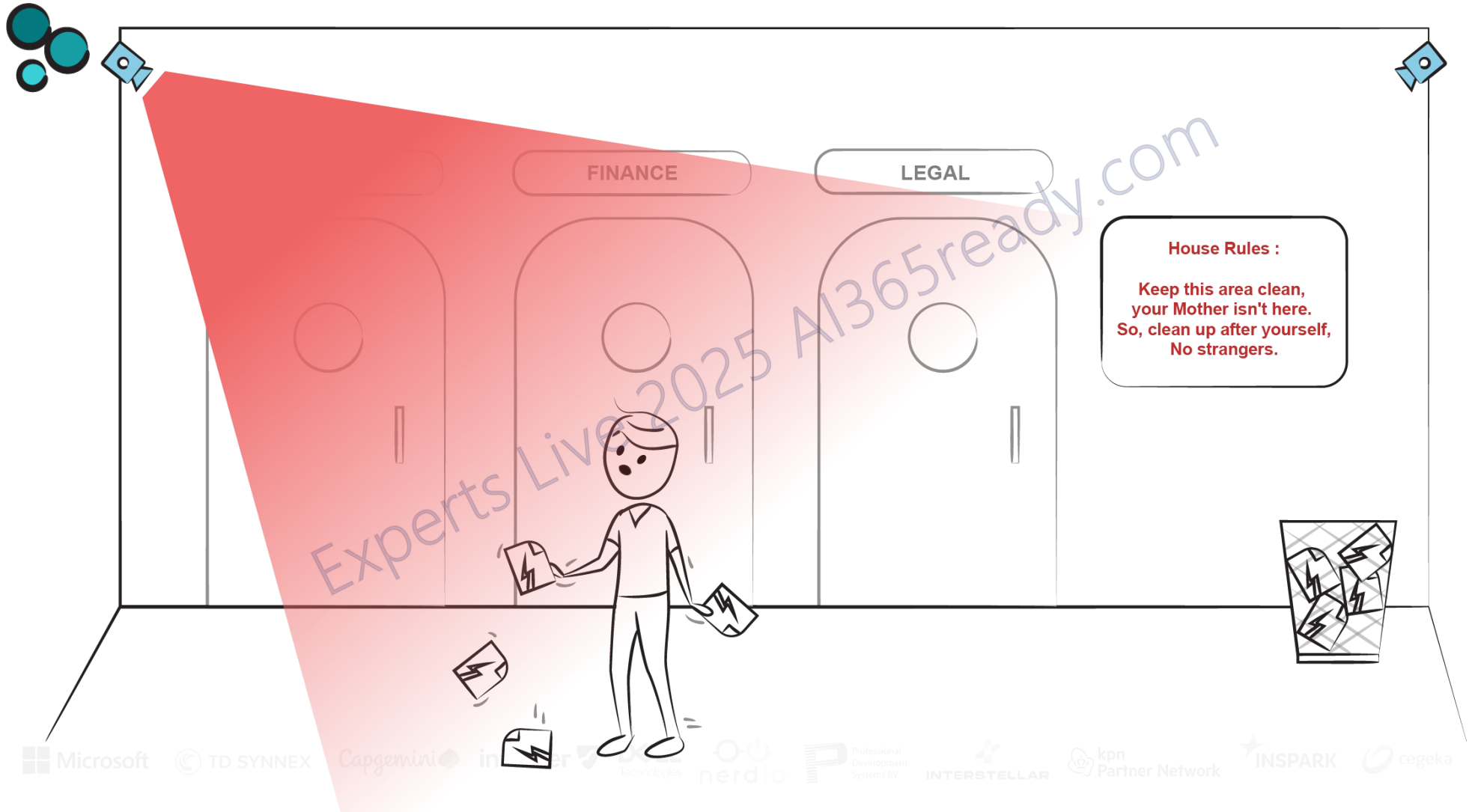
Saving...

Show insights at tenant level

When turned on, data is aggregated at tenant level and is shown as insights in Analytics reports. [Learn more about analytics](#) ☒ On

Show insights at user level

When turned on, data is aggregated at user level and is shown as insights in user activity summary of Data Loss Prevention, Communication Compliance and Microsoft Defender. Data sharing needs to be turned on along with this. [Learn more about user analytics](#) ☒ On





Data Governance Tools SAM features include



DATA ACCESS
GOVERNANCE INSIGHTS



SITE LIFECYCLE POLICY



SITE OWNERSHIP POLICY
(SOON RE-ENABLED)

At least one Copilot license is required in your tenant.



Share "Event Information"

👤 Add a name, group, or email

✉ Add a message

🔒 People in AI365ready with the link can edit.

🔗 Copy link ⚙️ ➤ Send

✅ Link copied. People in AI365ready with the link can edit.



AI Model Results

Confidential Presentations

Internal Briefings

✓

Project Plans

Share "Project Plans"

ev

E


Everyone except external users


Copy link


Send






 **SharePoint admin center**





 Home


 Sites ^

Active sites

Deleted sites


 Containers v


 Policies ^


 **Sharing**


Access control

Site lifecycle management

 Settings

 Content services v

 Migration

 Reports v

File and folder links

Choose the type of link that's selected by default when users share files and folders in SharePoint and OneDrive.

☐ Specific people (only the people the user specifies)

☒ Only people in your organization

☐ Anyone with the link

Choose the permission that's selected by default for sharing links.

☐ View

☒ Edit

Choose expiration and permissions options for Anyone links.

☐ These links must expire within this many days

These links can give these permissions:

Files:

Folders:



Data access governance

Reports

My review requests

Site lifecycle

Data access governance > Content shared with 'Everyone except external users'

Content shared with 'Everyone except external users'

Use these reports to view sites where 'Everyone except external users' was added as a site member, or view sites with specific content, like files, folders, and lists, shared with 'Everyone except external users'. Reports include data from the last 28 days. To get the latest data, run the report, which may take a few hours.

[Learn more about these reports](#)

+ Create report ▶ Run all ↺ Refresh status

Report name	Status	Report type ⓘ	Date range	Sites found	Privacy (Team sites only)	Sensitivity	Template
Report 09-04-2025 ...	Updated a month ago	Sites with specific content shared	Mar 27, 2025 - Apr 23, 2025	-	Private,Public	-	Classic site

permissions of their content based on the report.

View reports



Action needed: Manage 'People in your org' links

SharePoint

Search

MC

Home

Site

Library

Files

Calendar

Tasks

People

Settings

EL

Experts Live 2025

Public group

Not following

3 members

Site Reviews

Files, folders and lists shared with People-In-Your-Org links

Everybody in your organization could have access to these files as 'People-in-your-Org' links were generated for them between Apr 18, 2025 - May 15, 2025. Use 'Manage access' to remove the links, if such access is not required. [Learn More](#).

