

CLAUDE FEATURE GUIDE

Projects: keep one body of work together

Use a dedicated workspace when the same files and rules support many conversations.

ROLE

HR generalist

TASK

Answer repeated policy questions from current documents

LEVEL

Occasional or regular user

YOUR MONDAY MOVE

Create one Project for one repeated question and add only the current source documents.

You've pasted the same benefits PDF into Claude for the fourth time this week. Every new question means re-uploading the handbook, re-explaining the tone you want, re-explaining who's asking. That's not AI saving you time, that's you doing setup work for a tool that's supposed to remove setup work.

Claude Projects fixes this. A Project is a dedicated workspace with its own permanent file library and its own standing instructions. Set it up once. Every chat inside it already knows your documents and your rules.

TRUST BARRIER

A Project can answer confidently from an outdated file. The workspace improves access to context; it does not certify that the context is current.

Before and after

MANUAL WORKFLOW

Trigger: an employee asks a policy question.

Upload the handbook and benefits guide again.

Re-type the boundary: answer only from these files.

Draft, verify, and send the response.

AI-ASSISTED WORKFLOW

Trigger: the same employee question arrives.

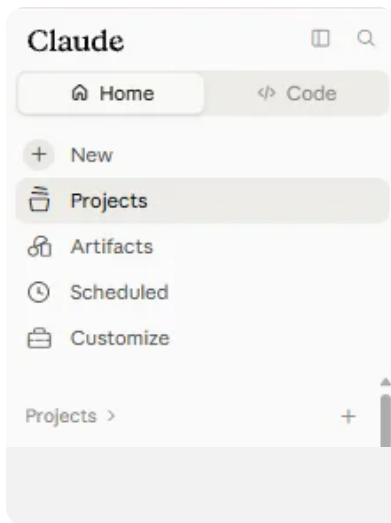
Open the Employee Handbook Project.

Ask the question; Claude retrieves relevant project knowledge.

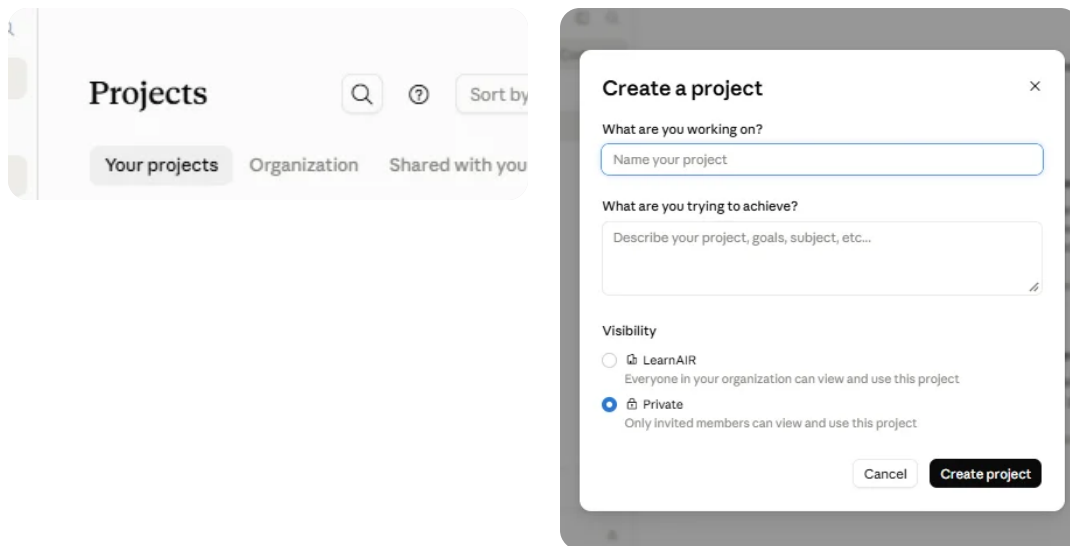
Verify against the current policy, then send.

