



Leverage SharePoint Advanced Management to prepare for Copilot

Liz Sundet





Liz Sundet

Sr. Cloud Solution Architect – Modern Work and Copilot

- 6 years with Microsoft- PFE and Program Management
- Pod leader from 2019-2020
- Expert in SharePoint, OneDrive, Viva, Teams- Collaboration, governance, adoption and change management
- Focus areas: Copilot and SharePoint Advanced Management
- Musician, dog lover, crafter and world traveler

Favorite Quote: *“Just because you can, doesn’t mean you should”*



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Agenda

- Why does Data Governance matter
- Using SAM for Data Governance
- Understanding and breaking down DAG.

SharePoint Data Governance – Why it matters

3.2 billion documents a day
are added to Microsoft 365

Unstructured data is the leading contributor to data growth

By end of 2025, 80–90% of data growth will be associated with unstructured data

Traditional methods of managing content aren't effective at this scale

Organizations spend \$59 billion per year storing and managing content

Classification projects remain a manual effort

Human errors by an organization's own employees or at an external vendor are behind a large fraction of data breaches

Challenges around content governance



Unlock productivity with Copilot

Governing ever-increasing digital content is critical for every SharePoint or IT admin.



Build your own AI capability

Lack of built-in tools to identify oversharing and broken content inheritance put the content at risk, especially in the new AI era.



Safeguard your business and data

Lack of advanced management tools to continuously monitor and govern inactive/active SharePoint sites content make it hard to meet access and regulatory requirements.

Secure and govern Copilot Challenges



Sprawl



Site & Content Sprawl

Storage Issues
Retention / Deletion Policies
Ownership Issues
Unattended and Inactive
Lack of Archiving

Governance



Compliance and Discovery

Self Service / Controlled Provisioning
Working on Sensitivity labels
Data loss prevention policies
Playbooks / Response

Adoption



People and Process Challenges

Content Management Governance
Site Ownership Responsibility
Security Foundations
Lifecycle

Oversharing – Problem Summary

Microsoft 365 Copilot's ability to leverage information available to employees has raised concerns for organizations about overshared permissions

If oversharing risks aren't addressed, they could lead to



Access to information
beyond what the user
needs for their role



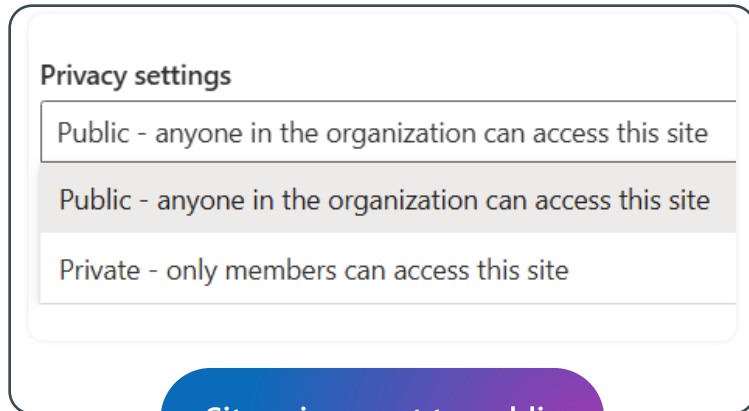
Inappropriate sharing
of content



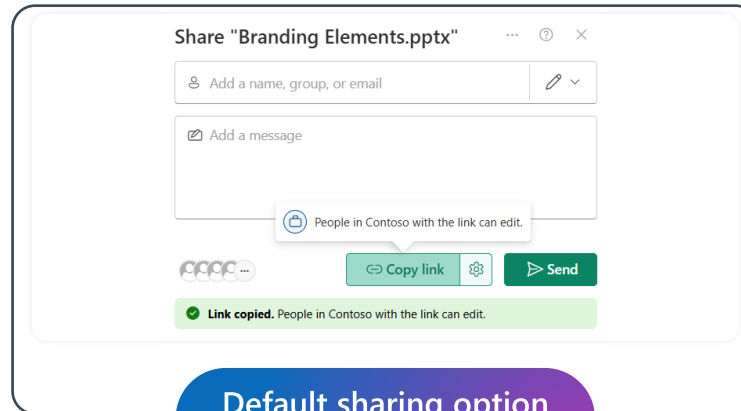
Out of date or irrelevant
responses

By addressing these risks, organizations can ensure that information is shared appropriately and securely

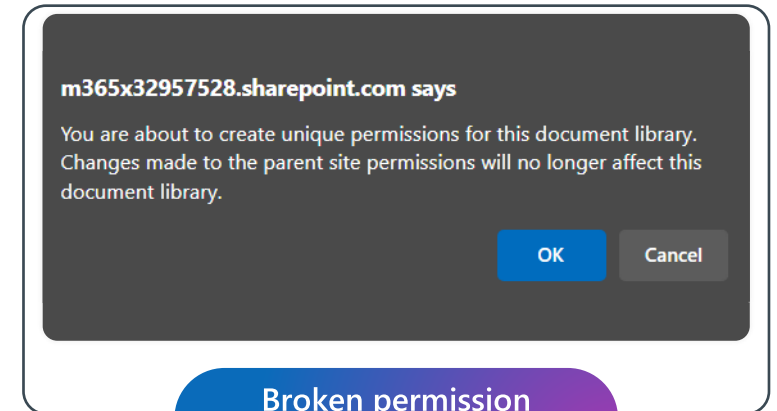
Common causes of Copilot oversharing in SharePoint



