

Claude in practice

Chats, prompts, files and projects: what to do, step by step

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How to use this handout

This handout gathers, in written and ordered form, everything covered in the lesson. You do not need to memorise it: it is there so you can find things again calmly, later, when the lesson is over and a question is left hanging.

GOAL

Use Claude every day with method: find and organise chats, write effective prompts, work with files and projects and decide on privacy.

What you will be able to do

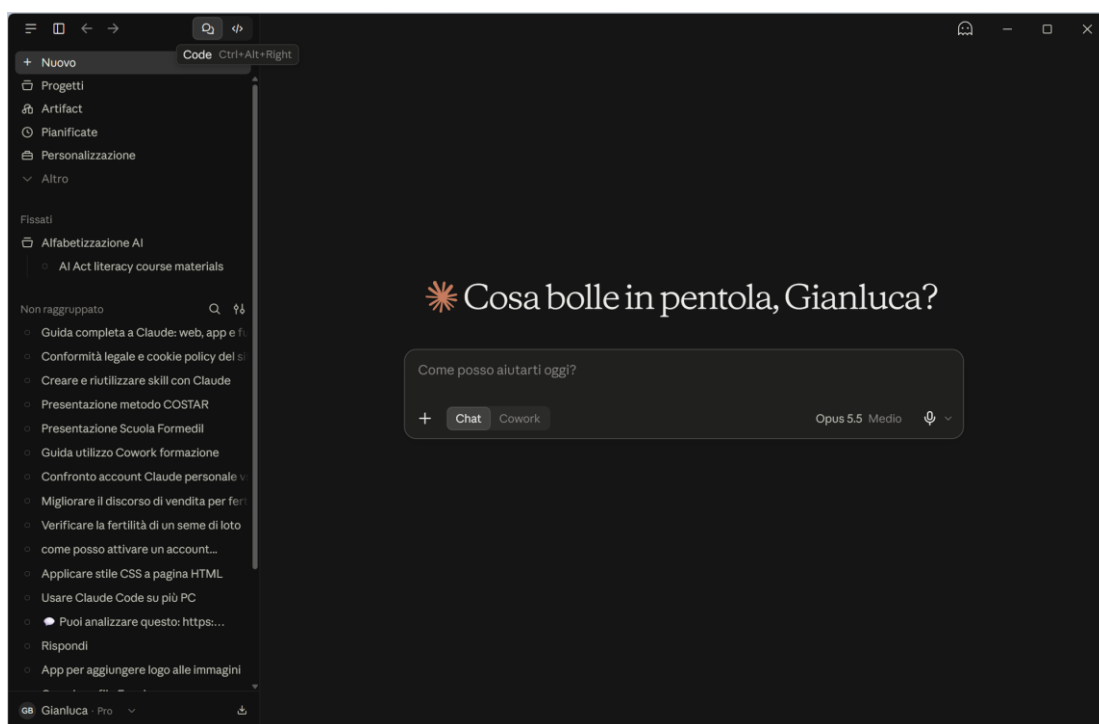
- Create, search, rename and delete chats.
- Write a prompt with the CO-STAR method and improve it without starting over.
- Attach files, use web search and dictation.
- Set up projects, instructions, skills and connectors.
- Decide privacy, memory and use of your limit.

1. Creating a new chat and resuming old ones

Every topic deserves its own chat: it is the gesture you will use most.

1.1 How to do it

1. Click **New** at the top of the sidebar (in the app also **Ctrl+N**, or File, New chat).
2. The «How can I help you today?» box appears: check model and effort at the bottom right («Opus 5.5, Medium» is fine to start).
3. Write the request and press **Enter**. To start a new line without sending use **Shift+Enter**.



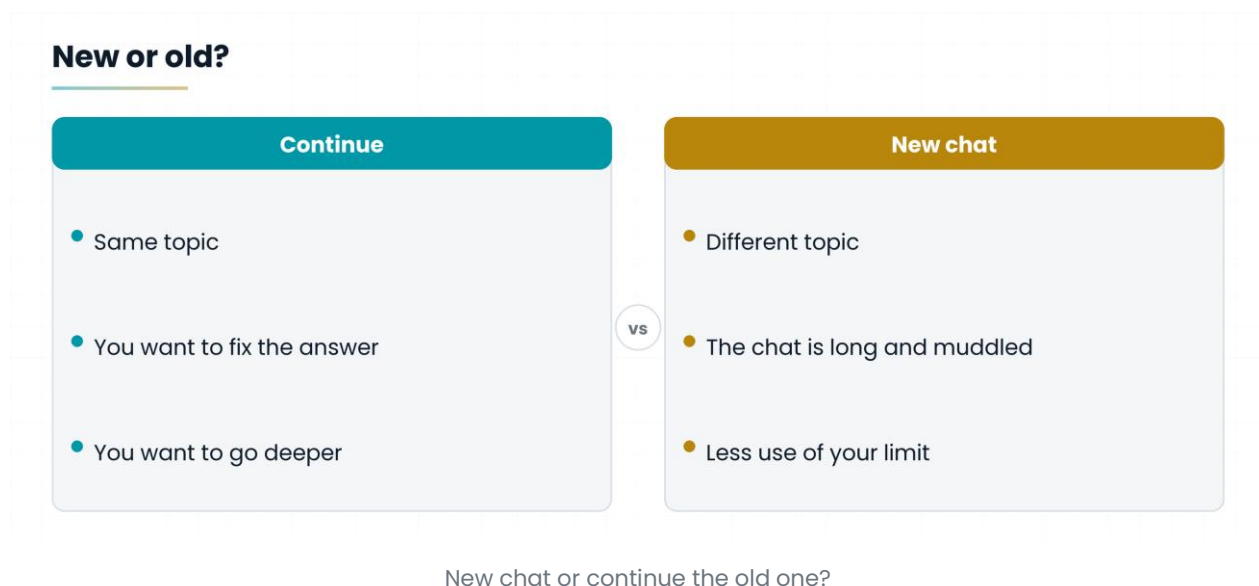
A new chat: box in the centre, New highlighted in the sidebar.

A FIRST TEST REQUEST

«Explain in three lines, like to a beginner, what a PDF file is and when to use it instead of Word.»

1.2 New chat or continue?

Claude remembers everything said **inside that chat**, but not in the others. If the topic is the same, continue where you are: you can correct, go deeper, ask for a different version. If the topic changes, open a new chat: answers are more precise and you use less of your limit.



1.3 Reopening an old chat

1. In the sidebar scroll the list under **Ungrouped**, from newest to oldest.
2. Click the title: the conversation opens with the whole exchange.
3. Type in the box at the bottom to **pick up where you left off**.

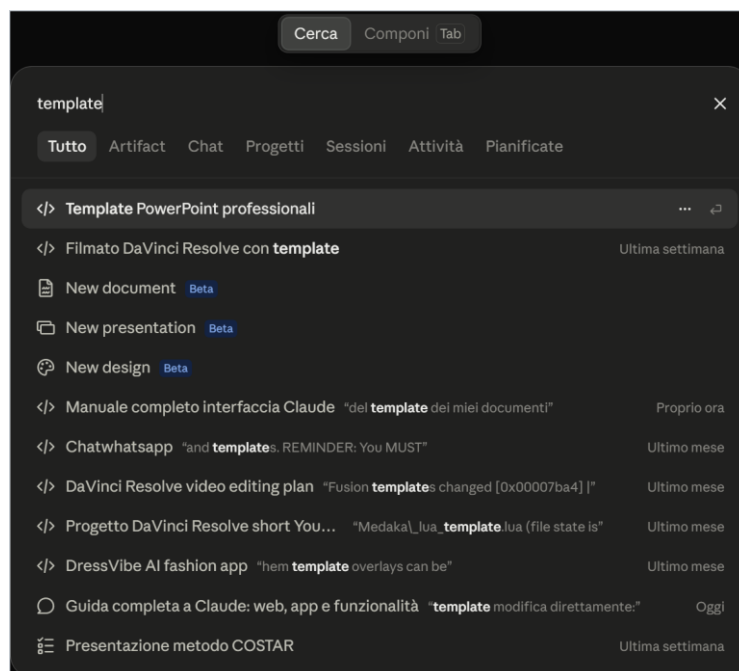
In the desktop app you can also move with the keyboard: **Ctrl+Tab** goes to the next chat, **Ctrl+Shift+Tab** to the previous one, **Alt+left arrow** goes back, **Ctrl+B** hides the sidebar.