Name	Shared on	Shared by	Action
Event Information	May 14, 2025	matthijs.hilboezen@ai365re...	Manage access

Complete review

Cancel

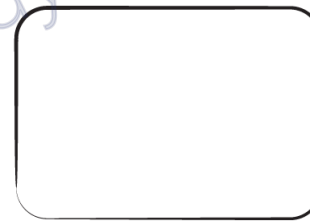
View all created links



HR

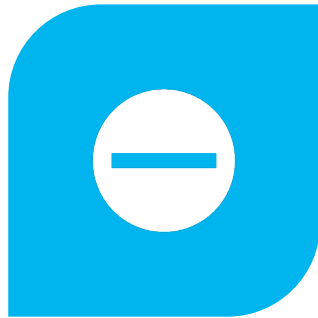
FINANCE

LEGAL





Copilot restrictions based on SAM include



RESTRICTED ACCESS
CONTROL (RAC)



RESTRICTED CONTENT
DISCOVERY (RCD)

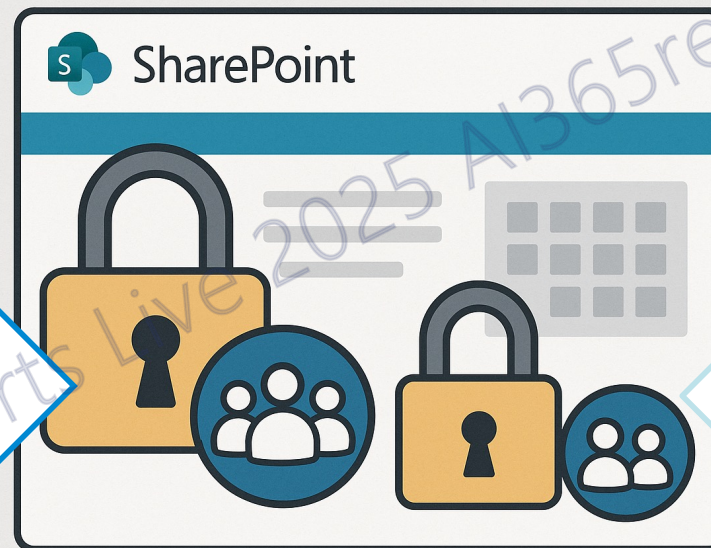


RESTRICTED SHAREPOINT
SEARCH (RSS)

At least one Copilot license is required in your tenant.

SharePoint Restricted Access Control

Site members by group
ex. Finance



Only accessible to a different group
(max 10), ex. Finance admins

SharePoint Restricted Access Control

Enable: `Set-SPOTenant -EnableRestrictedAccessControl $true`

Restricted site access ⓘ PRO

Finance



[Edit](#)

ⓘ Restricted site access is set so people can only access the site if they are owners or members of the group. To make changes, navigate to Settings and edit Restricted site access

Site members

Site visitors

About membership and permissions

<input type="checkbox"/>	Name	Email address
<input type="checkbox"/>	 Experts Live 2025 Members	ExpertsLive2025@moderncloudworkspaceblog.onmicrosoft.com
<input type="checkbox"/>	 Finance	Finance@ai365ready.com



SharePoint

RESTRICTED CONTENT DISCOVERY





SharePoint Restricted Content Discovery

Enable with PS: `Set-SPOSite -identity <site-url> -RestrictContentOrgWideSearch $true`

Restrict content from Microsoft 365 Copilot ⓘ PRO

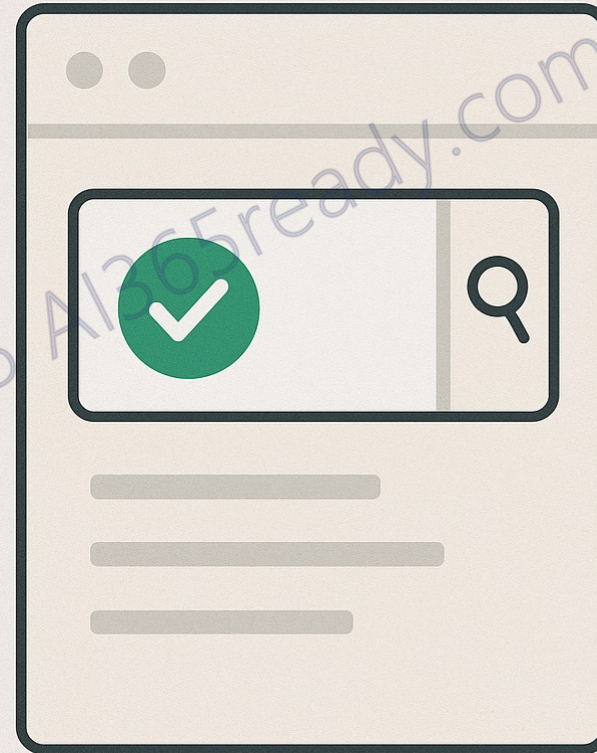
☐ On
☒ Off





SharePoint

RESTRICTED SEARCH





Restricted SharePoint Search

- Copilot license enabled within the tenant

```
PS C:\WINDOWS\system32> Connect-SPOService -Url https://slothsyndicate-admin.sharepoint.com
PS C:\WINDOWS\system32> Get-SPOTenantRestrictedSearchMode
Get-SPOTenantRestrictedSearchMode : You do not have the required license to perform this operation.
At line:1 char:1
+ Get-SPOTenantRestrictedSearchMode
+ ~~~~~
+ CategoryInfo          : NotSpecified: (:) [Get-SPOTenantRestrictedSearchMode], ServerException
+ FullyQualifiedErrorId : Microsoft.SharePoint.Client.ServerException,Microsoft.Online.SharePoint.PowerS
hell.GetSPORestrictedSearchMode
```




Restricted SharePoint Search

- Copilot license enabled within the tenant

```
Administrator: Windows PowerShell
Windows PowerShell
Copyright (C) Microsoft Corporation. All rights reserved.

