

ANALYZE

Intermediate

30 MIN

• UPDATED 2026-09-30

Cross-check travel expenses against policy.

Have Copilot Cowork reconcile a batch of travel expense submissions against the written policy and flag violations.

MICROSOFT 365

Excel

Word

WORKS WITH

Copilot Cowork

Business Outcome

Policy violations caught before reimbursement instead of discovered in a spend audit months later.

Workflow Steps

Step 1: Gather the submissions and the policy

Excel and Word

Have the travel expense export and the current approved policy document ready – Cowork needs both to do the comparison, not just the numbers.

Step 2: Hand the task to Copilot Cowork

Copilot Cowork

Unlike a single prompt, Cowork works through the whole batch end-to-end and returns a finished summary rather than a draft you have to assemble yourself.

PROMPT

Cross-check every expense in this travel submission export against the attached travel policy. Flag any submission that violates a spend limit, missing-receipt rule, or unapproved category, and cite the specific policy clause for each flag.

Step 3: Review the flagged list

Excel

Open the flagged list as its own filtered Table and work through it top to bottom, resisting the urge to re-skim the full unflagged batch "just in case" — spending your time there defeats the point of automating the first pass, which is to concentrate review effort where an actual rule was broken.

Step 4: Close the loop with the submitter

Word

Send flagged items back with the specific policy citation attached, so the conversation is about the rule, not a judgment call.

✓ Check the work

- Confirm the policy document Cowork used is the current version, not an outdated one.
- Spot-check a few non-flagged submissions to make sure real violations weren't missed.
- Verify the cited policy clause for each flag actually says what the summary claims.

Expected Outcome

A summary sheet listing every expense that violates policy, with the specific rule cited for each one.



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