



QUICK START GUIDE

HOW TO SECURE MICROSOFT 365 COPILOT USING LEPIDE

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1 Introduction

Microsoft Copilot is an advanced AI tool that can help with a variety of tasks to increase productivity. One of these tasks is its ability to assist in generating content. While this can be a major advantage, there are also disadvantages to using Copilot, particularly in terms of security. It is crucial, therefore, that there is a clear understanding of what the drawbacks are for any potential users and organizations before, during and after the implementation of Copilot. This will ensure that informed decisions can be made to minimize the threat surface and avoid the unintentional exposing of sensitive information, therefore keeping all Microsoft 365 Copilot data secure.

2 Why is there a Need to Monitor Copilot?

Copilot must collect and analyze user data to deliver search results, and this data will inevitably include sensitive or confidential information. It is, therefore, essential that user permissions are thoroughly checked before and during implementation. However, it is also crucial that Copilot activity is continually monitored going forward to ensure that users continue to have the bare minimum access required to do their job. If users have privileges that they don't need or should not have, then Copilot could deliver information to them that they should not have access to.

The Lepide Data Security Platform provides a comprehensive yet straightforward way to monitor Copilot usage using a range of pre-defined reports. These reports provide information including who has access to Copilot, any changes to Copilot access, inactive users with Copilot access, searches made using Copilot, sensitive data accessed by Copilot and changes to sensitivity labels.

These reports are explained in detail in Section 4 below.

3 The Lepide Copilot Reports

The Copilot reports within the Lepide Solution are in Lepide Trust and Lepide Auditor and are as follows:

The Lepide Trust Copilot Reports:

- Copilot Access
- Copilot Access Changed
- Inactive Users with Copilot Access
- All Copilot Searches

The Lepide Auditor Copilot Reports:

- Sensitive Data Accessed by Copilot
- Sensitivity Label Changes

The steps on how to run these reports are given below.

4 How to Configure Lepide to Run the Copilot Reports

4.1 Prerequisites

To configure and run the Copilot Reports, you need to have installed the Lepide Web Console and added a Copilot component which is found within the Microsoft 365 component. For details on how to add this please refer to the [Web Console User Guide](#).

4.2 Run the Lepide Trust Copilot Reports

Once the Copilot component has been installed, you can generate the Copilot reports and the steps to do this are as follows:

The Copilot reports available within Lepide Trust are:

- Copilot Access
- Copilot Access Changed
- Inactive Users with Copilot Access
- All Copilot Searches

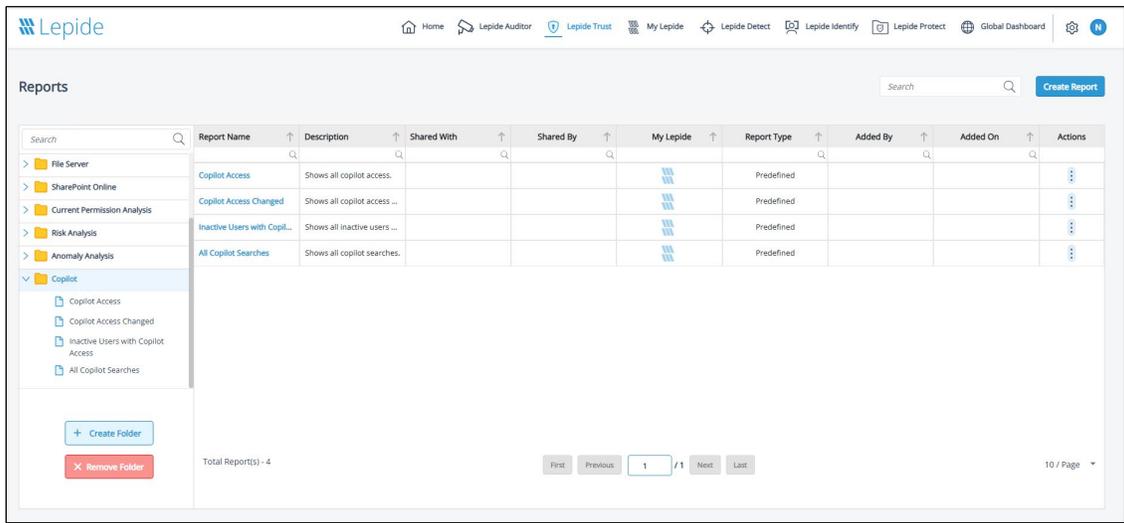


Figure 1: Copilot Reports within Lepide Trust

- From the web console Home screen, choose **Lepide Trust**
- From the **Lepide Trust** Menu at the top of the screen, choose **Reports**