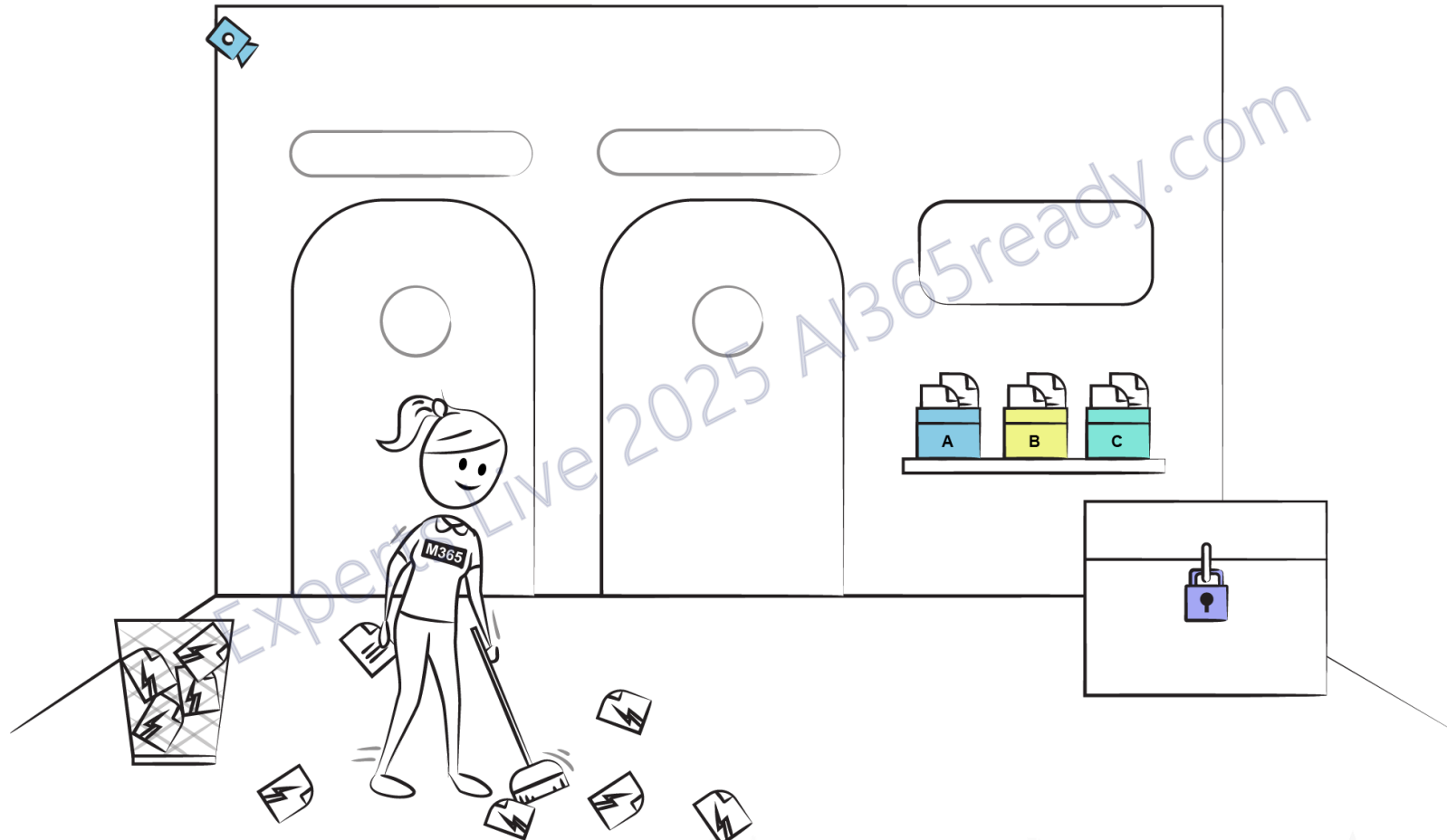
Install the latest PowerShell for new features and improvements! https://aka.ms/PSWindows