2. Searching, organising and deleting chats

When conversations number in the hundreds, you need three skills: search, order, clean up.

2.1 Searching

1. Click the **lens** near the list (on the web at the bottom left); in the app press **Ctrl+Shift+K**.
2. Type one or two distinctive words: a name, a topic, a phrase.
3. Narrow down with the filters: All, Artifacts, Chats, Projects, Sessions, Tasks, Scheduled.
4. Look at the snippet under each title: it shows the word found and when; then press **Enter** to open.



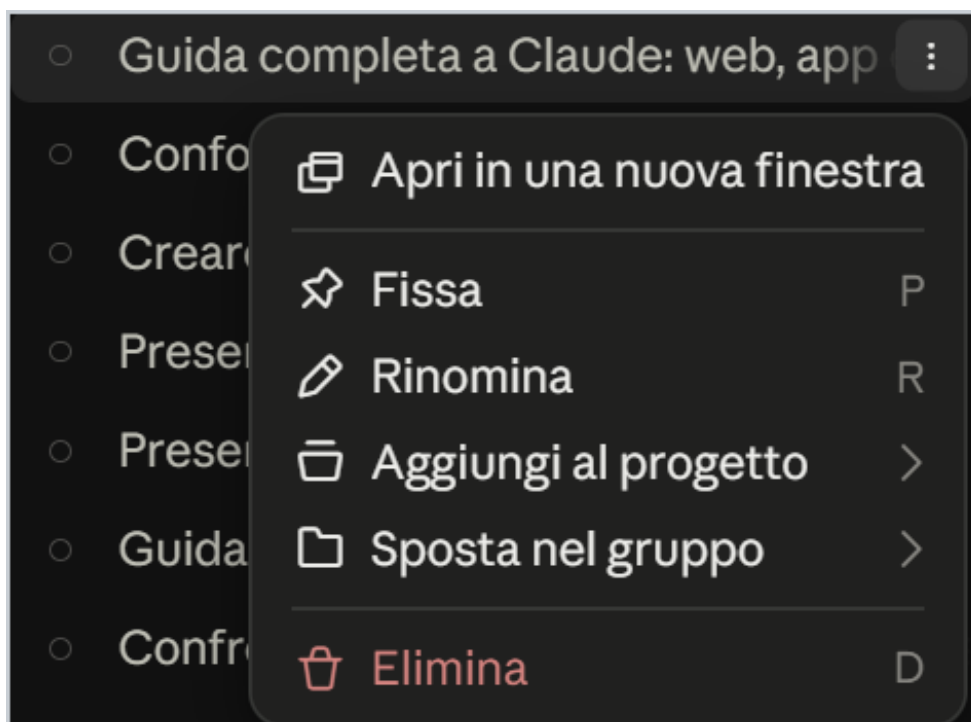
Search for the word «template»: title, highlighted snippet and date.

TO FIND FASTER

Search for a **rare** word (a client's name) rather than a common one («document»). For a file made with Claude use the **Artifacts** filter; if you find nothing, try a synonym.

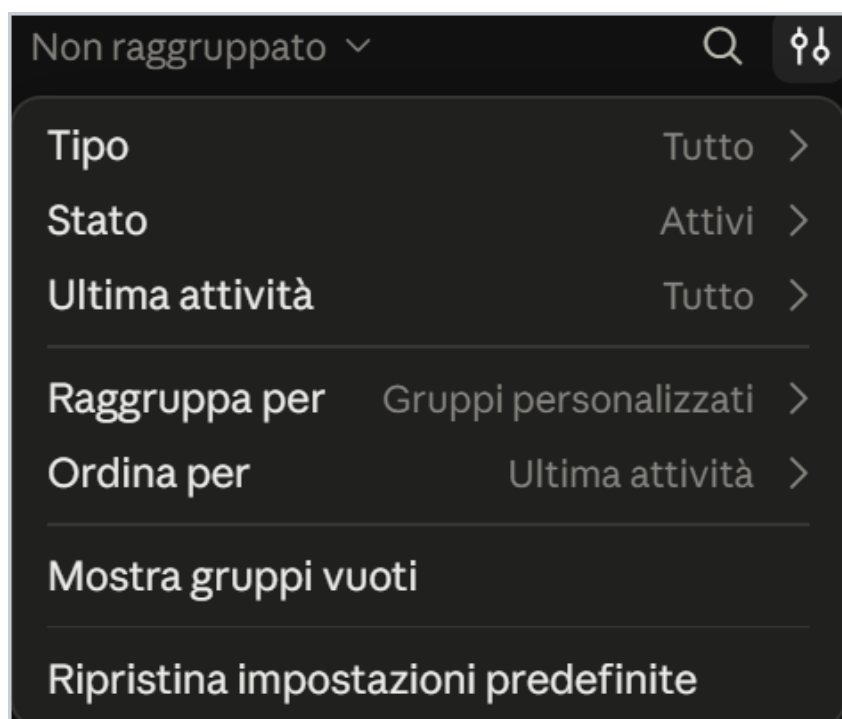
2.2 Renaming, pinning, moving

Hover over the title and click the **three dots**. A good title contains a word you will remember (the client's, course's or project's name): then search finds it at once.



The chat menu: Pin, Rename, Add to project, Move, Delete.

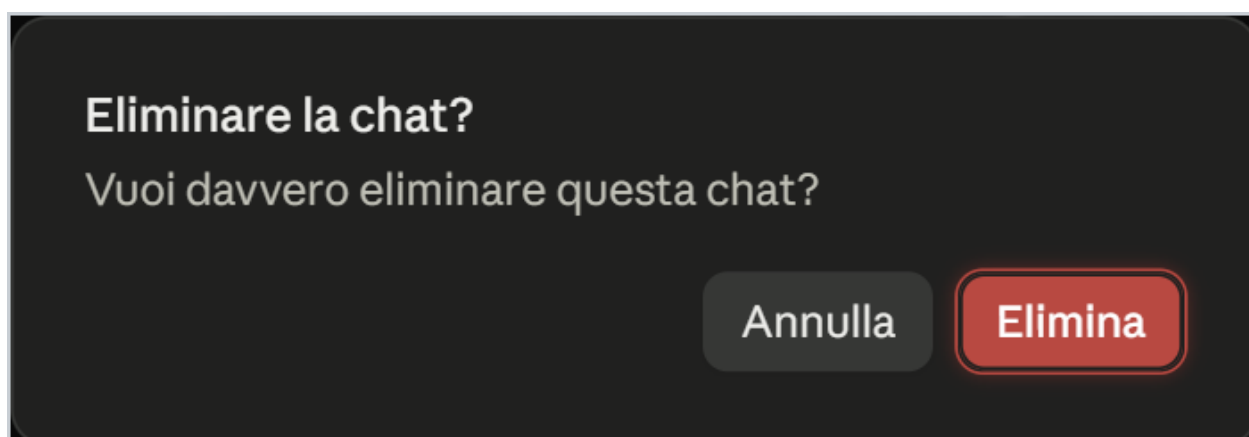
- **Rename (R)**: changes the title Claude gave.
- **Pin (P)**: puts it on top, under **Pinned**.
- **Add to project**: the chat will see the project's files and instructions.
- **Move to group**: assigns it to a group you create with **Group by**.
- **Open in a new window**: desktop only, to compare two chats.



List filters: Type, Status, Last activity, Group by, Sort by.

2.3 Deleting a chat

1. Open the three-dot menu and choose **Delete** (key **D** with the menu open), in red at the bottom.
2. A message appears: delete the chat, do you really want to delete this chat?
3. Click **Cancel** if in doubt, **Delete** to confirm.



The confirmation: Cancel or Delete.

DELETION IS PERMANENT

After you confirm, the chat cannot be recovered. Copy the important texts first, or export everything from Settings, Privacy, Export data.

