

Activity 3 Setup Guide: Claude

Set up a Claude Project using the paid Claude account prepared for the workshop

Feature: Project

Use this guide only to configure a workshop prototype. Claude Projects can hold instructions and project knowledge, but they are better treated as a build/practice workspace unless your district verifies deployment controls.

Before You Start

- Use the paid subscription account requested in the pre-conference instructions.
- Have your completed Instructions Drafting Template ready. You are pasting the instructions you wrote, not copying a generic prompt.
- Have your context-engineered content ready. At this stage that usually means Q&A cards; include a glossary only if you created one.

Setup Steps

#	Action	What to do
1	Create a project	Sign in at claude.ai with your paid Claude account. Open Projects or go to https://claude.ai/projects , then choose New Project.
2	Name the project	Use a specific name such as [District] Certification Assistant or Clear River Leave Assistant. Add a short description if prompted.
3	Paste completed instructions	Open Set project instructions. Paste the finished sections from your Session 1 Instructions Drafting Template. These instructions govern chats inside the project.
4	Load context-engineered content	Add your context-engineered content to Project Knowledge. At this point that usually means your Q&A cards; if time allowed, include your glossary or other engineered content for the same topic.
5	Keep the source set narrow	Do not load raw policy files for this activity unless the facilitator directs you to compare them. The build should use the content you engineered during the workshop.
6	Start inside the project	Begin a new chat from inside the project so Claude uses the project instructions and project knowledge.

Deployment Checkpoint for Session 3

Deployment caution: Claude Projects are useful for building and internal experimentation, but current Claude project sharing is not equivalent to an employee-facing assistant. Claude describes “use access” as allowing users to see project contents, knowledge, and instructions. Confirm account, workspace, and district rules in your district’s Claude environment. Additional deployment considerations will be covered in the workshop session 3.