

BEGINNER GUIDE

Getting started with Claude Cowork

A beginner's guide to delegating real work to an AI agent.

From "what is this?" to your first delegated task

This guide gets you from "what is this?" to confidently handing real work to Claude Cowork in an afternoon. No technical background required.

Questions, or want help rolling this out across your team? Reach us at nexushub.club/books-and-guides.

WHO THIS IS FOR

Individual knowledge workers — analysts, marketers, researchers, ops, legal, finance.

Small business owners & solo operators — anyone who wears many hats and loses hours to admin.

Teams and enablement leads — people standardizing how a group works.

THE COWORK SERIES

Book 1 — Beginner Guide YOU ARE HERE

Book 2 — Intermediate Guide CONNECTORS · SKILLS

Book 3 — Advanced Guide PLUGINS · TEAM SYSTEMS

Twelve chapters, start to finish

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HOW TO USE THIS GUIDE

Read straight through your first time — each chapter builds on the last. Later, jump straight to Chapter 9 whenever you need a copy-paste starting point, or Chapter 11 when a term doesn't ring a bell.

What Claude Cowork is (and why it matters)

Claude Cowork is Anthropic's **agentic desktop application for knowledge work** — the non-developer counterpart to Claude Code. Instead of answering one question at a time, Cowork takes a whole outcome you describe ("turn these ten receipts into an expense report"), makes a plan, does the multi-step work, and hands you a finished deliverable to review.

Anthropic launched Cowork as a research preview on January 12, 2026 (initially macOS and the Max plan only), after noticing that non-technical teams like Marketing and Data were quietly using the developer tool Claude Code for everyday work. Cowork is that same agentic engine with a simple interface and no terminal.

It matters because it changes the unit of work. Chat gives you answers; Cowork gives you completed tasks.

NOTE

Cowork is designed for work that is time-consuming but not deeply creative or judgment-heavy — assembling, formatting, synthesizing, organizing, extracting. You still make the decisions; Claude does the assembly.

1.1 WHO THIS IS FOR

Individual knowledge workers — analysts, marketers, researchers, ops, legal, finance.

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VISUAL 1.1 – ANSWER VS. OUTCOME

Chat = answers	Cowork = outcomes
You ask a question	You describe a goal
↓	↓
Claude replies with text	Finished deliverable

Chat responds to a prompt. Cowork completes a task.

WHAT PEOPLE ACTUALLY USE COWORK FOR

Business process & ops		33.4%
Content & copywriting		16.4%
Other non-dev work		~41%
Software development		<10%

Based on Anthropic's study of 1.2 million sessions, May 11–31, 2026.

How Cowork differs from Chat

2.1 Cowork vs. Chat

	Chat	Cowork
Interaction	One prompt, one reply	Describe an outcome; Claude plans and executes
Files	You upload/download manually	Reads/writes local files & folders directly (desktop)
Steps	You drive each step	Claude breaks work into sub-tasks itself
Duration	Short exchanges	Long-running, multi-step tasks
Output	Text in the chat	Formatted docs, spreadsheets, decks, organized files
Permissions	Minimal	You approve file, connector, and delete actions

2.2 COWORK VS. CLAUDE CODE

Both share the same agentic engine. Claude Code is built for software engineering and lives in the terminal, IDEs, and desktop app. Cowork is built for non-coding knowledge work — research, analysis, document creation — with a simplified, no-terminal experience.

VISUAL 2.1 – CHAT / COWORK / CLAUDE CODE

CHAT

Quick Q&A, drafting, brainstorming.

Best for: fast answers, no files involved.

COWORK

Multi-step knowledge work, files, decks, research.

Best for: tasks with several steps and real deliverables.

CLAUDE CODE

Software engineering, writing/debugging code.

Best for: developers shipping software.

Chat

Cowork

Claude Code

→

ONE AGENTIC ENGINE

TIP

Use Chat for quick questions and drafting. Use Cowork when the task touches files, needs several steps, or you'd otherwise be copying data between apps.

Installing and setting up Cowork

NOTE

Since July 7, 2026, Cowork sessions run in the cloud (beta) on Anthropic's servers, so work continues when your laptop is closed. But anything that touches your computer — local files, browser, computer use — needs the Claude Desktop app open on that machine.

3.1 WHERE COWORK RUNS, BY PLAN

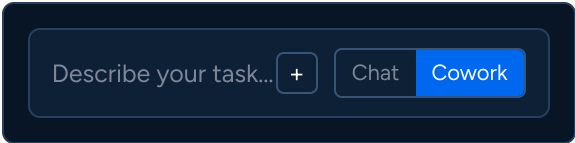
	PRO	MAX	TEAM	ENT.
Desktop (full)	✓	✓	✓	✓
Web & mobile	✓	✓	beta	admin
Chrome panel	rollout	✓	✓	—

Verify current availability at support.claude.com. Web/mobile run in the cloud and act as a remote control for deep work.

