GenAI[1] Assistant Technologies Usage Guidelines

Document No: CDO-007
Issued by: Chief Data Officer

1.0 Purpose

The purpose of the GenAI Assistant Technologies Usage Guidelines is to establish a framework for responsible use of GenAI assistant technologies across the State of Hawai'i agencies.

The GenAI Assistant Technologies Guidelines apply to all GenAI tools used by the State employees using State data on State-owned devices.

2.0 Authority

Hawaii Revised Statutes (HRS) Section §27-44, established within the Office of Enterprise Technology Services, in the Department of Accounting and General Services, and under the authority of the Chief Information Officer, the Chief Data Officer to develop, implement, and manage statewide data policies, procedures, standards, and Guidelines. HRS §27-44 also established a Data Task Force to assist the Chief Data Officer in developing the State's data policies, procedures, and standards.

3.0 Scope

The GenAI Assistant Technologies Guidelines apply to all State agencies.

4.0 Information Statement

4.1 General Guidelines for all GenAI Tools

- **Security: FREE GenAI tools are NOT SECURE**! When utilizing GenAI tools, verify whether you are using a State licensed version or a free public version.
- **Data Use: Avoid** uploading or inputting non-public work-related data to any free GenAI tool as it could become publicly available. The use of non-public data raises

---

[1] Refer to 7.0 Key Terms.

significant privacy and data security concerns for sensitive data or Personally Identifiable Information. [2]

- **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 leads, security leads, and PIOs shall review the data impacted and follow existing data privacy breach procedures.
- **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.
- **Intellectual Property:** The legal landscape regarding intellectual property related to GenAI usage is evolving. Each GenAI user should confer with its agency assigned deputy attorney general 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.[3]
- **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.

4.2 Tool Specific Guidelines

This section contains additional guidelines for each State licensed GenAI tool. If the GenAI tool is not listed, treat it as a free public version.

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

Microsoft GenAI Copilot Guidelines

- The free public version is Microsoft Copilot. Microsoft Copilot on Windows may come pre-installed on State issued PCs with Windows 11.
- The state licensed version is Microsoft 365 Copilot. For those using a State licensed version of Microsoft 365 Copilot, please refer to the table below for the Do's and Don'ts. Violations may result in license revocation.

---

[2] Refer to 7.0 Key Terms.

[3] 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.

To determine whether you are using a free public version or a licensed version of a Microsoft GenAI Copilot tool, please see the information below:

i.   You are using a free public version of Microsoft Copilot if you are not signed into the product with a State-issued account licensed for Microsoft 365 Copilot.
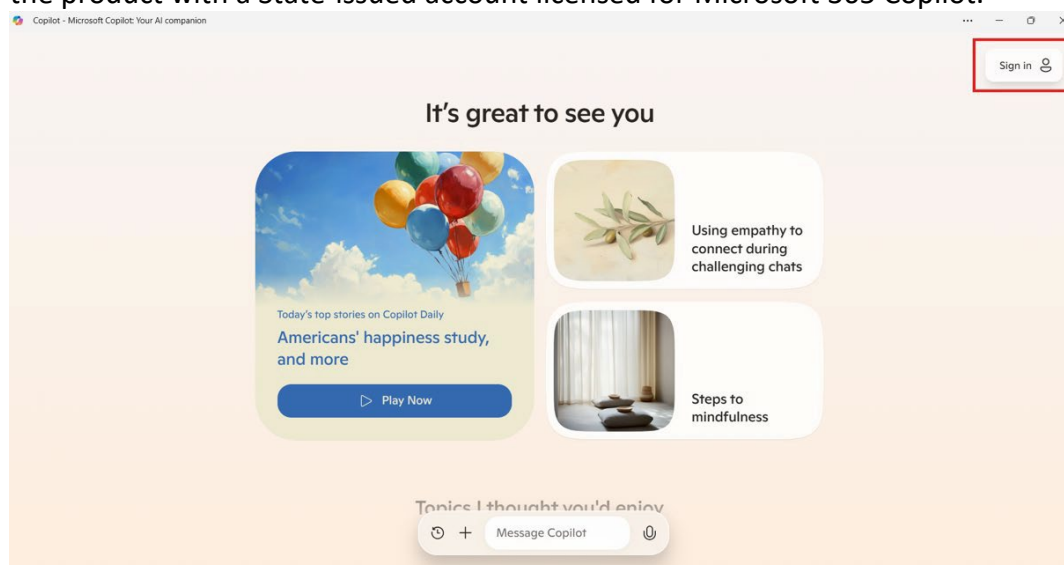
ii. Signing into Microsoft Copilot with a personal account gives you access to the free public version of Microsoft Copilot, which is available through: copilot.microsoft.com.

