Microsoft

Transcription Management in Microsoft 365 Copilot

Discover the comprehensive access, governance, and privacy controls Microsoft offers to help you manage your transcription and recording data

Executive summary

This paper provides an overview of the various controls Microsoft provides to help you unlock the value of transcription with Microsoft 365 Copilot, a generative AI tool that provides intelligent assistance for meetings, calls, documents, and tasks.

It explains how Copilot integrates with transcription and recording capabilities in Microsoft Teams to enhance collaboration and productivity, and outlines Microsoft's approach to managing transcription and recording data in a secure and compliant way, through application of controls for access, governance, and privacy.

Important product scope note

For this document, where "Copilot" is referenced, we are referring to Microsoft 365 Copilot. This does not include Microsoft Copilot for Sales, Microsoft Copilot for Service, Microsoft Copilot for Finance, Microsoft Copilot for Azure, Microsoft Copilot for Microsoft Security, Microsoft Copilot for Dynamics 365, or other Copilots outside of Microsoft 365.

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Securing sensitive data in the AI era

Collaboration matters. It helps teams spark ideas, solve problems, and strengthen connections—but it can also be a drain on productivity. Employees spend well over half their time in meetings, calls, chat conversations, and processing email. And they see inefficient meetings as their top productivity disruptor.[1]

At Microsoft, we've found that Microsoft 365 Copilot makes communication, whether in meetings or calls, more effective by combining the power of AI with your transcriptions and recordings to provide real-time intelligent assistance that supercharges collaboration, and lets you dynamically interact with the digital record after a meeting so you can catch up more quickly.

While the transformative capabilities of Copilot are immense, the adoption of such powerful technology highlights for many organizations—Microsoft included—security and governance concerns that have existed as long as there has been data. Concerns such as data oversharing, preservation and deletion of records, and compliance with regulatory requirements.

Copilot mitigates these concerns by operating within the context of the user—so it only generates responses using information currently available to that user. Further, Copilot is built on Microsoft's current commitments to data security and privacy in the enterprise, and adheres to all existing privacy, security, and compliance commitments to Microsoft 365 commercial customers. This means that:

- **You're in control of your data, prompts, and responses.**
- **Data accessed through Microsoft Graph aren't used to train foundation LLMs.**
- **Your data is protected at every step by the most comprehensive compliance and security controls in the industry.**

To learn more about the built-in tools available to manage your transcription data, read on.

The tremendous power of Copilot comes from its ability to not only find information, but to provide relevant information. It's able to deliver this level of intelligence by accessing content and context through Microsoft Graph, such as documents, emails, and chats that you have permission to access. When Microsoft Teams meetings are recorded or transcribed, their data is added to your organization's Microsoft Graph for subsequent use by meeting attendees with Copilot.

Copilot can then generate responses anchored in your organizational data—such as user documents, emails, calendar, chats, meetings, and contacts—and combined with your working context, such as the meeting you're currently in, emails you've exchanged on the topic, or previous chat conversations. It's this combination of content and context that helps Copilot provide accurate, relevant, and timely responses.

Managing your transcription and recording data

Microsoft's solution for transcription and recording management includes built-in tools for controlling:

- **Access** over who can capture data and view, share, edit, and delete artifacts after capture.
- **Governance** over how the captured artifacts are managed throughout their lifespan.
- **Privacy** of the participants recorded in those artifacts.

Adjusting the level of restriction across these three categories of access, governance, and privacy allows you to manage your transcription and recording data in the way that makes the most sense for your business.

To implement these controls effectively, you'll first need to define your organization's goals and policies for transcription and recording management. At Microsoft, we've engaged stakeholders across IT, legal, corporate security, privacy, the company's data custodians, and internal users to develop policies that support empowering experiences for employees while keeping the company safe. These policies represent a mix of technical defaults, meeting options, and employee empowerment to make informed decisions about usefulness and privacy. You can learn more about our approach in the Inside Track article, "Empowering employees after the call: Enabling and securing Microsoft Teams meeting data retention at Microsoft".

Ours is just one example of how data management policy can be crafted and implemented. Every organization's situation is unique, so it's important that you consult with your relevant stakeholders to craft your own policies. Useful questions to consider include:

- When should a meeting or call be recorded and when should it not?
- What kind of meeting or call data gets stored?
- Who can initiate recording, who keeps the recording, and who can access it after the meeting or call?
- How do we inform attendees that a meeting or call may be recorded?
- How do we support attendee privacy?
- How long should we retain meeting or call data?
- Where does the data live while it's retained?
- What does this mean for eDiscovery?

In the following section we'll take a deep dive into the access, governance, and privacy controls Microsoft offers to enact your answers to these questions.

*Note – Throughout this paper, **meetings** refers to scheduled events that are set up through calendar, even if attendees participated via a dial-in or audio only connection. **Calls** refers to unscheduled interactions initiated through the Teams video call or audio call options for VoIP calls or through the Calls app dialer for PSTN call.*

Access controls

Some of the most important decisions that organizations make about transcription and recording include what type of data capture to allow during meetings or calls, who can initiate capture, as well as who can get access to, modify, or delete what was captured. Microsoft provides a rich set of controls for customers to configure their implementation to their organization's needs.

