

Get Started with Copilot in OneDrive

A prompt guide for turning your files into outcomes

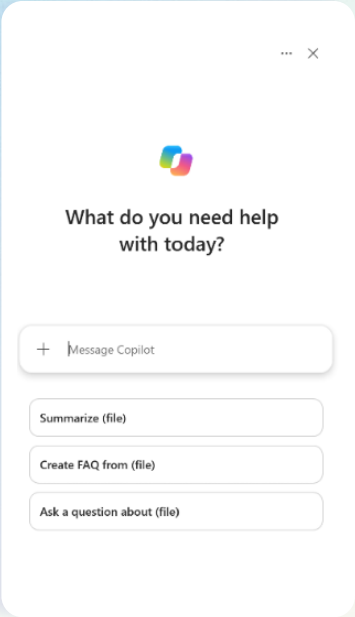
Microsoft

Turn files into outcomes with Copilot in OneDrive

Copilot in OneDrive helps you create new content, insights, and summaries from the files you already have. Instead of opening and reading files one at a time, you can ask Copilot to analyze information across your files, create new content from it, organize your files and folders, and automate tasks you repeat.

Open OneDrive on the web, select files or a folder, select the Copilot button, and describe the result you need. This guide gives you ready-to-use prompts for each of those scenarios.

Every prompt below is a starting point. Swap in your own project names, file types, and audiences, then keep refining the result with follow-up prompts until it is exactly what you need.



Before you start

Here are a few things to know before you begin:

- Copilot in OneDrive is available on the web for OneDrive for work or school, and you need a Microsoft 365 Copilot license to use it.
- Look for the Copilot entry point across OneDrive on the web, including Home, My files, the Shared, People, and Meetings views, and supported file previews such as PDFs.
- Copilot works within your existing permissions. It can only access, summarize, analyze, or act on content you are already allowed to view or edit, and your organization's sensitivity labels, retention, and sharing policies still apply.
- For actions that change content, such as creating, moving, renaming, sharing, or deleting files, Copilot asks you to review or confirm before it finishes, so you stay in control.

How to ask Copilot in OneDrive

Just describe what you need. Include these four ingredients:

Ingredient	What to include
Goal	What you want Copilot to do or produce
Context	Why you need it and who it is for
Source	Which files or folders to use
Expectations	Format, length, tone, or structure

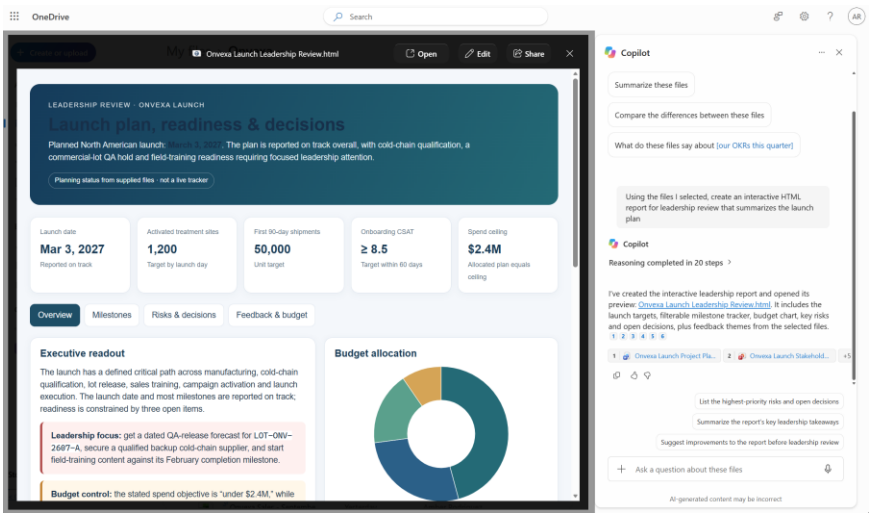
1. Select the files or folder you want to use before you enter your prompt, so Copilot focuses on the right content
2. Treat the first answer as a draft: ask follow-up questions, request a different format, or tell Copilot what to change



Create presentations, PDFs, and HTML reports

Turn your files into a presentation, PDF, or interactive HTML report you can keep refining with follow-up prompts.