3.2 INSTALL STEPS (DESKTOP)

1. Download the Claude Desktop app from claude.com/download.
2. Sign in with your paid Claude account.
3. In the message box, select "Cowork." Select "Chat" to return to a normal conversation.
4. Describe your task.

VISUAL 3.1 – THE COWORK MESSAGE BOX



- 1 Switch between Chat and Cowork here.
- 2 Add folders & connectors with +.
- 3 Choose how Claude checks with you.

3.3 REQUIREMENTS CHECKLIST

- ☐ A paid Claude subscription (Pro, Max, Team, or Enterprise)
- ☐ Latest Claude Desktop app installed
- ☐ An active internet connection throughout the session
- ☐ Decided which folder(s) Claude may access

The permission model & safety basics

Cowork takes real actions on your files and in connected tools, so understanding permissions is the most important thing in this guide.

4.1 THE THREE APPROVAL MODES

Mode	Oversight	What it does
Manual		Claude pauses and asks before actions; you Allow or Deny each. (Formerly "Ask before acting.")
Auto		Claude keeps working but screens each action and blocks anything unsafe; pauses when needed. Uses more usage limit. (Formerly "Automatically approve.")
Skip		Claude doesn't pause and nothing auto-checks. Use only when you fully trust everything involved. (Formerly "Act without asking.")

WARNING

Deleting files always requires your explicit approval, in every mode. You'll see a permission prompt and must select "Allow" before Claude can delete anything.

VISUAL 4.1 — WHICH PERMISSION MODE SHOULD I USE?

How risky is this task?

Sensitive files, money, or messages sent as me?

Use Manual — review every step.

Routine work, trusted files, want speed?

Use Auto — Claude screens actions.

Fully trusted, low-stakes, everything known?

Skip (rarely recommended).

When in doubt, stay in Manual.

04 · THE PERMISSION MODEL & SAFETY BASICS

NEXUSHUB.CLUB · 07

4.2 WHAT CLAUDE CAN AND CAN'T REACH

Claude can only read/write files in folders you connect. It can't reach anything else.

Network access follows your egress settings.

Its work runs in an isolated environment on Anthropic's servers, separate from your computer.

4.3 THE ONE RISK TO UNDERSTAND: PROMPT INJECTION

Because Cowork reads documents and web pages, malicious hidden instructions inside a file or website could try to redirect Claude ("prompt injection"). Anthropic has built defenses but says the risk is non-zero — its own framing is that agent safety "is still an active area of development in the industry."

Days after launch (disclosed Jan 14, 2026), security firm PromptArmor demonstrated a real proof-of-concept exfiltration chain against Cowork.

WARNING

Don't point Cowork at folders with sensitive data you wouldn't want exposed, and only let Claude work on websites you trust. If Claude suddenly acts outside your task — accessing files or sites you didn't mention, or asking for sensitive info — stop the task immediately.

SAFETY CHECKLIST FOR BEGINNERS

- ☐ Start in Manual mode until you trust a workflow
- ☐ Only connect folders you actually need
- ☐ Keep sensitive files in folders Cowork never touches
- ☐ Be cautious with files and skills from unknown sources
- ☐ Limit browser/web access to trusted sites

Your first task

Let's run something safe and satisfying: organizing a messy folder.

1. Put a handful of loose files in a test folder (e.g., a "Sandbox" folder — not anything sensitive).
2. In Cowork, connect that folder using the "+" menu.
3. Stay in Manual mode.
4. Paste the prompt below.
5. Watch the plan, approve steps, and review the result.

COPY-PASTE PROMPT

Organize the folder I've connected.
Group files by type and then by date
(YYYY-MM-DD). Propose a folder
structure first and wait for my
approval
before moving anything. Do not delete
anything.

5.1 WHAT YOU'LL SEE DURING A TASK

- Progress indicators showing each step
- Claude's reasoning and plan, so you can follow along
- The ability to jump in and steer mid-task
- For complex work, multiple sub-agents running in parallel

VISUAL 5.1 – BEFORE / AFTER, AND A TASK IN PROGRESS

Receipt_final2.pdf

Receipts/

contract(3).docx

Contracts/

img_0092.jpg

Photos/

Organize the Sandbox folder

1. Scan 2. Propose structure 3. Await approval 4. Move files

Reading 24 files...

Move 24 files into new
structure?

Allow

Deny

You keep visibility and can steer at any point.

Working with files and folders

Connect folders via the "+" menu. Claude reads and writes only inside connected folders.