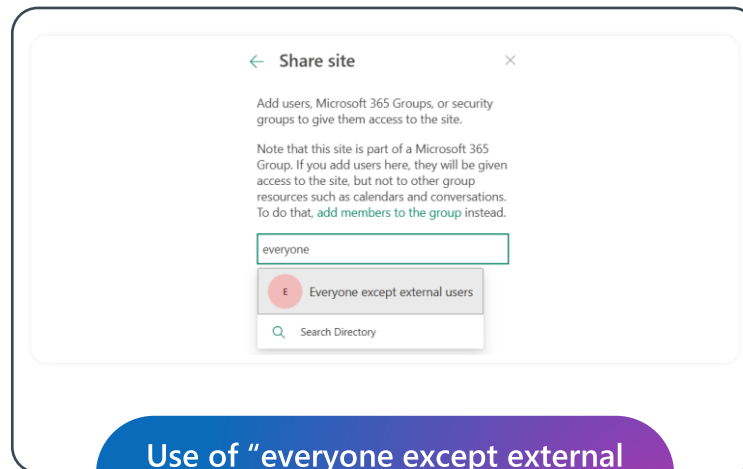
Site privacy set to public



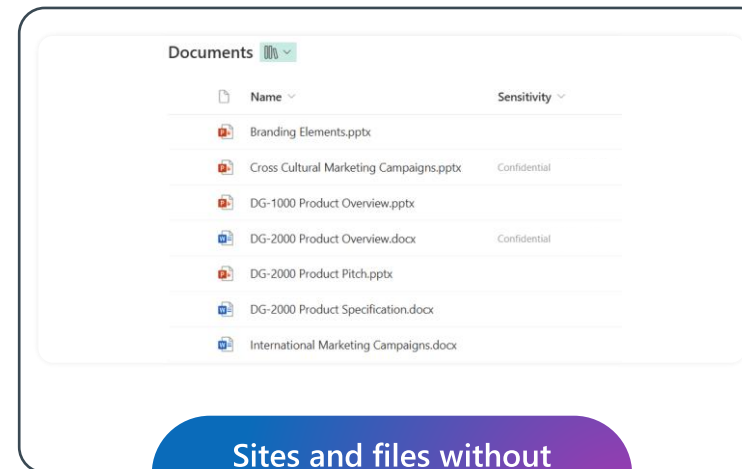
Default sharing option is everyone



Broken permission inheritance



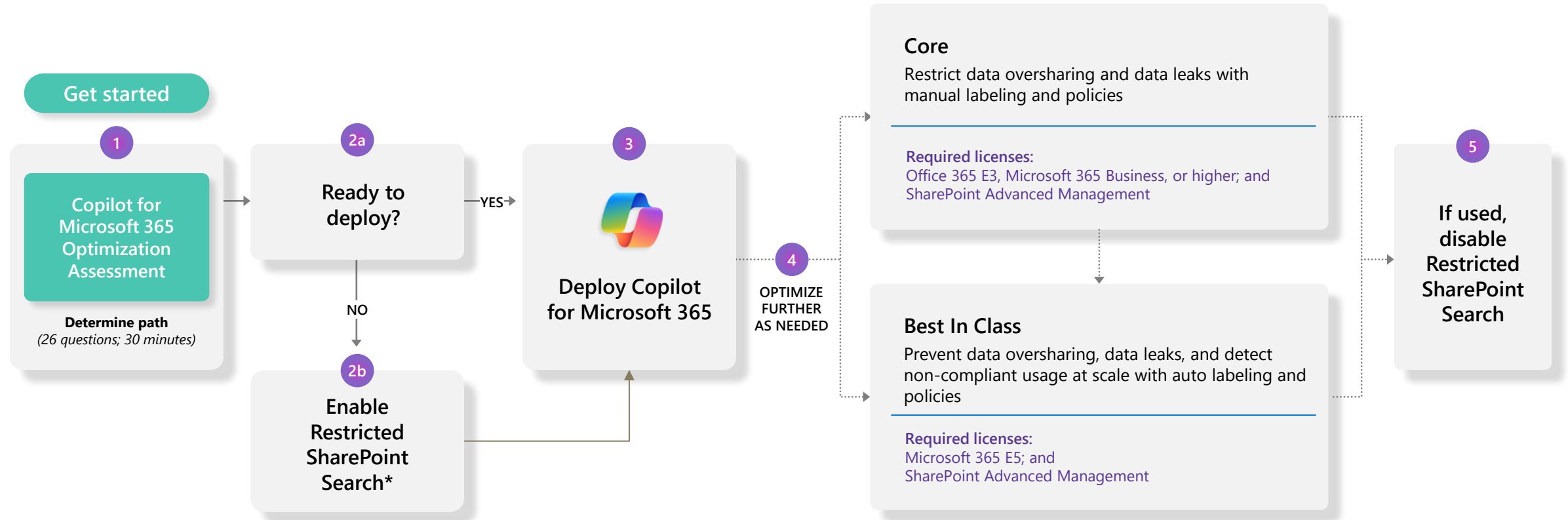
Use of "everyone except external users" domain group



Sites and files without sensitivity labels

Apply appropriate Data Security controls

Get started quickly and continue to optimize along the way



* Restricted SharePoint Search will limit Copilot for Microsoft 365 experiences and organization-wide search. It is a temporary option which gives you time to address oversharing concerns while getting started on your Copilot journey.

Security and Content Governance Optimization

Recommended Steps

SharePoint, OneDrive, Office Apps

Content management governance

Archive/Delete old and inactive content to improve Copilot accuracy and remove obsolete information while securing content that needs to be retained

Generate visibility and reports on files and sites that may be overshared and implement remediation steps in combination with an access review process

Restrict access or limit scope of search and copilot to meet organizational requirements and organizational risk tolerance

Data security and compliance path

Establish data retention and deletion policies, classification, and sensitivity labels for sensitive content.

Apply retention labels for deletion of old data and records

Apply sensitivity labels to documents, document libraries, and auto label intellectual property

Apply protection on sensitive data with encryption and DLP policies to prevent data leakage.