Prompt to try	When to use it
Using the project plan in this folder, create a 10-slide presentation for a stakeholder review.	You need a deck built from content you already wrote.
Using the files I selected create an interactive HTML report for leadership review that summarizes the launch plan.	You want a shareable report your team can explore.
Using the spreadsheets I selected, create an interactive HTML dashboard with KPI cards at the top, charts I can filter by month and category, and a sortable table of the details.	You want to explore your numbers without building pivot tables or charts by hand.
Create an HTML project hub from the files in this folder, with tabs for Overview, Timeline, Owners, and Risks. Show the timeline as a visual roadmap and color-code risks by severity.	You want one place to share project status, or you're getting a new teammate up to speed.



Skill suggestion

Content creation: Repeating the same kind of deliverable? Tell Copilot in OneDrive your sources, format, audience, and tone, then ask it to save the workflow as a skill. Next time, just ask Copilot to use that skill.

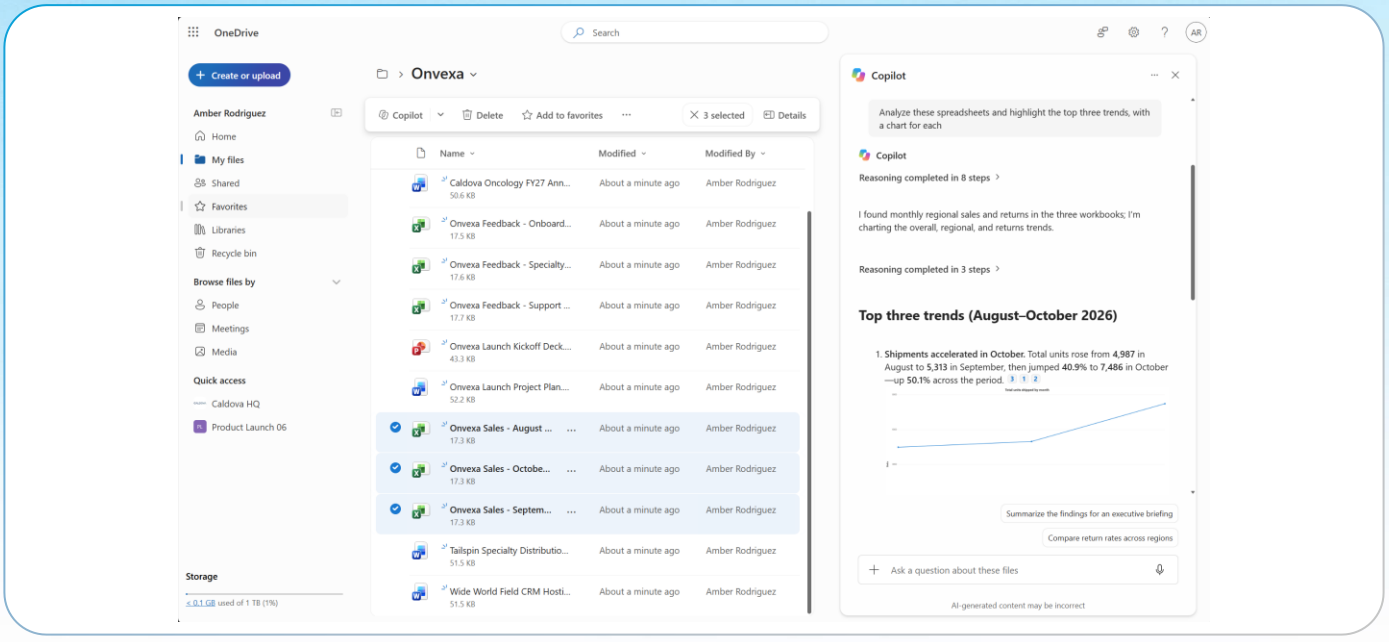
Analyze information across your files

Ask Copilot to work across multiple documents and spreadsheets to answer complex questions, identify trends and patterns, and generate charts and graphs.

Prompt to try	When to use it
Analyze these spreadsheets and highlight the top three trends, with a chart for each.	You have several data files and need the story behind the numbers.
Compare monthly sales across the selected spreadsheets and call out any outliers.	You want to spot what is unusual before someone else does.
Across these customer feedback files, what are the most common themes and how often do they appear?	You need patterns from a pile of qualitative input.
Based on these project status reports, which workstreams are at risk and why?	You need a quick health check across many updates.