What	Where to delete
Link of a shared chat	Settings, Privacy, Shared chats, Manage
Files you attached	Settings, Privacy, Uploaded files, Manage
Archived Claude Code sessions	Settings, Claude Code, Delete archived sessions
Your account	Settings, Account, after cancelling the subscription

3. Writing good prompts

A prompt is the request you write to Claude. The clearer it is, the less time you lose fixing the answer.

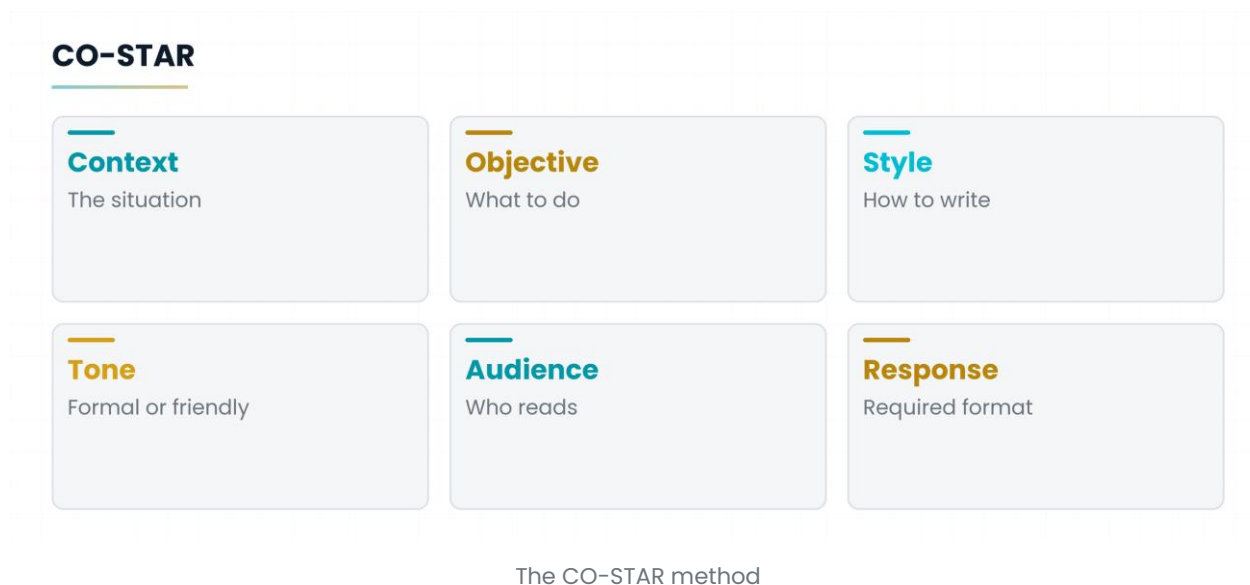
3.1 The four rules

- **Say what you want to get:** not «tell me about email» but «write a payment reminder email».

- **Give the context:** who you are, who you write to, what has already happened.
- **State form and length:** list or text, how many lines, what tone, what language.
- **Attach the material:** if Claude has to work on a document, attach it instead of summarising it.

3.2 The CO-STAR method

An easy outline to remember for important requests: each letter is one line of the prompt.

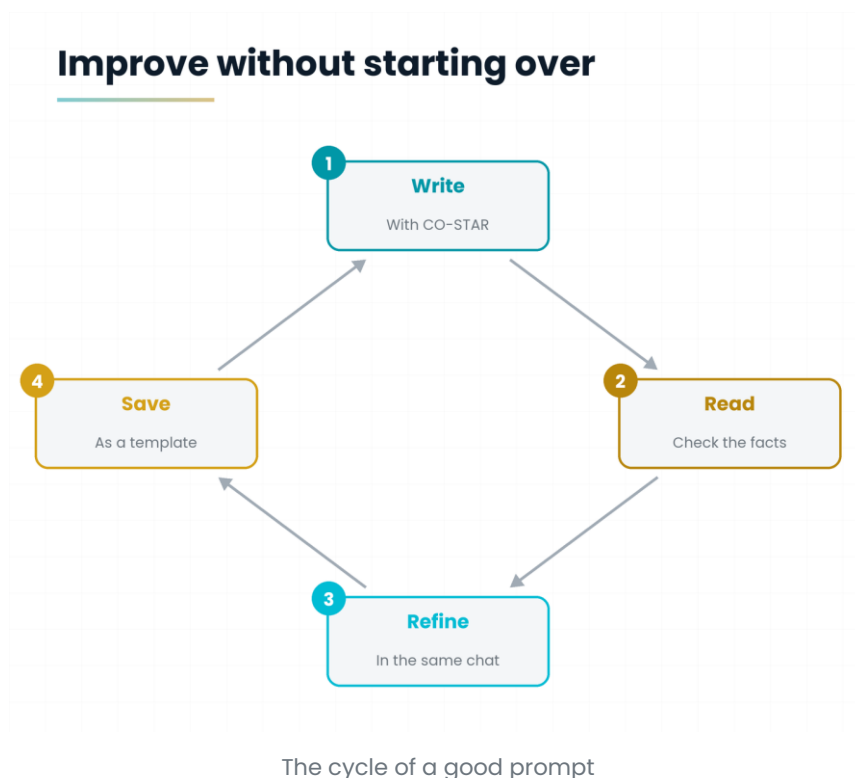


BEFORE AND AFTER

Weak: «Write me an email for a client.»

With CO-STAR: Context: I run a consulting firm and the client paid the invoice fourteen days late. Objective: write a message asking them to respect the terms without damaging the relationship. Style: concise. Tone: friendly but firm. Audience: a business owner who dislikes bureaucracy. Response: subject and body, at most one hundred and twenty words.

3.3 Improving without starting over



If the answer is...	Write
too long	«Cut it in half, keep only the essential points.»
too generic	«Add two concrete examples from the [sector name] sector.»
in the wrong tone	«Rewrite it in a more formal (or direct, or warm) tone.»
unclear	«Explain it as if you were talking to a fourteen-year-old.»
unreliable	«State the source for each fact and flag what you are unsure about.»

WHEN YOU DO NOT KNOW WHERE TO START

«I need to prepare [a presentation for the class council]. Before writing, ask me the questions you need, one at a time, then propose an outline.»

3.4 Saving the prompts that work

- **Instructions for Claude** (Settings, Account): rules that always apply, such as language, tone and format.
- **Project instructions**: rules that apply only in that project's chats.
- **Skills**: complete procedures to call with the / key.

A FIXED INSTRUCTION USEFUL TO EVERYONE

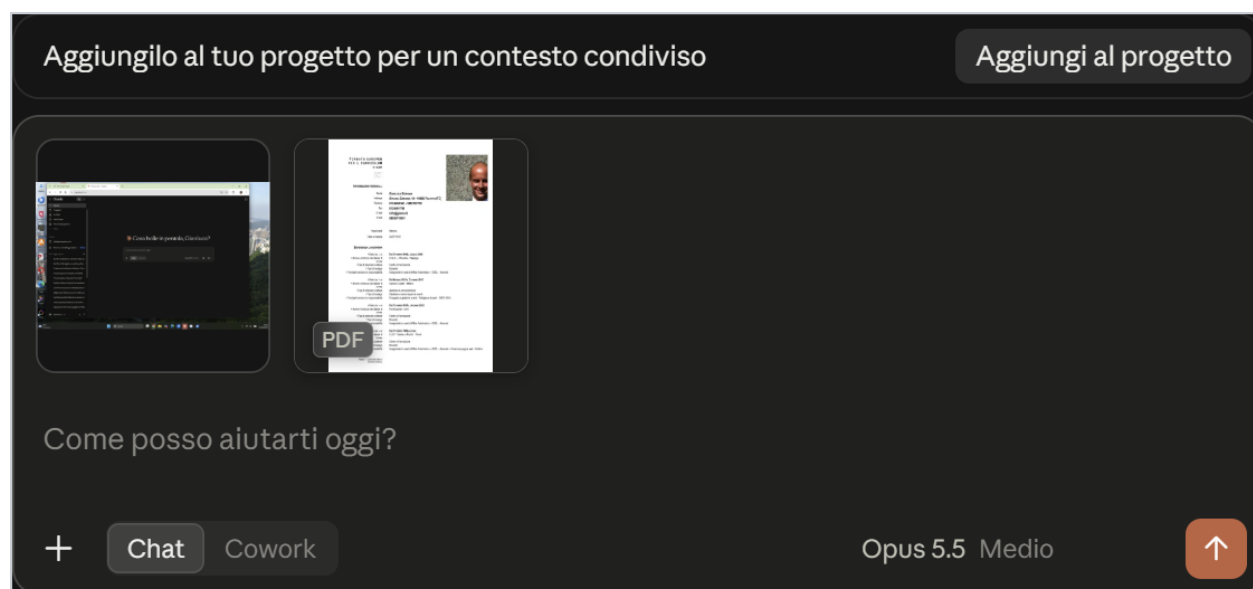
«Always answer in English. Be concise. If you are unsure of a fact, say so instead of inventing it. Before a long task, ask me a clarifying question if needed.»

