How to Begin

Setting Up Your AI Portfolio Coach Claude Project

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> *This document tells you exactly what to do to get started. It should take you about five minutes to set up. Once you've completed these steps, you're ready to begin your first strategy session with Claude.*

Step 1 — Get a Claude Account

Go to claude.ai and create a free account if you don't already have one. The free tier is perfectly adequate for this work.

Step 2 — Create a New Claude Project

In your Claude account, create a new Project. Name it something clear and personal — for example: "My Report & Portfolio Development" or "MSDS 458 Report Project." This will be your dedicated workspace for developing your Project Report.

Step 3 — Upload the Baseline Documents

Upload all of the following documents to your new Project. These are the files that orient Claude to its role and give it the context it needs to work with you effectively. You should have received all of these files from Dr. Maren.

> **Files to upload:**
> ✓ Claude_AI_Portfolio_Coach_Briefing_v1.2.docx
> ✓ Project-Report-Template_2026-02-22.docx
> ✓ TC-001_TitlePage_YouTube_Summary.docx
> ✓ AI_Portfolio_Coach_About_Me.docx
> ✓ Meta_Document_Briefing_Guide_v1.docx
>
> *Note: If Dr. Maren has provided updated versions of any of these files, always use the most recent version (identified by the version number or date in the filename).*

Step 4 — Open a Chat and Begin

Once your documents are uploaded, open a new chat within your Project. You don't need to explain anything or provide any context. Simply say:

> ### "I'm ready to begin."
> *Claude will take it from there.*

Important Things to Know About Working With Claude

Claude has no memory across chats. Each time you open a new chat, Claude starts fresh within the context of your uploaded Project documents. Your previous conversation is not automatically carried forward.

Claude has no memory across Projects. If you are working with Claude in other Projects — for example, an AI Teaching Associate Project for content mastery — those conversations are entirely separate. Each Project's Claude knows only what is in that Project.

Strategy 1 — Return to the Same Chat

If you are in the middle of substantial ongoing work with Claude and want to continue where you left off, return to the same chat rather than opening a new one. Claude retains the full conversation history within a single chat session.

To find your previous chat: in your Claude Project, look at the left sidebar where your past conversations are listed. Click on the most recent conversation to resume it. You and Claude will both have full access to everything discussed in that session.

Strategy 2 — Create a Work Summary Document

At the end of a substantial session — particularly if you are wrapping up one topic and moving to another — ask Claude to produce a summary document capturing the key points, decisions made, and work completed. Review the summary, ask Claude to refine anything that seems incomplete or unclear, and then download the document.

Once downloaded, upload the summary document back into your Project and confirm with Claude that it can see it. This way, when you open a new chat, you can both orient quickly to the content of your prior work — and pick up efficiently without having to reconstruct what was done.

> *Both strategies are worth using. Strategy 1 is simpler and works well for ongoing work within a single topic. Strategy 2 is more powerful for longer-term continuity — and the act of reviewing and refining a work summary is itself a useful way to consolidate what you've accomplished.*