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COPILOT SAFETY FOR EXCEL USERS

A quick-start checklist for working responsibly with AI in Microsoft 365

What Copilot does (in the paid enterprise version)

- Works entirely inside your organization's Microsoft 365 environment
- Respects your existing permissions and access levels
- Surfaces only the content you already have access to
- Does not train the underlying model with your data
- Follows the same security and compliance rules as Outlook, Teams, SharePoint, and OneDrive

In other words: if your company trusts Microsoft 365 with payroll, legal docs, HR files, and financials, it can trust Copilot with your Excel workbook.

What Copilot does NOT do

- It does not “upload your files to the public internet”
- It does not bypass sensitivity labels or permissions
- It does not clean or sanitize sensitive data for you
- It does not compensate for poor data governance

Copilot is powerful, but it’s not magic. *The guardrails have to come from your organization and your habits.*

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5 habits of safe Copilot use

1. **Use enterprise-approved tools only.** If your company pays for Microsoft 365 Copilot, use that. *Avoid free AI sites.*
2. **Treat AI like email.** If you wouldn't send a piece of data to a stranger's Gmail, don't paste it into a random chatbot.
3. **Check your permissions.** Copilot won't override them. But you can override yourself by mishandling data you shouldn't have.
4. **Stay inside your organization's environment**. Use SharePoint, OneDrive, Teams, and Excel files stored in Microsoft 365 — not personal accounts.
5. **Verify everything.** Copilot is an assistant, not an auditor. You are still responsible for the final output.

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Common “red flag” behaviors to avoid

These are the actions that lead to real-world data leaks:

- Pasting sensitive data into free/public AI tools
- Uploading internal documents to unapproved websites
- Using personal AI accounts for work files
- Sending spreadsheets outside of your Microsoft 365 boundary “just to try something”
- Assuming AI knows which data is sensitive (it doesn’t)

If something makes you pause for even half a second, stop and ask:

“Would I handle this the same way over email?”

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A quick self-check before using Copilot

Ask yourself:

- Am I using the enterprise version of Copilot?
- Is the data stored in Microsoft 365?
- Do I actually have permission to use this data?
- Is any part of this confidential or regulated?
- Do I know how I will verify Copilot's output?

If the answer to any of these is no, slow down and rethink your approach.

Remember the big picture

- AI isn’t the new risk.
- The cloud isn’t new.
- Your habits are what matter most.

Copilot works safely when you work safely.