4. Files, photos, screenshots, web search and voice

Claude reads PDF, Word, Excel, text and images: you show it, you do not describe it.

4.1 Attaching a file

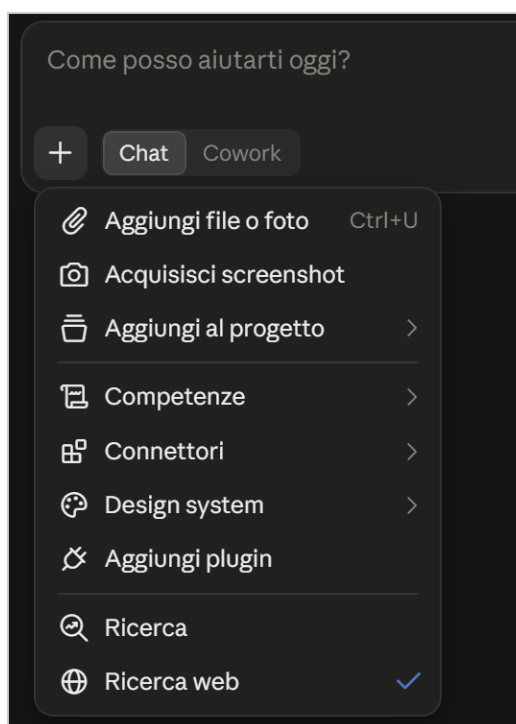
1. Click the **+** to the left of the box and choose **Add files or photos (Ctrl+U)**, or drag the file into the window.
2. The file appears as a thumbnail above the text; you can attach more than one.
3. Write what you want: «Summarise in ten points», «Compare these two contracts».
4. Press Enter. To remove an attachment before sending use the small x on the thumbnail.



A photo and a PDF attached: the thumbnails stay in the box until you send.

4.2 Capturing the screen

From the **+** menu choose **Take a screenshot**: you select part of the screen and Claude receives it as an image. It is the quickest way to ask for help on an error, a form or a chart.



The + menu: files, screenshot, project, skills, connectors, web search.

With this material	Try asking
Contract PDF	«List deadlines, penalties and withdrawal clauses. Mark with an exclamation point what I should have a lawyer check.»
Photo of a document	«Transcribe the text and fix the reading errors.»
Screenshot of an error	«What does it mean and how do I fix it, step by step?»
Excel sheet	«Find the odd rows and suggest a chart of sales by month.»

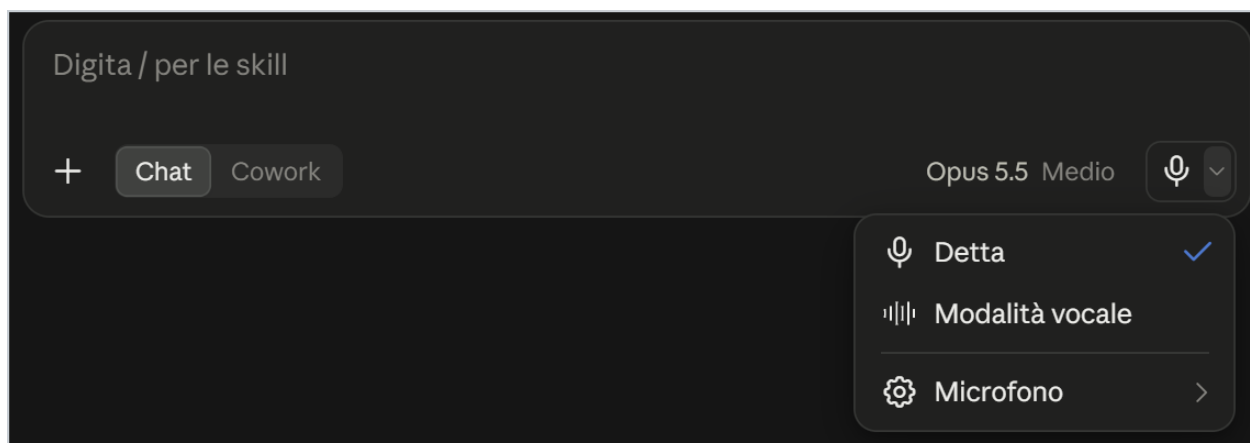
MIND THE DATA

Do not attach documents with third parties' personal data, health data or trade secrets without checking Settings, Privacy. For a test use an incognito chat.

4.3 Up-to-date information: web search

In the + menu check that **Web search** has the tick, then ask a question that needs recent data and ask for sources. Claude searches the web and reports them: **always open the links** to verify. The **Research** entry, above it, turns on the deeper mode across many sources.

4.4 Dictating instead of typing



The voice menu: Dictate, Voice mode, Microphone.

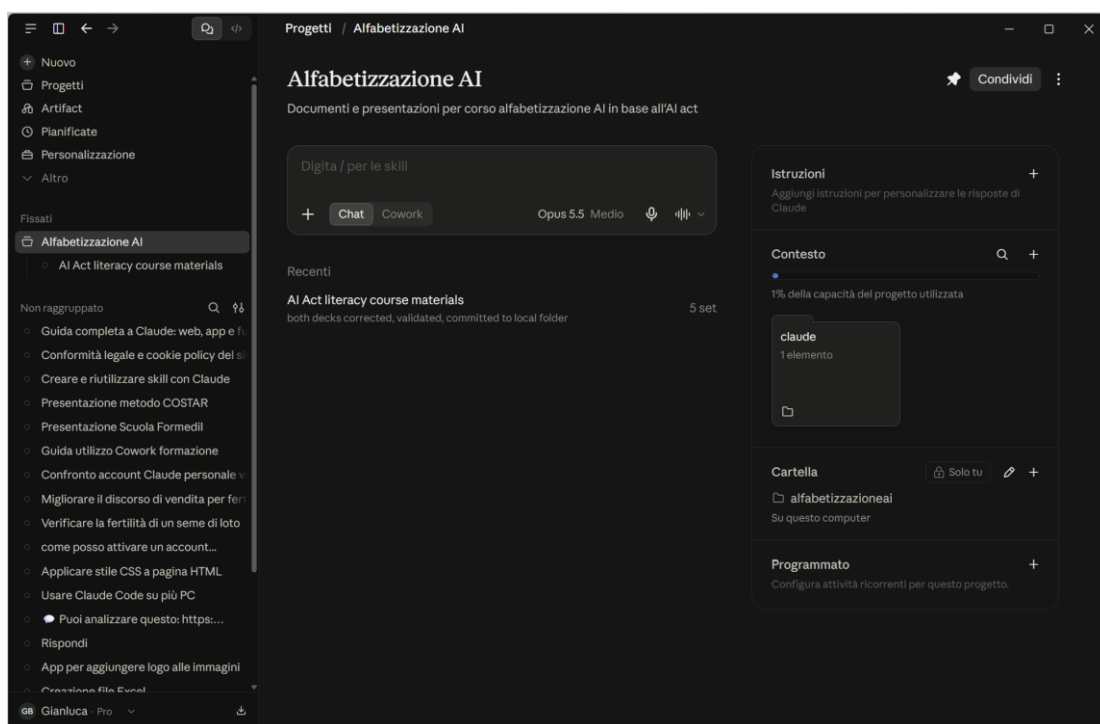
Press the **microphone** (or **Ctrl+D** in the app), speak normally, press again to stop, reread and send. For notes right after a meeting: dictate in a jumble and then write «Put these notes in order as a list of decisions and to-dos». **Voice mode** allows a real spoken conversation.

