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DYNAMICS CON LIVE

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Demystify Security and Compliance for Copilot in D365 CS

Deepa Bansal

Senior Program Manager

Dynamics 365 Customer Service

<https://www.linkedin.com/in/deepa-bansal-2b73281/>



Data Security Principles

- Are NOT available to other customers.
- Are NOT used to train or improve any third-party products or services (such as OpenAI models).
- Are NOT used to train or improve Microsoft AI models unless your tenant admin has opted into optional data sharing.

The Azure OpenAI Service is fully controlled by Microsoft; Microsoft hosts the OpenAI models in Microsoft's Azure environment and the Service does NOT interact with any services operated by OpenAI (e.g. ChatGPT, or the OpenAI API).

Copilot Promises

Your data is your data

Your data from any inferencing is not used to train the foundation AI models

Your data is protected by the comprehensive enterprise compliance and security controls

Data remains in **Microsoft Cloud**
No “**eyes-on**” access for **Microsoft employees**

Customer data is **not being used** by Microsoft to train or improve any Microsoft models, unless customer opts into data sharing

Built on Microsoft's approach to **security, compliance, and privacy**

Follows **Responsible AI** practices

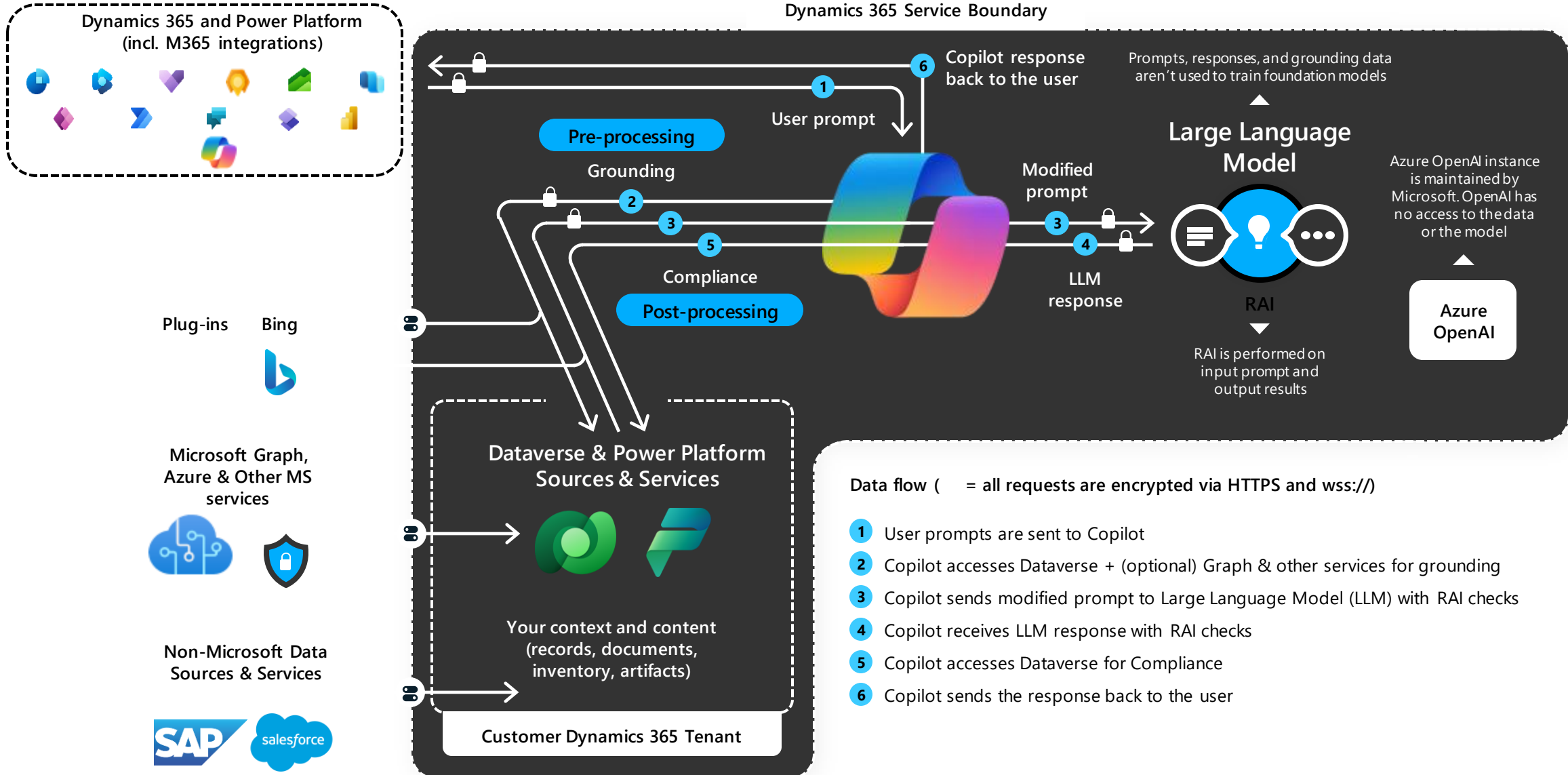
Leverages existing **user** permissions and **DLP** policies