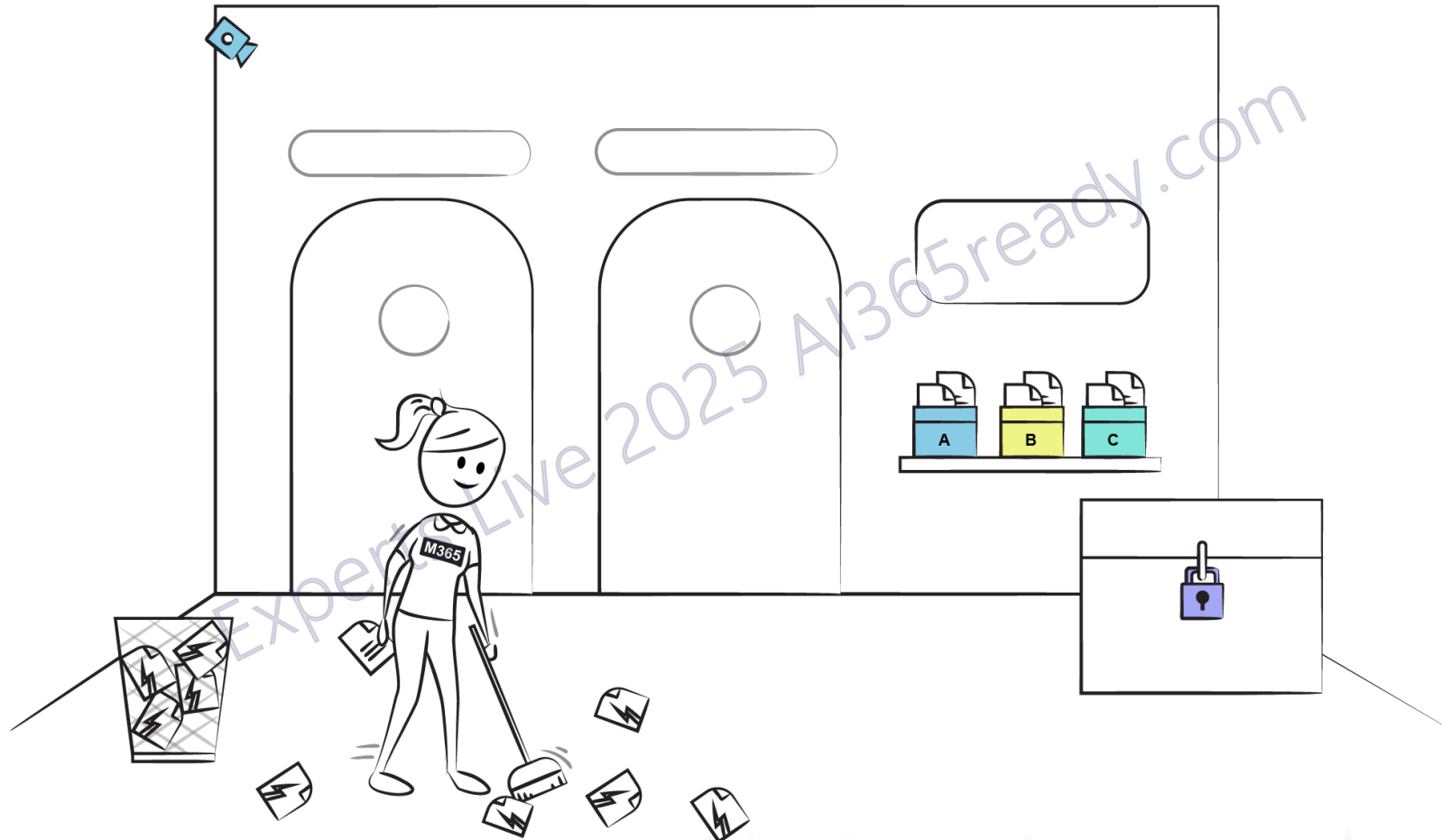
PS C:\WINDOWS\system32> Connect-SPOService -Url https://ai365ready-admin.sharepoint.com
PS C:\WINDOWS\system32> Get-SPOTenantRestrictedSearchMode
Restricted search mode is currently not set.
```



Administrator: C:\Program Files\PowerShell\7\pwsh.exe
PS C:\Windows\System32> Add-SPOTenantRestrictedSearchAllowedList -SitesListFileUrl "C:\Temp\PS Import\AllowedSites.csv"
PS C:\Windows\System32>

	A	B	C	D	E	F	G
1	https://ai365ready.sharepoint.com/sites/ResearchDevelopment						
2	https://ai365ready.sharepoint.com						
3	https://ai365ready.sharepoint.com/sites/HumanResources						
4	https://ai365ready.sharepoint.com/sites/ExpertsLive2025						
5	https://ai365ready.sharepoint.com/sites/Finance						
6							







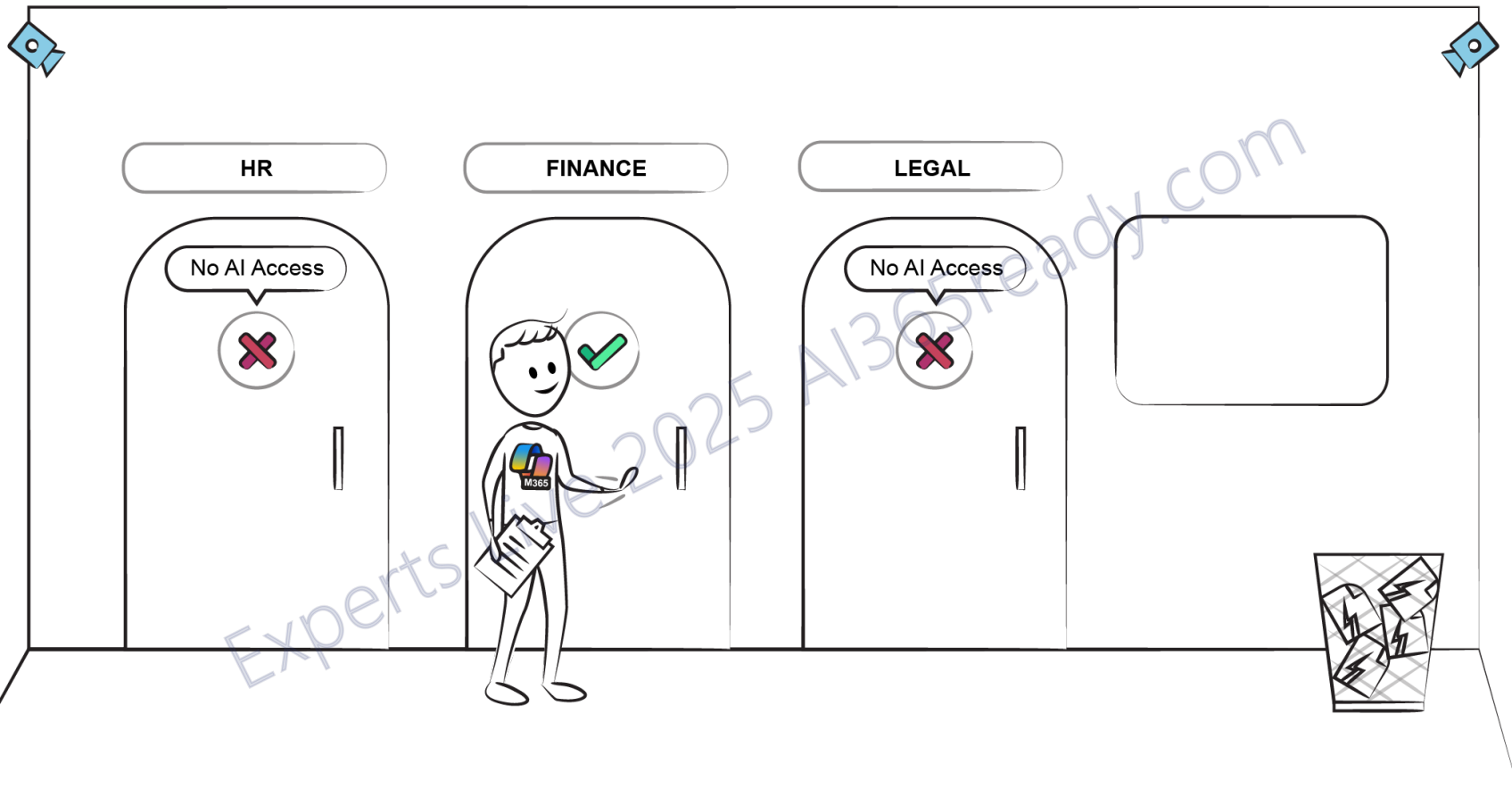
Retention rules

Retention
wins over
deletion

Longest
retention
wins

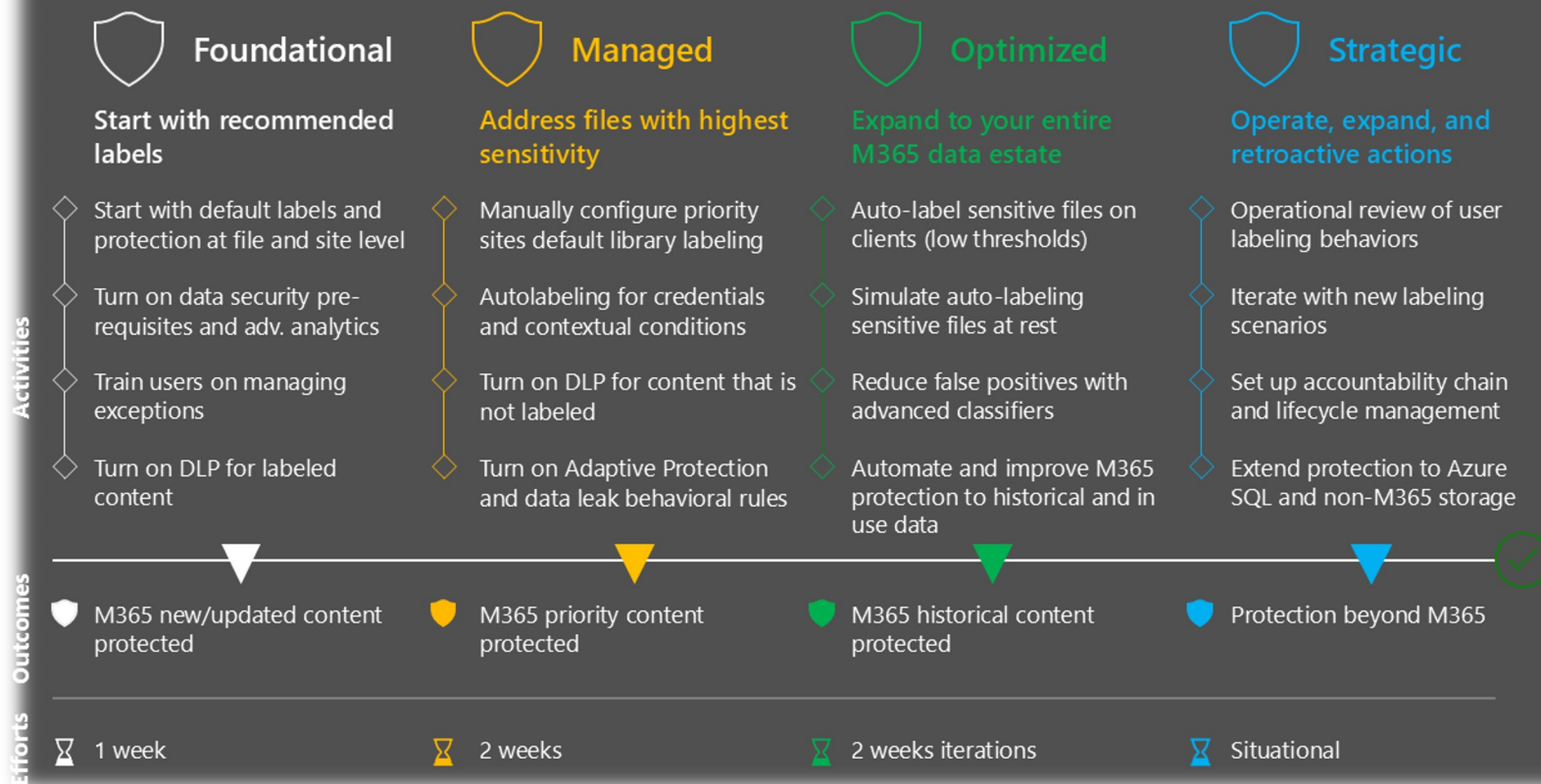
Shortest
deletion
wins

Explicit
wins over
implicit





Secure by default with Microsoft Purview



Deployment guide available: <https://aka.ms/PurviewDeploymentModels/SecureByDefault>

Last updated: May 4, 2021



Basic label Taxonomy



Public - Public data is unrestricted data meant for public consumption, like publicly released source code and announced financials. Share it freely.



General - Business data that isn't meant for public consumption, such as daily work product. Data that can be shared internally and with trusted partners.



Confidential - Sensitive business data crucial to achieving your organizational goals. Limited distribution.



Highly confidential - Your most critical data. Share it only with named recipients.



Sublabels

\Specific People - Data can only be accessed by the specified people.



\All Employees - Data can be accessed by anyone within your organization.



\Internal exception - Data can be accessed by anyone internally but prevented from being shared externally. Use this label in situations where encryption is impacting daily operations.



Overview | Microsoft Purview

https://purview.microsoft.com/datalossprevention/overview?tid=44f12cb3-9905-4d15-9364-bd097c8d6753

Microsoft Purview

Search

Copilot

Sign in

Home

Solutions

Learn

Settings

Insider Risk Management

Data Loss Prevention

Related solutions

DSPM for AI

Data Security Posture Management (preview)

Compliance Manager

Data Loss Prevention

Overview

Policies

Alerts

Classifiers

Explorers

Diagnostics

Information Protection

Insider Risk Management

Overview

If your role group permissions are restricted to a specific set of users or groups, you'll only be able to view data for those users or groups. [Learn more about role group permissions.](#)