Getting your Data Governance house in order with SAM

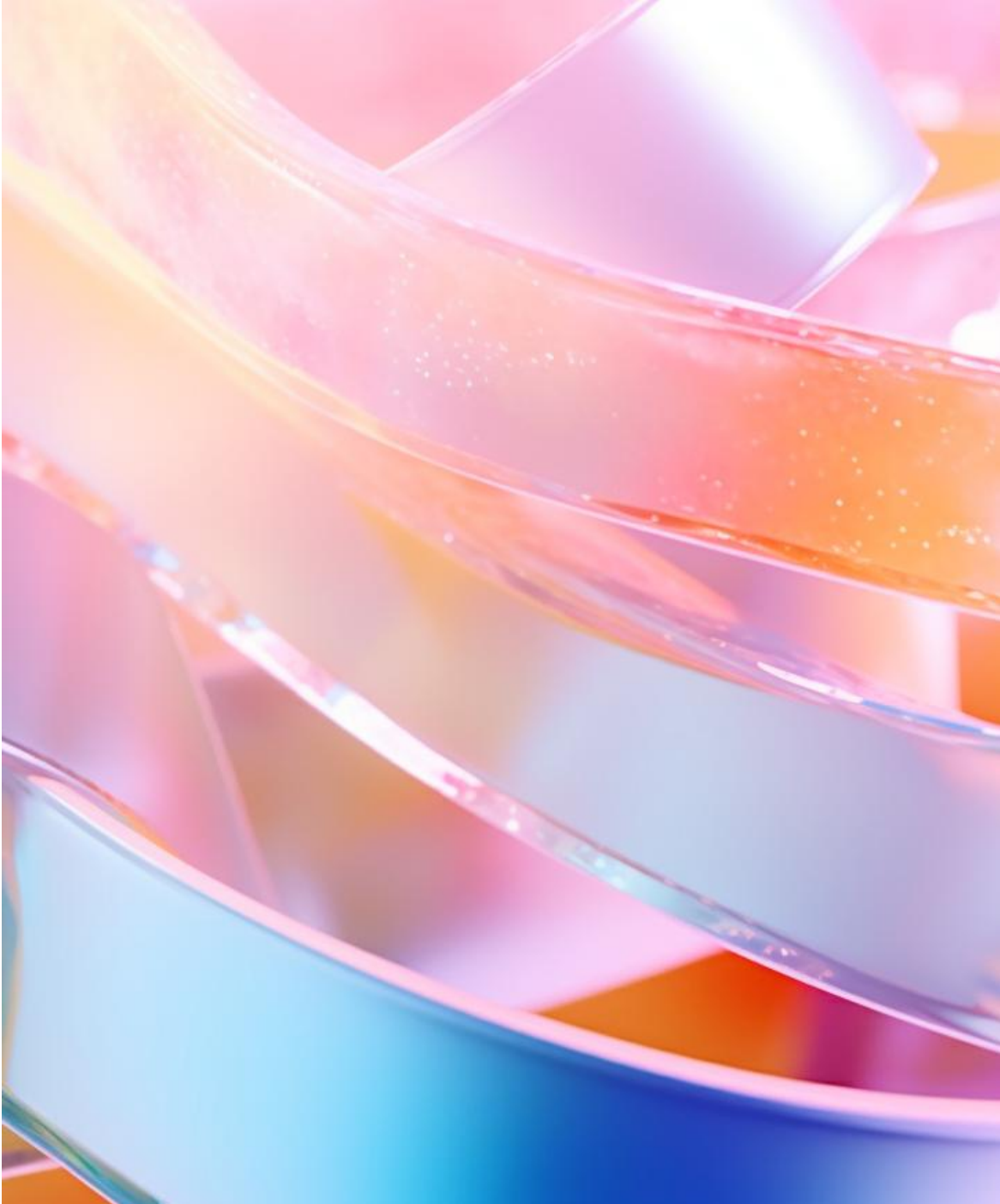
Prescriptive guidance for Copilot prep



Column	Description
TenantID	GUID identifying the tenant
Site ID	GUID identifying the tenant
Site Name	Name of the site
Site URL	URL of the site
Site Template	Specifies the type of site. Has values such as Communication site, Team site, Team site (no Microsoft 365 group), Other sites
Primary admin	Site administrator marked as Primary in Active sites page
Primary admin email	Email of primary site administrator
ExternalSharing	Specifies whether content can be shared with external guests. Yes or No.
Site Privacy	Applicable in Microsoft 365 connected team sites. Specifies the privacy setting of the group. Has values Public or Private
Site Sensitivity	Specifies the sensitivity label applied to the site
Number of users having access	Unique number of users having access to site content at any level/scope
Guest user permissions	Count of permissions to guest users at any level/scope. These users are marked with #EXT# in their Entra identities
External participant permissions	Count of permissions to external users who can directly use their own credentials to login and collaborate, such as in Shared channels
Entra group count	Number of Entra cloud only groups at all scopes
File count	Approximate number of all files in the site
Items with unique permissions count	Extent of broken inheritance. Count of all items where inheritance was broken and unique permissions were assigned
People In Your Org link count	Number of existing PeopleInYourOrg links across all the files in the site
Anyone link count	Number of existing Anyone links across all the files in the site
EEEU permission count	Number of permissions with 'Everyone except external users' as the recipient at any level/scope
Everyone permission count	Number of permissions with 'Everyone' as the recipient at any level/scope
Report Date	Time of generation of report. It might take up to 48 hours to reflect any changes in the report

SharePoint Sites Inventory

Total SharePoint Site Count	
Key Areas of Focus	
Inactive Sites (6 mos min)	
Group Connected SPO Sites	
Private Sites (Group Connected)	
Public Sites (Group Connected)	
Sites with Guests Users	
Sites with Admin Owner	
Community Classic Sites Other	
OneDrive Sites	
Loop Sites	



Inactive Sites

Unattended and inactive content are potential vectors for attacks, moving to archiving moves content to cold and immutable storage

Unattended and stale content that may be overshared and overexposed will now be removed from both enterprise search and Copilot search.

An archiving strategy will be key in implementing a sustainable and cost-effective storage strategy as generative AI allows for an easier path to content generation which leads to an increase in content growth rate

Total Site Count	
Key Areas of Focus	
Sites inactive for over a year	
Storage Consumed	

Public Sites

(Group Connected)

A “Public” site when created by design automatically adds the EEEU permission as it is intended for everyone in the organization to consume information and join the site or team without a need for approval

In the context of a private vs a public team, public would automatically add the EEEU permission by design but private would start with a set of members and owners and can expand based on guest users as well as how users share the content

Total Public Site Count	4087
Key Areas of Focus	
Account Legal HR Tax Sites Procurement Development	
Public Sites with Everyone Permissions	
Public Sites with Guest Users	
External Sharing	

Private Sites

(Group Connected)

Site Privacy – Refers to the membership type of the site/group and not sensitivity

This is a key reason why a site is labeled “Private” under site privacy but is open to external sharing as well as the EEEU permission