Validated through **adversarial testing**

Copilot Data Security & Privacy Assets

- [FAQ](#) about the Copilot Data Security and Privacy across Dynamics and Power Platform.
- [An article authored by Donald Kossmann](#) that explains how business data accessed in the user's context, in Copilot for Dynamics 365 and Power Platform deliver the highest levels of security, compliance, and privacy in accordance with our Responsible AI Standard.
- The [video](#) featuring James Oleinik and Phil Topness, highlights the extensive steps taken to enable users to interact with business data securely.
- [High-level](#) Copilot architecture diagram
- [Trust portal](#) with Certifications, Regulations and Standards that are often required for customer cybersecurity reviews.

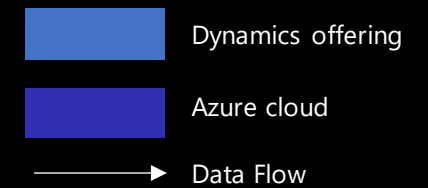
High level Architecture



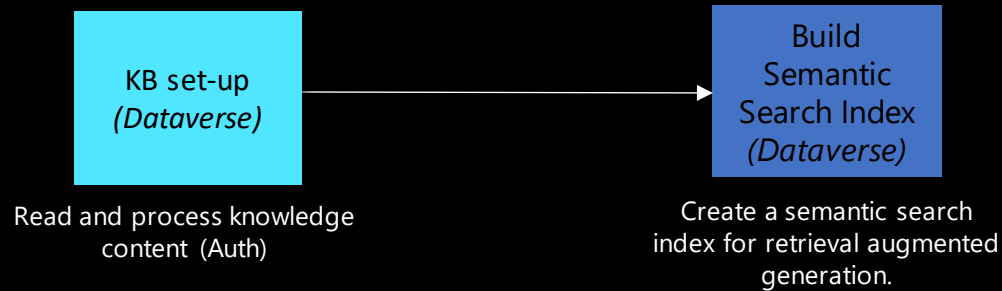
Data flow (= all requests are encrypted via HTTPS and wss://)

- 1** User prompts are sent to Copilot
- 2** Copilot accesses Dataverse + (optional) Graph & other services for grounding
- 3** Copilot sends modified prompt to Large Language Model (LLM) with RAI checks
- 4** Copilot receives LLM response with RAI checks
- 5** Copilot accesses Dataverse for Compliance
- 6** Copilot sends the response back to the user

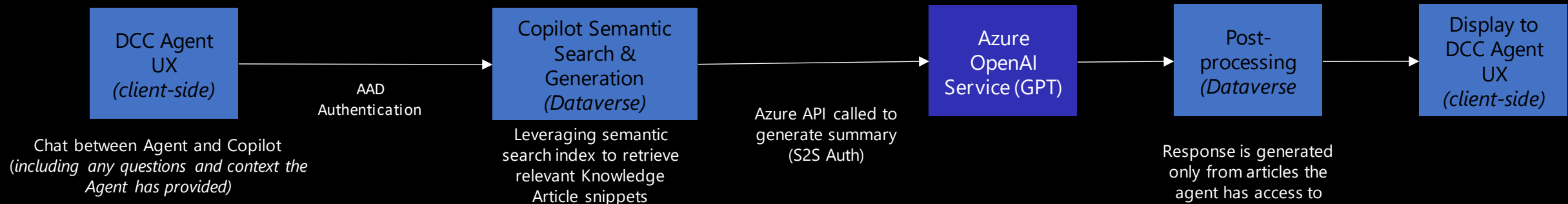
Copilot in D365 CS: Deep Dive on Q&A Feature