Modes of transcribing and recording

Teams Meetings and calls can be recorded or transcribed in three different modes of operation, and IT admins can enable these modes on a per user basis.

1. **Record** – Records video, audio, and creates a transcript of the audio.

2. **Transcribe** – Uses speech-to-text processing to create a text version of what was said. There is no temporary or permanent recording of the audio.

3. **Allow Copilot** – Transcription is also automatically enabled when you turn on Copilot. Copilot can be enabled either during the meeting only, or during and after the meeting, based on the 'Allow Copilot' setting in meeting options. When '**only during the meeting**' is selected, a temporary transcript is used during the meeting that Copilot uses to answer questions, but it is discarded after the meeting and no transcript is stored. As such, there is no transcript available to users or administrators at any point, and no transcript available for retention or eDiscovery. For more on using Copilot only during the meeting, please refer to the Microsoft Support article, "Manage Microsoft 365 Copilot in Teams meetings and events – Microsoft Teams | Microsoft Learn".

Once you've established your policies, be sure to communicate them across the organization as part of your Copilot roll-out.

You can also customize and display a link to your organization's privacy statement in the Teams meeting join experience to ensure attendees are aware of your privacy guidelines before they join a meeting.

Microsoft 365 Copilot is compatible with all three modes, although recording is not required to use Copilot, only transcription is required.

At Microsoft we use all these modes, and we believe that they all have appropriate usage scenarios for our customers. Administrators can make all, some, or none of these available in their tenant through the admin console. To learn more about how administrators can manage transcription for Copilot, please refer to the Microsoft Learn article "Manage Copilot for Microsoft Teams meetings and events".

How to manage Copilot in Teams Admin Center for calling

Starting in April 2025, administrators can manage Copilot for calling in Teams Admin Center. In the Copilot section under Voice > Calling policies, administrators can enable or disable Copilot features related to calling, including settings for call transcription, call recording, and AI-based call analysis. To learn more, please refer to the Microsoft Learn article "Configure call recording, transcription, and captions in Teams".

Initiating transcription or recording during a meeting

When meeting attendees are assigned a presenter role they gain the ability to start or stop transcription or recording. However, in sensitive and regulated scenarios such broad access to capture data on record is not appropriate. Microsoft provides multiple options to give you control over this important decision.

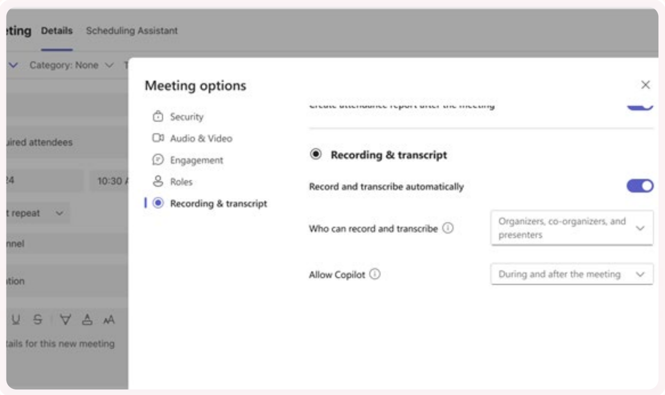
Limit presenter access to actual meeting presenters

Assign the attendee role to anyone who doesn't need recording rights. Meeting organizers can set participants' roles while scheduling the meeting and can also change their roles during the meeting. For more on who can record, please refer to the Microsoft Support article "Record a meeting in Microsoft Teams".

Meeting organizers can control who can record and transcribe

As of June 2024, meeting organizers with a Teams Premium license or Copilot can select from three options for both record and transcribe while setting up the meeting:

1. Organizers and co-organizers.
2. Organizers, co-organizers, and presenters (default option).
3. No one.



Meeting options

Recording & transcript

Record and transcribe automatically: On

Who can record and transcribe: Organizers, co-organizers, and presenters

Allow Copilot: During and after the meeting

Controlling who can record and transcribe in a Teams meeting

In the default option, any tenant users in the presenter role will also be able to record or transcribe. While they set up the meeting, organizers can also decide whether to **record automatically** and whether to **allow Copilot only during the meeting.**

Meeting templates

Meeting templates provide a convenient way to manage multiple settings including all three recording options mentioned above: Which roles can record, whether to record automatically, and whether to use Copilot with or without transcription. Templates are set up by administrators and are selected by meeting organizers to enforce a set of standards for all meetings attendees. **Note:** Access to meeting templates is limited to administrators with a Teams Premium license. For more information about meeting templates, please refer to the Microsoft Learn article, "Overview of custom meeting templates in Microsoft Teams".