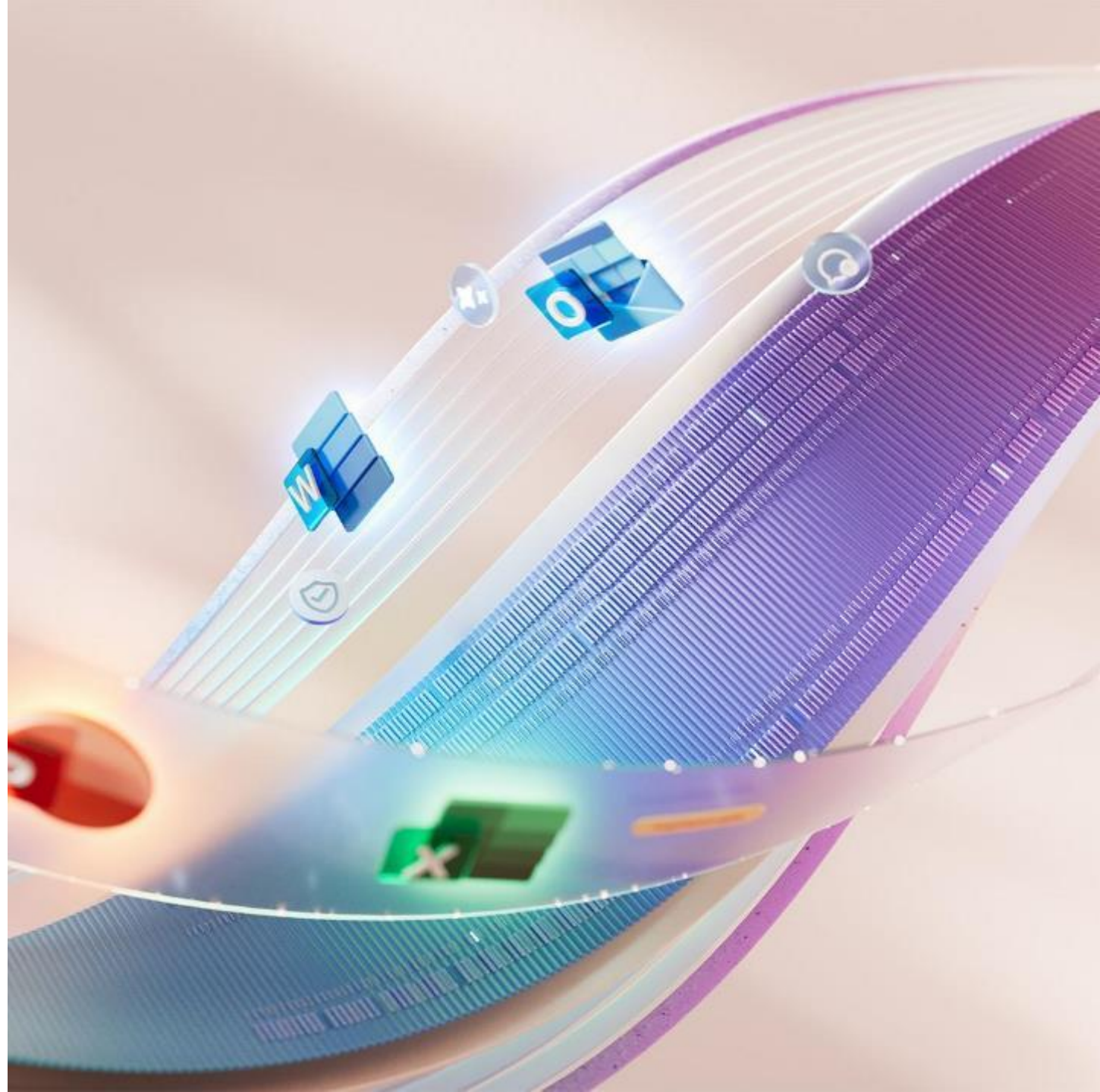
Total Private Site Count
Key Areas of Focus
Private Sites with Everyone Permissions
Private Sites with EEEU Permissions
Private Sites with Guest Users

Community | Classic | Other Sites (Not Group Connected)

Not group connected and leverages the traditional Owners and Members permissions.

Total Site Count
Key Areas of Focus
Sites with EEEU Permissions
Site with Everyone Permissions
Sites with Guest Users
Loop related sites

Remediation Strategy, Plan, and Workstreams



Milestone 1:

Archive Inactive Sites

- Key Execution Steps
 - Review Inactive Sites Report – This information was not provided.
 - Tremendous Impact in Cleanup Effort & Overshared stale and old content
 - **Very Low Risk** as sites will be archived and can be reactivated if needed without cost to rehydrate
- Archive Sites after Read Only state
 - Setup M365 Archive - [Set up Microsoft 365 Archive - Microsoft 365 Archive | Microsoft Learn](#)
 - PowerShell to archive at scale - [Set-SPOSiteArchiveState \(Microsoft.Online.SharePoint.PowerShell\) | Microsoft Learn](#)

Current Progress | Estimates

- [Set expiration for Microsoft 365 groups - Microsoft Entra ID | Microsoft Learn](#)
- **Reference Link in Copilot Oversharing Blueprint** - [Get your data ready for Microsoft 365 Copilot with E3 + SAM licenses | Microsoft Learn](#)
- **Archiving sites effort and estimated timeline – 14 Days**



Tactical Benefits

- Copilot Benefits:
- Content moved in Archive is not in the scope of Copilot search. Improves data accuracy, quality, and removes obsolete and old insights.
- Security Benefits:
- Unattended and inactive content are potential vectors for attacks, moving to archiving moves content to cold and immutable storage
 - Unattended and stale content that may be overshared and overexposed will now be removed from both enterprise search and Copilot search.
 - Reduce the amount of data that you may potentially need to label with Purview.

Active Eng Site

Name	Modified	Modified By	Client	Contractor	Date	Processing status	Add column
Allen Depuyung.pdf	August 15	System Administrator	Best For You Organics	Allen Depuyung	March 1, 2020	Finished	
Delina Berger.pdf	August 15	System Administrator	Adventure Works Uptake	Delina Berger	January 1, 2019	Finished	
Diego Sckan.pdf	August 15	System Administrator	Blue Tracker Actions	Diego Sckan	March 1, 2020	Finished	
Emily Braun.pdf	August 15	System Administrator	Fabrikam Industries	Emily Braun	July 1, 2018	Finished	
Enrico Catanesi.pdf	August 15	System Administrator	Salspari Toys Ltd.	Enrico Catanesi	September 15, 2017	Finished	