Figure 2: Lepide Trust Reports Menu

From the tree structure to the left side of the screen, expand **Copilot** to see the Copilot reports:

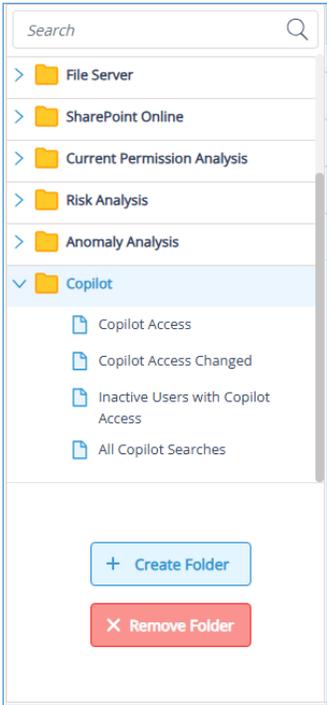


Figure 3: Tree Structure showing Lepide Trust Copilot Reports

4.2.1 Running the Copilot Access Report

This report shows users who have accessed Copilot within the last specified number of days. It includes information about the user name, license type, when the license was granted, the date it was last accessed and how many times the user accessed Copilot. The default number of days is 30 but this can be changed by adding a filter.

To run the report:

- Click on the Copilot Access Report from the tree structure
- The empty Copilot Access Report is displayed:

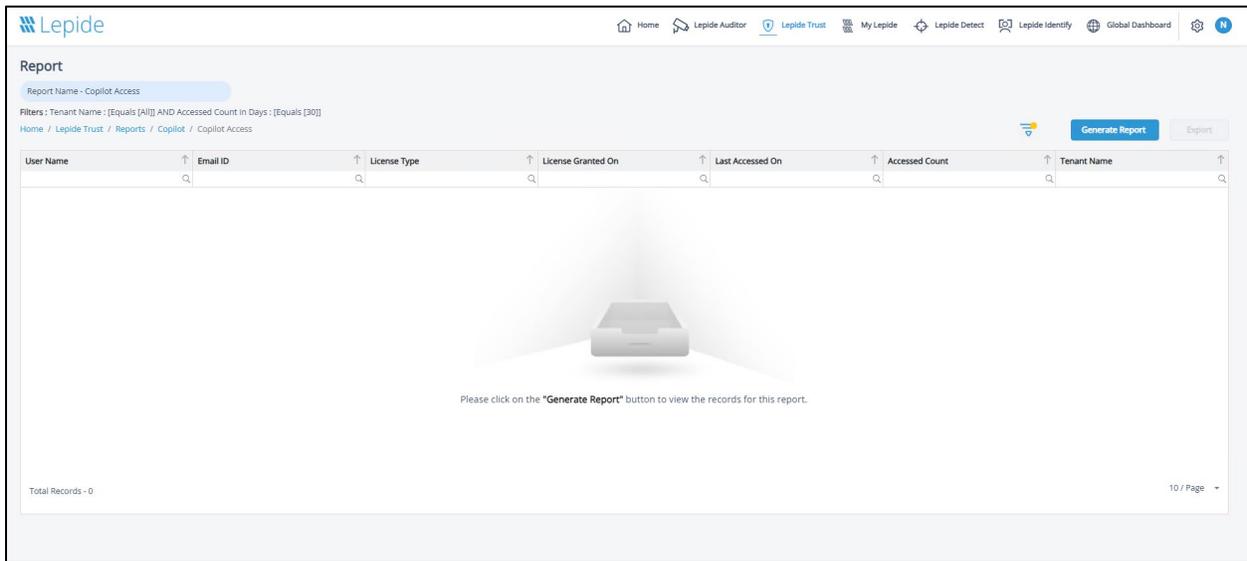


Figure 4: Copilot Access Report

The number of days can be changed by adding a filter:

- Click the Filter icon 

The Modify Filters dialog box is displayed:

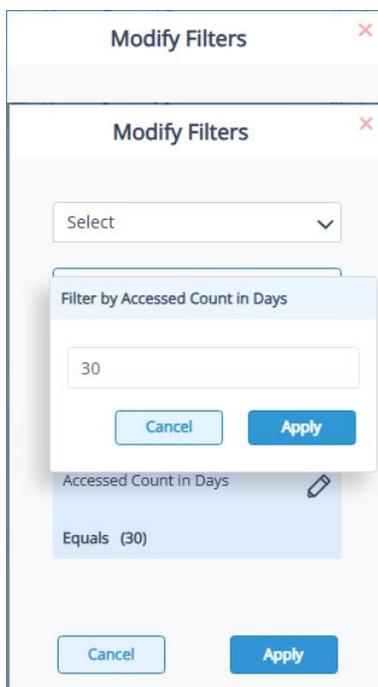


Figure 6: Filter by Accessed Count in Days

- Click the Edit icon 
- Enter the number of days required in the Filter by Accessed Count in Days dialog box
- Click **Apply**
- Click **Generate Report** to run the report

Report
Report Name - Copilot Access

Filters: Tenant Name : [Equals [All]] AND Accessed Count in Days : [Equals [30]]

Home / Lepide Trust / Reports / Copilot / Copilot Access

User Name	Email ID	License Type	License Granted On	Last Accessed On	Accessed Count	Tenant Name
Alex	Alex@lepidesoftware.org	Microsoft_365_Copilot	10-01-2025 06:38:15 PM	10-01-2025 06:45:03 PM	10	LepideCorp1.onmicrosoft.com
Wilson	Wilson@lepidesoftware.org	Microsoft_Copilot_for_Sales	10-01-2025 06:37:55 PM	10-01-2025 06:55:10 PM	13	LepideCorp1.onmicrosoft.com
David	David@LepideCorp1.onmicrosoft.com	Microsoft_Copilot_for_Service	10-01-2025 06:37:17 PM	N/A	0	LepideCorp1.onmicrosoft.com
Lepide Corp1	LepideCorp1@LepideCorp1.onmicroso...	Microsoft_365_Copilot	10-12-2024 10:16:01 AM	10-01-2025 06:25:23 PM	142	LepideCorp1.onmicrosoft.com

Total Records - 4

First Previous 1 / 1 Next Last

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Figure 7: Copilot Access Report

- The report is generated and can be filtered, sorted and exported to CSV and PDF formats using the **Export** button

4.2.2 Copilot Access Changed Report

This report shows users for which Copilot access has been changed. It is important to have visibility over these changes to ensure that they are authorized. The report includes the user name, the current and previous license type and the date when the access was changed.

- Follow the steps in Section 4.2 to show the Lepide Trust Copilot reports
- From here, select the Copilot Access Changed Report
- The empty Copilot Access Changed Report will be displayed
- Click on the Date drop-down menu to add a time frame if required:

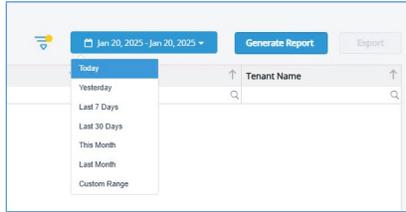


Figure 8: Date Menu

- Add a filter if required (see Section 4.2.1 for the steps on how to add a filter)
- Click **Generate Report**
- The Copilot Access Changed Report will run

Report
Report Name - Copilot Access Changed

Filters: Tenant Name : [Equals [All]] AND Accessed Count in Days : [Equals [30]]
Home / Lepide Trust / Reports / Copilot / Copilot Access Changed

Jan 16, 2025 - Jan 16, 2025 **Generate Report** **Export**

User Name	Email ID	Current License Type	Previous License Type	License Changed On	Last Accessed On	Accessed Count	Tenant Name
Alex	Alex@lepidesoftware.org	No License	Microsoft_Copilot_for_Sales	16-01-2025 10:51:50 AM	10-01-2025 06:45:03 PM	10	lepidecorp1.onmicrosoft.com
Alex	Alex@lepidesoftware.org	Microsoft_Copilot_for_Sales	No License	16-01-2025 09:39:33 AM	10-01-2025 06:45:03 PM	10	lepidecorp1.onmicrosoft.com
Charles	Charles@LepideCorp1.onmicros...	No License	Microsoft_Copilot_for_Sales	16-01-2025 09:39:24 AM	N/A	0	lepidecorp1.onmicrosoft.com
Charles	Charles@LepideCorp1.onmicros...	Microsoft_Copilot_for_Sales	No License	16-01-2025 09:39:00 AM	N/A	0	lepidecorp1.onmicrosoft.com
Anupam Mishra	Anupam@LepideCorp1.onmicros...	No License	Microsoft_Copilot_for_Sales	16-01-2025 09:38:50 AM	N/A	0	lepidecorp1.onmicrosoft.com
Anupam Mishra	Anupam@LepideCorp1.onmicros...	Microsoft_Copilot_for_Sales	No License	16-01-2025 09:38:42 AM	N/A	0	lepidecorp1.onmicrosoft.com
Arthur	Arthur@LepideCorp1.onmicrosof...	No License	Microsoft_Copilot_for_Sales	16-01-2025 09:37:51 AM	N/A	0	lepidecorp1.onmicrosoft.com
Arthur	Arthur@LepideCorp1.onmicrosof...	Microsoft_Copilot_for_Sales	No License	16-01-2025 09:37:41 AM	N/A	0	lepidecorp1.onmicrosoft.com
Anupam Mishra	Anupam@LepideCorp1.onmicros...	No License	Microsoft_Copilot_for_Sales	16-01-2025 09:37:32 AM	N/A	0	lepidecorp1.onmicrosoft.com
Anupam Mishra	Anupam@LepideCorp1.onmicros...	Microsoft_Copilot_for_Sales	No License	16-01-2025 09:37:25 AM	N/A	0	lepidecorp1.onmicrosoft.com