Brief guide to roles in Teams Meetings

Teams meetings include the following roles:

1. **Organizer/co-organizer** – Schedules the meeting, controls the settings of the meeting, can start/stop recording and transcription, and much more.
2. **Presenter** – Shares many of the same rights as Organizer/co-organizer, but can't change meeting settings and manage breakout rooms.
3. **Attendee** – Can speak, share video, and participate in meeting chat, but they can't start/stop recording or transcription.

To learn more about differences between the roles, see "Roles in Microsoft Teams meetings".

Meeting organizer, co-organizers, and recording/transcript initiator can select spoken language to ensure transcript accuracy

The transcript is a key source for Copilot's knowledge of the meeting. To ensure transcript accuracy, and therefore Copilot accuracy, it's important that the language settings for the meeting are enabled correctly.

When transcription, recording, or Copilot are enabled before or during the meeting, users will be prompted to select the spoken language to ensure accuracy. Once transcription is enabled, only the meeting organizer, co-organizers, or transcript initiator will be able to change the spoken language for the meeting. If the meeting participants speak a language that doesn't match the selected meeting spoken language, the organizer, co-organizer, and transcript initiator will be notified and prompted to update the spoken language. In multilingual meetings, each participant can individually set their own spoken language and should ensure their setting accurately matches the language they speak. If their individual spoken language does not match their actual spoken language, the participant will be notified with a prompt to adjust their settings. Please refer to the Microsoft Support article "Change transcription language" to learn more.

For organizations that use Purview to protect and govern their data in Microsoft 365, **sensitivity labels** (assigned to a meeting invitation in Outlook or Teams) can also provide control over who can record. Sensitivity labels will override templates in case of a discrepancy in who can record. For more information about sensitivity labels, please refer to the Microsoft Learn article, "Use sensitivity labels to protect calendar items, Teams meetings, and chat".

Viewing, sharing, and downloading

As with the ability to capture data, Microsoft offers multiple controls over viewing, sharing, copying, forwarding and downloading of meeting or call records.

Before we review the controls, it's important to note where recordings and transcripts are stored.

- Since June 2024, the meeting organizer is the owner of the recording, with **meeting recordings and transcripts stored in the meeting organizer's OneDrive folder,** as well as accessible in the Teams app and in Stream. Previously, the recordings and transcripts were stored in the OneDrive folder of the meeting participant who initiated the recording.

- For **calls, recordings and transcripts are stored in the OneDrive folder of the participant who initiated the call transcription or recording.**

For more information, please refer to the Microsoft Learn article "Teams meeting recording and transcript storage and permissions in OneDrive for Business and SharePoint".

View access to transcripts and recordings is managed through the following controls:

For meetings

- **Meeting invitation or join is required.** Users must be members of the meeting invite list or have joined the meeting otherwise (e.g., forwarded invite or nudged into the meeting).
- **No access for external and anonymous users.** External and anonymous users don't get access to the transcript and recording.
- **Manage which attendees have access.** Meeting organizers also have an option to manage which attendees have access to the meeting recording, transcript, and AI-generated insights that are based on the transcript, like Copilot responses and intelligent meeting recap. Meeting organizers can select from three options: (1) Everyone (2) Organizers and co-organizers, or (3) Specific People. By default, access is set to 'Everyone,' but meeting organizers can change this before the meeting starts. This control is available to Copilot and Teams Premium users.

For calls

- **Call join is required.** Users have joined the call at some point (e.g., joined at the start, or added to the call later).
- **No access for external and anonymous users.** External and anonymous users do not have access to the calls transcript or recording.

Share access to transcripts and recordings is managed through the following controls:

For meetings

- **Meeting organizer approval required** to share access to transcript or recording with internal users. There is no option to share with external users. Organizers can grant access in Stream or OneDrive.

For calls

- **Approval from the call attendee who initiated the transcription or recording is required** to share access with internal users through Stream or OneDrive. There is no option to share with external users.

Download access to transcripts and recordings of meetings is managed through the following controls:

- The recording owner is the only user who can download the recording. Recording owner can also grant download (and view, edit) access to specified internal users via Stream. As of June 2024, the recording owner defaults to the meeting organizer. *Note: Prior to June 2024, ownership of the recording defaulted to the person who initiated the recording.*

- As of June 2024, the default settings for transcripts match that of recordings so that only the transcript file owner can download or delete the transcript in Teams client. *Note: Prior to June, all internal meeting participants/invitees could download the transcript from Teams.*
- There is an admin policy is available to block users from downloading recordings and meeting transcripts. Admins can exempt people who are members of specified security groups from the policy, allowing admins to specify which users or groups should still have download access. This capability is available in SharePoint Advanced Management and Copilot licenses. When this policy is enabled by an admin, it cannot be overridden by meeting organizer's permissions in Stream. Learn more in the Microsoft Learn article, "Block the download of Teams meeting recording files from SharePoint or OneDrive".

