Connecting a Virtual Machine to AI

MGMT 675: Generative AI for Finance

Kerry Back

Cowork

Step 4: Cowork — Claude Acts on Your Files

This is the point at which Claude goes from answering to doing.

Switch to the **Cowork** tab in Claude Desktop.

How it works

1. Point Claude at a folder on your computer
2. Describe the task in plain English
3. Claude plans, executes in an isolated VM, delivers results
4. No Python, R, or GitHub needed — the VM has everything

Example

"I've pointed you at my FinanceData folder. Read the file portfolio_returns.csv

Cowork — Key Details

Strengths

- Zero setup beyond the app
- VM installs packages itself
- Parallel sub-agents for complex tasks
- Produces Excel, PowerPoint, PDF
- Great for non-coders

Watch Out

- Uses tokens **fast** (VM overhead, planning steps, sub-agents)
- Pro plan ($20/mo) limits hit quickly
- App must stay open while running
- Not available on Windows ARM64

Recommendation: Use Cowork for tasks that need file I/O and complex orchestration. Use regular Chat/Artifacts for quick questions to save tokens.