GenAI[1] Assistant Technologies Usage Guidelines

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General Guidelines for all GenAI tools

1. **Security: FREE GenAI tools are NOT SECURE**! When utilizing GenAI tools, verify whether you are using a State licensed or free version.
2. **Data Use: Avoid** uploading/inputting non-public work-related data to any free GenAI tool as it could become publicly available. The use of non-public data raises significant privacy and data security concerns for sensitive or PII data.
3. **Data Protection**: If non-public data is accidentally entered into a free GenAI tool, notify your departmental IT lead, security lead, and Public Information Officer (PIO) immediately. Departmental IT lead, security lead, and PIO shall review the data impacted and follow existing data privacy breach procedures.
4. **Human Oversight:** Human oversight must be applied for every GenAI use. GenAI users must review all content generated by GenAI tools before publishing. Human oversight must ensure the accuracy and fairness of the results and ensure the GenAI tools use accurate and updated information.
5. **Intellectual Property:** The legal landscape regarding intellectual property related to GenAI usage is evolving. Each GenAI user should confer with their agency assigned Attorney General representative regarding the intellectual property implications of using GenAI tools, including for example, using copyrighted materials as inputs into a GenAI tool or the extent to which a work created by a GenAI tool may contain copyrighted elements.[2]
6. **Transparency and Disclosure:** Where members of the public interact directly with a State agency system using GenAI tools, the use of such GenAI tools should be disclosed by the State agency.

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[1] GenAI refers to the class of AI models that emulate the structure and characteristics of input data in order to generate derived synthetic content which can include images, videos, audio, text, and other digital content, as defined in Executive Order (E.O.)14110. https://www.whitehouse.gov/briefing-room/presidential-actions/2023/10/30/executive-order-on-the-safe-secure-and-trustworthy-development-and-use-of-artificial-intelligence/

[2] For additional guidance, please refer to the Copyright Registration Guidance: Works Containing Material Generated by Artificial Intelligence published by the U.S. Copyright Office. https://www.federalregister.gov/documents/2023/03/16/2023-05321/copyright-registration-guidance-works-containing-material-generated-by-artificial-intelligence

7. **Tool Specific Guidelines:** For each State licensed GenAI tool, please refer to the "Tool Specific Guidelines" section to reference detailed information regarding usage of GenAI Assistant technologies. If the GenAI tool is not listed, treat it as a free version and follow guidance provided under "General Guidelines for all GenAI tools" in this section.

These will be updated frequently as additional state licensed GenAI tools are made available. It is advised to check these GenAl Assistant Technologies Usage Guidelines regularly.