Copying and forwarding access to meeting artifacts is managed through the following control:

> Microsoft has expanded the existing 'Turn off copying or forwarding of meeting chat' control for meeting organizers to include live captions, transcription, and meeting recap. With this change, meeting organizers with Teams Premium licenses will see a control called 'Turn off copying and forwarding of meeting chat, live captions, and transcript' in the meeting options. When this control is enabled, meeting participants won't be able to copy the meeting chat, live captions, live transcript, or any insights generated from intelligent meeting recap.
>
> *Note: Copying and forwarding access control is available to meeting organizers with a Teams Premium license.*

Editing and deleting

Edit access to transcripts and recordings is managed through the following controls. *Note: Prior to June 2024, ownership of the meeting transcript or recording defaulted to the person who started the recording or transcription, but as of June 2024 defaults to the meeting organizer. Ownership for call transcripts or recordings remains with the person who initiated transcription or recording in the call.*

- Only the recording owner can edit the transcript in Stream. The meeting organizer can also update file permissions in Stream to select which participants have permission to download, view, and edit the transcript in Stream.
- Only the recording owner can trim the recording in Stream, which creates a customized recording view with a dedicated link but preserves the original. Learn more about recording trimming and hard editing in the Microsoft Support article, "How to trim videos in Stream".
- Recording owners with edit permissions can grant edit access to other users.

Delete access to transcripts and recordings is managed through the following controls:

- Deletion access is limited to organizer/co-organizer and IT admin.

- Only the recording owner (meeting organizer) can delete the transcript from Stream.

Note: Automatic deletion policies, retention policies, and legal holds also govern deletion. Refer to the Governance Controls section of this paper for additional details.

Note: Channel meetings have different access controls than non-channel meetings. The main difference is that every member of the channel gets access to view, edit, and download the recording and transcript of a channel meeting.

Managing participant use of Copilot for meetings

Copilot provides responses based on meeting transcripts and recordings. When answering questions, Copilot references specific sections of the transcript, allowing users to hover over citations and view the exact source of the information within Intelligent Meeting Recap.

Copilot is available only to the internal tenant users licensed for Copilot. In addition, Copilot responses consider the user's permissions. In this case, users must have access to the transcript in order for contents of that transcript to be surfaced in a Copilot response.

Managing the Availability of Copilot in Teams Meetings

There are now expanded controls for managing the availability of Copilot in Teams meetings. IT admins and meeting organizers can select an 'Off' value for Copilot. IT admins will see the setting in the Teams Admin Center and can set Copilot to 'Off' per tenant, per user, or both.

Meeting organizers can access the control called "Allow Copilot" in meeting options, and they will see three choices:

1. Only during the meeting.
2. During and after the meeting.
3. Off. The new 'Off' value will disable Copilot availability for Teams meetings and also disables Recording and Transcription. Turning Copilot 'Off' will turn off transcript also in the Teams client.

Broadening Copilot's Understanding of Meetings

Conversations and interactions happen across multiple surfaces in Teams. With expanded contextual awareness, Copilot now provides more comprehensive and relevant assistance during and after meetings, no matter where the conversation happens.

Copilot in Teams Meetings Can Now Source Responses from Meeting Chat

Copilot can review both the meeting transcript and the meeting chat to provide a complete picture of what was discussed.

Advanced scenario: How to limit access to meeting artifacts?

Some meetings involve a lot of participants, but require restricted access to recording, transcription, and Copilot. Scenarios include large meetings and long meetings (such as executive leadership business reviews), with multiple topics and audiences.

Under normal circumstances every internal meeting participant gets access to the transcript, recording, as well as Copilot (license required).

In June 2024, we introduced a new meeting option to provide more granular meeting artifact access management. This control gives Copilot and Teams Premium customers the flexibility to manage which attendees have access to meeting artifacts such as transcript, recording, AI-generated recap, and Copilot. Meeting organizers can select from three options:

1. **Everyone:** Anyone with the meeting link or nudged into the meeting has access,
2. **Organizer and Co-organizers:** Only the people who organized the meeting have access,
3. **Specific People:** Besides the organizers, you can choose specific individuals to have access.

Advanced Scenario: In-meeting only chat policy

The existing 'Meeting chat' control in Teams Admin Center includes two new values: "In-meeting only for everyone" and "In-meeting only except anonymous users." In Teams Admin Center, admins will see a setting called 'Meeting chat' under Meetings > Meeting Policies > Meeting Engagement.

Admins can now select from five options in the 'Meeting chat' setting.

- "On for everyone"
- "On for everyone but anonymous users"
- "Off"
- "In-meeting only for everyone"
- "In-meeting only except anonymous users"

Admins can select the "In-meeting only" values to disable participants' ability to send messages in the meeting chat before or after the meeting, for meetings organized by specific users in their tenant. When one of these "In-meeting only" values are selected, participants can read past chat history, but no one can send messages in the meeting chat unless the meeting is active.

Advanced Scenario: Inheriting sensitivity labels from shared files to Teams meetings

For Microsoft 365 E5 and Teams Premium customers, sensitivity labels from Microsoft Purview Information Protection can now be referenced to set the right protection settings for meetings. When an attendee shares a file that has a higher sensitivity in a Teams meeting chat or during live share, the meeting's sensitivity can be upgraded either automatically or via a recommendation to the organizer.

