



Copilot Business Trial: How to See Value in Your First 30 Days

FAQ's

1. Q: Can Copilot be prevented from exposing sensitive data such as payroll information, HR records, or commercially sensitive information?

A: Yes. Microsoft 365 Copilot honours the same permissions, security controls, and compliance policies already configured within your Microsoft 365 environment. Users can only access content through Copilot that they are already authorised to view, and organisations can use tools such as sensitivity labels, Data Loss Prevention (DLP), access controls, and Microsoft Purview policies to further protect sensitive information such as payroll data, HR records, and commercially sensitive content.

It's important to remember that Copilot does not create new access permissions. However, because it makes information easier to discover, many organisations choose to review permissions, identify overshared content, and strengthen governance controls before a wider rollout.

2. Q: Can we audit or investigate what users are asking Copilot and what information Copilot is returning?

A: eDiscovery, audit logs premium, and DSPM For AI are tools you can use to audit conversations with Copilot. These tools are included in Purview which you can bundle on top of a Business Premium license.

With Audit (Standard) included with Business Premium, you can see:

User activity

File access

SharePoint activity

Exchange activity

Teams activity

Basic Copilot-related audit events (where available in Audit Standard)

Audit Standard provides searchable audit logs with a default retention period of 180 days

3. Q: How can I encourage Copilot adoption when some users favour tools like Claude over Microsoft 365 Copilot and are resistant to Microsoft 365 governance, security, and collaboration best practices?

A: Although users may prefer different AI tools, Microsoft 365 Copilot's strength lies in its integration with Microsoft 365. Copilot can securely use organisational context from emails, meetings, chats and documents to provide more relevant responses, directly within the applications employees already use. It also includes enterprise data protection, ensuring organisational data is handled within existing security, compliance and governance controls. As a result, organisations can drive AI adoption without compromising security or collaboration best practices.

4. Q: How do we allow Copilot to access data held on a local File server?

A: Copilot cannot directly access a local file server. To use on-premises file share content with Microsoft 365 Copilot, organisations can deploy a Microsoft Graph File Share Connector, which indexes approved

file shares into Microsoft Graph while respecting existing permissions. For the best Copilot experience, Microsoft recommends storing collaborative content in SharePoint Online and OneDrive

5. Q: We hold a fair amount of data outside our Microsoft environment. Under this licence, can we build an agent in Copilot Studio that connects to an MCP server to reach that data? If so, is that usage included in the per user licence, or does it draw on Copilot Credits or require a separate Copilot Studio subscription? The agents would be internal only, used by our own licensed staff in Teams and Copilot Chat, not customer facing.

A: Yes. You can build an agent in Microsoft Copilot Studio that connects to data held outside of Microsoft 365, including through a Model Context Protocol (MCP) server. MCP support allows agents to access external knowledge sources, APIs, and business systems while still benefiting from Microsoft security and governance controls.

From a licensing perspective, there are two considerations. Creating and using agents within Microsoft 365 Copilot is included as part of the Microsoft 365 Copilot / Copilot Business license, but agent execution and access to external systems may consume Copilot Credits depending on the agent design and workload. More advanced Copilot Studio scenarios, custom integrations, and large-scale agent usage can require either Copilot Credits, Pay-As-You-Go billing, or a separate Copilot Studio subscription.

6. At the end of the trial what happens if we wanted to reduce the quantity of the licenses when they covert into a paid subscription?

A: At the end of the trial you will enter a 7-day window like you do for the rest of your CSP renewals. During this window you will be able to decrease the quantity, change the commitment and billing term or cancel the subscription.

7. What happens when the Copilot Business Trial ends?

A: The trial auto-renews to a paid subscription by default. The default renewal is an annual commitment with monthly billing. Softcat can change the renewal settings during the trial if you'd prefer a different billing term or frequency.

8. How will trial participants be supported after the webinar?

A: The plan is to provide a downloadable welcome pack containing guidance and resources for each week of the 30-day trial, tailored with Softcat branding and support services.

9. Are there funding opportunities available after a successful trial?

A: Yes. Organisations who qualify and purchase an additional 25 seats after the trial (50 seats in total) would become eligible for deployment funding, which could help support adoption and implementation.