

Learn More with Copilot Cowork

Delegate a multi-step project, stay in control, and review the results.

~30 MIN · Microsoft 365 Copilot app · Cowork · Outlook · Teams

Scenario. You are the project coordinator for the **Marina Pop-up Festival**. The tracker has 25 tasks and the event is approaching. You ask **Cowork** to assess progress, build a visual board and brief your team.

OBJECTIVES

By the end of this workshop you will be able to:

- Choose between **Copilot Chat**, **agents** and **Cowork**.
- Navigate the Cowork interface and add work context.
- Write an outcome-based request and approve sensitive actions.
- Review outputs critically and check usage with **/cost**.

BEFORE YOU START

- Access to **Microsoft 365 Copilot** with the **Cowork** tab.
- Dataset from your trainer: **marina-festival-tracker.csv** (25 tasks: status, priority, % complete, dates, owners, notes).

Copilot Chat One prompt, you steer each turn.	Agents A specific, bounded job (e.g. Analyst).	Cowork Several steps and deliverables you want to delegate.
---	--	---

Rule of thumb: if your prompt turns into a long checklist, hand Cowork the outcome instead.

YOUR TASKS

1 Explore the interface

Where: Microsoft 365 Copilot app > **Cowork** tab.

1. In the prompt area, find the three ways to add context: **Add work context** (files, people, emails, Teams chats), **upload** from your device, and **attach cloud files** (OneDrive, SharePoint, Teams).
2. In the left menu, open **New task**, **My tasks**, **Scheduled** and **Customize**.
3. Under **Customize > Skills**, browse the built-in skills and note two that match this workshop.

Checkpoint: You can name the four menu items and the three ways to add context.

2 Delegate your first multi-step task

Where: Cowork > **New task**.

1. Drag in or upload **marina-festival-tracker.csv**.
2. Paste the prompt below and press the **send arrow** (bottom right).
3. Watch the progress log, the skills being loaded and the **output panel**.
4. When Cowork asks permission to send the email, read the preview, then choose **Approve once**.

COWORK REQUEST

Review the attached tracker for the Marina Pop-up Festival. 1) Group all tasks by status and highlight priority concerns (overdue or high-priority items that are behind). 2) Build an interactive HTML kanban board with three lanes - Open, In Progress, Done - and a metrics header showing total tasks, percent complete and number of overdue items. 3) Email me a short summary report with the main risks. 4) Draft, but do not post, an update for the festival team channel in Teams.

Tip: Cowork adapts to the context it has, so results will differ between students. That is normal.

Checkpoint: The board previews, lanes are correct, the email reached your inbox, and the Teams update is still a draft.

3 Iterate and stay in control

Where: Same Cowork conversation.

1. Send a follow-up message: *Add a fourth lane called Blocked and move any task whose notes mention waiting into it.*
2. Try **Pause** and **Resume** while Cowork works, or **Cancel** and send a new message.
3. Type **/cost** to see how many Copilot credits the task used.

Checkpoint: The board has a Blocked lane and you know how many credits the task consumed.

4 Schedule a recurring request (optional)

Where: Cowork > **New task** > then check **Scheduled**.

1. Ask: *Every Monday at 9am, email me a one-paragraph status of the festival tracker.*
2. Open **Scheduled** to see the task, then cancel it to avoid unwanted emails.

Checkpoint: You can see (and cancelled) the scheduled task.

FINAL CHECKLIST

- Your request described an **outcome and deliverables**, not step-by-step instructions.
- You approved only actions you had read. Cowork cannot delete files and cannot access local-device files (use upload or OneDrive/SharePoint).
- You checked the board against the tracker. AI-generated content is a draft: review it before you rely on it.

REFLECT

Which part of this task would you never delegate without reviewing? What would you ask Cowork to do every week?