5 sharing settings to check before turning on Copilot

A one-page self-check for small businesses on Microsoft 365. Free, no sign-up. Your IT person or MSP can work through it with tools you already have.

"If we turn on Copilot, what can it see?" Microsoft's answer: Copilot "only surfaces organizational data to which individual users have at least view permissions." [1] Copilot doesn't create new access. It makes the access people already have much easier to find. An old "Anyone" link to a contract, or a folder shared with the whole company, becomes one question away.

1. Anyone links (links that work without signing in)

Where to click: SharePoint admin center > **Policies** > **Sharing**. Look at the External sharing level for SharePoint and OneDrive. [2]

- ☐ If the level is **Anyone**, that is a deliberate choice, not a leftover default.
- ☐ Under the Anyone link settings, links **expire** after a set number of days, and are limited to **View** where you can. Microsoft notes that if you shorten the expiry, existing links update to the shorter limit. [2]
- ☐ Under **File and folder links**, the default link type is not **Anyone with the link**. [2]

2. Sites and teams open to the whole company

Where to click: SharePoint admin center > **Reports** > **Data access governance**. The **Site permissions across your organization** report and the **Shared with 'Everyone except external users'** report show where content is open to everyone inside the company. These reports need SharePoint Advanced Management. Microsoft's current prerequisites list enterprise base plans (such as Microsoft 365 E3 or E5), so many small businesses on Business plans won't see them. [3][4]

- ☐ Without those reports: in the Teams admin center, go to **Teams** > **Manage teams** and check the **Privacy** column. Confirm each public team should be public. [5]
- ☐ Sites that hold finance, HR or client files have a stricter sharing level than the default: **Sites** > **Active sites** > select the site > **Settings** > **More sharing settings**. [6]

3. Guests who should have left

Where to click: Microsoft 365 admin center > **Users** > **Guest users**. [7]

- ☐ Every guest still has a current reason to be there. Remove the rest.
- ☐ Consider making guest access expire: SharePoint admin center > **Policies** > **Sharing** > **More external sharing settings** > "Guest access to a site or OneDrive will expire automatically after this many days." [2]
- ☐ If you have Microsoft Entra ID Governance or Entra Suite, the inactive guest report (Entra admin center > **ID Governance** > **Dashboard** > **View inactive guests**) flags guests with no activity for 90 days by default. [8]

4. How many people are admins

Where to click: Microsoft 365 admin center > **Roles** > **Role assignments** > **Global Administrator**. **Export admin list** gives you a full list. [9]

- ☐ Fewer than five people hold Global Administrator. That is Microsoft's own recommendation. [10]
- ☐ No former employee, former vendor or former IT provider still holds any admin role, and no guest does either.

5. Who gets Copilot first

Where to click: Microsoft 365 admin center > **Billing** > **Licenses** > select the Copilot product > **Assign licenses**. [11]

- ☐ Start with a small pilot group, not everyone. In a June 2024 Gartner survey of 132 IT leaders (about half at companies with 10,000 or more employees), 57% limited their Copilot rollout to "low-risk or trusted" users. [12]
- ☐ For a few sensitive sites you can't clean up before the pilot, consider **Restricted Content Discovery** (Active sites > select the site > **Settings** > **Restrict content from Microsoft Copilot**). It keeps the site out of organization-wide search and Copilot results without changing permissions. It needs a Copilot license and SharePoint Advanced Management (same plan limits as above). [4][13]

What this page does not cover. It doesn't cover MFA, backups, or what staff upload to ChatGPT or other outside AI tools. Those matter too. Microsoft says an account is 99.9% less likely to be compromised with MFA turned on. [10] Settings also drift: new links and guests appear every week, so plan to check again.

Want it all in one place? TrueNorth Data Shield runs a read-only review of these same areas and gives you recommendations ranked by risk. It changes nothing; your team or IT provider makes the fixes. See a sample report at **truenorthdatashield.com/sample-report**, or start at **truenorthdatashield.com/get-started**. Calls are optional.

Sources (all opened October 16, 2026)

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