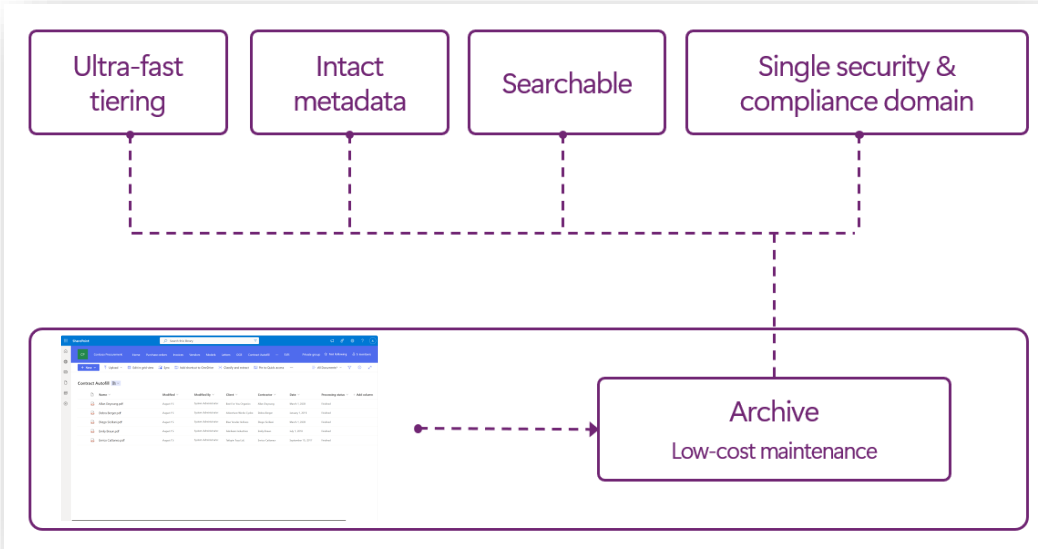
Old Eng Site

Old product site

Name	Modified	Modified By	Client	Contractor	Date	Processing status	Add column
Allen Depuyung.pdf	August 15	System Administrator	Best For You Organics	Allen Depuyung	March 1, 2020	Finished	
Delina Berger.pdf	August 15	System Administrator	Adventure Works Uptake	Delina Berger	January 1, 2019	Finished	
Diego Sckan.pdf	August 15	System Administrator	Blue Tracker Actions	Diego Sckan	March 1, 2020	Finished	
Emily Braun.pdf	August 15	System Administrator	Fabrikam Industries	Emily Braun	July 1, 2018	Finished	
Enrico Catanesi.pdf	August 15	System Administrator	Salspari Toys Ltd.	Enrico Catanesi	September 15, 2017	Finished	

Automatically archive data after 3/6 months of inactivity and after notifying owners.

Archived content is not available for Copilot search.



Milestone 2:

Site Access Reviews

- **Medium User Impact**
 - Site access reviews in the SharePoint admin center allow IT administrators to delegate the process of reviewing data access governance reports to site owners of overshared sites. - [Initiate site access reviews for Data access governance reports - SharePoint in Microsoft 365 | Microsoft Learn](#)
 - IT administrators can't access file-level or item-level details due to compliance reasons.
 - Site owners are best positioned to review and address oversharing issues for their own sites.

Initiate site access review

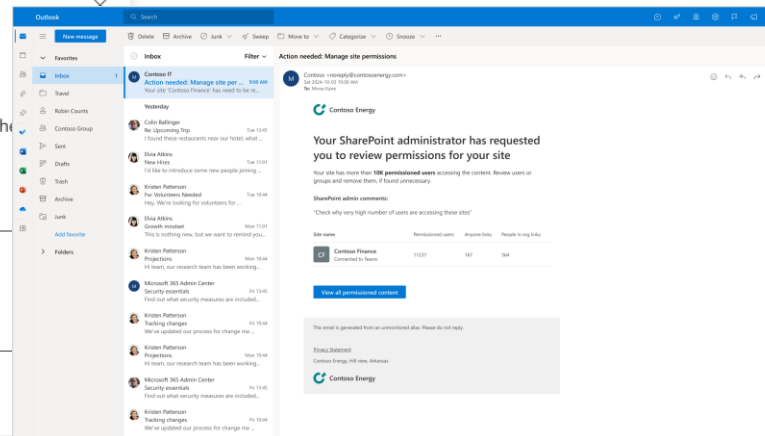
An email will be sent to all site owners, with a request for them to review the potential oversharing.

Add a comment for site owners

Kindly validate if these are shared beyond what is necessary.

Sites added

CS Contoso Finance
...com/sites/contosofin



Estimates

- **Classic Sites** may not be suitable due to subsites being part of the site collection
- **Reference Link in Copilot Oversharing Blueprint** - [Get your data ready for Microsoft 365 Copilot with E3 + SAM licenses | Microsoft Learn](#)
- **Maybe dependent on communication of adoption and new policy changes - 14 to 30 Days**

Site reviews > Permissions to many users

The list below details scopes which have the highest number of permissioned users. It also highlights possible sources such as count of sharing links and presence of groups such as Everyone and Everyone Except External Users (EEEU). Remove permissions where they are no longer required to prevent oversharing.

	Name	Scope	Total number of Permissioned users	Total number of groups	Count of 'Anyone' links	Count of 'People in your org' links	Has EEEU	Has Everyone	Action	Final status
>	Project Apollo	SharePoint Site	10804	4	-	-	-	-	Manage access	Select
>	Finance_projections_FY23.xlsx	File	9845	5	2	2	-	-	Manage access	Select
>	Vendor_bills	Folder	8524	7	1	2	-	-	Manage access	Select
>	ProfitabilityPlan.pptx	File	7945	6	1	3	Yes	-	Manage access	Select
>	Flow_map.jpg	File	6580	3	2	1	Yes	-	Manage access	Select
>	Service_Usage_dashboard.docx	File	5092	4	3	3	-	-	Manage access	Select

Service_Usage_dashboard

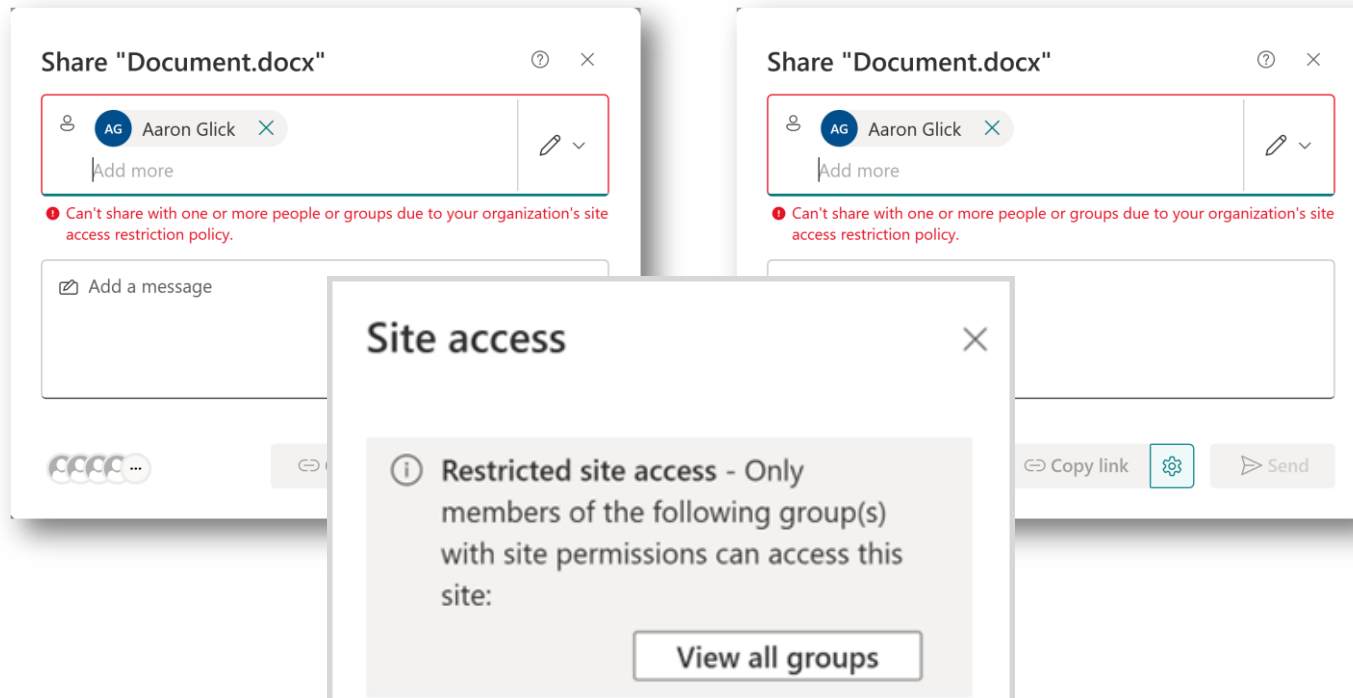
Group name	Alias	Members
Contoso FTE	cfe@contosoenergy.com	4528
Contoso Giving	cgive@contosoenergy.com	198
Contoso Benefits	cbenefits@contosoenerg...	126
Contoso Vendors	conv@contosoenergy.co...	78