Tool specific Guidelines

Microsoft GenAI Copilot Guidelines

1. A free version of Microsoft Copilot on Windows may come pre-installed on State issued PCs with Windows 11.
2. For those using a State licensed version of Microsoft Copilot, please refer to the table below on the "Do's" and "Don'ts". Violations may result in license revocation.
   i. To determine whether you are using a free or licensed version of a Microsoft GenAI Copilot tool, please see the information below: You are using a free version of Microsoft Copilot if you are not signed into the product with a State-issued account licensed for Microsoft 365 Copilot.
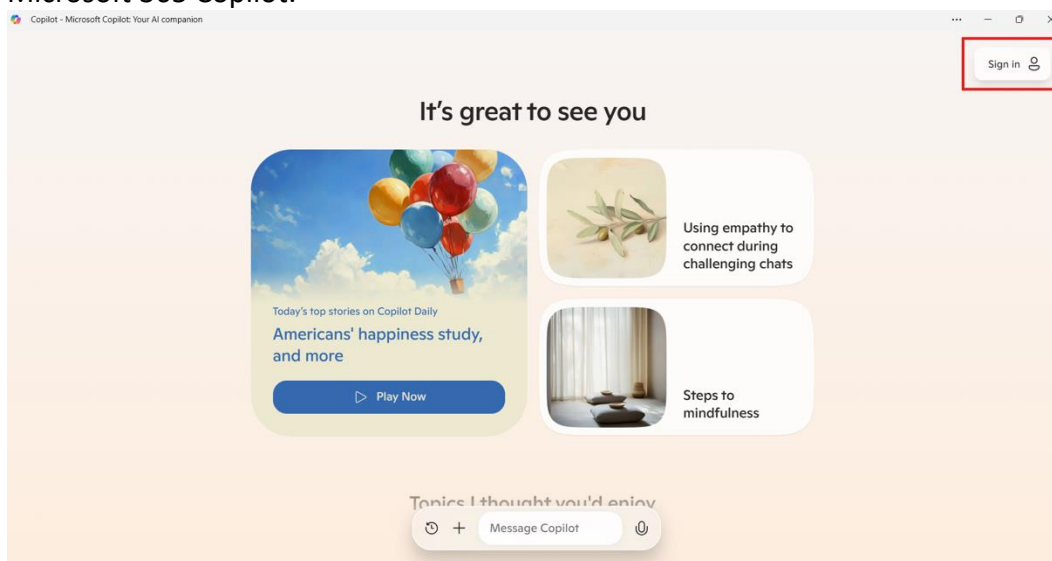
   ii. Signing into Microsoft Copilot with a personal account gives you access to the public version of Copilot, which is available through: copilot.microsoft.com.
   iii. You are using a licensed version of Microsoft Copilot if you are signed into the product using a state-issued account with a Microsoft 365 Copilot license. Users will see an option to switch between "Work" and "Web" modes. A toggle that is similar to the one shown below should appear:
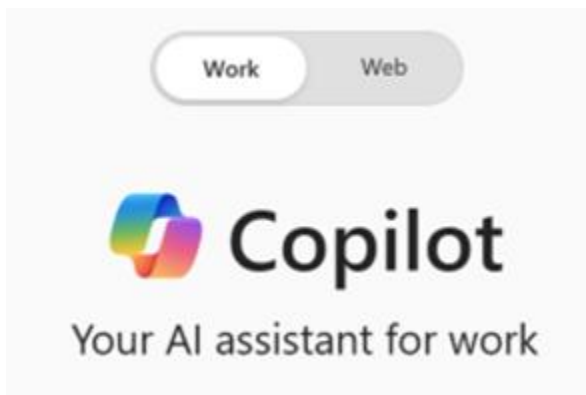
3. Microsoft Copilot's **Work Mode** and **Web Mode** are toggles that determine the context in which the GenAI assistant operates, particularly regarding the type of data it accesses and the environment it functions within. Here is a breakdown of the two modes:

   i. **Work Mode** is designed to focus on enterprise data and organizational content. It provides access to files, emails, chats, and documents stored within your Microsoft 365 ecosystem, such as SharePoint, Teams, or OneDrive for Business. Operating within your organization's security and compliance boundaries, it adheres to enterprise policies and protections. This mode is ideal for tasks involving sensitive or company-related information, such as drafting business documents, analyzing internal data, or summarizing team conversations.

   ii. **Web Mode** focuses on general, publicly available information from the web. It accesses online sources such as websites, public articles, or databases, rather than internal organizational data. Operating outside enterprise security environments, it relies on publicly accessible web-based resources. This mode is best suited for general queries, researching external topics, or creating content based on publicly available information.