Sync for new/ updated KB articles

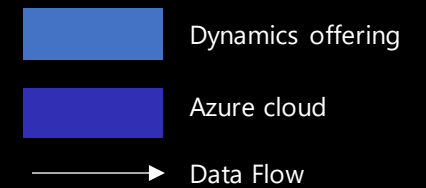


Agent initiated

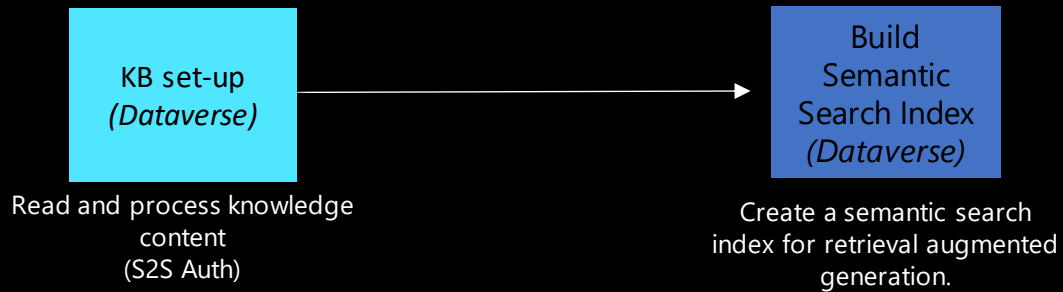


- All calls are HTTPS.
- For cross-geographies, the OpenAI Service endpoints could be in different geographies. Reference [Copilot data movement across geographies \(preview\) | Microsoft Learn](#)

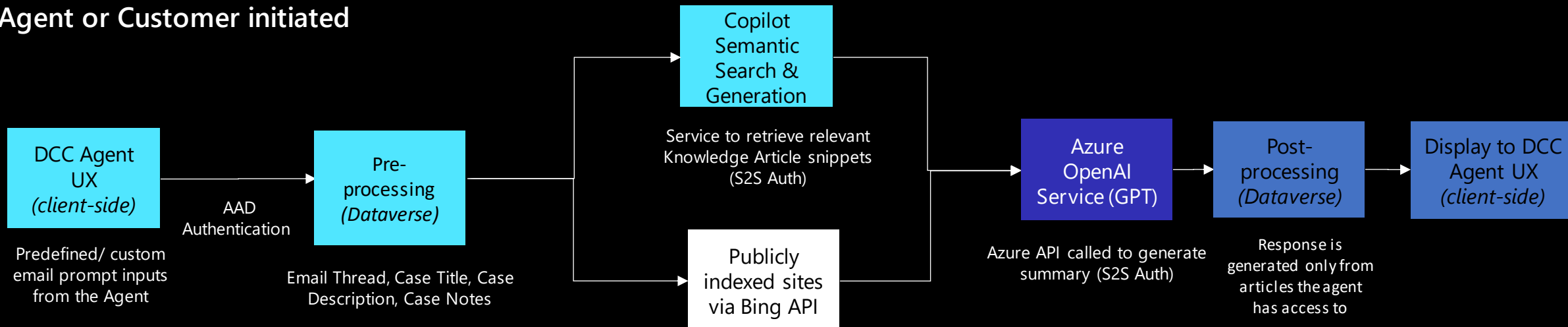
Copilot in D365 CS: Deep Dive on Email Assist Feature