This feature helps classify meetings in a more automated, intelligent, and timely manner, reducing dependency on end users to manually adjust meeting sensitivity.

Advanced Scenario: Copilot support for multi-tenant organizations

This new admin policy in Teams admin center allows admins to enable or disable access to Copilot in meetings between Business-to-Business members in Multi-Tenant Organization set ups. Teams admins can toggle the 'Allow Copilot for B2B members' setting in the Teams admin center or with PowerShell.

This setting is turned on by default, allowing B2B members within the multi-tenant organization who have Copilot licenses to use Copilot when they join meetings hosted by their organization. For more details visit: [Manage Copilot access for B2B members within multitenant organizations (MTO) in Teams](#).

Turning the dials on access

Here are some ways organizations can use the above controls to manage access related to meetings:

1. **Limit recording and transcription rights to organizers/co-organizers through meeting options.**
2. **Set up sensitivity labels that allow recording only for organizers/co-organizers.**
3. **If you don't use recording or transcription for privacy/sensitivity reasons, consider using "Copilot only during the meeting" mode to benefit from Copilot during the meeting and generate action items and summaries without leaving behind a transcript.**

Governance controls

After meeting data is captured in the form of a recording or a transcript, organizations must decide how to manage the artifacts throughout their lifecycle. This includes important decisions about where to store, how long to store, and when to delete. Since the recording and transcript are stored in OneDrive for Business, customers can take advantage of the extensive capabilities Microsoft offers to support information governance, a familiar set of controls, as well as advanced governance features of Microsoft Purview.

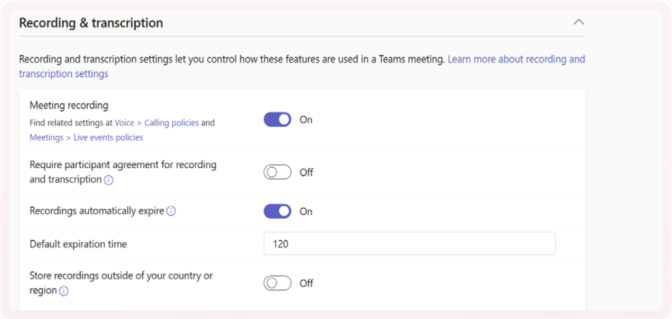
Microsoft Digital, our IT organization, created an AI Center of Excellence (CoE) bringing together experts from across the company working in several disciplines—from data science and machine learning to product development and experience design—to provide the guidance and governance we need to ensure our employees and organization are set up for success. To learn more about our approach, read the Inside Track article, "Getting the Most Out of Generative AI at Microsoft with Good Governance".

Note: None of the controls in this section apply to "Copilot only during the meeting" because the transcript isn't retained in this mode.

Retention and deletion

Retention and deletion of Teams meeting recordings and transcripts is managed through the following controls:

- **Auto-expiration of recordings and transcripts.** Teams provides a default policy to retain meeting recordings for 120 days and calls recordings for 60 days. Customers are free to change these periods to suit their needs. After the expiration period ends, the records are automatically deleted. This control is designed to help manage the overall volume of stored data, which can increase quickly with multiple recordings as each hour takes up approximately 400 MB. **However, this control is not intended for compliance purposes**. Meeting organizers and co-organizers can delete a meeting prior to the expiration period.



Recording & transcription

Recording and transcription settings let you control how these features are used in a Teams meeting. Learn more about recording and transcription settings

Meeting recording: On
Find related settings at Voice > Calling policies and Meetings > Live events policies

Require participant agreement for recording and transcription: Off

Recordings automatically expire: On

Default expiration time: 120

Store recordings outside of your country or region: Off

Teams meeting auto-expiration settings

- **Retention and expiration compliance controls.** Customers who use Microsoft Purview can use auto-apply retention label policies (requires one of the E5/A5/G5 SKUs) to set explicit retention and expiration controls on Teams recordings and transcripts alone. To learn more about auto-applying retention labels, please refer to the Microsoft Learn article, "Automatically apply a retention label to Microsoft 365 items".

- Alternatively, customers who use Microsoft Purview can use Retention policies (requires one of the SharePoint Plan 2/Microsoft 365 E5/A5/G5/E3/A3/G3, Business Premium, Microsoft 365 E5/A5/G5/F5 Compliance and F5 Security & Compliance, Microsoft 365 E5/A5/F5/G5 Information Protection and Governance, Office 365 E5/A5/G5/E3/A3/G3 SKUs) to set general file-based retention and expiration controls, which would also implicitly cover recordings and transcripts as well as regular files.

- Either of the above is the recommended approach for meeting organization's compliance requirements for record retention. Configured policies supersede auto-expiration settings and user's attempts to delete files manually.