View role groups

Protect even more sensitive info on your Windows endpoint devices by turning on advanced classification, which allows your endpoint DLP policies to detect named entities and exact data match (EDM) classifiers in files on users' devices. [Learn more about advanced classification.](#)

Turn on advanced classification

adm-eolijve, complete the listed tasks to access analytics with insights and tailored DLP policy recommendations

<input type="radio"/>	Learn about analytics Review the provided Microsoft documentation and instructional videos to learn the functionality.	Optional	2 minutes
<input checked="" type="radio"/>	Turn on analytics for risk detection and policy refinement opportunities (preview) Enabling analytics allows you to detect potential risks, discover blind spots and find opportunities for policy improvement or fine-tuning.	Highly recommended	2 minutes

Explore DLP analytics

Potential Data Leak - Unprotected data at risk

Prevent users from sharing more sensitive info externally

In last month, 2 users shared sensitive info with people outside your org. Investigate recent activity and create a policy to help prevent it from happening again.

Summary of sensitive info shared

- 2 Files containing sensitive info
- 3 Instances of sensitive info detected

View detection details

View policy settings



Microsoft 365 Copilot

Home Copilot Create OneDrive Pages Apps

Work Web

New chat

Generating Sales Report for Last Year

- Click the Display columns by drop-down and select Products/Services.
- Customize the report by expanding the Filter menu and selecting the desired products/services.
- Run the report to see the quantities sold and revenue generated for each product [2].

If you need a more specific or detailed report, you might want to check your company's internal reporting tools or contact your finance or sales department for assistance.

1 How do I view a total sale... 2 How do I see the quantity ...

Edit in Pages Copy

AI-generated content may be incorrect

What sales have we had this year so far?

Copilot

I found some internal documents related to sales this year, but they are protected and I cannot access the detailed information [1] [2] [3] [4] [5].

However, based on external sources, here are some general insights on sales trends this year:

- Retail Trade Sales:** Retail trade sales were up 1.4% from February 2025 and up 4.6% from last year. Motor

Sales 2025 details

No Copilot

List key points

Who contributed to this?

Ask about this

1 Sales 2025 details 2 Sales 2025 3 Untitled 4 Sales 2025 Show more

Edit in Pages Copy

AI-generated content may be incorrect