Total Records - 27

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Figure 9: Copilot Access Changed Report

- The report is generated and can be filtered, sorted and exported to CSV and PDF formats using the **Export** button

4.2.3 Inactive Users with Copilot Access

Inactive users who have Copilot access are a significant security threat as these accounts could have their credentials compromised and Copilot could then be used to gain access to sensitive information without anyone being aware that this is happening.

An example of this report is shown below:

User Name	Email ID	Last Copilot Access	Last Logon Time	Inactivity Time	Account Age	Tenant Name
Alex	Alex@lepidesoftware.org	10-01-2025 06:45:03 PM	07-01-2025 05:18:12 PM	8 Days	1 Years, 146 Days, 21 Hours	LepideCorp1.onmicrosoft.com
Wilson	Wilson@lepidesoftware.org	10-01-2025 06:55:10 PM	07-01-2025 05:18:12 PM	8 Days	1 Years, 61 Days, 20 Hours	LepideCorp1.onmicrosoft.com
David	David@LepideCorp1.onmicrosoft.com	N/A	07-01-2025 05:18:12 PM	8 Days	1 Years, 168 Days, 2 Hours	LepideCorp1.onmicrosoft.com
Lepide Corp1	LepideCorp1@LepideCorp1.onmicroso...	10-01-2025 06:25:23 PM	07-01-2025 05:18:12 PM	8 Days	1 Years, 168 Days, 19 Hours	LepideCorp1.onmicrosoft.com

Figure 10: Inactive Users with Copilot Access

- This report is run in a similar way to the Copilot Access Changed Report in Section 4.2.2 so please follow these steps to run the report.
- Once the report is generated, it can be filtered, sorted and exported to CSV and PDF formats using the **Export** button

4.2.4 All Copilot Searches

This report will show all Copilot searches which have been carried out within a specified time frame providing organizations with visibility over what their users are using Copilot for. Information includes the user name, email id, the search query and the date of the search.

An example of this report is shown below:

User Name	Email ID	Search Query	Department	Manager	When	From	Tenant Name
Lepide Corp1	LepideCorp1@LepideCorp1.onm...	Can you provide examples of mis...	Support	Mike	10-01-2025 06:25:23 PM	US	lepidcorp1.onmicrosoft.com
Lepide Corp1	LepideCorp1@LepideCorp1.onm...	Can you explain the privacy conc...	Support	Mike	10-01-2025 06:24:22 PM	US	lepidcorp1.onmicrosoft.com
Lepide Corp1	LepideCorp1@LepideCorp1.onm...	What are the legal challenges ass...	Support	Mike	10-01-2025 06:18:47 PM	US	lepidcorp1.onmicrosoft.com
Lepide Corp1	LepideCorp1@LepideCorp1.onm...	What are the potential solutions t...	Support	Mike	10-01-2025 06:08:40 PM	US	lepidcorp1.onmicrosoft.com
Lepide Corp1	LepideCorp1@LepideCorp1.onm...	Can you provide more details on ...	Support	Mike	10-01-2025 06:08:09 PM	US	lepidcorp1.onmicrosoft.com
Lepide Corp1	LepideCorp1@LepideCorp1.onm...	Can you summarize the key point...	Support	Mike	10-01-2025 06:07:33 PM	US	lepidcorp1.onmicrosoft.com
Lepide Corp1	LepideCorp1@LepideCorp1.onm...	How can I access the Single chat ...	Support	Mike	10-01-2025 06:07:13 PM	US	lepidcorp1.onmicrosoft.com
Lepide Corp1	LepideCorp1@LepideCorp1.onm...	Who created this file?	Support	Mike	10-01-2025 06:07:04 PM	US	lepidcorp1.onmicrosoft.com
Lepide Corp1	LepideCorp1@LepideCorp1.onm...	How much income replacement ...	Support	Mike	10-01-2025 05:36:35 PM	US	lepidcorp1.onmicrosoft.com
Lepide Corp1	LepideCorp1@LepideCorp1.onm...	Can you explain the short-term a...	Support	Mike	10-01-2025 05:36:11 PM	US	lepidcorp1.onmicrosoft.com