5. Projects, documents, skills and connectors

Four tools to stop re-explaining everything every time.

5.1 Creating a project

1. In the sidebar click **Projects**, then **New project**.
2. Give a short **name** and **description**.
3. With the **+** next to **Instructions** write how Claude should behave in this project.
4. With the **+** next to **Context** upload the reference files.
5. Write the first request in the project box: the chat is born with all the context.



Inside a project: Instructions, Context, Folder and Scheduled.

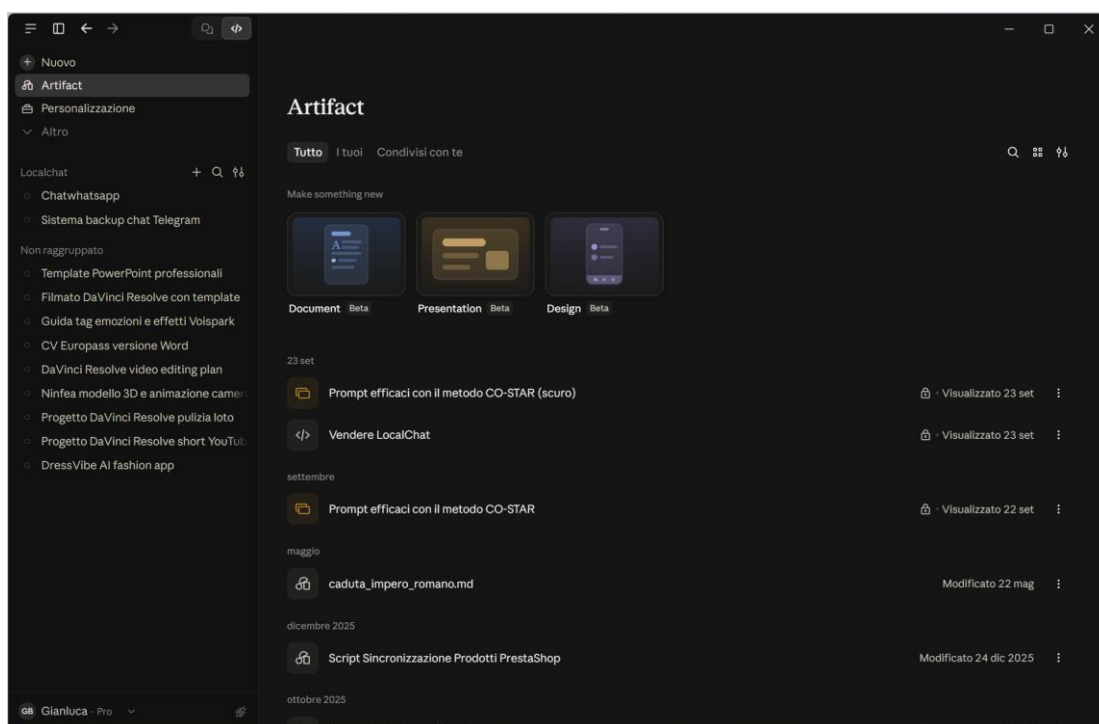
INSTRUCTIONS FOR A TRAINING PROJECT

«You are my assistant for an artificial intelligence course for adult workers. Use simple language, examples from office work and do not exceed three pages. If I ask for a presentation, propose the outline first.»

Already started a chat outside the project? From the three-dot menu choose **Add to project**. In the app, the **Folder** entry can also link a folder on your PC.

5.2 Creating documents, presentations and pages

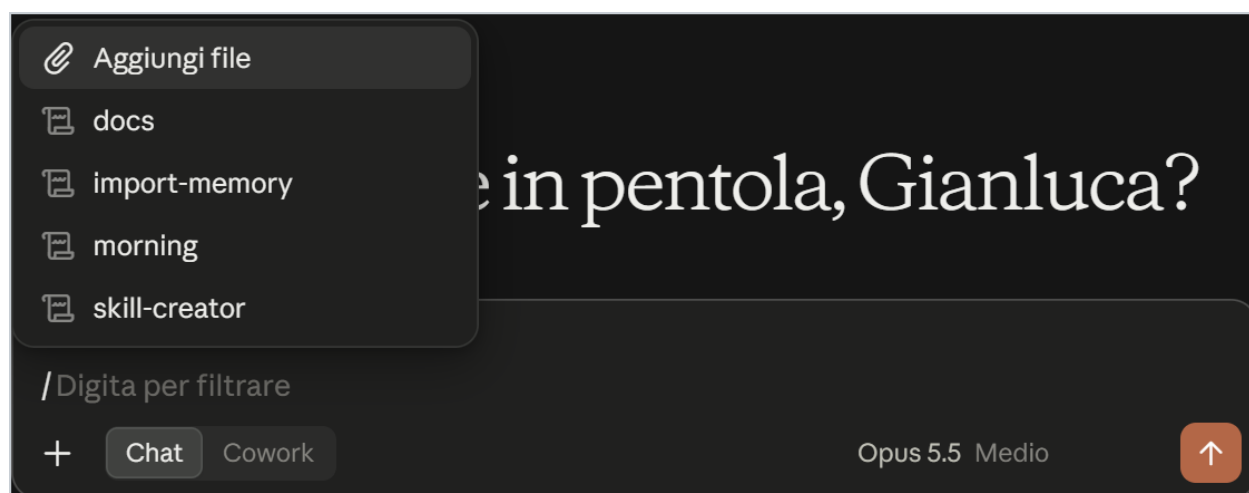
Describe what you need: «Create a flyer for an evening computer course, A4 format, blue and orange colours». Claude prepares the content in a window on the right (the **Artifact**) and you can ask for changes in the chat. For a Word, Excel, PowerPoint or PDF file ask for the format: the **Code execution and file creation** option in Settings, Features is needed. Everything is found again on the **Artifact** page.



The Artifact page: Document, Presentation and Design as starting points.

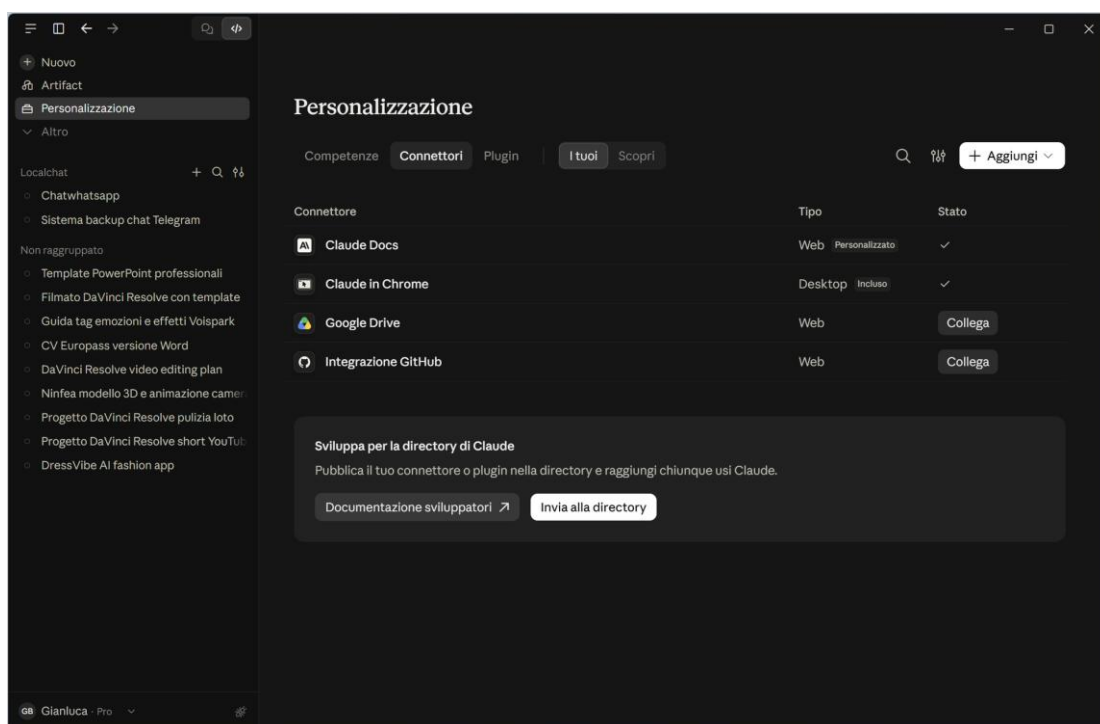
5.3 Skills and connectors

Type **/** in the box: the list of skills opens. If you often repeat the same task, turn it into a skill from **Customize, Skills, Add, Create with Claude**: «When I give you minutes, return decisions, owners and deadlines in a table».