 Copilot

Results 2024.docx What are the contents of this file?

The document titled [Results 2024](#) is protected, and I can't provide more information as the result is protected ¹.

If you need specific details from this document, you might need to access it directly through your organization's secure systems. Is there anything else you would like to know or any other way I can assist you?



Results 2024

 Ask

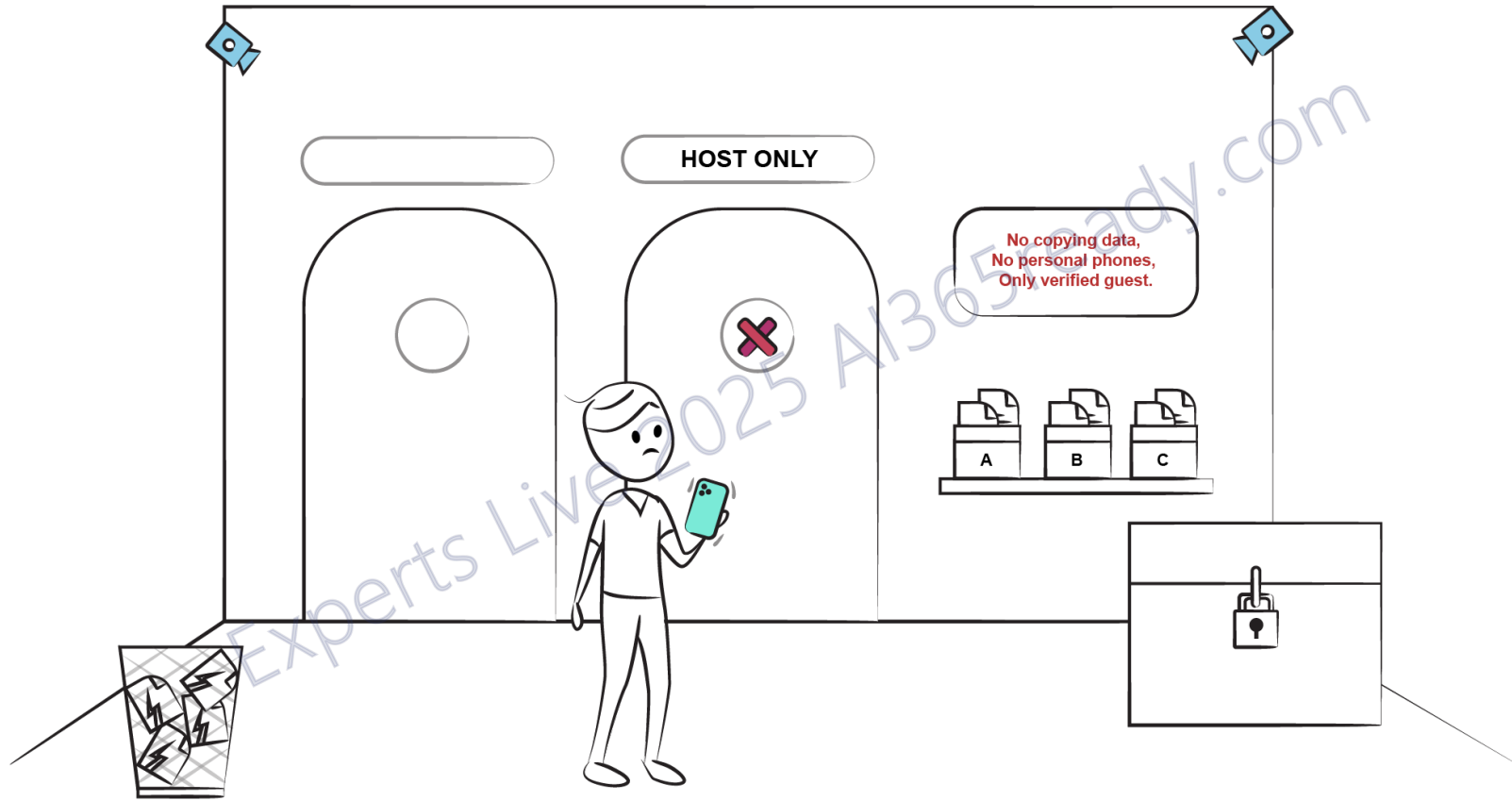
High confidential Finance
Finance

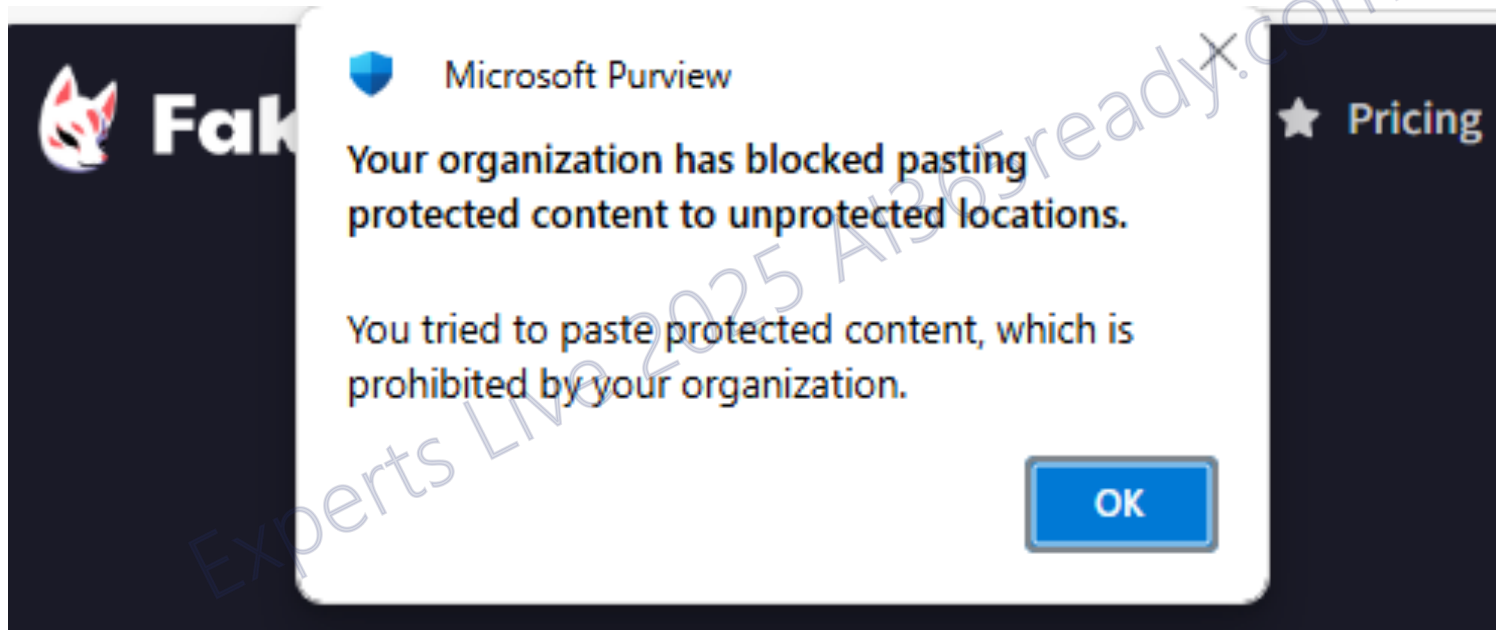
nt: Finance > ... > General
ot modified 22 days ago



1

 Results 2024







Data loss prevention > Edit policy

- ✓ Name
- ✓ Admin units
- ✓ Locations
- Advanced DLP rules
- Policy mode
- Finish

Edit rule

Conditions

Actions

Use actions to protect content when the conditions are met.

Audit or restrict activities on devices

When specific activities are detected on devices with protected files containing sensitive information, you can choose whether to audit or restrict the activity.

Service domain and browser activities

Detects when protected files are blocked or allowed to be uploaded to cloud service domains based on the 'Allow/Block cloud service domains' policy.

☒ Upload to a restricted cloud service domain or access from an unallowed browsers ⓘ

Sensitive service domain group restriction(s) configured. [Edit](#)

☒ Paste to supported browsers ⓘ

Sensitive service domain group restriction(s) configured. [Edit](#)

Sensitive service domain restrictions

Enforce different restrictions for sensitive service domains as defined by the sensitive service domain groups in endpoint DLP settings. When these restrictions are enforced, sensitive service domain group details will be available to review in activity explorer for each related event.

+ Add group ↑↓ Reorder × Clear selection

Group	Priority	Action
<input type="checkbox"/> Generative AI Websites	1	<div>Block with ov... </div>



AI - Windows - Google Chrome

Device configuration profile

Delete

Included groups

Group	Filter	Filter mode
AI - Windows - Devices - Production	None	None

Excluded groups

Group
No results.

Scope tags [Edit](#)

Selected tags Default

Configuration settings [Edit](#)

Google

Google Chrome > Extensions

Extension/App IDs and update URLs to be silently installed (Device) echcgldkblhodogklpincgchnpgcdco;https://clients2.google.com/service/update2/crx

Extensions - Microsoft Purview

chrome://extensions/?id=echcgldkblhodogklpincgchnpgcdco

Extensions

Developer mode

Microsoft Purview Extension

On

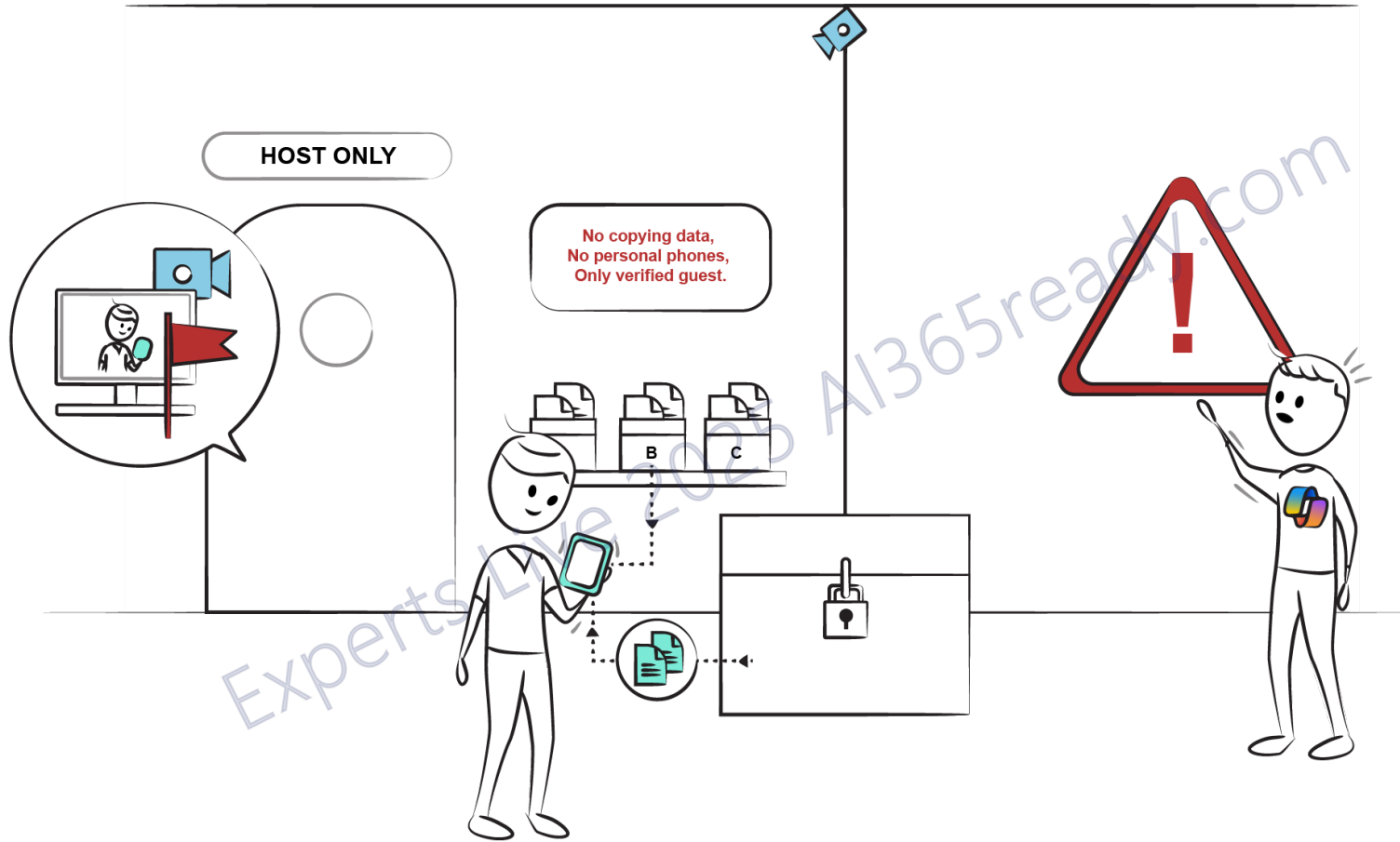
Description
Protect your organization against sensitive data leaks.