Note: The user's view of files doesn't always match the organization's. For example, if a user deletes a recording before the retention policy ends, the user won't see the file, but the file will persist in the Preservation Hold through the end of the retention period.

eDiscovery and legal holds

Legal holds are an important component of a defensible discovery process. The following controls support eDiscovery and legal holds for recordings and transcripts stored in OneDrive:

- Recordings and transcripts are available for eDiscovery using Microsoft Purview.

- Recordings and transcripts can be preserved via legal hold using Microsoft Purview.

In case of conflict, legal holds will supersede other retention and deletion policies.

For customers using third-party eDiscovery tools, Microsoft offers APIs, including Graph APIs for eDiscovery and Graph APIs to get Teams meetings recordings and transcripts.

Note: Prior to June 2024, the storage location was determined by the Preferred Data Location of the person who initiated the recording or transcription of the meeting. As of June 2024, the storage location is determined by the Preferred Data Location of the meeting organizer.

Microsoft Exchange and its role in storing artifacts

Within Copilot's architecture, Microsoft Exchange plays an important role as the place where the user's prompts and responses are stored. Exchange is also the place where the automatically generated meeting summaries and action items are stored after they are created by Copilot. A few things to know about these summaries:

- Access to the summary is limited to internal meeting participants with a Teams Premium or Copilot license.
- Summaries can't be modified.
- The retention and deletion of these automatically generated summaries is tied to the transcript/recording file for the same meeting. This associates summary retention policies and deletion with the transcript/recording's retention and deletion.

Historically Exchange also played a role in storage of recordings and transcripts. Until June 2024, recording and transcription were stored in two locations: Microsoft Exchange and OneDrive for Business, which has since become the designated storage location. This section covers controls related to the dual storage locations:

- OneDrive was previously intended as the primary storage location for information governance purposes and as of June 2024 has become the exclusive storage location.

  When a transcript is deleted from the Teams apps, both the Exchange copy and the OneDrive copy will be deleted. Note that manual deletions by meeting organizer are not intended to meet information governance scenarios, which are supported by Microsoft Purview.

Advanced scenario: Compliance archives

Customers in Financial Services and other heavily regulated industries often use specialized archiving solutions that create a centralized content archive from multiple communications platforms. For such scenarios, Microsoft Teams provides an Export API function for recordings and transcripts. For more information about the Export API, please refer to the Microsoft Learn article, "Export content with the Microsoft Teams Export APIs".

Advanced scenario: Communication compliance

Many organizations need to monitor regulatory compliance (for example, SEC or FINRA) and business conduct violations such as sensitive or confidential information, harassing or threatening language, and sharing of restricted content. Microsoft Purview Communication Compliance is designed to help you detect, capture, and act on potentially inappropriate messages in your organization. For Teams, it provides these capabilities for meeting transcripts and Microsoft 365 Copilot prompts. For more information, please refer to the Microsoft Learn article, "Learn about communication compliance".

Turning the dials on governance

Here are a couple of ways organizations can use the above controls:

1. **Set auto expiration of Teams recordings to support your organization's needs. In most cases, meetings aren't viewed after 60 days and only a tiny portion of meetings are viewed more than 120 days after capture. Organizations looking to minimize data storage and potential exposure can set a shorter expiration schedule.**
2. **Use Microsoft Purview to set appropriate retention policies for different types of content. Purview provides the recommended set of lifecycle management controls and allows you to adjust them to the circumstances (vs. single auto-expiration period).**

Privacy controls

Whenever we transcribe or record an interaction, we also have to consider the privacy of the participants. Organizations need to consider whether to simply inform the participants that recording is taking place or to request explicit consent. In some circumstances, attendees may want to participate but may not want their contributions directly attributed. Data residency is another consideration for many organizations as they evaluate privacy implications of a new technology service.

Notification

The following automated notifications help inform attendees that data recording or transcription is taking place:

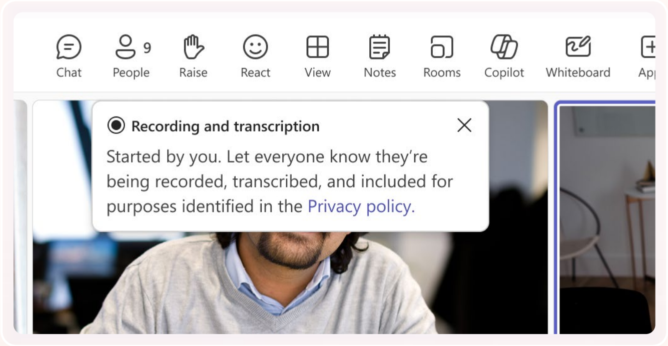
- Notification prompt that recording or transcription has been initiated. This prompt is presented automatically to all meeting participants, as soon as recording or transcription starts. Participants who join via the "dial in by phone" option receive an automated audio notification.
- Notification prompt that Copilot 'only during meeting' has been initiated. This prompt shows automatically to meeting participants.

- Audio notification in calling is provided to participants when a call is being recorded or transcribed, ensuring transparency and compliance.