Figure 11: All Copilot Searches

- This report is run in a similar way to the Copilot Access Changed Report in Section 4.2.2 so please follow these steps to run the report.
- Once the report is generated, it can be filtered, sorted and exported to CSV and PDF formats using the **Export** button

4.3 Run the Lepide Audit Copilot Reports

Once the Copilot component has been installed, you can generate the Copilot reports and the steps to do this are as follows:

The Copilot reports available within Lepide Auditor are:

- Sensitive Data Accessed by Copilot
- Sensitivity Label Changes

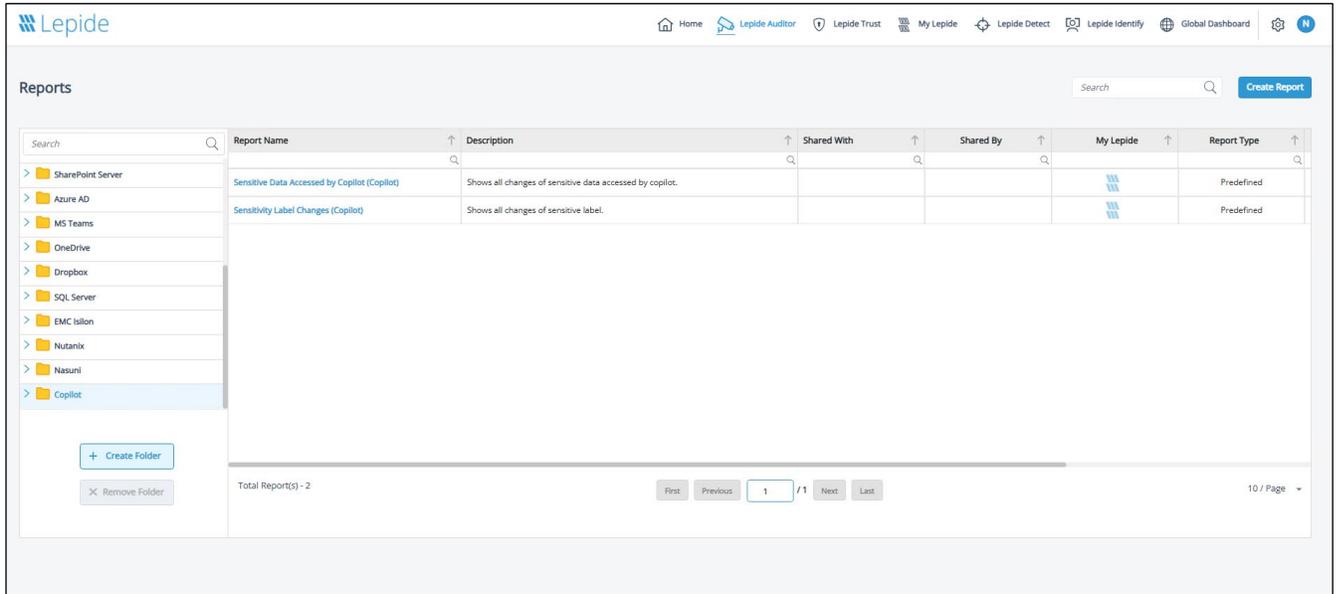


Figure 12: Copilot Reports within Lepide Auditor

- From the web console Home screen, choose **Lepide Auditor**
- From the **Lepide Auditor** Menu at the top of the screen, choose **Reports**