License required: SharePoint Advanced Management

Milestone 2:

Restrict Access of Sites

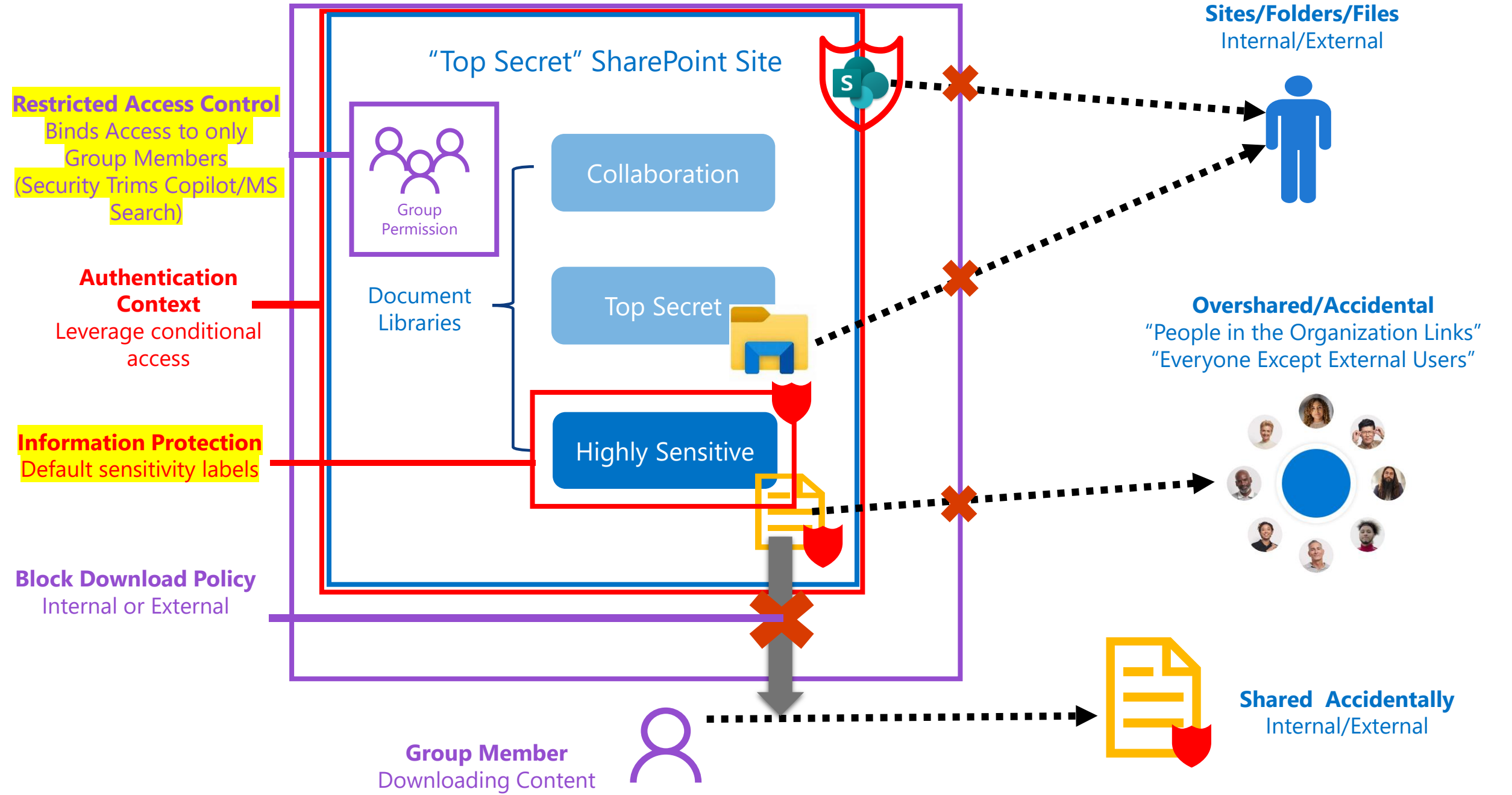
- **High User Impact**
- **Some sites may need more restrictive access controls and limit access to groups**
 - Implement Restricted Access Control on sites that need to be limited to just specific groups to have access to it - [Restrict SharePoint site access with Microsoft 365 groups and Microsoft Entra security groups](#) - [SharePoint in Microsoft 365 | Microsoft Learn](#)

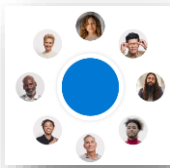
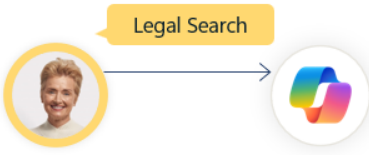


Estimates

- **Classic Sites** may not be suitable due to subsites being part of the site collection
- **Reference Link in Copilot Oversharing Blueprint** - [Get your data ready for Microsoft 365 Copilot with E3 + SAM licenses | Microsoft Learn](#)
- **Maybe dependent on communication of adoption and new policy changes - 14 to 30 Days**

Purview & SAM: Protecting Sensitive sites & content





Lock Legal SharePoint sites to only the legal department to be able to access and prevent oversharing



SharePoint Adv Mgmt

Restricted Access Control

Lock Legal Leadership site to only the leadership team and prevent oversharing.