Folder instructions: add project-specific context that applies whenever Claude works in a folder.

Global instructions (Settings > Cowork) apply to every session — set your tone, formats, and role once.

Where outputs go: finished files are delivered to your session; when Claude writes to a connected folder, review the location it names.

EXAMPLE — GLOBAL INSTRUCTIONS TO PASTE INTO SETTINGS > COWORK

- I'm a marketing manager at a mid-size B2B company.
- Default to concise, plain-English writing. Avoid jargon.
- Deliver Word or Markdown unless I ask otherwise.
- Always show me your plan before taking any action that changes files.

TIP

Good global instructions are the single highest-leverage setup step. They save you from repeating yourself in every task.

VISUAL 6.1 — LAYERS OF CONTEXT

Your task prompt (this job)

Folder / Project instructions

Global instructions (every session)

MOST SPECIFIC → MOST GENERAL, TOP TO BOTTOM

Claude combines all three layers when it works.

EXAMPLE IN PRACTICE

Global says "write plainly." The folder says "this is our brand assets folder." Your task says "make a one-pager." Claude follows all three at once — plain writing, your brand assets, one page.

Reading and reviewing agent output

Never ship agent output unread. Build a habit:

- 1. Open the deliverable and skim for structure and completeness.
- 2. Spot-check facts and numbers against the sources.
- 3. Check formatting matches what you asked for.
- 4. Read Claude's summary of what it did and any assumptions it made.
- 5. Ask for fixes in place — highlight text and click "Edit with Claude."

WARNING

Claude can make mistakes. Treat output as a strong first draft from a capable but new colleague — verify before it leaves your hands.

REVIEW CHECKLIST

- ☐ Does it actually answer the goal I set?
- ☐ Are the numbers/figures correct and sourced?
- ☐ Is the format right (file type, headings, length)?
- ☐ Did Claude flag any assumptions or gaps?
- ☐ Would I be comfortable if a client saw this?

VISUAL 7.1 – THE 5-POINT OUTPUT REVIEW

Answers the goal	☐
Numbers correct	☐
Right format	☐
Assumptions flagged	☐
Client-ready	☐

Sixty seconds of review saves an hour of rework.

RED FLAG VS GREEN FLAG

✗ Numbers appear with no source

✓ Assumptions and gaps called out plainly

Basic prompting & delegation

Anthropic's golden rule of prompting: write instructions a new colleague with no context could follow. If a person would be confused, so will Claude.

THE FIVE HABITS THAT MATTER MOST

1. **Be clear and direct.** Say exactly what you want.
2. **Give context.** Who it's for, why, and any background.
3. **Specify the deliverable.** Format, length, file type, structure.
4. **Show an example.** One good example beats three adjectives.
5. **Sequence the steps** for multi-part work.

VAGUE VS. CLEAR

✗ "Make a report."

✓ "Build a 2-page status report for my VP from the notes in /ProjectX, due Friday — exec summary, updates, risks, next steps."

TIP

End longer tasks with "Before finishing, check your work against the Definition of done and list anything you were unsure about."

A REUSABLE PROMPT SKELETON

Goal: [the outcome you want]
 Context: [who it's for, why, background]
 Inputs: [which folder/files/connectors to use]
 Deliverable: [format, length, structure, file type]
 Constraints: [what NOT to do; approval requirements]
 Definition of done: [how I'll judge it's correct]

VISUAL 8.1 — THE PROMPT SKELETON

GOAL	the outcome you want
CONTEXT	who it's for, why, background
INPUTS	folder/files/connectors to use
DELIVERABLE	format, length, structure, file type
CONSTRAINTS	what NOT to do; approvals
DEFINITION OF DONE	how I'll judge it's correct

Copy this skeleton for any Cowork task.

A starter set of copy-paste workflows

Adjust bracketed placeholders. Start in Manual mode.

1. EXPENSE REPORT FROM RECEIPTS

Goal: Build an expense report from the receipt images in the connected folder.

Deliverable: An Excel file with columns Date, Vendor, Category, Amount, Notes, and a total row. Flag any receipt you can't read.

Constraints: Don't guess amounts; list unreadable receipts separately.

2. REPORT FROM SCATTERED NOTES

Goal: Turn the notes and voice-memo transcripts in this folder into a 2-page status report for [audience].

Deliverable: A Word doc with an executive summary, key updates, risks, and next steps.

Constraints: Only use what's in the files. Flag gaps, don't invent content.

3. MEETING TRANSCRIPT TO ACTION ITEMS

Goal: Read the meeting transcript in this folder and extract decisions and action items.

Deliverable: A Markdown table with Owner, Action, Due date, and a short summary at top.