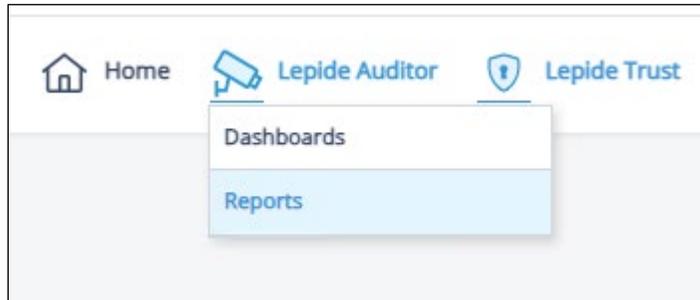


Figure 13: Lepide Auditor Reports Menu

From the tree structure to the left side of the screen, expand **Copilot** to see the Copilot reports:

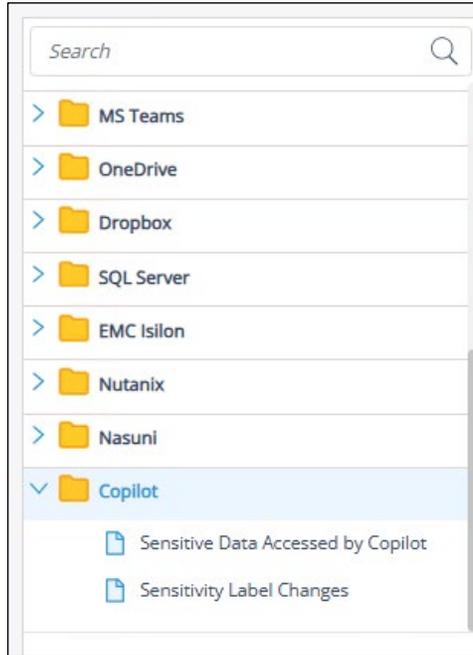


Figure 14: Tree Structure showing Copilot Reports

4.3.1 Sensitive Data Accessed by Copilot

This report gives detailed information on who is searching and what types of sensitive information are being searched for using Copilot.

All sensitive data accessed by Copilot is shown and the report includes the user name, file name, URL, the sensitivity label, the search query and the date of the search.

An example of this report is shown below:

Report
Report Name - Sensitive Data Accessed by Copilot

Filters: Tenant Name: [Equals [All]]

Home / Lepide Auditor / Reports / Copilot / Sensitive Data Accessed by Cop...

Jan 1, 2024 00:00:00 - Jan 31, 2025 23:59:59 Generate Report Export

User Name	Email ID	File Name	File URL	Sensitivity Label	Search Query	What	When	From	Tenant Name
Lepide Corp1	LepideCorp1@LepideCor...	Single chat Window.xlsx	https://lepidecorp1-my.sh...	General \ Anyone (unrest...	What are the legal challen...	Lepide Corp1 read the file...	10-01-2025 06:18:48 PM	US	LepideCorp1.onmicrosoft...
Lepide Corp1	LepideCorp1@LepideCor...	Single chat Window.xlsx	https://lepidecorp1-my.sh...	General \ Anyone (unrest...	What are the potential sol...	Lepide Corp1 read the file...	10-01-2025 06:08:40 PM	US	LepideCorp1.onmicrosoft...
Lepide Corp1	LepideCorp1@LepideCor...	Single chat Window.xlsx	https://lepidecorp1-my.sh...	General \ Anyone (unrest...	Can you provide more de...	Lepide Corp1 read the file...	10-01-2025 06:08:09 PM	US	LepideCorp1.onmicrosoft...
Lepide Corp1	LepideCorp1@LepideCor...	Single chat Window.xlsx	https://lepidecorp1-my.sh...	General \ Anyone (unrest...	Can you summarize the k...	Lepide Corp1 read the file...	10-01-2025 06:07:33 PM	US	LepideCorp1.onmicrosoft...
Lepide Corp1	LepideCorp1@LepideCor...	Single chat Window.xlsx	https://lepidecorp1-my.sh...	General \ Anyone (unrest...	How can I access the Sing...	Lepide Corp1 read the file...	10-01-2025 06:07:14 PM	US	LepideCorp1.onmicrosoft...
Lepide Corp1	LepideCorp1@LepideCor...	Single chat Window.xlsx	https://lepidecorp1-my.sh...	General \ Anyone (unrest...	Who created this file?	Lepide Corp1 read the file...	10-01-2025 06:07:04 PM	US	LepideCorp1.onmicrosoft...
Lepide Corp1	LepideCorp1@LepideCor...	Leave Policy for IT Compa...	https://lepidecorp1.share...	Custom-Sensitivity-Label-6	How much income replac...	Lepide Corp1 read the file...	10-01-2025 05:36:35 PM	US	LepideCorp1.onmicrosoft...
Lepide Corp1	LepideCorp1@LepideCor...	Leave Policy.docx	https://lepidecorp1-my.sh...	Public	How much income replac...	Lepide Corp1 read the file...	10-01-2025 05:36:35 PM	US	LepideCorp1.onmicrosoft...
Lepide Corp1	LepideCorp1@LepideCor...	Leave Policy for IT Compa...	https://lepidecorp1.share...	Custom-Sensitivity-Label-6	Can you explain the short...	Lepide Corp1 read the file...	10-01-2025 05:36:12 PM	US	LepideCorp1.onmicrosoft...
Lepide Corp1	LepideCorp1@LepideCor...	Leave Policy.docx	https://lepidecorp1-my.sh...	Public	Can you explain the short...	Lepide Corp1 read the file...	10-01-2025 05:36:12 PM	US	LepideCorp1.onmicrosoft...

