

Preparing for Microsoft 365 Copilot and keeping your data safe



Organise your data

Organise your data in Teams/ SharePoint.

Sort into folders and sites, standardising file names.

Consider tagging files and folders with keywords for easier searching.

Evaluate data and accuracy

Evaluate necessity of each element - remove old imagery, data and content

Check the accuracy of your documentation and information, is it correct and up to date?

Data loss prevention

Configure/enable appropriate AIP - Azure Information Protection and DLP (Data Loss Prevention policies).

This also increases your cyber resilience

Do you have a strategy?

Do you have a strategy in place? Start with a small pilot group.

After, who is going to use Microsoft 365 Copilot?

What actions do you intend to take with it?

Reviews and feedback

Ongoing reviews and feedback loops to highlight and resolve issues in forms or teams.



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Assign a data steward

Start by assigning a data steward. They will be responsible for ensuring the quality, security, and proper use of data.

Ensure key people in your organisation are on board.

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Secure your data

Microsoft 365 Copilot can only access what you can, but you might have data you don't want Copilot to see.

Check who should have access, and to what. Grant or revoke permissions accordingly. **Review regularly.**

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Personal data

Secure personal information, such as names and addresses, and address anomalies.

Use DLP sensitivity labels.

Anonymise where you can.

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Documentation classification

Use document classification, such as: public, confidential and sensitive.

This helps Copilot understand context and sensitivity of information.

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Start practising

Learn the lingo and start using Copilot for web (formerly Bing Chat Enterprise).

Practice how to 'talk' to AI, and how to ask the right questions for your desired outcomes.

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Are you planning on using AI and want to do it strategically and securely? Contact us on **01483 412040** or visit **www.ramsac.com** for more information on how to get started.