Legal Department

Legal Projects

Legal Leadership



Without **Purview** compliance policies and sensitivity labels applied

Block documents from being downloaded

Automatically archive data after 3/6 months of inactivity and after notifying owners.

Archived content is not available for Copilot search.

Ultra-fast tiering

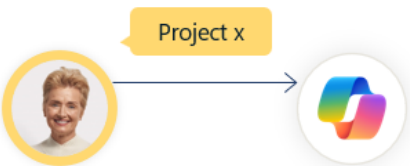
Intact metadata

Searchable

Single security & compliance domain

Archive
Low-cost maintenance





Lock Project Alpha site to only the alpha team and prevent oversharing.

Lock Project Beta site to only the beta team and prevent oversharing.

Lock Project Gamma site to only the gamma team and prevent oversharing.

Sensitivity label

Retention/Deletion Policy

Copilot Engagement Rules
Classification
Encryption
DLP
Document Lifecycle
Records Enforcement

Project Alpha

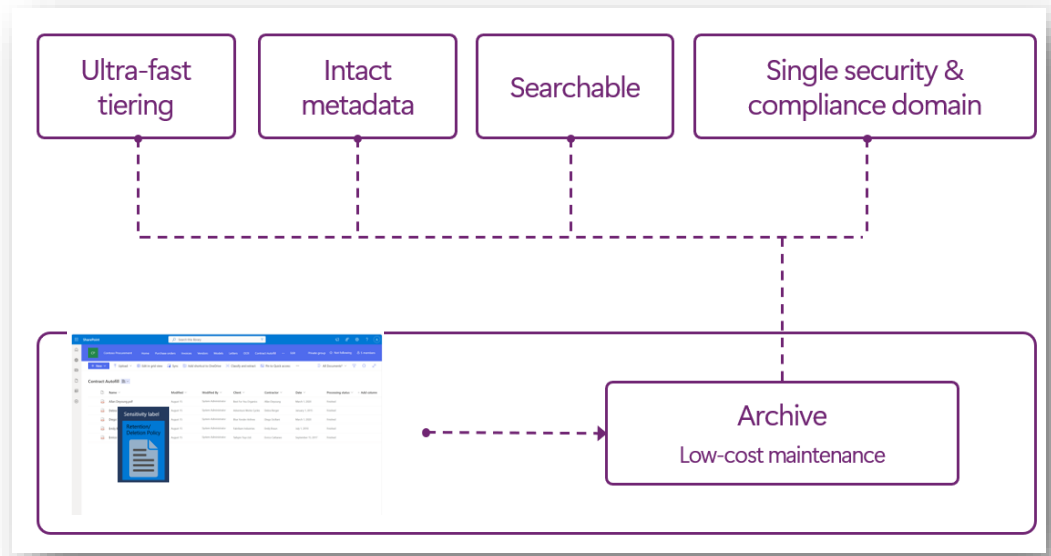
Project Beta

Project Gamma

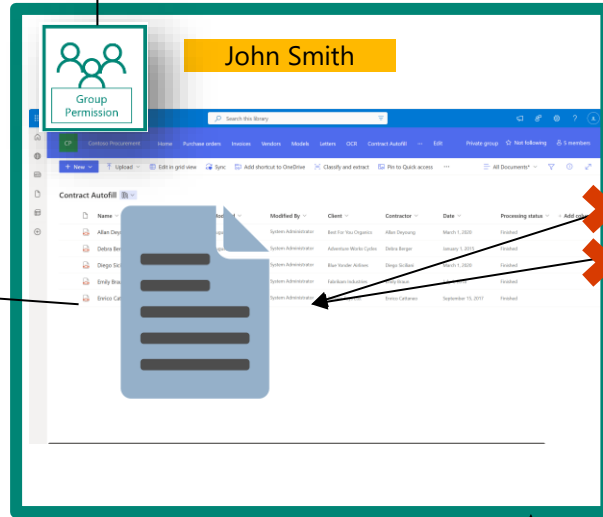
Automatically archive data
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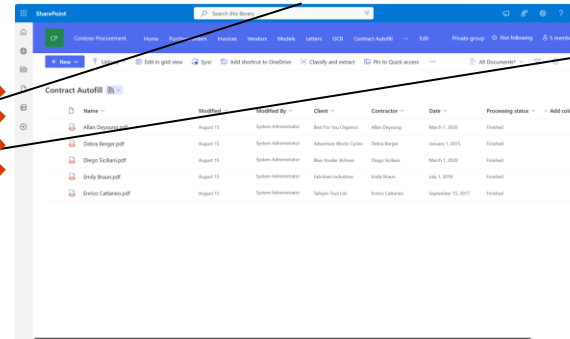
Encrypt Label
or
Encrypt on Download



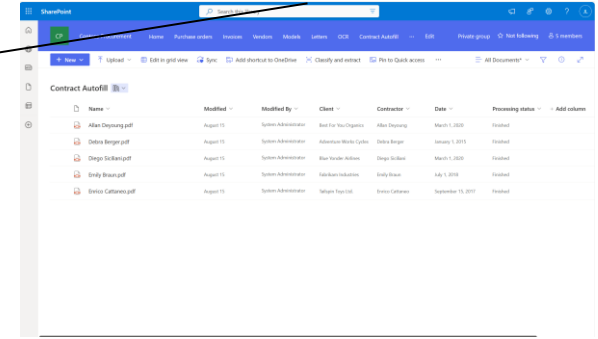
Locks the OneDrive down to just "John Smith" and your team by applying RAC and using a security group to bind the OneDrive



Robert Thomas



Mark Stone



A sensitive file has been accidentally overshared with Robert and Mark. An employee submits a ticket that there has been an oversharing incident and we need to remediate quickly



Trigger your incident response and apply the RAC policy to the OneDrive that is exposed. Once the policy is applied access to John Smith OneDrive content will be blocked for all users except John. Once finished with remediation, you can remove policy and the access will resume to how it was before except for what you have remediated or fixed.

OneDrive Oversharing Incident response use case.

Milestone 2:

Restrict Discovery of sites

- **Low User Impact**
- **Prevent overexposed sites from being discovered in Copilot Search and Enterprise Search**
 - Implement **Restricted Content Discoverability** on targeted sites that are potentially overexposed providing time to triage and restrict access if needed - [Restrict discovery of SharePoint sites and content - SharePoint in Microsoft 365 | Microsoft Learn](#)
 - Will require a recrawl of the SharePoint sites and will take a week or two to complete depending on how much content is in the site
 - Blocks the discovery and searchability of content and is designed to mitigate Everyone Except External users' permissions as well as the Everyone permissions on content which is a common cause for oversharing incidents.