Total Records - 125 First Previous 11 / 13 Next Last 10 / Page

Figure 15: Sensitive Data Accessed by Copilot

- This report is run in a similar way to the Copilot Access Changed Report in Section 4.2.2 so please follow these steps to run the report.
- Once the report is generated, it can be filtered, sorted and exported to CSV and PDF formats using the **Export** button

4.3.2 Sensitivity Label Changes

This report provides visibility over all changes to sensitive data labels. It shows information including the user name, the current and previous sensitivity labels, the operation which was carried out, file name, URL and the date that the change was made.

An example of this report is shown below:

Report
Report Name - Sensitivity Label Changes
Filters : Tenant Name : [Equals [All]]
Home / Lepide Auditor / Reports / Copilot / Sensitivity Label Changes

User Name	Email ID	Current Label	Previous Label	Operation	File Type	File Name	File URL	Changed On	From	Tenant Name
Lepide Corp1	LepideCorp1@LepideCo...	N/A	Confidential-Trial	File Sensitivity Label Re...	File	How to Do Automation ...	https://lepidecorp1-my...	22-01-2025 09:39:13 AM	52.108.230.14	lepidecorp1.onmicrosof...
Lepide Corp1	LepideCorp1@LepideCo...	Confidential-Trial	N/A	File Sensitivity Label Ap...	File	How to Do Automation ...	https://lepidecorp1-my...	22-01-2025 09:38:59 AM	52.108.230.14	lepidecorp1.onmicrosof...
Lepide Corp1	LepideCorp1@LepideCo...	N/A	Custom-Highly-Sensitivi...	File Sensitivity Label Re...	File	How to Do Automation ...	https://lepidecorp1-my...	22-01-2025 09:38:35 AM	52.108.230.14	lepidecorp1.onmicrosof...
Lepide Corp1	LepideCorp1@LepideCo...	Custom-Sensitivity-Labe...	Personal	File Sensitivity Label Ch...	File	Copilot Search Queries...	https://lepidecorp1.shar...	22-01-2025 06:48:18 AM	20.219.55.33	lepidecorp1.onmicrosof...
Lepide Corp1	LepideCorp1@LepideCo...	Custom-Highly-Sensitivi...	Personal	File Sensitivity Label Ch...	File	How to Do Automation ...	https://lepidecorp1-my...	22-01-2025 06:49:13 AM	20.219.55.33	lepidecorp1.onmicrosof...
Lepide Corp1	LepideCorp1@LepideCo...	Personal	Public	File Sensitivity Label Ch...	File	Copilot Search Queries...	https://lepidecorp1.shar...	22-01-2025 06:49:05 AM	20.219.55.33	lepidecorp1.onmicrosof...
Lepide Corp1	LepideCorp1@LepideCo...	Personal	Highly Confidential \ All ...	File Sensitivity Label Ch...	File	How to Do Automation ...	https://lepidecorp1-my...	22-01-2025 06:48:58 AM	20.219.55.33	lepidecorp1.onmicrosof...
Lepide Corp1	LepideCorp1@LepideCo...	Public	Confidential-Trial	File Sensitivity Label Ch...	File	Copilot Search Queries...	https://lepidecorp1.shar...	21-01-2025 07:43:08 AM	52.108.44.13	lepidecorp1.onmicrosof...
Lepide Corp1	LepideCorp1@LepideCo...	Confidential \ Anyone (u...	General \ Anyone (unre...	File Sensitivity Label Ch...	File	Overview of the Indian ...	https://lepidecorp1-my...	16-01-2025 05:13:26 AM	20.219.55.33	lepidecorp1.onmicrosof...
Lepide Corp1	LepideCorp1@LepideCo...	Custom-General	Custom-Highly-Sensitivi...	File Sensitivity Label Ch...	File	Summary of Sensitivity ...	https://lepidecorp1-my...	16-01-2025 05:13:19 AM	20.219.55.33	lepidecorp1.onmicrosof...