Sync for new/ updated KB articles

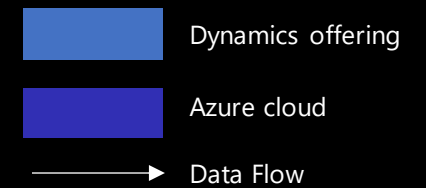


Agent or Customer initiated

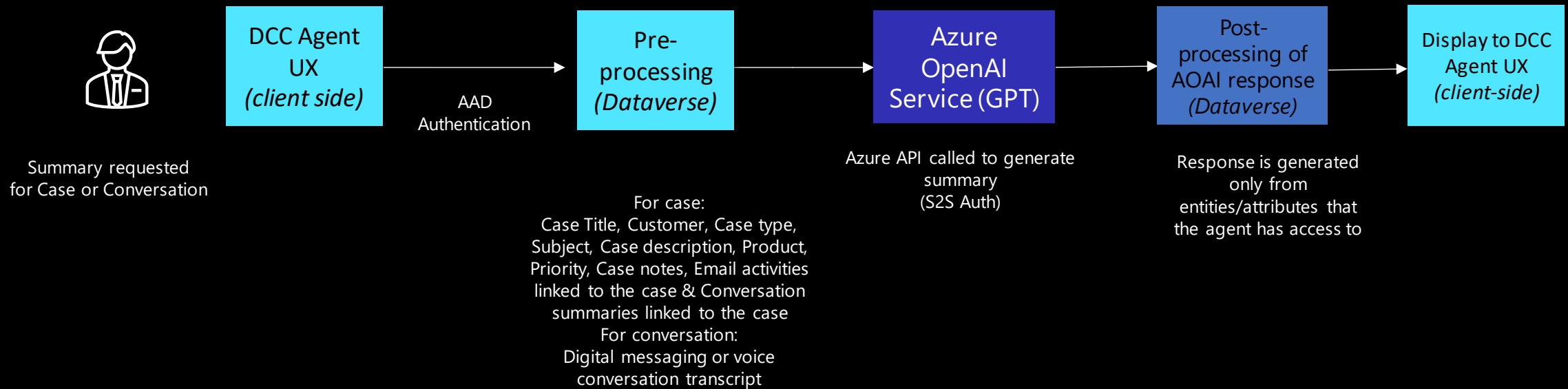


- All calls are HTTPS.
- For cross-geographies, the OpenAI Service endpoints could be in different geographies. Reference [Copilot data movement across geographies \(preview\) | Microsoft Learn](#)

Copilot in D365 CS: Deep Dive on Summarization Features



Agent or Customer initiated



- All calls are HTTPS.
- For cross-geographies, the OpenAI Service endpoints could be in different geographies. Reference [Copilot data movement across geographies \(preview\) | Microsoft Learn](#)

Roadmap: Release Planner

The screenshot shows the Microsoft Release Planner interface. At the top, there's a navigation bar with the Microsoft logo, 'Release Planner', and various menu items like 'Products', 'Solutions', 'Pricing', 'Partners', 'Platform', 'Resources', 'Support', and 'Community'. On the right, there are links for 'Sign in' and 'English'. Below the navigation bar, the page title is 'Dynamics 365 and Microsoft Power Platform Release planner'. There are search and 'What's new' buttons. The main content area has two tabs: 'All release plans' and 'My release plans'. A video player titled 'Watch the new highlights!' is visible. Below it, there are three sections: 'Planned' (5 upcoming features), 'Coming soon' (15 upcoming features), and 'Try now' (42 new features). The 'Omnichannel' category is expanded, showing a list of features with their status and release dates. The 'Customer Service' category is highlighted in the left sidebar.