Version
3.0.0.239

Size
< 1 MB

Permissions
This extension requires no special permissions

Site access
This extension has no additional site access



Microsoft

© TD SYNnex

Capgemini

infor

DELL

nerdio

P

Professional Development Systems BV

INTERSTELLAR

kpn Partner Network

INSPIRE

C





DSPM for AI

Microsoft Purview

Search

Microsoft Purview now secures Copilot in Fabric and Security Copilot interactions [Learn more](#)

Data Security Posture Management for AI

Discover and secure all AI activity in Microsoft Copilot, agents, and other AI apps. Keep your data safe and stay on track with industry regulations. [Learn more about DSPM for AI](#)

Get started

✓ Activate Microsoft Purview Audit Get insights into user interactions with Microsoft Copilot experiences and agents.	Required	7 Minutes
✓ Install Microsoft Purview browser extension Detect risky user activity and get insights into user interactions with other AI apps.	Required	1 Hour
✓ Onboard devices to Microsoft Purview Protect sensitive data from leaking to other AI apps.	Required	1 Hour
✓ Extend your insights for data discovery Discover sensitive data in user interactions with other AI apps.	Required	10 Minutes

Recommendations

[View all recommendations →](#)

Insight into communications

Detect unethical behavior in AI apps

Set up a policy to detect sensitive info in prompts and responses and address potentially unethical behavior in Microsoft Copilot experiences, agents, and ChatGPT for Enterprise across your organization.

[View details](#)

New AI regulations

Get guided assistance to AI regulations

Stay on track with newly established industry regulations for AI, such as ISO 42001 and NIST AI RMF. To ensure safe AI interactions, we've identified the key actions associated with these regulations.

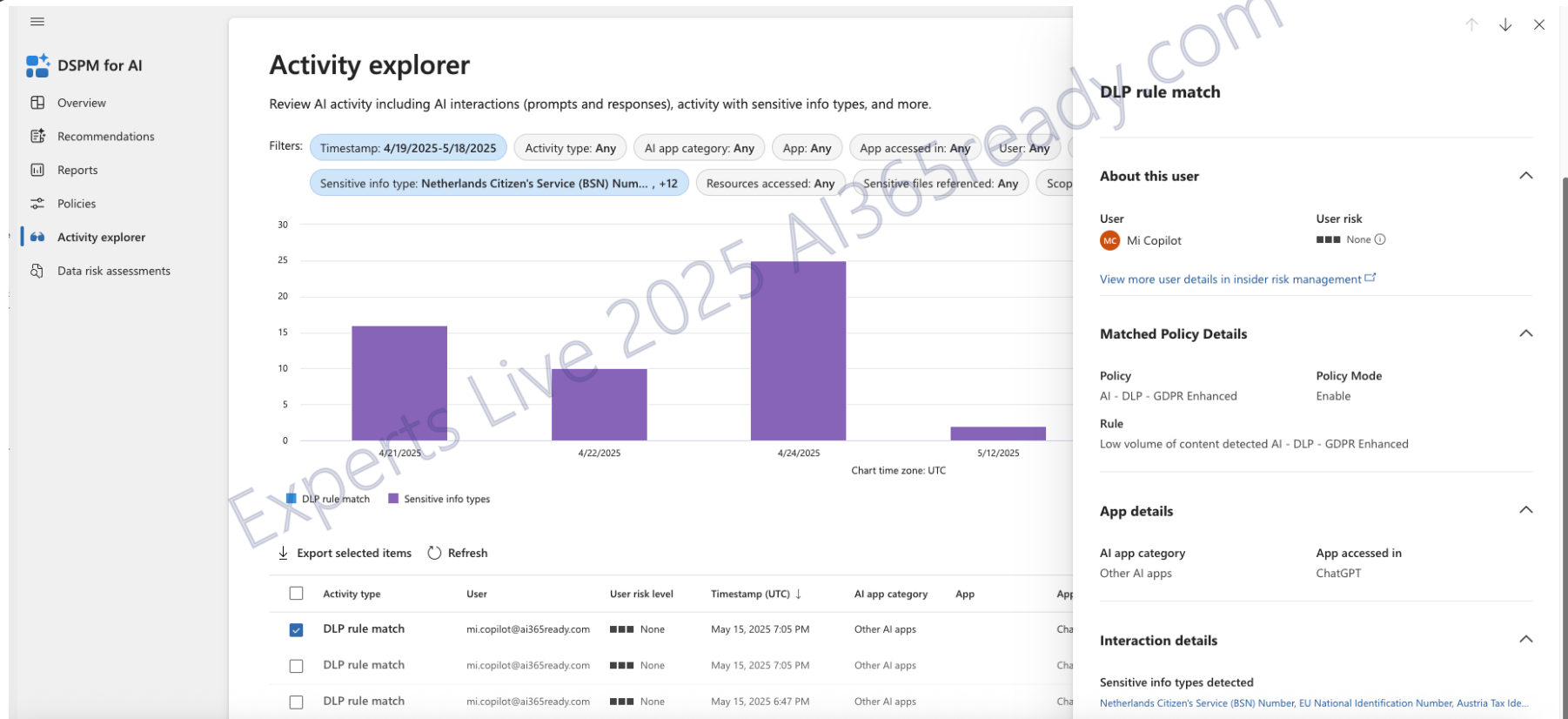
[View details](#)

Interactions with sensitive data
Last 30 days

93



DSPM for AI – Activity explorer







Visibility into what Microsoft 365 Copilot is doing.

DSPM for AI

Overview

Recommendations

Reports

Policies

Activity explorer

Data risk assessments

0

5/12/2025

5/14/2025

Chart time zone: UTC

DLP rule match

Sensitive info types

AI Interaction

Export selected items

Refresh

<input type="checkbox"/>	Activity type	User	User risk level	Timestamp (UTC)	AI app category	App
<input type="checkbox"/>	DLP rule match	mi.copilot@ai365ready.com	None	May 15, 2025 7:05 PM	Other AI apps	
<input type="checkbox"/>	AI Interaction	mi.copilot@ai365ready.com	None	May 14, 2025 9:27 AM	Copilot experienc...	
<input type="checkbox"/>	AI Interaction	mi.copilot@ai365ready.com	None	May 14, 2025 9:46 AM	Copilot experienc...	