Skill suggestion

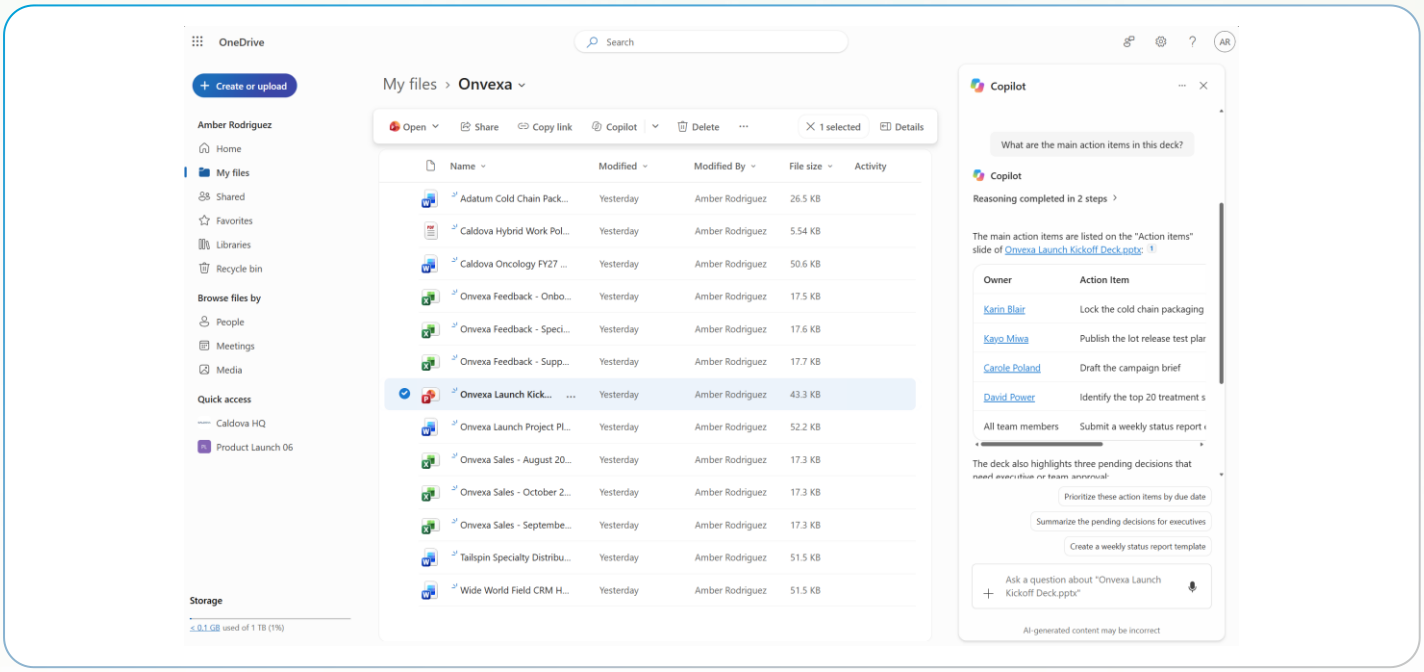
Cross-file analysis: Tell Copilot which files and measures to analyze and which trends, outliers, or risks to find, then ask it to save the workflow as a skill. Next time, just ask it to use your cross-file analysis skill.



Compare and ask about your files

Compare files and get answers without opening each one.

Prompt to try	When to use it
What changed between these versions?	You are reviewing edits to a draft
Compare these two vendor proposals on price, timeline, and scope in a table	You are weighing options and want a structured view
What is different between last year's plan and this year's plan, and what stayed the same?	You are preparing for a planning conversation
What are the main action items in this deck?	You need the takeaways from a presentation before a meeting



Skill suggestions

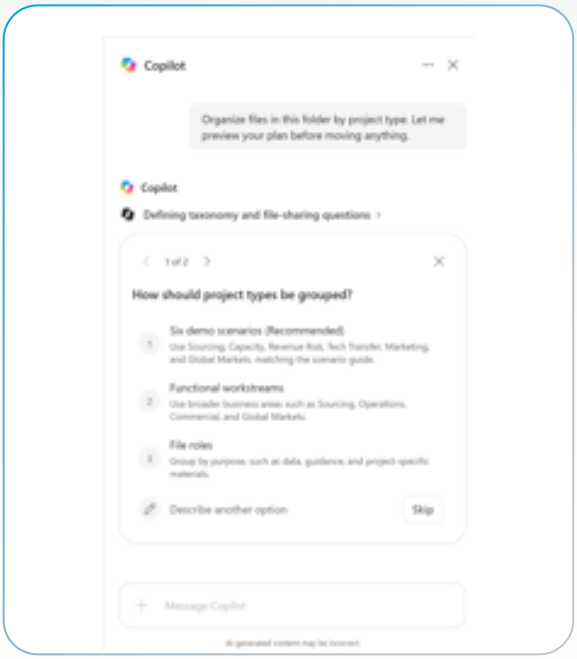
File comparison: Tell Copilot which criteria to evaluate and which changes to highlight, then ask it to save the workflow as a skill. Next time, just ask it to use your file comparison skill.