Microsoft Copilot Usage Guidelines	
DO	**DO NOT**
Use **Work Mode** by signing into your Work Account when using Copilot for business. This step is important when using online based copilot products including Copilot Bing, Edge, Windows, and Business Chat Online.	Use Web (Personal) Mode for business tasks, as it may expose sensitive data.
Ensure the **Enterprise Protection Shield** icon is visible in Copilot Web, Windows, and M365.	Proceed with tasks if the Enterprise Protection Shield icon is not visible.
Use the **Work or School Results** page in Bing Web for business-related searches.	Rely on the All Results page in Bing Web for State-related or sensitive searches.
Use the **More Balanced** or **More Precise** output modes in Copilot Windows for higher accuracy.	Select the More Creative output mode when accuracy is critical.
Only use **PUBLIC DATA** for **Bing** or **Edge** as such data will become publicly available.	Upload non-public, confidential, or sensitive data to Bing or Edge.
Routinely clear conversation history to protect any stored data.	Leave conversation history uncleared, risking exposure of sensitive information.
Review outputs critically for fairness, neutrality, and accuracy.	Assume GenAI outputs are unbiased, accurate, or final without verification.
Routinely review source data to ensure it is up-to-date and accurate.	Use outdated, incomplete, or incorrect resources as input data.
Verify Copilot's suggestions against trusted official sources.	Assume Copilot's responses are always accurate without cross-referencing.
Report outdated or incorrect references to your supervisor and departmental data leads.	Ignore instances where Copilot references outdated or irrelevant data.
Craft neutral and specific prompts free of leading language.	Use prompts with subjective, biased, or leading language which leads to bias.
Keep prompts clear, concise, and specific to the task.	Include excessive or irrelevant details in prompts.
Treat Copilot outputs as drafts and refine as needed.	Use Copilot's output verbatim without review, especially for critical communications.
Focus on essential information needed for the task at hand.	Use overly detailed or complex prompts that may confuse Copilot.

Appendix A: Key Features for Microsoft 365 Copilot

Copilot in Microsoft 365 is application specific.

365 Application	Feature Description
Word	• Generate text with and without formatting in new or existing documents. • Create content, summarize, ask questions about your document, and do light commanding.
PowerPoint	• Create a new presentation from a prompt or Word file using enterprise templates. • Summary and Q&A. • Add slides, pictures, or make deck-wide formatting changes.
Excel	• Get suggestions for formulas, chart types, and insights about data in your spreadsheet.
Loop	• Create content that can be collaboratively improved through direct editing.
Outlook	• Get coaching tips and suggestions on clarity, sentiment, and tone, and an overall message assessment and suggestions for improvement. • Summarize an email thread to quickly understand the discussion. • Pull from other emails or content across Microsoft 365 that the user already has access to.
Teams	• Summarizes up to 30 days of chat content, using only the current thread for responses. Ask questions or use prewritten prompts with clickable citations to the source content. Conversations take place in a side panel and close when the panel is closed. • Uses the transcript in real-time to answer questions and knows the name of the user typing the question. • Answers questions only related to the meeting conversation from the transcript. The user can copy and paste an answer and access Copilot after the meeting ends. • Automates important administrative tasks of a call, like capturing key points, task owners, and next steps. Supports voice over Internet Protocol (VoIP) and public switched telephone network (PSTN) calls. • Generate ideas, organize ideas into themes, create designs based on ideas, and summarize whiteboard content.
OneNote	• Use prompts to draft plans, generate ideas, create lists, and organize information to help you find what you need.
Forms	• Use prompts to draft questions and suggestions that help you create surveys, polls, and other forms.

Appendix B: Key Features for Microsoft Business Chat Copilot

CAUTION: Microsoft Business Chat Copilot is a **FREE** software version intended for use with **public data only.** Do not input private or sensitive information when using Business Chat Online through Microsoft.com/copilot.

To enable full functionality and activate work mode for enterprise-level protections, you must **sign in** with your **work account and have a valid Microsoft Copilot License**.

Users can interact with Business Chat using open-ended prompts. Business Chat can be accessed through Teams (chat), Microsoft 365 applications, or through microsoft.com/copilot.