iii. You are using a licensed version of Microsoft 365 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:
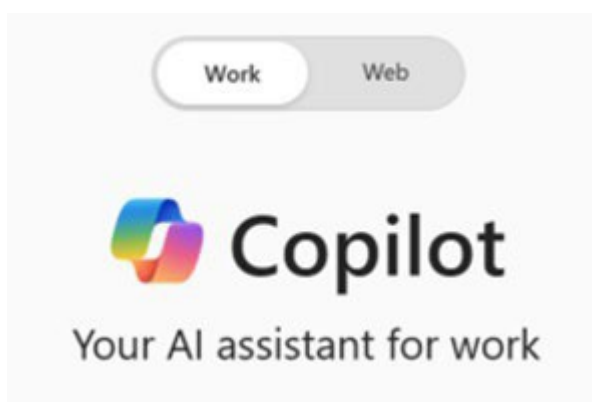
- The licensed Microsoft 365 Copilot **Work Mode** and the free public Microsoft Copilot **Web Mode** are toggles that determine the context in which the GenAI assistant operates, particularly regarding the type of data the GenAI assistant tool accesses

and the environment the GenAI assistant tool functions within. Here is a breakdown of the two modes:

i. Microsoft 365 Copilot **Work Mode** is designed to focus on enterprise data and organizational content. Work Mode 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, Work Mode adheres to enterprise policies and protections. Work Mode is ideal for tasks involving sensitive or company-related information, such as drafting business documents, analyzing internal data, or summarizing team conversations.

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

Microsoft GenAI Assistant Tools Usage Guidelines	
DO	**DO NOT**
Use Microsoft 365 Copilot **Work Mode** by signing into your Work Account when using Microsoft 365 Copilot for business. This step is important when using online based Copilot products including Copilot Bing, Edge, Windows, and Business Chat Online.	Use Microsoft Copilot Web Mode for business tasks, as it may expose sensitive data.
Ensure the **Enterprise Data 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.

Microsoft GenAI Assistant Tools Usage Guidelines	
DO	**DO NOT**
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.

5.0 Compliance

The GenAI Assistant Technologies Guidelines shall take effect upon publication. Compliance is strongly recommended.

6.0 Contact Information

Submit all inquiries and requests for future enhancements to the Chief Data Officer in the Office of Enterprise Technology Services, Department of Accounting and General Services, at data@hawaii.gov.

Additional data and AI related standards and guidelines can be found at data.hawaii.gov.

7.0 Key Terms

All terms shall have the meanings found in the Data and AI Glossary (under Resources on https://data.hawaii.gov/).

- **GenAI:** GenAI refers to the class of AI models that emulate the structure and characteristics of input data in order to generate derived synthetic content. This can include images, videos, audio, text, and other digital content. [4]
- **Personally Identifiable Information** (PII): Personally Identifiable Information refers to Information that can be used to distinguish or trace an individual's identity—such as name, social security number, biometric data records—either alone or when combined with other personal or identifying information that is linked or linkable to a specific individual (e.g., date and place of birth, mother's maiden name, etc.).[5]

8.0 Additional Information

8.1: 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.

---

[4] National Institute of Standards and Technology (NIST): https://csrc.nist.gov/glossary/term/generative_artificial_intelligence.
[5] National Institute of Standards and Technology (NIST): https://csrc.nist.gov/glossary/term/personally_identifiable_information.

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	• Summarize 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. • Use the transcript in real-time to ask questions and know the name of the user typing the question. • Ask questions only related to the meeting conversation from the transcript. Copy and paste an answer and access Copilot after the meeting ends. • Automate important administrative tasks of a call, like capturing key points, task owners, and next steps. Calls supported include voice over Internet Protocol (VoIP) and public switched telephone network (PSTN) calls. • Ask to 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.

8.2: 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 Microsoft Business Chat Copilot online through Microsoft.com/copilot.

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

Feature	Description	Prompt Example
Information Access Across Multiple Apps	Access information from different tools in one place as Business Chat connects to Microsoft apps like Teams, Outlook, and Word.	*Example*: "Find the latest report in Word and summarize it in Teams."

Open-Ended 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?"
Tasks and Documents Support	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."
Data Summarization	Understand key points and make decisions using summarized data and content from different tools.	*Example*: "Summarize the recent customer feedback from the latest reports."
Teamwork Support	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."

8.3 : 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.

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	Draft, edit, and enhance 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 to 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 Information From Web Pages	Extract and present key data or statistics from web pages for easy reference.	*Example*: "Extract the most important statistics from this report on global economic trends."

8.4: 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.

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

Feature	Description	Example of Output
ALL results page	Relevant work or school results 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	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.

8.5: Key Features for Microsoft Windows Copilot

CAUTION: Microsoft 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.

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

Feature	Description	Example of Output
More Creative	Output will be more imaginative and inventive but might lack accuracy.	For a project proposal introduction: "Imagine a world that data flows seamlessly,

		empowering every decision with groundbreaking insights!"
More Precise	Output will be highly accurate and detailed but may not be as creative.	For a project proposal introduction: "This project aims to integrate data from 15 state agencies, improving efficiency by 25% within one year."
More Balanced	Output will be a blend of both creativity and accuracy, balancing the two aspects.	For a project proposal introduction: "Harnessing data from 15 state agencies, this initiative will drive a 25% efficiency boost, unlocking new insights."

9.0 References
IT Guide

- [Allow Web search in Copilot](#)
- [Managing Microsoft 365 Copilot Chat](#)

Privacy, Security, and Compliance Guide

- [Audit logs for Copilot and AI activities](#)
- [Data, privacy, and security for web search in Microsoft 365 Copilot and Microsoft 365 Copilot Chat](#)
- [Microsoft 365 Copilot Architecture](#)

10.0 Revision History

Date	Description of Change
December 16, 2024	Approved by the State Data Task Force
March 28, 2025	Published