Prepare Microsoft 365 for Copilot: the four checks

- Copilot shows each person only what they can already open
- So the fix is who can open which files, not Copilot itself
- For a business of five to fifty people with no IT team
- By xSquare Web Studio

First: is Copilot already on?

- In the Microsoft 365 admin center, open Billing, then Your products
- A plan name ending in "with Copilot" means those people have Copilot now
- If so, the four checks are overdue, so do them first
- Still on a plain plan? Ask your provider what it renews onto

Check one: who can open each SharePoint site

- SharePoint admin center: Sites, then Active sites
- Select a sensitive site, then Membership
- Remove anyone who does not need it, then Save
- Make the sensitive sites private: in Outlook on the web, Edit group, then Privacy
- Start with salaries, staff details, client contracts, bank and tax papers

Check two: old sharing links

- An Anyone or People in your organization link nobody clicked is not something Copilot can show
- A link sent by Outlook, Teams chat or the web counts as clicked for each person named
- Specific people links work for the people named straight away
- Tighten the default: SharePoint admin center, Policies, then Sharing
- File owners remove old links: Details, then Manage access

Check three: sensitivity labels, where your plan has them

- A label is an extra layer, not a fix for a site open to everyone
- Business Premium includes sensitivity labels
- On other plans, check Microsoft's Purview service description first
- No labels? Move the sensitive files into a private site

Check four: a pilot of two or three people

- The first Copilot seat brings SharePoint Advanced Management
- SharePoint admin center: Reports, then Data access governance
- Run the site permissions baseline, Everyone except external users and sharing links reports
- Pick people in different roles, including one with ordinary access
- Ask what Copilot should not answer: salaries, bonuses, staff NRIC numbers
- Fix each leak at the site or the link, then ask again

Then decide on more seats

- Judge the pilot on a month of real output
- Read our guide to Microsoft Copilot pricing in Singapore for the cost side
- Decide the cost and the prep together