Feature	Description	Prompt Example
Work Across Multiple Apps	Connects to Microsoft apps like Teams, Outlook, and Word, allowing you to access information from different tools in one place.	*Example*: "Find the latest report in Word and summarize it in Teams."
Ask Questions	Ask open-ended questions and get responses based on the current context of your work.	*Example*: "What were the key points discussed in today's meeting?"
Helps with Tasks and Documents	Create, manage, and track tasks and documents, pulling information from multiple sources like emails or files.	*Example*: "Create a task in Teams based on the action items in my Outlook email."
Summarize Data	Helps you understand key points and make decisions by summarizing data and content from different tools.	*Example*: "Summarize the recent customer feedback from the latest reports."
Supports Teamwork	Makes it easier to share information and collaborate with your team by pulling data from various sources.	*Example*: "Share the meeting notes from OneNote with the project team in Teams."

Appendix C: Key Features for Microsoft Edge Copilot

CAUTION: Microsoft Edge Copilot is a **FREE** software version intended for use with **public data only.** Do not input private or sensitive information when using Microsoft Edge Copilot.

To enable full functionality and activate work mode for enterprise-level protections, you must sign in with your **work account and have a valid Microsoft Copilot License**.

A sidebar Copilot tool in Microsoft Edge provides assistance-based on opened tabs.

Feature	Description	Prompt Example
Web Page Summarization	Summarize long web pages into concise summaries.	*Example*: "Summarize the key points of this article about climate change policies."
Text Generation from Web Content	Generate new text based on the content of a web page.	*Example*: "Generate a summary for a blog post on digital marketing trends."
Writing Assistance in Forms and Text Boxes	Copilot assists with drafting, editing, and enhancing writing in web-based forms, comment sections, or social media posts.	*Example*: "Help me write a professional comment on a news article about healthcare reform."
Search Assistance	Refine or expand search queries, helping you find more relevant results based on what you are researching.	*Example*: "Refine my search for software development tools to include only those suitable for small businesses."
Extract Key Data From Web Pages	Extracts and presents key data or statistics from web pages for easy reference.	*Example*: "Extract the most important statistics from this report on global economic trends."

Appendix D: Key Features for Microsoft Bing Copilot

CAUTION: Microsoft Bing Copilot is a **FREE** software version intended for use with **public data only.** Do not input private or sensitive information when using Microsoft Bing Copilot.

To enable full functionality and activate work mode for enterprise-level protections, you must sign in with your **work account and have a valid Microsoft Copilot License**.

Web-based Copilot tool, accessible through Bing for general assistance with public web content. Copilot Bing provides a range of result features.

Feature	Description	Example of Output
ALL results page	If there is a relevant work or school result, it will appear at the top of the search results page, followed by relevant public web results.	**Work Result:** "Quarterly Sales Report (Internal Document)" followed by **Public Web Result:** "Best practices for sales growth strategies."
WORK or SCHOOL results page	This page only shows work or school results from your organization and never includes public web results.	**Work Result Only:** "Annual Budget Summary (Internal Document)" without any public web distractions or irrelevant results.

Appendix E: Key Features for Windows Copilot

CAUTION: Windows Copilot is a **FREE** software version intended for use with **public data only.** Do not input private or sensitive information when using Windows Copilot.

To enable full functionality and activate work mode for enterprise-level protections, you must sign in with your **work account and have a valid Microsoft Copilot License**.

Windows Copilot is integrated directly into the Windows operating system and accessible through the taskbar or windows side bar on a laptop or a desktop. Windows Copilot provides customized result features based on subject area.

Feature	Description	Example of Output
More Creative	The output will be more imaginative and inventive but might lack in accuracy.	For a project proposal intro: "Imagine a world where data flows seamlessly, empowering every decision with groundbreaking insights!"
More Precise	The output will be highly accurate and detailed but may not be as creative.	For a project proposal intro: "This project aims to integrate data from 15 state agencies, improving efficiency by 25% within one year."
More Balanced	The output will be a blend of both creativity and accuracy, balancing the two aspects.	For a project proposal intro: "Harnessing data from 15 state agencies, this initiative will drive a 25% efficiency boost, unlocking new insights."