Estimates

- **Reference Link in Copilot Oversharing Blueprint** - [Get your data ready for Microsoft 365 Copilot with E3 + SAM licenses | Microsoft Learn](#)
- **Depending on number of sites and content on site, recrawl estimates to complete – 14 to 30 Days**



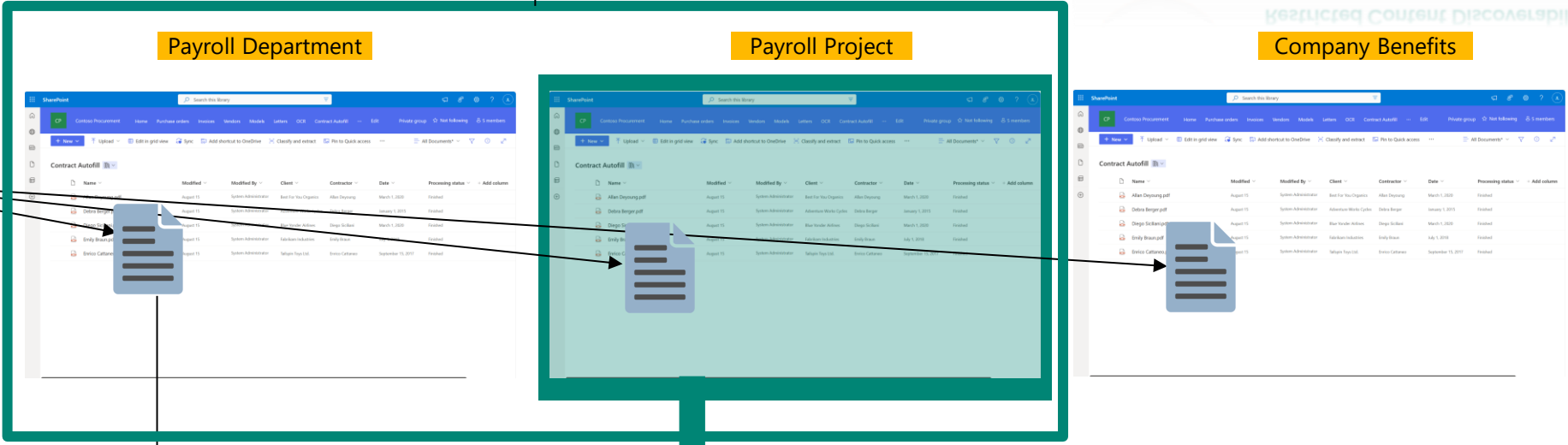


Block sites from being searchable in Copilot and Enterprise Search.



SharePoint Adv Mgmt

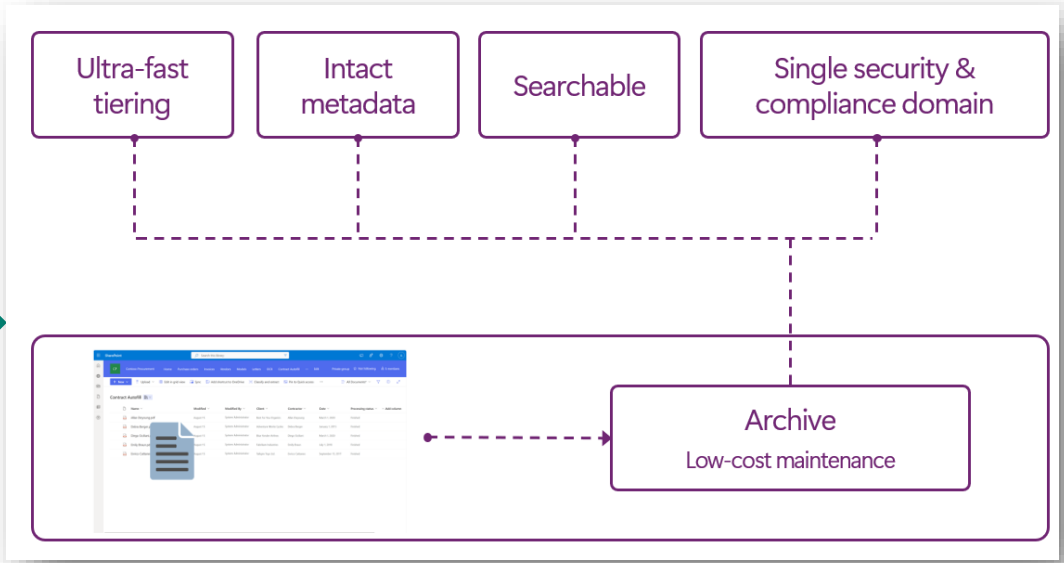
Restricted Content Discoverability



Without **Purview** compliance policies and sensitivity labels applied

Block documents from being downloaded

Automatically archive data after 3/6 months of inactivity and after notifying owners.
Archived content is not available for Copilot search.



Milestone 3:

OneDrive Remediation

- Key Execution Steps

- Total OneDrive Sites – No information provided
- Risk is low with only a few users that have multiple files share with Everyone or everyone except external users
 - OneDrive's with at least two EEEU permissions
 - OneDive's with Everyone permissions

Estimates

- 60 Days or Less

Milestone 4:

Provisioning | Lifecycle

- Key Execution Steps

- Team has turned on one year Group Expiration via Entra ID as go forward policy for self- provisioned Teams sites. - [Set expiration for Microsoft 365 groups - Microsoft Entra ID | Microsoft Learn](#)
- Access to groups and applications for employees and guests changes over time. To reduce the risk associated with stale access assignments, administrators can use Microsoft Entra ID to create access reviews for group members or application access - [Create an access review of groups and applications - Microsoft Entra ID Governance | Microsoft Learn](#)

- Site Attestation Policy

- Can create policies, but not execute the emails
- <https://youtu.be/02lZoaj-Mto?si=qvqZWu0c1HAF-8Fk>

Current Progress | Estimates

- Also discussed, Entitlement Packages - [What is entitlement management? - Microsoft Entra ID Governance | Microsoft Learn](#)
- **Estimated Time - 90 Days**

Milestone 5:

Communication | Training

- Key Execution Steps
 - Governance and adoption of new governance policies
 - Security Best Practices Teams & SPO training
 - Email awareness of new responsibilities, accountability, and link to training
 - See link for assets to be reused for governance - [Copilot Success Kit – Microsoft Adoption](#)

Estimates | Options

- 60 – 90 Days
- On Demand training if possible
- Programmatic approach to certifications
- Sharing best practices
- New Employee Onboarding

Thank you.

Submit session feedback