Total Records - 56 First Previous 1 / 6 Next Last 10 / Page

Figure 16: Sensitivity Label Changes

- This report is run in a similar way to the Copilot Access Changed Report in Section 4.2.2 so please follow these steps to run the report.
- Once the report is generated, it can be filtered, sorted and exported to CSV and PDF formats using the **Export** button.

5 Global Dashboards

There is a Global Dashboard available for Copilot which summarizes the predefined Copilot reports to provide an operational overview of Copilot activities. The dashboard does not require any configuration and will load automatically.

To display the dashboard:

- Select **Global Dashboard** from the menu at the top of the screen

The Dashboard will be displayed:

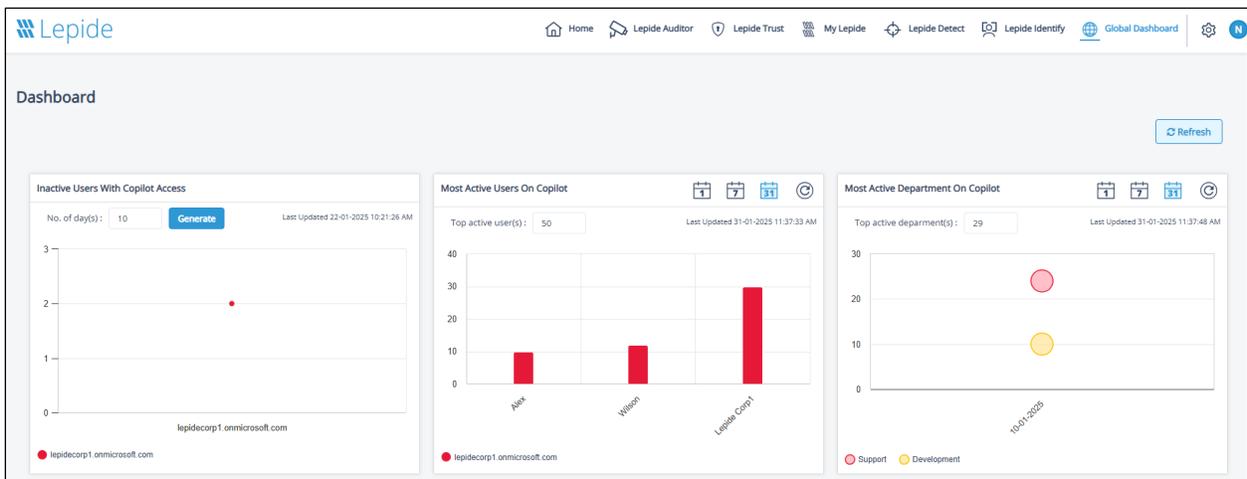


Figure 17: Global Dashboard

- Click the **Refresh** button to refresh all the data
- Click the Refresh icon  to refresh data for individual charts
- To change the number of days for the Inactive Users with Copilot Access chart, edit the **No of day(s)** box and click **Generate** to display the chart with the new number of days.
- To change the number of **Top active user(s)**, click the number box and either enter the number or use the arrow selectors to change the number:

Top active user(s) :

- To change the number of **Top active department(s)**, click the number box and either enter the number or use the arrow selectors to change the number:

Top active department(s) :

- To change the time frame for the Most Active Users on Copilot and Most Active Department on Copilot charts, click one of the calendar icons. These options are 1 day ago, 7 days ago, 31 days ago:



6 Support

If you are facing any issues whilst installing, configuring, or using the solution, you can connect with our team using the contact information below.

Product Experts

USA/Canada: +1(0)-800-814-0578

UK/Europe: +44 (0) -208-099-5403

Rest of the World: +91 (0) -991-004-9028

Technical Gurus

USA/Canada: +1(0)-800-814-0578

UK/Europe: +44 (0) -208-099-5403

Rest of the World: +91(0)-991-085-4291

Alternatively, visit <https://www.lepide.com/contactus.html> to chat live with our team. You can also email your queries to the following addresses:

sales@Lepide.com

support@Lepide.com

To read more about the solution, visit <https://www.lepide.com/data-security-platform/>.

7 Trademarks

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