4. COMPETITOR SNAPSHOT

Goal: Research [3 competitor names] and summarize recent product, pricing, and positioning changes.

Deliverable: A one-page comparison table plus 5 bullet takeaways.

Constraints: Only use trusted sites. Note anything unverified.

VISUAL 9.1 – THE 8 STARTER WORKFLOWS

1. Receipts → Expenses

2. Notes → Report

3. Transcript → Actions

4. Competitor snapshot

5. Spreadsheet cleanup

6. Inbox triage

7. Doc → Deck

8. Weekly briefing

Workflows 1–4 shown here; 5–8 continue on the next page.

5. SPREADSHEET CLEANUP

Goal: Clean the spreadsheet in this folder: standardize date formats to YYYY-MM-DD, remove duplicate rows, and flag outliers.

Deliverable: A new cleaned copy (don't overwrite the original) plus a short change log.

6. INBOX TRIAGE DRAFT (GMAIL CONNECTOR)

Goal: Summarize my unread email from the last 24 hours and group by theme.

Deliverable: A prioritized list with suggested one-line replies I can approve.

Constraints: Draft only – do not send anything without my approval.

7. SLIDE DECK FROM A DOCUMENT

Goal: Turn the attached report into a 10-slide deck for [audience].

Deliverable: A PowerPoint following a clear narrative: context, findings, recommendation. Keep to one idea per slide.

8. WEEKLY BRIEFING (SCHEDULE IT)

Goal: Every Monday at 8am, compile a briefing from my connected calendar and project folder: this week's meetings, open tasks, and anything due.

Deliverable: A short Markdown brief saved to my /briefings folder.

TIP

Type `/schedule` in any Cowork task to make a task recur. Scheduled tasks run in the cloud, so your computer doesn't need to be awake (verify current behavior at support.claude.com).

Troubleshooting

Symptom	Likely cause	Fix
"Setting up Claude's workspace"	Cowork updating to latest version	Expected — wait a moment
● Claude stopped mid-task (local)	Desktop app closed or computer slept	Keep the app open; cloud sessions keep running
● Hitting usage limits fast	Cowork uses more than chat; Auto mode uses more still	Batch related work; use Chat for simple tasks; monitor Settings > Usage
● Files not where expected	Folder access not granted, or output saved elsewhere	Check connected folders; re-read the location Claude named
● Connector action denied	Permission set to "Needs approval" or "Blocked"	Adjust in the "+" menu / Customize > Connectors

Expected behavior ● Wait it out / manage usage ● Check a setting

NOTE

If a task depends on local files or your browser, the Claude Desktop app must stay open even when the session runs in the cloud.

Glossary

AGENTIC

Software that plans and takes multi-step actions toward a goal, not just replies.

AUTO / MANUAL / SKIP MODES

How often Claude checks with you before acting.

CONNECTOR

An integration (via MCP) that lets Claude use an external service like Gmail or Google Drive.

MCP (MODEL CONTEXT PROTOCOL)

The open standard Claude uses to talk to external tools.

SKILL

A reusable instruction file (SKILL.md) that teaches Claude a repeatable task.

PLUGIN

A bundle of skills, connectors, and sub-agents for a role or workflow.

SUB-AGENT

A helper Claude spins up to handle part of a task in parallel.

PROMPT INJECTION

A hidden malicious instruction in a file or web page that tries to redirect Claude.

SCHEDULED TASK

A saved task Claude runs automatically on a cadence.

LIVE ARTIFACT

A persistent, self-refreshing dashboard Claude builds (desktop only).

CLOUD SESSION

A Cowork session running on Anthropic's servers that continues when your laptop is closed.

You can run and review real tasks. Now go further.

You can now install Cowork, set permissions safely, and run and review real tasks. When you're comfortable, move on to the **Intermediate Guide** for connectors, Skills, Projects, and multi-app workflows — and then the **Advanced Guide** for building custom Skills, plugins, and team-wide systems.

YOU'VE COVERED

- | | | | |
|---------------------|----------------------|-----------------------|------------------|
| ✓ 01 What Cowork is | ✓ 02 vs. Chat | ✓ 03 Setup | ✓ 04 Permissions |
| ✓ 05 First task | ✓ 06 Files & folders | ✓ 07 Reviewing output | ✓ 08 Prompting |
| ✓ 09 Workflows | ✓ 10 Troubleshooting | ✓ 11 Glossary | → 12 Next steps |

BOOK 1

Beginner Guide

You are here — install, permissions, first tasks.

BOOK 2

Intermediate Guide

Connectors, Skills, Projects, and multi-app workflows.

BOOK 3

Advanced Guide

Custom Skills, plugins, and team-wide systems.

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