Administrators can also make use of the following optional control:

- Optional control enabling administrators to include a privacy policy link inside the notification prompt. Once set up, this control will apply to all recorded or transcribed meetings in the tenant.

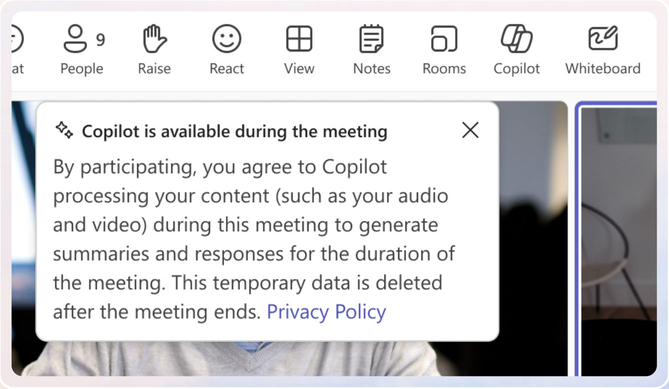
Collectively, these notifications enable organizations to inform their users that meeting discussion is being captured either in a persistent manner (recording/transcription) or temporarily for the duration of the meeting (Copilot only during the meeting).



Recording and transcription

Started by you. Let everyone know they're being recorded, transcribed, and included for purposes identified in the Privacy policy.

Notification that recording and transcription have started, with privacy policy link



Copilot is available during the meeting

By participating, you agree to Copilot processing your content (such as your audio and video) during this meeting to generate summaries and responses for the duration of the meeting. This temporary data is deleted after the meeting ends. Privacy Policy

Notification that Copilot only during the meeting has been initiated, with privacy policy link

Best practice: Recommend that meeting organizers "tell and confirm" before initiating a recording.

Consent

In certain cases, an organization may need to go beyond notification for recording and transcription of their meeting participants. In such scenarios, starting in June 2024, we offer an additional administrator control to capture participants' explicit consent to process their audio, video and screen sharing content.

The **explicit consent control** covers all three modes of operation:

- Explicit consent to be recorded (supported for meetings and group calls, not supported for 1:1 calls)
- Explicit consent to be transcribed (supported for meetings and group calls, not supported for 1:1 calls)
- Explicit consent for Copilot 'only during meeting' (supported for meetings and group calls, not supported for users joined via PSTN or 1:1 calls)

Explicit consent is first configured by the administrator by assigning the consent policy to the relevant users in their tenant.

On the participant side, explicit consent works the same way across all modes. Each participant, assigned to the consent policy, is presented with a prompt requesting their explicit consent for their participation in the meeting or call to be recorded or transcribed. If the participant consents, they will be able to participate in the meeting according to their permissions. If they decline, their participation will be limited to muted observation—their microphone will be muted and their video will not display to other participants. For more information on managing explicit consent, please refer to the Microsoft Learn article, "Require participant agreement for recording and transcription".

Attribution

In some circumstances, meeting participants may want to participate in a meeting while maintaining some degree of anonymity in the transcript about what they said, when they joined, and when they departed the meeting.

Teams meetings and calls have **no join/leave timestamps in transcripts**, providing a degree of anonymity from other meeting participants. This is built into Teams and requires no action for administrators and meeting organizers. *Note: Meeting organizers have access to attendance reports that show join and leave times.*

Meetings Transcript attribution opt-out allows meetings users to remove their name from the transcript. This control applies to all meetings in which the user participates. *Note: There are some inherent limitations to the degree of anonymity provided by this control in meetings that are recorded—for example, a participant's identity can be deduced from the attendance reports, which are available to the meeting organizer during and after the meeting. Meeting organizers can allow participants to opt out of sharing their attendance information, however this applies only to the post-meeting report. For more information on meeting policies, please refer to the Microsoft Learn article, "Teams settings and policies reference".*

Data residency

Many organizations consider data location as a part of privacy considerations. The storage location of recording and transcript is automatically determined based on the meeting organizer's Preferred Data Location.

Organizations with the **Microsoft 365 Multi-Geo Capabilities add-on** can manage data-at-rest locations at a granular level for their users, SharePoint sites, Microsoft 365 Groups, and Microsoft Teams team level to satisfy their data residency requirements. Without Multi-Geo Capabilities, the Preferred Data Location is determined by the country/region selected during tenant creation and cannot be changed.

Turning the dials on privacy

Here are some ways organizations can use the above controls to manage privacy:

1. **Turn on notification prompts any time recording, transcription, or Copilot transcription is initiated.**
2. **Include a link to your organization's privacy policy in the notification prompt.**
3. **If appropriate, require consent from meeting participants. This control involves more change management than the rest and may result in missing participation of some users as they learn to respond to consent requests.**

Get started

Generative AI is already being woven into the workplace at an unexpected scale. Three out of four knowledge workers are already using AI at work today, and report that it helps them save time (90%), focus on their most important work (85%), be more creative (84%), and enjoy their work more (83%).[2]

Microsoft 365 Copilot combines the power of generative AI with your organization's data to enhance efficiency, foster innovation, and boost productivity across your entire organization. With meeting transcription enabled, the intelligence of Copilot is unlocked to deliver contextual information both during and about your meetings and calls.

