

The Copilot Toolbox

When to use what

Five tools, one distinction: asking versus getting things done. M365 Copilot and Notebooks retrieve. Cowork and Agents execute. Scout keeps working when you're not watching. Know that line and you pick in seconds — instead of typing everything into chat.

As of: 6 August 2026



M365 Copilot

RETRIEVAL

Your everyday entry point to AI. Quick questions, summaries, brainstorming — mainly retrieval across your M365 data.

„Summarise yesterday's meeting with [client] and list the open action items.“



Notebooks

RETRIEVAL + CONTEXT

Your project entry point. Knowledge builds over time and the context stays. With a Copilot licence the first 300 references ground answers, 50 without. It writes from that material but doesn't act in systems.

„I added 12 project documents. What's the current status?“



Cowork

DELEGATION

Complex, multi-step work. Here Copilot doesn't just retrieve, it executes. Runs in the background — generally available since June 2026, but billed by usage through Copilot Credits.

„Prepare my week: check the calendar, schedule X based on meeting Z, and draft replies to the open emails.“



Agents

PROCESS + EXECUTION

Carries an entire business process. From retrieval to writing into third-party systems — built for the work you repeat.

„I have a client meeting. Prepare me for [client A]: latest invoices from SAP, activities from CRM.“



Scout

AUTOPILOT — ALWAYS ON

Microsoft Frontier programme only

Microsoft's first Autopilot: always on, with its own identity. It doesn't just understand tasks, it carries them forward — coordinating meetings, spotting risks early, keeping work moving.