The **/** key in the box: the available skills.

To connect Google Drive, Gmail or Calendar go to **Customize, Connectors**, find the service under **Discover** and click **+**, or **Connect** under **Yours**. Then ask: «Search my mail for August invoices and summarise them in a table».



Connectors: Connect to turn them on, a tick if already connected.

CONNECT ONLY WHAT YOU NEED

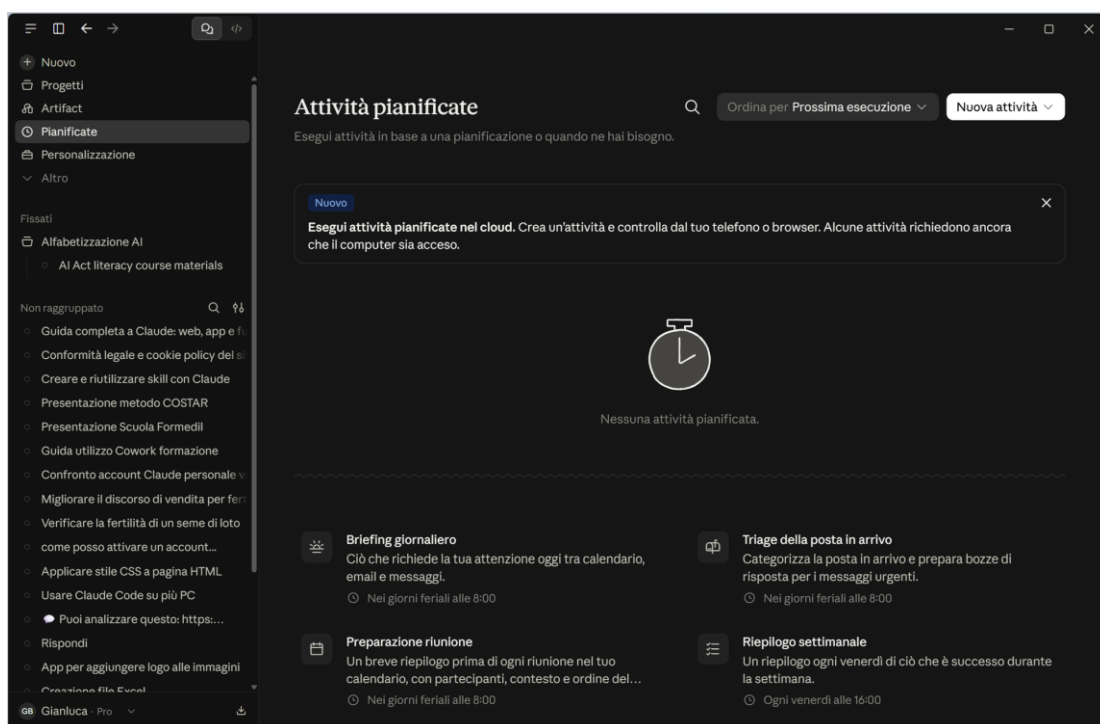
Every connector gives Claude access to real data. If you no longer need it, disconnect it; before connecting work mail check your organisation's rules.

6. Scheduled tasks and Cowork

Have Claude do the same job every day, or hand it a whole task.

6.1 Creating a scheduled task

1. Click **Scheduled** in the sidebar.
2. Choose one of the templates at the bottom (for example **Daily briefing**) or **New task**.
3. Describe what it must do and **when**: days and time.
4. Save: the task appears in the list with the date of the next run.



Scheduled tasks: ready-made templates and New task.

Task	When	What it produces
Daily briefing	weekdays, eight o'clock	what needs attention across calendar, email and messages
Inbox triage	every morning	sorted mail and draft replies for urgent ones
Meeting prep	before each meeting	summary with attendees, context and agenda
Weekly recap	Friday, four in the afternoon	what happened during the week

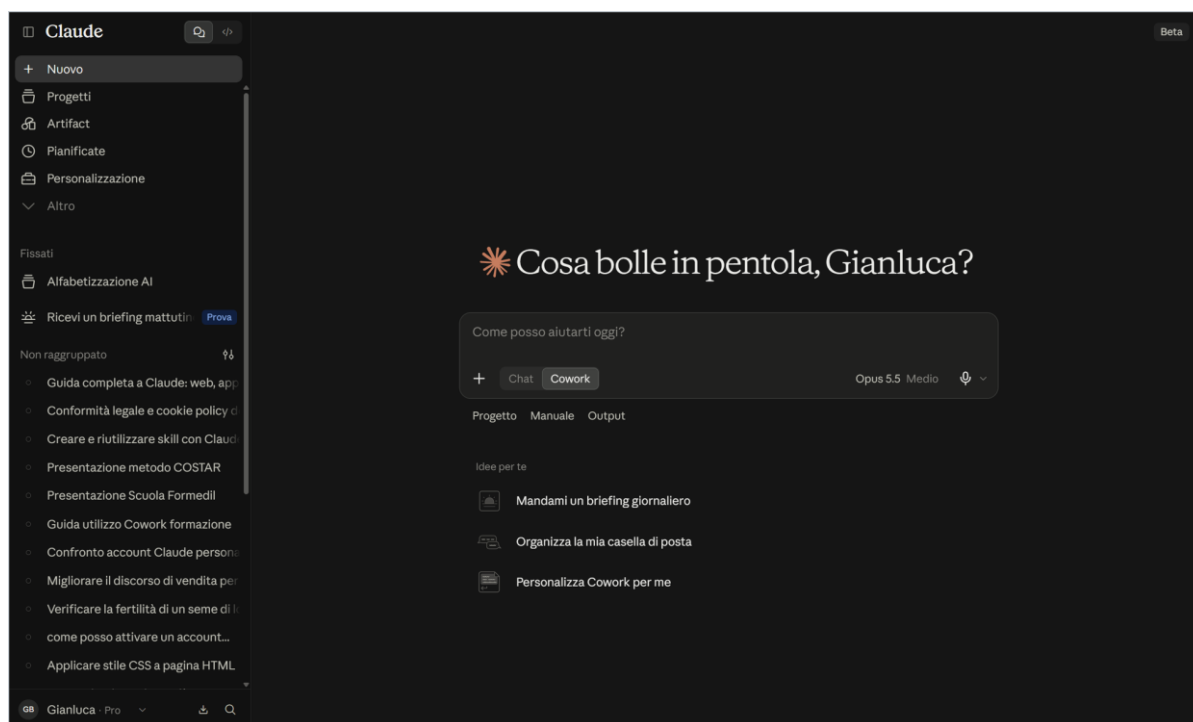
SO THAT IT REALLY RUNS

Some tasks need the computer on. In the app turn on Settings, System, Keep the computer awake and leave Claude in the notification area. Each run uses your limit: few tasks, well written.

6.2 Cowork

- Under the box move the switch from **Chat** to **Cowork**.
- Choose the **Project** and, if you like, **Manual** mode (Claude asks for confirmation step by step).

3. Describe the task: «Read the PDFs in the Invoices folder, extract date and amount and prepare a summary Excel sheet».
4. Check the results in the **Output** tab or in the folder you indicated.



Cowork: Project, Manual, Output tabs and ideas to start.