<input checked="" type="checkbox"/>	AI Interaction	mi.copilot@ai365ready.com	None	May 14, 2025 9:27 AM	Copilot experienc...	
<input type="checkbox"/>	Sensitive info types	mi.copilot@ai365ready.com		May 15, 2025 6:37 PM	Copilot experienc...	
<input type="checkbox"/>	AI Interaction	mi.copilot@ai365ready.com	None	May 14, 2025 9:47 AM	Copilot experienc...	
<input type="checkbox"/>	AI Interaction	mi.copilot@ai365ready.com	None	May 12, 2025 6:47 PM	Copilot experienc...	
<input type="checkbox"/>	AI Interaction	mi.copilot@ai365ready.com	None	May 14, 2025 9:51 AM	Copilot experienc...	
<input type="checkbox"/>	AI Interaction	mi.copilot@ai365ready.com	None	May 14, 2025 9:29 AM	Copilot experienc...	
<input type="checkbox"/>	AI Interaction	mi.copilot@ai365ready.com	None	May 15, 2025 6:37 PM	Copilot experienc...	
<input type="checkbox"/>	Sensitive info types	mi.copilot@ai365ready.com		May 12, 2025 6:47 PM	Copilot experienc...	
<input type="checkbox"/>	AI Interaction	mi.copilot@ai365ready.com	None	May 14, 2025 9:23 AM	Copilot experienc...	
<input type="checkbox"/>	AI Interaction	mi.copilot@ai365ready.com	None	May 14, 2025 9:46 AM	Copilot experienc...	
<input type="checkbox"/>	AI Interaction	mi.copilot@ai365ready.com	None	May 14, 2025 9:29 AM	Copilot experienc...	

AI Interaction

App details

AI app category

Copilot experiences & agents

App accessed in

Microsoft 365 apps

Plugins or extensions

Name	ID	Version
BuiltIn	BingWebSearch	

Interaction details

You can view prompts and responses with your Microsoft Purview Content Explorer Content Viewer role. [Learn more about permissions for DSPM for AI](#)

Prompt

Did you source any internet sources?

Response

No, I did not use any internet sources for my previous response. The information provided was based on general business knowledge and common considerations regarding global threats to sales results. If you need specific data or insights from your enterprise resources, please let me know, and I can search for relevant information within your enterprise

Microsoft

cegeka

Microsoft 365 Copilot welcome



Sensitivity labels enabled



Oversharing reduced



DLP in place



Personal devices restricted



Insider Risk monitored



Purview AI controls in place



Defender for Endpoint & Cloud Apps active

HR

FINANCE

LEGAL

AI365ready



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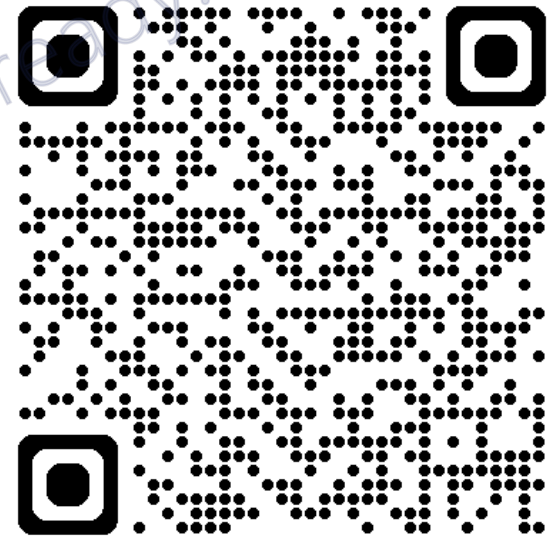




**Using Copilot
responsibly
starts with you-**

- Know your site
- Label your data
- Review who has access

Prepare your organization, now.



ai365ready.com



Please evaluate this session in the App.

THANK YOU

Are there any questions?