Built on the foundation of Microsoft's comprehensive approach to security, compliance, privacy and responsible AI, Copilot is the only enterprise-ready generative AI that inherits your security, compliance and privacy controls. Its robust management tools empower you to customize controls to protect sensitive data and govern usage to meet the unique needs of your organization.

With a firm grasp of the technology and close collaboration with the right stakeholders, you can guide your own policy decisions and unlock the value of generative AI for your business.

Using Copilot in the context of meetings has a measurable impact on productivity. In a study of the Microsoft 365 Copilot Early Access Program, participants found they were able to catch up on a missed meeting nearly 4x faster with Copilot than without, 84% said Copilot made it easier to take action after a meeting, and 58% found the task of summarizing meetings to be less draining.[3]

Further reading

Here are some additional resources to help you on your AI journey:

- Microsoft 365 Copilot overview
- Getting the most out of generative AI at Microsoft with good governance
- Enabling and Securing Microsoft Teams Meeting Data Retention at Microsoft
- Data, Privacy, and Security for Microsoft 365 Copilot
- Empowering responsible AI practices

Microsoft's privacy commitments apply to AI

- **We keep your organization's data private.** Your data remains private when using Microsoft 365 Copilot and is governed by our applicable privacy and contractual commitments, including the commitments we make in the Microsoft's Data Protection Addendum, Microsoft's Product Terms, and the Microsoft Privacy Statement.

- **You are in control of your organization's data.** Your data is not used in undisclosed ways or without your permission.

- **Your organization's data is not shared.** Microsoft does not share your data with third parties without your permission. Your data, including the data generated through your organization's use of Microsoft 365 Copilot – such as prompts and responses – are kept private and are not disclosed to third parties.

- **Your organization's data privacy and security are protected by design**. Security and privacy are incorporated through all phases of design and implementation of Microsoft 365 Copilot. As with all our products, we provide a strong privacy and security baseline and make available additional protections that you can choose to enable. As external threats evolve, we will continue to advance our solutions and offerings to ensure world-class privacy and security in Microsoft 365 Copilot, and we will continue to be transparent about our approach.

- **Your organization's data is not used to train foundation models.** Microsoft's generative AI solutions, including Microsoft 365 Copilot services and capabilities, do not use your organization's data to train foundation models without your permission. Your data is not available to OpenAI or used to train OpenAI models.

- **Our products and solutions continue to comply with global data protection regulations.** The Microsoft AI products and solutions you deploy continue to be compliant with today's global data protection and privacy regulations. As we continue to navigate the future of AI together, organizations can be certain that Microsoft will be transparent about our privacy, safety, and security practices. We will comply with laws globally that govern AI, and back up our promises with clear contractual commitments.

- **Your access control and enterprise policies are maintained.** To protect privacy within your organization when using enterprise products with generative AI capabilities, your existing permissions and access controls will continue to apply to ensure that your organization's data is displayed only to those users to whom you have given appropriate permissions.

The power of Copilot with transcription

Copilot with transcription unlocks	Copilot only during the meeting
Enhanced Productivity: Transcriptions allow users to quickly recap information, remember key points from discussions, and identify action items.	Users can only access specific details or decisions made during the meeting. Content is not available after the meeting.
Searchability: Stored transcripts make it easier to search for specific information discussed in meetings.	Users can only access specific details or decisions made during the meeting. Content is not available after the meeting.
Knowledge Management: Transcription turns conversations into searchable, manageable data, boosting knowledge retention and accessibility.	Conversations no longer become searchable data for recall on given topics, losing valuable knowledge across the organization.
Collaboration and Inclusivity: Transcription fosters inclusivity and better collaboration, especially in a global workforce with diverse language needs.	Global colleagues have a limited ability to access meeting details and interact with their peers.
Data-Driven Insights: Transcripts serve as a source for AI to understand meeting content, enabling it to provide more accurate and relevant assistance.	Copilot is unable to provide the most up to date and accurate information based on meetings and conversations.
Compliance and Record-Keeping: Having a transcript can be beneficial for compliance purposes, as it provides a verifiable record of the discussions that took place.	Organizations may face challenges in keeping track of important decisions and discussions, potentially leading to compliance risks.
Training and Onboarding: Transcriptions can be valuable resources for onboarding new employees or training team members.	New hires may have to rely on secondhand information or miss out on valuable insights shared during meetings.

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[1] Microsoft 2023 Work Trend Index: Annual Report by Edelman Data x Intelligence, May 2023

[2] 2024 Work Trend Index Annual Report from Microsoft and LinkedIn by Edelman Data x Intelligence and LinkedIn Economic Graph Research Institute, May 2024

[3] What Can Copilot's Earliest Users Teach Us About Generative AI at Work? Work Trend Index Special Report by Microsoft, November 2023