DESKTOP ONLY

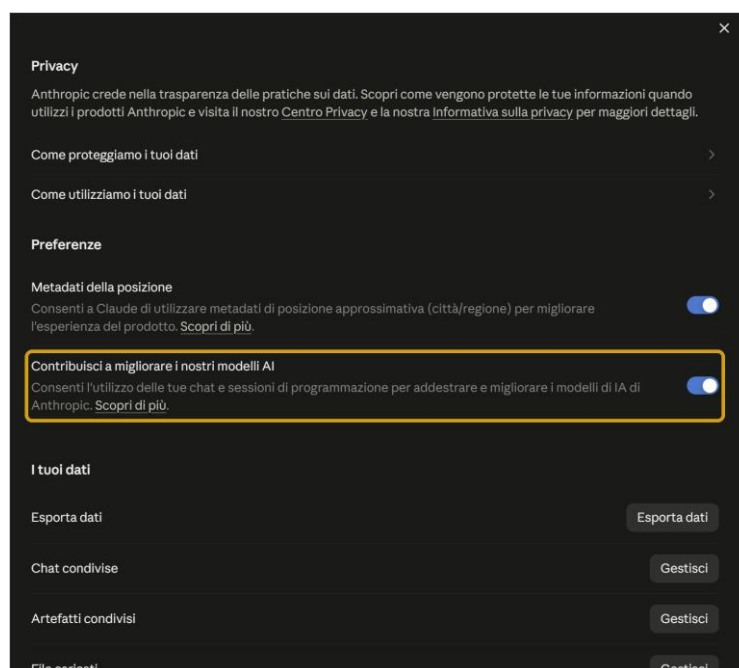
To work on your computer's files, in Settings, Cowork name the trusted folders. Start with a single test folder: the more permissions you give, the more care is needed.

7. Privacy, memory and usage limit

Five actions to use Claude with peace of mind, in order of importance.

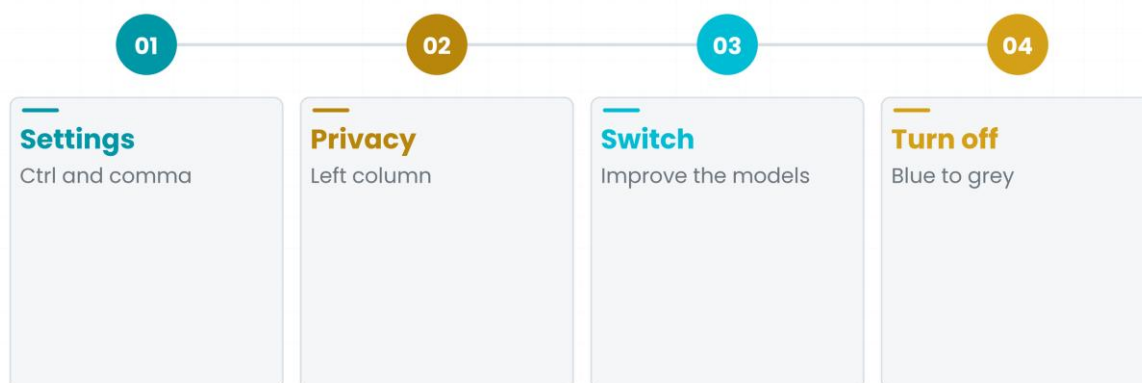
7.1 Decide whether your data trains Claude

1. Open **Settings** (Ctrl+comma, or your name menu, Settings).
2. Go to **Privacy** and find the **Help improve our AI models** switch.
3. If it is **blue** (on) and you do not want your chats and coding sessions to train the models, **click it to turn it off**.



Privacy: the highlighted switch controls the use of your content for training.

Four steps



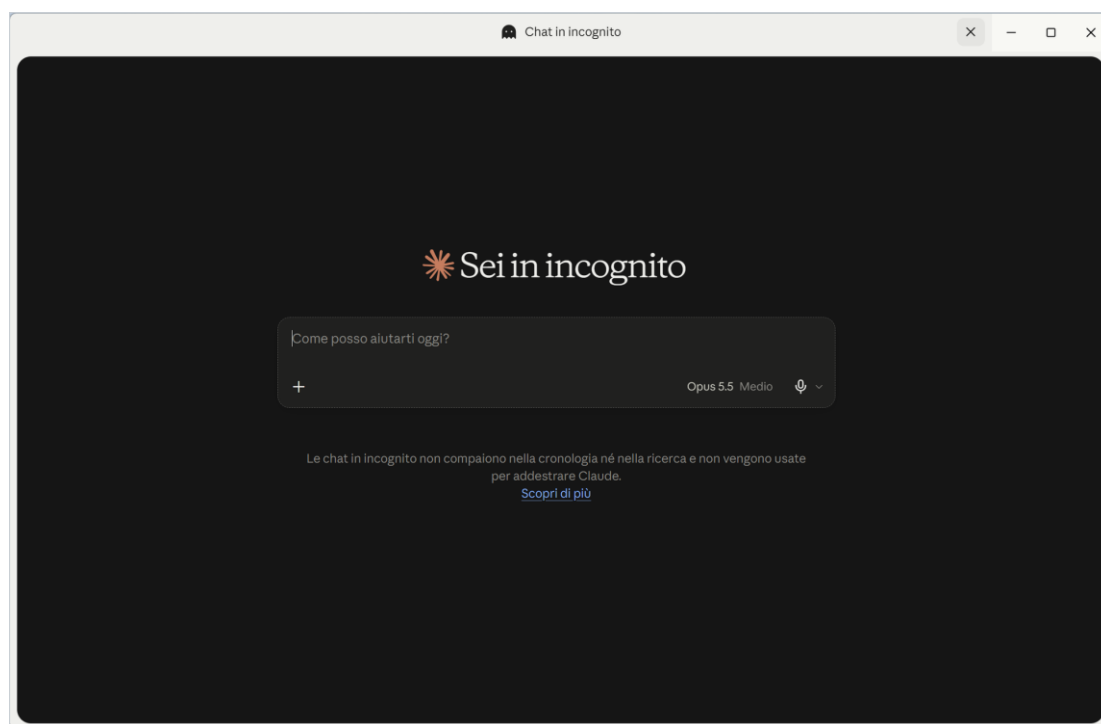
How to turn off training

TO REMEMBER

If you work with data from clients, students, patients or confidential documents, **turn it off before you start**. It applies to future conversations; incognito chats are never used for training anyway.

7.2 Use incognito for sensitive things

Click the **ghost icon** at the top right (**Ctrl+Shift+I** in the app): the chat does not appear in history or search. If you need the text, copy it before closing.



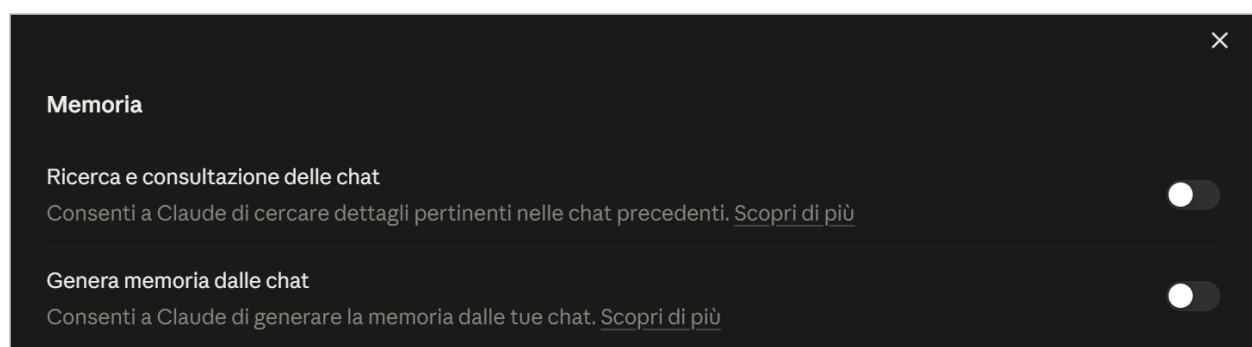
An incognito chat: not in history and not used to train Claude.