How to steps:

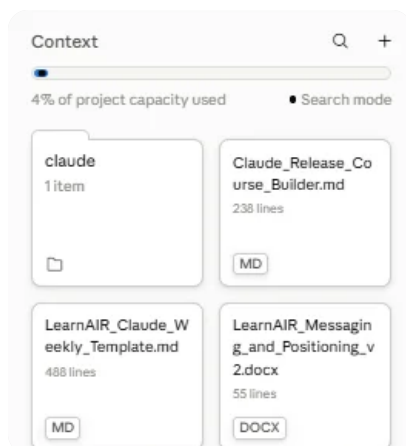
- 1 Go to claude.ai/projects (or click your account icon → Projects).



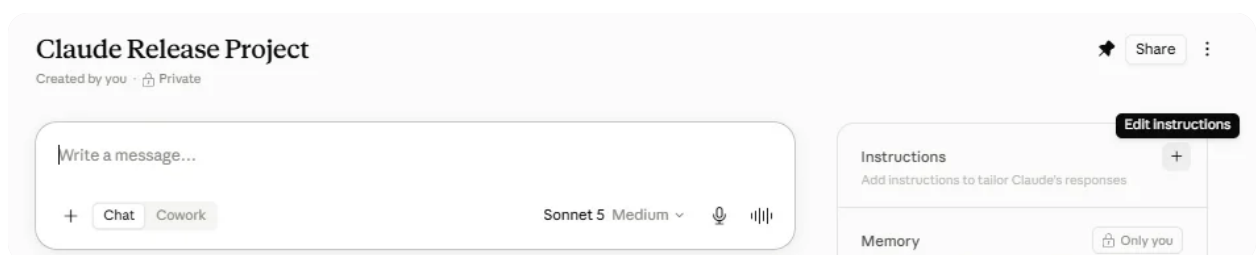
- 2 Click “+ New Project,” name it, and open it.



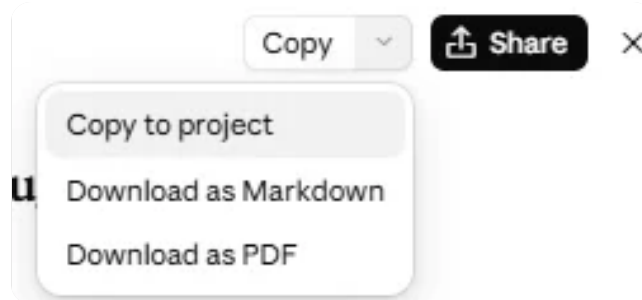
- 3 In the knowledge panel, click “+” and upload the handbook and benefits guide.



- 4 Click “Set project instructions” and tell Claude how to behave — e.g., “Only answer from the uploaded documents. If something isn’t covered, say so instead of guessing.”



One thing to know: a Project's shared context lives in its knowledge base, not automatically across every chat you've ever had inside it. If you want two chats in the same Project to build on each other, the shared file library is what connects them, not chat memory alone. Just add the context/document to the project library.



DIRECT© prompt

D – Doing: Answer an employee policy question using the Project knowledge.

I – Information: The current handbook, benefits guide, and this question: [paste question].

R – Role / Persona: Act as a careful work partner who flags uncertainty instead of guessing.

E – End Goal / Result: A short draft answer with the source document and section named.

C – Context: Use only the material I provide and protect confidential information.

T – Tone / Style / Format: Use clear headings, concise bullets, and plain language.

Reuse it: save the prompt in Claude Instructions, a Project, or a Skill. If you also use ChatGPT, tell ChatGPT: “Save this to my permanent memory.”

Prompting best practices

- ✦ Name the Project narrowly (one topic, one document set) rather than building one giant “everything” Project. Narrow Projects give Claude a cleaner, more focused knowledge base to answer from.