Organize your files and folders

Copilot organizes your files and folders around how you work, taking a tedious task off your plate so your day feels more focused.

Prompt to try	When to use it
Organize files in this folder/My files by project type. Let me preview your plan before moving anything.	Your project folder has become hard to navigate.
Show me a plan for how you would rename these files based on their contents.	Renaming files.

Copilot asks you to review and confirm before it moves or renames anything.



Skill suggestion

Folder organization: Find yourself repeatedly organizing folders using the same structure and naming rules? Tell Copilot in OneDrive how to group and name your files, what to archive, and when to ask for your approval, then ask it to save the workflow as a skill.

Automate your work with skills

Save a repeatable, multistep workflow as a personal custom skill so Copilot runs it the same way every time. Skills are saved as Markdown files, so you can reuse them whenever you need them.

Prompt to try	When to use it
Save what we just did as a skill called Monthly business report.	You have finished a workflow you will need again.
Create a skill that summarizes new files in this folder each week and lists action items by owner.	You want a standard routine you can run on demand.
Run my Monthly business report skill on the files in the October folder.	It is time to repeat a saved workflow.
Update my skill so the report also includes a risks section.	Your process has changed and the skill should too.



Listen, review, and share

Copilot in OneDrive also helps you take in content on the go and share with more context.

Prompt to try	When to use it
Summarize this PDF and list any questions I should ask the author.	You are reviewing a PDF using Copilot actions from the file's context menu.
Who has access to this folder, and is anything shared more broadly than it should be?	You want to check permissions before sharing.
Share this report with my project team with edit access.	You are ready to send, and want Copilot to help with the sharing settings.

Skill suggestion

Document review: Want a faster, more consistent way to review documents and prepare thoughtful follow-up questions? Tell Copilot in OneDrive what to summarize, which questions to identify, and what context to include in a sharing message, then ask it to save the workflow as a skill. Next time you review a document, just tell Copilot to use the document review skill you created, and it will apply those steps automatically.

Summarize your files

Get insights and actions from your files.

Prompt to try	When to use it
Summarize this document in five bullet points for a busy executive.	You need the gist fast.
Give me a summary of this PDF, then list the three decisions I need to make.	You want a summary that ends in clear next steps.
Create an FAQ based on this policy document.	You want to turn dense content into easy answers for others.

Skill suggestion

File summary: Get file summaries that fit your audience. Tell Copilot in OneDrive what to prioritize, how to format the summary, and what actions to flag, then save it as a skill to reuse anytime.



Put it together: Your monthly report in minutes

Many of us spend hours pulling together a monthly business report: gathering spreadsheets, sorting through notes, and finding last month's version. Here is how the scenarios above combine into one workflow.

Analyze

Select this month's spreadsheets, documents, and meeting recordings and ask: Compare trends across these files and highlight what changed since last month.

Organize

Ask Copilot: Organize the files I need for this report into a single folder called October report.

Create

Select the spreadsheets and your notes in Word, then ask Copilot: Create an interactive HTML report that summarizes all of this for my team.

Refine and share

Use follow-up prompts to adjust the content, then share the report and edit it together in real time.

Save

Ask: Save this as a repeatable skill, ask Copilot, "save this workflow as the monthly report skill." Next month's report is just a prompt away. Now, just ask Copilot, "prepare the monthly report for November using the selected files."

Tips for better results

- Be specific about the output. Name the format (table, bullets, slides, HTML report), the length, and the audience.
- Point Copilot at the right content. Selecting files or working inside the relevant folder keeps answers focused and grounded.
- Iterate instead of starting over. Follow-up prompts such as “make it shorter” or “add a chart” build on what Copilot already did.
- Share a sample, give Copilot an output you already like, such as last month’s report, so it can match your tone and structure.
- Check the sources. Review key facts and figures against the original files before you share the result.
- Start with the OneDrive Prompt Gallery. It offers ready-to-use prompts that help you explore what is possible with your files.

Learn more

- OneDrive Blog
- OneDrive Adoption Hub
- Copilot in OneDrive Event
- Get started with Copilot in OneDrive - Microsoft Support
- Recent Blog: OneDrive Just Got a Major Upgrade: New Copilot Capabilities, Simpler Sharing, and Smarter Photos
- Join OneDrive Office Hours or Explore past OneDrive sessions
- Learn more