7.3 Download a copy and check what you shared

In **Privacy, Your data: Export data** prepares an archive of what Claude keeps about you; **Shared chats, Shared artifacts** and **Uploaded files** let you see and revoke public links and delete attached files.

7.4 Decide how much Claude should remember

In **Settings, Memory** two switches decide whether Claude searches past chats and whether it generates memory from them. Turn them on only if you want an assistant that knows you over time; otherwise leave them off.

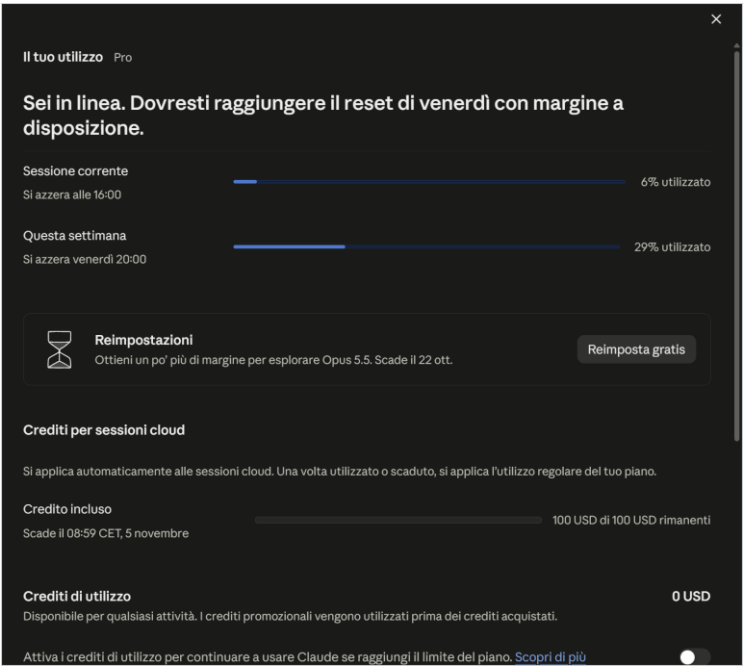


Settings, Memory: two switches, off here.

8. Do not run out of your usage limit

Claude has a usage limit with periodic resets: here is how to watch it and make it last.

Settings, Usage shows the current session, weekly use and the split between Chat, Cowork and Claude Code.



Usage: current session and weekly limit.

Habit	Why it helps
A new chat for each topic	long chats weigh more with every message
Medium effort , high only if needed	Max uses five and a half times or more
Haiku or Sonnet for simple work	lighter and faster models
Only the attachments needed	every attachment counts
Few scheduled tasks	each run counts as a use

9. Five scenarios and a prompt cookbook

From start to finish: how the functions seen so far combine.

9.1 Scenario 1: answering a difficult email

- 1. New**, empty chat, Opus 5.5, Medium effort.

2. Paste the message you received and write: «I am [role]. The sender is angry because [reason]. Write a friendly but firm reply, at most one hundred and twenty words.»
3. Refine: «Less formal» or «Add that we can call him back tomorrow».
4. Copy the text with the **copy** icon and paste it into your mail program.

9.2 Scenario 2: understanding a long document

1. **New**, then **+**, **Add files or photos** and choose the PDF.
2. Write: «Summarise in ten points, then list deadlines and obligations for me. Flag what is ambiguous.»
3. Dig deeper with questions: «What does point four mean? Give me an example.»
4. **Rename** the chat with the contract's name and **pin** it if you will need it again.

9.3 Scenario 3: preparing a course

1. **Projects, New project**: «Basic Excel course».
2. In **Instructions** write audience, level and tone; in **Context** upload the syllabus.
3. Ask: «Propose an outline of six two-hour lessons», then «Write lesson one with exercises».
4. Ask for the material in Word or PowerPoint: you find it in **Artifacts**.

9.4 Scenario 4: resuming work from two months ago

1. Press **Ctrl+Shift+K** (or the lens) and type the client's name.
2. Filter by **Chats** or **Artifacts** and look at the dates.
3. Open the chat and write: «Let us pick up here: update the document with September's data.»

9.5 Scenario 5: tidying up

1. Open the list sliders and use **Last activity** to see old chats.
2. For each: **Pin** or **Add to project** if needed, **Delete** if no longer needed.
3. Before bulk deleting run **Privacy, Export data**.
4. Revoke useless links from **Privacy, Shared chats, Manage**.

9.6 The cookbook

For...	Prompt
Summarising	«Summarise the following text in [five] points and a closing sentence. Do not add information that is not there.»
Rewriting	«Rewrite this text in a more [simple, formal, concise] way, keeping all the data.»
Translating	«Translate into [Italian] in a professional tone. Flag ambiguous terms and suggest alternatives.»
Proofreading	«Correct spelling and grammar. Show me the changes in a separate list.»
Explaining	«Explain [topic] to me like to a beginner, with a practical example and an analogy.»
Preparing a meeting	«I am about to meet [person] about [topic]. Prepare five questions to ask and three likely objections.»
Deciding	«Compare [option A] and [option B] in a table: costs, risks, timing. Then advise me, with reasons.»
Minutes	«From these notes derive decisions, owners, deadlines and open points, in a table.»
Learning	«Give me a ten-question quiz on [topic], one at a time, and correct me after each answer.»
Checking	«Reread your answer: list what you are unsure about and how I can verify it.»

Ten requests that cover most office work.

A CLOSING TIP

When a request works, **save it**: as a fixed instruction, inside a project or as a skill. One good prompt reused is worth a hundred written in a hurry.

An afternoon as an expert user

Twenty minutes with a real case from your work: at the end you will have a tidy chat, a saved prompt and your privacy settings decided.

1. Choose a task you do often, for example answering an email or summarising a document.
2. Open a new chat and write the request the way you would today; save the answer.
3. Rewrite it with the CO-STAR method and compare the two answers.
4. Rename the chat with a word you will remember and pin it.
5. Search for it with Ctrl+Shift+K to check you can find it again.
6. Save the better prompt in Instructions for Claude or in a project, with the variable parts in square brackets.
7. Open Settings, Privacy, and decide the training switch.
8. Look at Usage to see how much of your limit you used.

CHECK THAT YOU DID

The prompt contains context, objective, tone, audience and format.

The chat has a title that search can find.

You made a conscious decision on the training setting.

You saved a reusable template.

Questions that come up in class

Does a longer prompt work better?

No: precision matters, not length. Five lines with the right information beat a page of padding.

Does Claude remember what I said in another chat?

Not on its own: it remembers everything inside the open chat. To carry context elsewhere use a project or turn on Memory in Settings.

How do I find a chat from months ago?

With the lens or Ctrl+Shift+K, searching a rare word such as a client's name. You can filter by Chats, Artifacts, Projects.

I deleted a chat by mistake: can I get it back?

No. In future export your data from Privacy, and pin or move important chats into a project instead of deleting them.

Can I attach documents with my clients' data?

First decide the training setting in Privacy and check your organisation's rules. For tests use incognito.

I ran out of my limit: what do I do?

Look at Usage for the reset time; open new chats, pick a lighter model and keep effort on Medium.

Glossary

Term	What it means
Artifact	A document, page or small app created by Claude and shown in a separate window.
Chat	A conversation with Claude; it remembers everything said within it.
CO-STAR	A six-line outline for a prompt: context, objective, style, tone, audience, response.
Connector	A link from Claude to a service such as Google Drive or Gmail.
Cowork	A mode where you assign Claude a task instead of asking a question.
Effort	How much Claude thinks before answering; higher means more usage.

Term	What it means
Incognito	A chat that does not appear in history and is not used for training.
Project	A folder with instructions, files and chats on one topic, visible to Claude in every conversation.
Prompt	The text you write to Claude: the request with its context.
Skill	A reusable procedure callable with the slash.
Training	Use of content to improve future models: decided in Privacy.

Further reading

Claude interface, web version and desktop app for Windows – observed and captured in September 2026

The CO-STAR method for writing prompts – reference framework used in gianlu.it courses

Anthropic help and privacy pages – to consult for up-to-date terms

WATCH OUT

Interface observed and captured in September 2026: model names and menu entries change often. Screenshots are cropped from the original screens. The screenshots show the Italian interface.