- ✦ Write project instructions as rules, not requests “Only answer from the uploaded documents” works better than “please try to stick to the documents.”
- ✦ Re-upload a document every time the source policy changes; Claude has no way to know a file you uploaded last quarter is now outdated.
- ✦ If a chat inside the Project starts drifting off-topic, start a fresh chat in the same Project rather than trying to redirect a long one. The knowledge base carries over either way.

AIRLift snapshot

A – Audit: Choose one repeated question or deliverable that depends on the same source documents. Capture what starts the work, which files are authoritative, what the finished answer should contain, and where repeated uploading or re-explaining creates friction.

I – Integrate: Claude uses the Project files and instructions to find relevant material and draft the response. You keep the knowledge base current, remove superseded files, resolve policy meaning, and approve anything shared with another person.

R – Run: Test three different real questions, including one the documents do not answer. The workflow is ready when Claude uses the current sources, identifies gaps instead of guessing, and gives you an answer you can verify quickly.

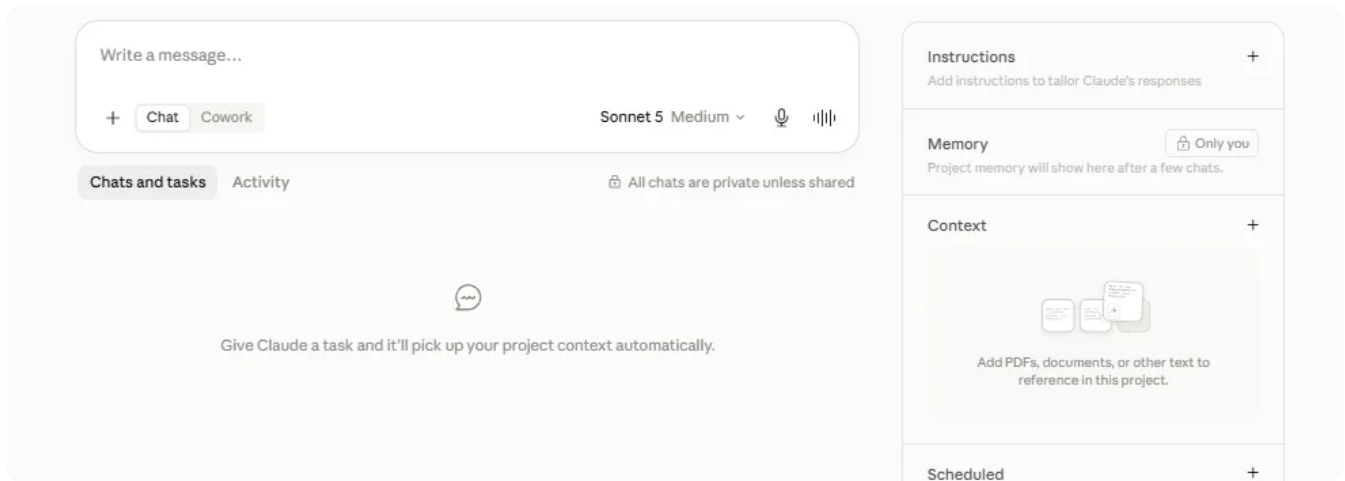
THE HUMAN PART

Confirm the answer against the current approved policy before it reaches an employee. HR or legal owners retain interpretation authority.

Technical details

- ✦ Free accounts are capped at 5 Projects. (support.claude.com)
- ✦ Collaboration features: inviting teammates, assigning “can view” or “can edit” require a Team or Enterprise plan.

- ✦ Projects use retrieval-augmented generation (RAG) to expand how much knowledge-base content a Project can draw from as it grows.
- ✦ Each Project has its own separate memory space, isolated from your general account memory.



Try it now

In under five minutes, create the Project, upload one current policy file, and test one question you answered this week.

Reflect: what did Claude find correctly, and where did your project instruction need a sharper boundary?

SHARE THE WIN

Share the Project instruction, never the employee or policy-sensitive content.