Planned	Coming soon	Try now
5 upcoming features included in release plans	15 upcoming features available this month	42 new features recently released to market


Feature	Status	Release Date	Actions
Access voice channel features in GCC Moderate	UPDATED	Public Preview Apr 2024	+ v
Explore enhancements to outbound dialing	UPDATED	Public Preview Apr 2024	+ v
Get FedRAMP certified for new features	UPDATED	General Availability Apr 2024	+ v
Mask sensitive data and prevent unauthorized access		Public Preview Apr 2024	+ v
Rate call quality and provide feedback on improvements	UPDATED	General Availability Apr 2024	+ v
See enhancements in call transfers to external numbers		General Availability Apr 2024	+ v




Other sessions to note: Tuesday


Monday May 13, 2024 **Tuesday May 14, 2024** Wednesday May 15, 2024 Thursday May 16, 2024 Friday May 17, 2024


9:15 AM - 10:15 AM
Demystify Security and Compliance in Copilot in Service
COTTONWOOD

 **ADVANCED**


 Deepta Bansal


9:15 AM - 10:15 AM
Fasten your seatbelts for Field Service Copilot
LARKSPUR

 **FUNCTIONAL** **ALL LEVELS**


 Michelle L Albright and David Humphreys


11:45 AM - 12:45 PM
RealTime Engagement in Moments that Matter
IRIS

 **TECHNICAL** **ALL LEVELS**


 Tim Smith


11:45 AM - 12:45 PM
Balancing Innovation and Compliance: Navigating AI Governance in Dynamics 365
EVERGREEN A

 **FUNCTIONAL** **BEGINNER**


 Nancie Calder and Rick McCutcheon


1:30 PM - 2:30 PM
Customer Journey with Dynamics 365 - Full Circle Service Experience
PRIMROSE

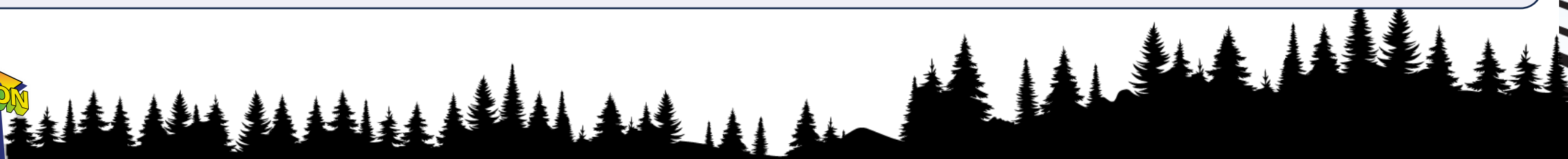
 **FUNCTIONAL** **INTERMEDIATE**

 David Humphreys and Mauricio Oliveira



















4:30 PM - 5:30 PM
Different Use Cases for Scheduling with Dynamics 365 Field service
LARKSPUR

 **FUNCTIONAL** **ALL LEVELS**


 Marcio Decat



Other sessions to note: Wednesday & Thursday

Monday May 13, 2024	Tuesday May 14, 2024	Wednesday May 15, 2024	Thursday May 16, 2024	Friday May 17, 2024
<p>8:30 AM - 9:30 AM How Dynamics 365 Customer Service is taking over contact / support centers: PRIMROSE</p> <p> FUNCTIONAL INTERMEDIATE</p> <p> Beth Burrell</p> <p>View Session Details</p>				
<p>9:15 AM - 10:15 AM One word makes a difference: Copilot in D365 Customer Service & Copilot for Service compared EVERGREEN C</p> <p> BEGINNER</p> <p> Marcus Schmidt</p>				
<p>10:30 AM - 11:30 AM Cracking the sales productivity code COTTONWOOD</p> <p> FUNCTIONAL ALL LEVELS</p> <p> Justin Coaxum</p>				
<p>4:00 PM - 5:00 PM Stump the Microsoft Experts - Cross Workload EVERGREEN C</p> <p> FUNCTIONAL ALL LEVELS</p> <p>      Michelle L Albright, Marcio Decat, Beth Burrell, David Humphreys, Justin Coaxum, and Tim Smith</p> <p>View Session Details</p>				
<p>9:15 AM - 10:15 AM Spinach for Your Service: Power-Boosting Field Service with Power Platform BLUEBELL</p> <p>  TECHNICAL ADVANCED</p> <p> Marcio Decat</p>				
<p>9:15 AM - 10:15 AM Dynamics 365 Sales to Field Service, Quote to Cash! PRIMROSE</p> <p> FUNCTIONAL INTERMEDIATE</p> <p> David Humphreys</p>				





Q&A

Thank you

